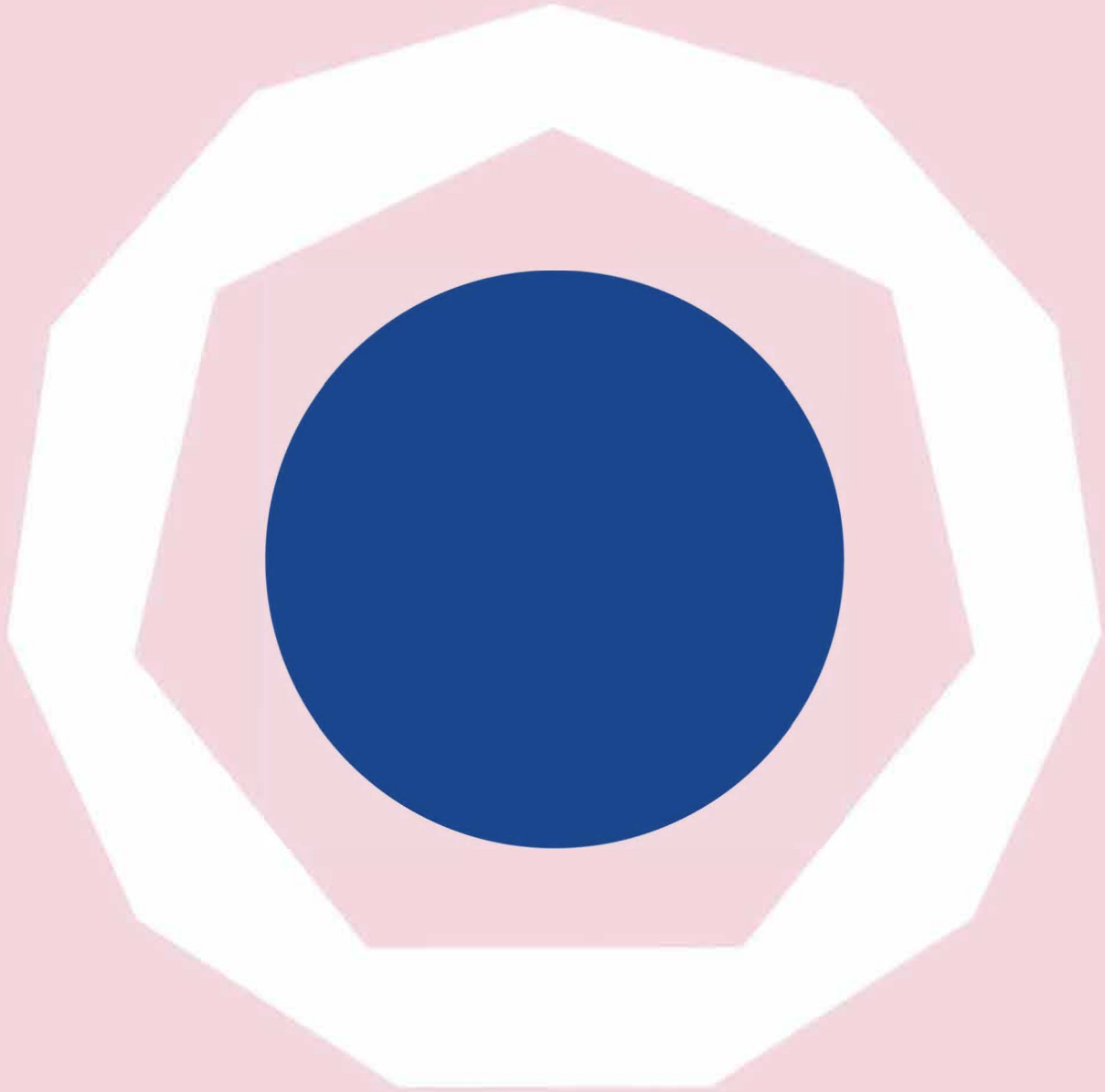


Creativity & Cultural Production in the Hunter

An applied ethnographic study of
new entrepreneurial systems in the
creative industries.



Hunter Creative Industries

Final Report

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A. EXECUTIVE SUMMARY

PREAMBLE

This report is the result of a multi-year applied ethnographic study of key collaborative groups across all the major creative sectors in the Hunter Region in NSW. It provides invaluable baseline data for the creative industries (CI) in the region so that policymakers, businesses, not-for-profits and all those working in, and dealing with, these increasingly significant industries, either educationally, economically or culturally, know exactly what they are, how they work, why they're important, and what's been happening with them. This research project has plotted these industries' approach to creativity and cultural production in the Hunter Region and as a consequence it provides detailed insights into the dynamic systems these CI are part of. In an area as geographically, socially and industrially diverse as the Hunter Region, with its urban concentrations of more than 350,000 people, and with rural and tourism centres and waterfront villages, there is a wide band of skills and market experience evident in the valley.



Mining, defence, shipping, health, manufacturing, power generation, viticulture, education, agriculture and professional services are all evident in the region's profile but steel and aluminium production, shipbuilding, manufacturing and even coal production have all decreased their contribution in recent years. Alongside these significant and mature generators of jobs and related businesses there is an identifiable and potentially strong economic sector now commonly referred to as the creative industries (CI). These industries have been typically comprised of:

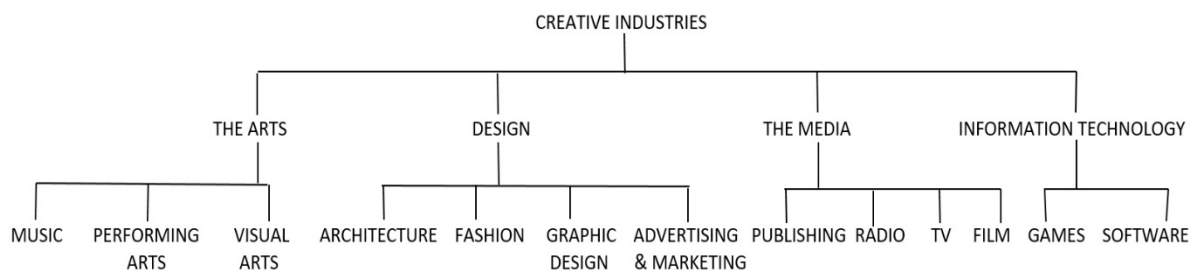


Figure 1 Creative industries list represented as a hierarchical structure

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LITERATURE IN BRIEF

In line with the research literature into creativity (for summaries see Alexander 2003, Pope 2005, Sawyer 2011) creativity is defined here as the bringing into being of novel objects, processes and ideas that are valued in at least one social setting (Hennessey & Amabile 2010).

Culture is seen as 'the convergence between an anthropological and sociological senses of culture as a distinct "whole way of life"' (Williams 1981, p. 13) and the 'more specialised if also more common sense of culture as "artistic and intellectual activities"... broadly defined to include all the "signifying practices"' (ibid) of, in this case, the creative industries.

The concept of the creative industries is used as an umbrella term covering sectors which are all connected by three defining features. Firstly, they 'all require some input of *human creativity*; second, they are vehicles for *symbolic messages*, that is, they are *carriers of meaning*; and third, they contain, at least potentially, some *intellectual property* that belongs to an individual or group' [italics in original] (Davies & Sigthorsson 2013, p. 1). The creative industries are thus those industries that use signifying practices to intentionally bring meaning into being via audio, visual and text based artefacts in order to create value. That value may be social, cultural, symbolic or economic.

An innovation 'is an idea, practice, or object that is perceived as new by an individual or other unit of adoption. It matters little, so far as human behaviour is concerned, whether or not an idea is "objectively" new as measured by the lapse of time since its first use or discovery' (Rogers 1983, p. 11).

'It takes creativity or innovation to enter and compete in an existing market, to change or even create a new market' (European Commission 2003). From an economic point of view, 'entrepreneurship deals with the process of developing new business ventures and/or promoting growth and innovation in existing firms' (Mazzarol 2011, p. i).

Systems, whether they are also labeled ecosystems or ecologies, are wholes whose 'primary properties derive from the interactions of their parts' (Skyttner 2006, p. 38). They are scalable as 'a system in one perspective is a subsystem in another. But the system view always treats systems as integrated wholes of their subsidiary components' (Laszlo 1972, p. 14). Complex systems share similar characteristics including interdependence, networks, self-organisation, complement-arity, scalability, non-linear dynamics, and emergence.

Social and cultural systems, ecosystems or ecologies, are self-organised as interconnected networks built on shared knowledge and are populated by choice making agents.

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METHODOLOGY

Ethnography is a qualitative methodology (Fetterman 2011) based in anthropology. As researcher Susannah Priest asserts, groups like the creative industries 'must be understood as whole systems, not isolated parts' (1996, p. 25). On this basis research was undertaken to detail the different participants and institutions, their entrepreneurial activities and the networks involved in the creative industries in the Hunter region. This process involved a number of practical methods.

The first action taken in this research process was a literature review (see prior page and Section 2 of this report).

A descriptive quantitative approach was undertaken to support the more extensive qualitative aspects of the study. This quantitative aspect involved two measures. Measure 1 involved a search of 2011 Census data using the ANZSCO 6 Digit Occupation Codes as listed in the CIIC Report (2013, pp. 24-25) and was applied to the 11 LGAs of the Hunter Region. Measure 2 involved the use of the Creative Trident Methodology where data was drawn from both the 2011 and 2016 Census. Unlike Measure 1 this data was based on SA4 geographical areas. The collected data for Measure 2 was then used to calculate the specialist, support and embedded workers, their earning and average annual income.

The specific qualitative methods, which afforded the collection of the majority of the material, included ongoing desktop research, 115 recorded in-depth semi-structured

interviews with key informants, and participant observation over a four year period by researchers in the field. The data revealed in this ongoing and recursive research process informed, firstly, the interim report and, secondly, the creative industries forum conducted mid-way through the research process. These were later complemented with a focus group of key informants from the Upper Hunter. The Miles and Huberman framework (Robson 2002; Punch 2014) for qualitative data analysis (QDA) was then applied to the collected data. The final report demonstrates the 'thick description' most ethnography entails (Geertz 1973, pp. 5-6 & 9-10).

A website has also been constructed to house the transcribed interviews, summaries of practitioners' experiences, various databases pertinent to the study and filmed material of certain interview subjects, as well as the interim report and now the final report.

As such the conduct of this research followed the key methods and principles of ethnography. A very brief summary of results is below.

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STATISTICAL ANALYSIS

Measure 1:

	All Industries	Creative Industries
Population Figures		
Total Working	330,847	6,535
Employed	293,793	5,810
Self-Employed	37,054	719
Females Working	-	2,578
Males Working	-	3,957
Economic Contribution		
Contribution to GRP	\$48.351 billion	\$0.967 billion
Contribution to GVA	\$41.124 billion	\$0.820 billion

Table A Comparison of Total Industries with Creative Industries in the Hunter

The Gross Regional Product (GRP) for the Hunter Region sits at \$48.351 billion. The creative industries, by statistical measure 1, constitute 2% of the working population in the region and they are conservatively estimated to contribute close to \$1 billion to the Hunter GRP.

LGA	Advertising and Design	Electronic Games & Interactive Content	Architecture	Fashion	Visual Arts	Performing Arts	Music	Publishing	Radio	Film	TV	Total
Cessnock (C)	133	45	27	5	61	9	15	12	6	6	4	323
Dungog (A)	24	21	6	0	0	0	0	0	0	0	0	51
Gloucester (A)	3	6	6	3	9	0	0	0	0	0	0	27
Great Lakes (A)	79	17	49	6	19	6	3	15	3	0	0	197
Lake Macquarie (C)	960	400	252	22	176	33	77	69	24	22	39	2,074
Maitland (C)	273	98	79	6	65	6	9	30	6	6	6	584
Muswellbrook (A)	27	6	6	0	9	6	3	9	6	0	0	72
Newcastle (C)	1061	508	361	34	182	60	82	136	42	12	61	2,539
Port Stephens (A)	207	76	61	19	50	9	14	24	0	15	9	484
Singleton (A)	66	3	20	3	18	0	0	6	0	3	0	119
Upper Hunter Shire (A)	37	0	9	3	4	0	3	6	0	0	3	65
Total	2870	1180	876	101	593	129	206	307	87	64	122	6,535

Table B Creative Industries Local Government Area (LGA) Cross Sector Tabulation

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From Table B we can see that the urban centre of Newcastle has 2,539 CI operatives and Lake Macquarie has 2,074. Of the rural and semi-rural areas, Maitland houses 584 closely followed by Port Stephens with 481 people engaged in the creative industries. The Dungog LGA has the lowest number of CI residents with the Upper Hunter contributing 65 to the overall total of 6,535. The data from the 2011 Census shows, by this measure, that the Advertising and Design sector in the Hunter constitutes 43.9% of all those in the creative industries, 18.1% in the Electronic Games and Interactive Content sector, with Architecture at 13.4%. These sectors represent 75% of total CI occupations in the Region. The lowest is the Film sector at 1% followed by Radio at 1.3%, Fashion at 1.5%, Television at 1.9% and Performing Arts at 2%.

Measure 2:

Trident Employment (POR)	Employed 2011	Employed 2016	Share of Workforce 2011	Share of Workforce 2016	Share of Creative Employment 2011	Share of Creative Employment 2016	CAGR 2011 to 2016
Specialist	2,349	2,431	0.89%	0.89%	27.05%	25.33%	0.7%
Support	2,698	2,803	1.02%	1.03%	31.07%	29.21%	0.8%
Total Creative Industries	5,050	5,239	1.92%	1.93%	58.15%	54.60%	0.7%
Embedded	3,636	4,360	1.38%	1.60%	41.87%	45.44%	3.7%
Total Trident	8,683	9,594	3.30%	3.53%	100%	100%	2.0%
Creative Occupations	5,986	6,797	2.27%	2.50%	68.93%	70.84%	2.6%
Total Workforce	262,944	271,408					0.6%

Table C Comparison of Employment in the Greater Hunter Valley (SA4), 2011 & 2016, by Place of Residence
(Source: Analysis of customised extract of ABS Census of Housing and Population)

The number of people employed in the creative industries in the region rose from 2011 to 2016. Share of total workforce increased with a cumulative annual growth rate of 2.0% compared with a growth in the general workforce of 0.6%. The percentage of specialist and support workers dropped marginally with growth in employment for embedded creatives.

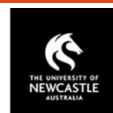
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Trident Earnings	2011	2016	Share of Workforce Earnings 2011	Share of Workforce Earnings 2016	Share of Creative Earnings 2011	Share of Creative Earnings 2016	CAGR 2011 to 2016
Specialist	\$92,813,812	\$121,498,468	0.8%	0.8%	27%	24%	5.5%
Support	\$136,277,492	\$193,338,340	1.2%	1.2%	39%	38%	7.2%
Total Creative Industries	\$229,091,304	\$314,836,808	1.9%	2.0%	66%	62%	6.6%
Embedded	\$120,162,744	\$194,641,616	1.0%	1.2%	34%	38%	10.1%
Total Trident	\$349,254,048	\$509,478,424	3.0%	3.2%	100%	100%	7.8%
Creative Occupations	\$212,976,556	\$316,140,084	1.8%	2.0%	61%	62%	8.2%
Total Workforce	\$11,818,150,032	\$16,074,953,024					6.3%

Table D Comparison of Earnings in the Specialist, Support and Embedded CI workforce 2011 to 2016

The total share of earnings sits at 7.8% in comparison with the total workforce at 6.3%.

Trident Mean Weekly Income	2011	2016
Specialist	\$940.00	\$1,050.00
Support	\$1,030.00	\$1,250.00
Total Creative industries	\$990.00	\$1,170.00
Embedded	\$1,180.00	\$1,390.00
Total trident	\$1,050.00	\$1,240.00
Creative Occupations	\$1,060.00	\$1,230.00
Workforce	\$980.00	\$1,140.00

Table E Comparison of Mean Weekly Income in the Specialist, Support and Embedded CI workforce 2011 to 2016

There has been an increase in income levels across the board for the creative industries. However, it is in the support sector where incomes have risen most, followed closely by those working as embedded personnel. Embedded creatives have the highest level of weekly income.

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NOTES ON DATA SOURCES FOR STATISTICS

Measure1:

Table A Comparison of Total Industries with Creative Industries in the Hunter

- 1) ABS 6 digit ANZCO statistics 2011 Census of Population and Housing. Counts of Employed Persons aged 15 years and over by selected 6 digit ANZSCO '06 Occupations, by Age, by Sex - Geography: Selected LGAs of Usual Residence (2011 Boundaries) - Reference Period: 9 August 2011
- 2) Self Employment estimates are based on World Bank calculations for Australia in 2011 of 11.1%
- 3) Economic Contribution to Gross Regional Product and Gross Value Add is based on REMPLAN data incorporating ABS June 2016 Gross State Product, 2013 / 2014 National Input Output Tables and 2011 Census Place of Work Employment Data.

Table B. Creative Industries Local Government Area (LGA) Cross Sector Tabulation.

ABS 2011 Census data using 6 digit ANZSCO '06 Occupations by Creative Industries Sector

Measure 2:

Table C Comparison of Employment in the Specialist, Support and Embedded CI workforce 2011 to 2016

Analysis of customised extract of ABS Census of Housing and Population 2011 and 2016 Census - Number of persons employed, total who stated income and mean income for 35 selected industries (4 - digit IND06P) and all other industries by all occupations (6 - digit ANZSCO). Geographic Level - SA4 aggregated for Hunter Valley plus Newcastle and Lake Macquarie.

Table D Comparison of Earnings in the Specialist, Support and Embedded CI workforce 2011 to 2016

As for Table C. - Composite stats courtesy of Peter Higgs.

Table E Comparison of Mean Weekly Income in the Specialist, Support and Embedded CI workforce 2011 to 2016

As for Table C - Composite stats courtesy of Peter Higgs.

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CONCLUSIONS

- The creative industries sectors - music, performing arts, visual arts, architecture, fashion, advertising and design, publishing, radio, television, film, and electronic games and software development – constitute important parts of a diverse and continually dynamic creative system focused on profiting from and valorising the signifying practices used to produce, disseminate and consume symbolic messages.
- The representation of siloed structures of production that typify traditional economies are mutating rapidly. Industries are increasingly being seen as loosely coupled systems of production and yet many still appear to apply 19th century concepts to what is a 21st century phenomenon.

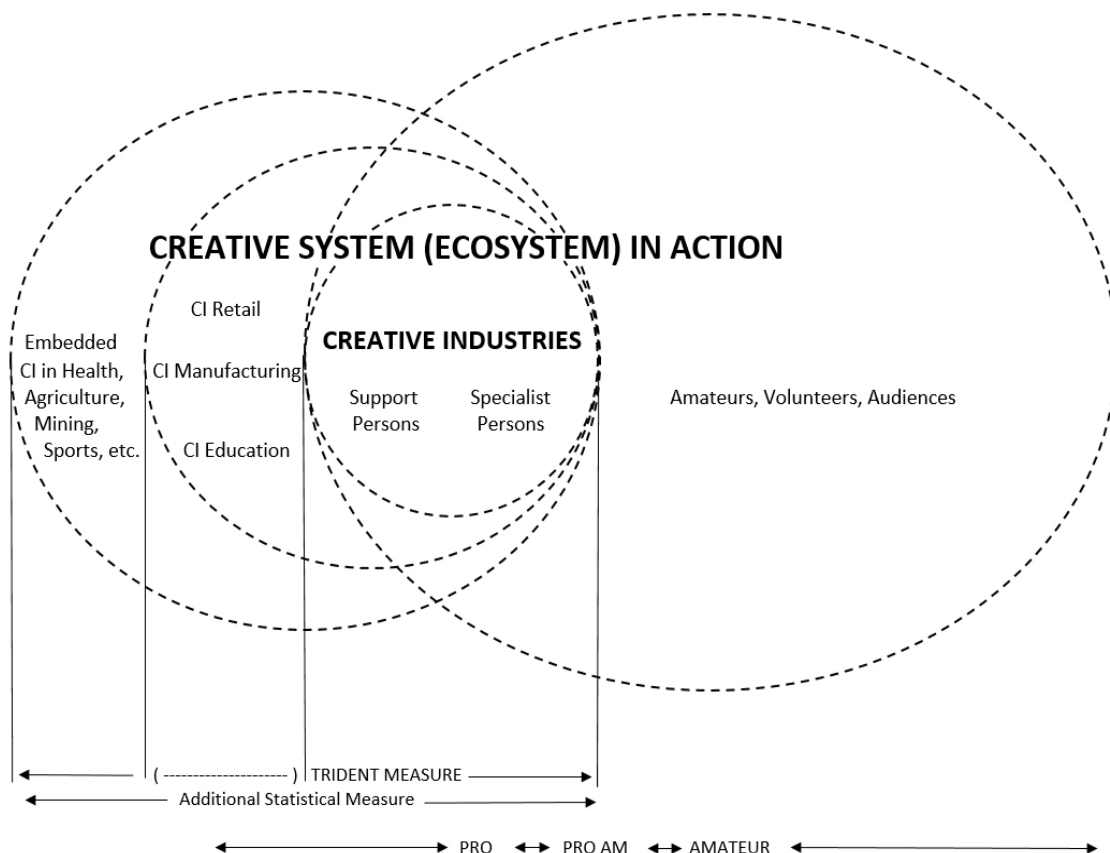


Figure A The Creative System (Ecosystem) in Action

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- These entrepreneurial systems are adapting to pressures of globalisation and digitisation but many are employing extensions of more traditional business models.
- Some sectors in the creative industries are mature while others are emerging. If emergent sectors, such as games and interactive software, were to be encouraged and financed adequately, they could stimulate activity in nearly all of the other sectors.
- The social and cultural value of these industries does not always equate to financial value while a number of culturally specific beliefs and assumptions still play a major part in actions taken by institutions and individuals.
- The project found very little clustering in the way it had been envisaged by Michael Porter. It did find that regional understandings and actions tended to be focused at the urban centre of the region, consisting of Maitland, Lake Macquarie and Newcastle LGAs, within what is a highly scalable regional system. The hinterland was highly active itself and also fed into what the urban centre was producing. The internet provided a way for many to bypass this clustering effect although traditional face-to-face activity was still vital to success for many.
- The infrastructure that is necessary to the creative industries is substantial and is both physical and digital. Production hubs, studios, theatres, museums and galleries, retail outlets, warehouses and office space as well as standard electricity, road and air transport infrastructure are all still highly important. However, there was not a single SME, organisation or individual found in the ethnographic study who has not come to rely on the internet and its necessary software, hardware and telecommunications infrastructure to carry out their current social, cultural and financial activities. The promise of the NBN has become substantial.
- Many also tend to see creative industries and 'the creatives' that work within them using only their own specific sectoral lens.
- There is a rapidly growing trend toward outsourcing, freelancing and the casualisation of the workforce which is having an effect on those who are members of this creative industries precariat.
- Many operatives work cross-sectorally in order to gain an income, i.e. multiple tasks = one income. There is also a great deal of mobility between professions. Operatives in the creative industries have to be T-shaped, that is, specialised vertically as well as multi-skilled horizontally.
- Many sectors rely on amateurs and pro-amateurs to support industrial structures. The gift economy is enormous in comparison to what the ABS Census statistics are revealing.

- There is a variety of collaborative activities occurring for creative practitioners in the region. These are often a function of the type of cultural production being engaged in, for example, film, television, radio, music and design activities all rely on collaboration to do what they do. There are also a number of efforts on the part of support organisation to foster collaboration and the setting up of production hubs, both local government and privately operated, which have stimulated various forms of collaboration within certain creative industries sectors.
- There is also a 'creative drain' of sector operatives who typically move away from the Hunter for approximately a decade and acquire international level skills. However, many return to the Hunter to have a family and take advantage of the lifestyle opportunities returning their hard earned acquired skills as a gift to the regional community. Others arrive in the Hunter also bringing a high level of expertise with them, which is fed into the sectors they go on to work in, as they escape the financial and real estate pressures of the larger urban areas. We observe in these migratory patterns a positive net inflow of skilled operatives for the Hunter Region.
- New occupations such as social media manager, transmedia storyteller, technopreneur or digital strategist are emerging at an exponential rate.
- Operatives in the creative industries, by necessity, are 'glocally' oriented i.e. they are locally embedded but globally active. As such globalisation and digitisation provide the broad context of play for the creative industries where they are subject to the same STEEPLE factors all other industries are.

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GENERAL CONCLUSIONS

As detailed more fully in each section of the final report, which outlines each sector's history, structure, business models, operational methods and important personnel, it can be claimed that these creative industries sectors - music, performing arts, visual arts, architecture, fashion, advertising and design, publishing, radio, television, film, and electronic games and software development – constitute important parts of a diverse and continually dynamic creative system focused on disseminating, profiting from and valuing the signifying practices used to produce symbolic messages.

Some sectors of the creative industries are mature while others are emerging. Radio, architecture, television, and advertising and design, for example, are well established in the commercial sphere while publishing, the performing and visual arts and music have maintained a long and deep sociocultural tradition in the region. Local communities have sustained them for a long time. Unsurprisingly electronic games and software development are emergent sectors which could, if encouraged and financed adequately, stimulate activity in nearly all of the other sectors as many operatives from other sectors

are in demand within this sector, particularly for the production of games.

The system - or 'ecosystem' if the notion of systems appears unpalatable – these sectors all form part of, is not only comprised of specialist, support and embedded persons who make the most obvious statistically measurable set of operatives within the creative industries, that is, the recognised professionals, but also those members of the industry who are counted elsewhere in other industries such as in mining, health, agriculture and so on. This perspective also recognises that the education, retail and manufacturing arms are a part of this ecosystem. For example, those working at Musos Corner in Newcastle West and at Eckersley's in Hamilton see themselves as very much part of the music industries and their art worlds respectively. Looking at the creative activity in this region as a creative system in action also accounts for the all-important pro-ams, as well as the numerous amateurs, volunteers and audiences who comprise a very important set of contributors to this entrepreneurial system. This system *in toto* produces economic, social, cultural and symbolic value for the economy and the broader community.

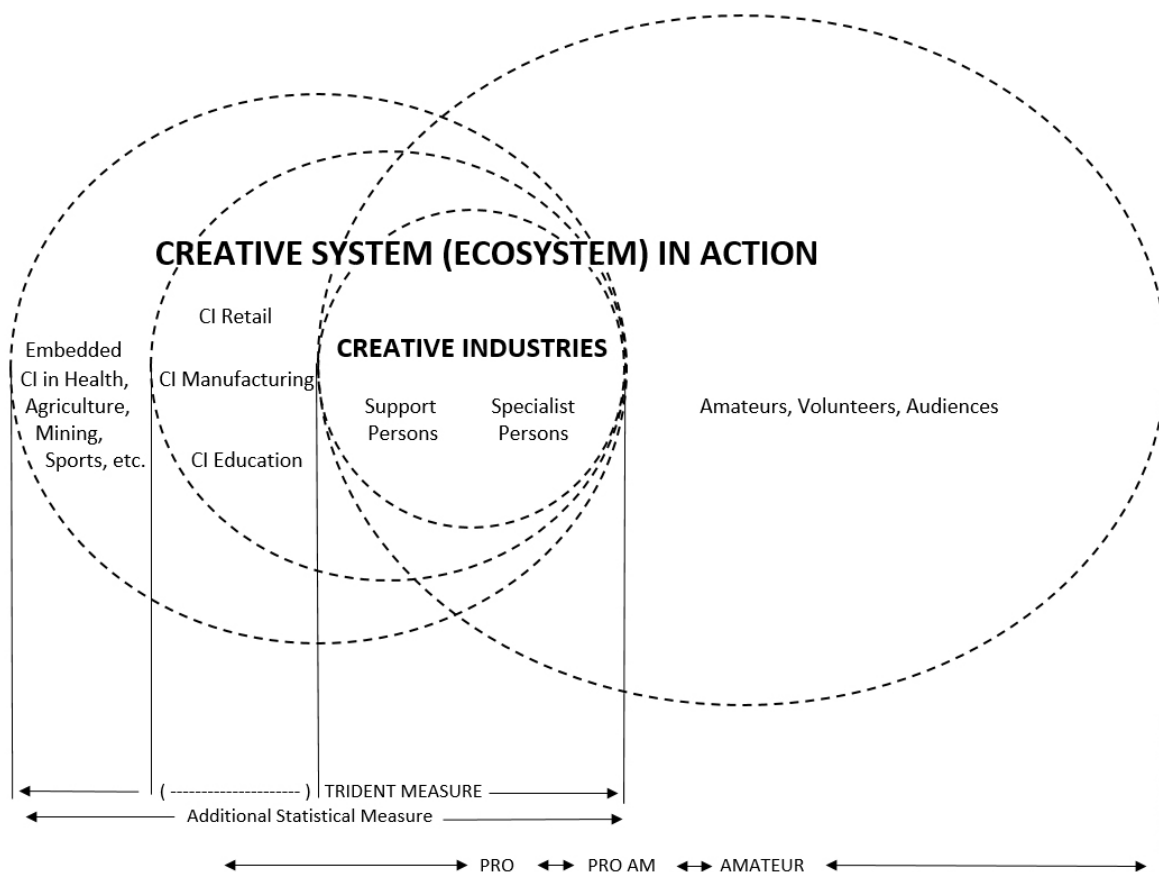


Figure A(2): The Creative System (Ecosystem) in Action

There have been ongoing and, at times, remarkable changes in this system. This has certainly occurred across the short lifespan of this research project. Apart from the variations in the way people have been deriving income and the means by which they have been producing a variety of symbolic messages, it needs to be noted that one of the significant changes is in that of attitudes within the region to the notion of the creative industries itself. From the beginning of the study it was observed that culturally specific beliefs and assumptions, particularly about creativity and the way it is believed to work, played a major part in actions taken by many significant institutions and active decision-making entities. Many of these exhibited little understanding of what the creative industries actually are. A number, relying on what could be called a well-worn set of myths, beliefs and assumptions, would either want to divorce creativity completely from the notion of an

industry, or have little real cognisance of the social, cultural, symbolic or indeed economic input the creative industries are contributing to the region. Towards the latter part of the project it was noticeable from observation and interviews that the term 'creative industries' had grown, if not in acceptability certainly in recognition, within the region. For example, the Newcastle City Council in their Newcastle's Economic Development Strategy 2016-2019 document (Newcastle City Council, 2016) not only reinforced the importance of innovation and creativity (ibid, p. 5) but directly recognised the creative industries as a strategic growth sector (ibid p. 34). Prior to actions such as this there tended to be an understanding of the creative industries, certainly from within the business community, as primarily 'basket weaving', as one respondent put it. It has come as a surprise to some that the creative industries are indeed strong contributors to the regional economy

just as many of the more traditionally focused industries are. Coupled with the recognition of the creative industries' contribution it was observed that there is also now a tendency on the part of financial donors, patrons and investors, to expect more than 'art for art's sake' from the recipients of these funds. Economic indicators are increasingly part of the selection criteria for many involved in sponsorships and grants from these sectors, with the notable exception being for what has been called 'straight arts funding'.

It was also observed that many participants inside the creative industries themselves tended to view these industries, again unsurprisingly, from within their own specific sectoral lens. It was not uncommon, as one example only, to hear people working within the design community to refer to themselves as the 'creatives' within the region, neglecting to observe the possibility that creativity was occurring across all the other sectors as well.

Similarly, regional understandings have tended to be focused at the urban centre. It was difficult for many, including for the researchers on this project, to look beyond the urban hub and not just focus on Newcastle in particular. Scalability, as a property of systems, is nonetheless still deeply operative in this regional system. As discussed more fully in the body of the report, the hinterland remains deeply interconnected with the urban centre, just as this regional hub is still deeply connected to the state capital, and, significantly, with the rest of the world. The movement of people, ideas, projects, goods and services between and within this scaled system was one of the characteristics found to be true of this creative system in action. While the project found very little clustering in the way it had been envisaged by Michael Porter. It did find that regional understandings and actions tended to be focused at the urban centre of the region, consisting of Maitland, Lake Macquarie and Newcastle LGAs, within

what is a highly scalable regional system. The hinterland was highly active itself and also fed into what the urban centre was producing. The internet provided a way for many to bypass this clustering effect although traditional face-to-face activity was still vital to success for many.

Observations and in-depth interviews revealed that quite a number of operatives are 'glocally' oriented, that is, many of them are locally embedded but globally active. Each sector revealed at least one story, and often many more, where particular people developed their skills within the regional system to the point where they could trade on them internationally and move out into the wider world. This regional creative drain was often reversed as, after approximately a decade of this activity, many have moved back to the region to live and raise a family bringing an international level of expertise, and a desire to continue to operate at that level, to the region. This situation was coupled with those who found their way to the Hunter in an attempt to escape the overcrowding and real estate pressures felt in larger urban agglomerations. Many of this latter group have been surprised by what they found in this region and have generally relished the lifestyle opportunities it affords. Either way it was observed the region gained a net benefit in terms of the input of the international expertise that has become part of the fabric of the region.

Commensurate with these migratory patterns often associated with the creative industries, is the affordances provided by the infrastructure the creative industries now have at their disposal. This infrastructure is substantial and is both physical and digital. Production hubs, studios, theatres, museums and galleries, retail outlets, warehouses and office space as well as standard electricity, road and air transport infrastructure are all still highly important. However, there was not a single SME, organisation or individual found in the

ethnographic study who has not come to rely on the internet and its necessary software, hardware and tele-communications infrastructure to carry out their current social, cultural and financial activities. The promise of the NBN has become substantial.

There is a growing concern over the necessity for extensive storage and fast broadband speeds. Apart from diminishing the isolation of regional centres, the internet in particular has presented commercial opportunities not apparent to earlier incarnations of the creative sector. Whether they engage with the NBN or wait for the far faster 5G network, many practitioners employ newer digital technologies, applications and platforms to varying degrees in the creation, distribution and promotion of their products and services. In short, internet access is now *de rigueur* for the creative industries.

While some more traditional and established creative industry businesses are ambivalent in their engagement with the digital environment, simply having a website, for example, a number of innovative and emerging players are much more *au fait* with the digital economy and adept at using the tools it offers. Further, they engage with other creatives locally, nationally and internationally to extend their knowledge bases, communication networks and markets. Many creative businesses do also deploy social media and many, especially those in the design and advertising field, appear to understand its benefits. However, based on an examination of these companies' websites, a number still engage with social media only as a form of mass communication. For example, all the key advertising agencies in Newcastle emphasise the importance of an aesthetic 'look' and use a form of engagement in their websites through the use of video clips, but a number do not use social media as a form of conversation. In this case it can be claimed that social media is primarily treated as a mass communication

channel in the region and is designed to send out information with little expectation of reply or desire for comment as part of a genuinely encouraged conversational interaction. There are of course many exceptions since many of the cooperatives and collaborative spaces detailed in the final report are much more dynamic in terms of blogging and open creative expression. What is common to each sector is an increasingly necessary presence on social media, some businesses operating solely online and others using a mix of traditional and more innovative entrepreneurial approaches.

These entrepreneurial strategies are, of course, linked to the way people gain income for their businesses and the finances available to them. Many artists, musicians, filmmakers, photographers and so on, start out by investing their own money which may come from a 'day job' or they take a risk with personal credit. Many seek, or are offered, personal loans from friends or family but in doing so run the risk of harming those personal relationships. Unsecured loans typically made by banks or credit unions are usually for relatively small amounts and usually don't require collateral which means the interest rates are high - if indeed such a loan would be extended to the freelancers or contract workers increasingly typifying the creative industries. A secured loan usually requires collateral and many creative industries professionals have taken the risk of using their homes for this purpose. Once a business idea is fully formed, whether it's a software application or a film project, those working in the creative industries will then move beyond self-funding and possibly seek what is known as 'angel' investment. Angel investors usually don't make business decisions but venture capitalists require much more control. The further a creative practitioner or business moves along this hierarchy of funding the more control they cede to the investor. As the NSW Business Chamber reports 'while innovation is fundamental to the development of a strong

Digital Economy, funding innovation is a barrier for many companies ... the lack of angel and venture capital funding results in SMEs being largely self-funded' (NSW Digital Economy 2012, p. 29). As a result, one further method of gaining funding which has become increasingly popular in the region, although not overly so, is crowdfunding. Reward-based models are the most popular, representing 43% of the crowdfunding market (ibid). As Buff and Alhadeef suggest:

The reward-based model permits artists to raise funds before work has commenced, as the funds are only realised if the goal is met, and artists can cover costs or break even before the work has started. However, the authors also indicate that of the 22,000-plus projects that have been launched on Kickstarter, only 54% have reached their funding goal (2013, p. 28).

They also assert that trying to budget for a crowdfunding campaign can be quite problematic since it is often hard to estimate, prior to initiating the production, 'the distribution of rewards fans will choose. Moreover, it is even harder to guess what an average pledge will be, and this is a critical piece for a successful crowdfunding campaign' (ibid).

Apart from the general issues surrounding finance for creative industry professionals and small business owners, there is also the question of the effect of the gift economy. There is little doubt that the gift economy is a significant part of the creative system at work. The gifts exchanged in these processes, many of which go unaccounted for in many business models, are both tangible and intangible. Exchange in the gift economy is not only an economic transaction, it is also a good in itself resulting in social capital or the strengthening of personal relationships. This personal

interaction is fundamental to the establishment of networks - social capital can be converted into economic capital. Additionally, the use of social, cultural or symbolic capital will often supersede financial capital as the basis of the gift economy. The actions of gifts in the Hunter Region are not only linked to the formal and thus more measurable economy, as seen in the figures above indicating Gross Regional Product, but this informal gift economy is highly operative and one where not only professionals exchange the gift but volunteers, amateurs and pro-amateurs dominate in its operation. It was observed that many sectors, whether they are mature or emergent, have come to rely on these amateurs and pro-amateurs to support their industrial structures.

Just as there is a huge amateur base that professional sports people come from and utilise, the creative industries also rely on an army of volunteers, amateurs and pro-amateurs to underpin much of the activity in each of the sectors. This idea reinforces the point that we are looking not just at an industry measure via ABS statistics but a creative system that encompasses all of those individuals and the vital contribution they make. There is a deep connection, as one example between the 16 FTE positions available in the theatre world and the approximately 11,000 volunteer positions that undergird the 41 active theatre companies in the region. Businesses like Musos Corner do not cater solely to fully professional musicians; they would go out of business if they did. It is the amateur and pro-amateur musicians - the weekend warriors - that support them. The economic contribution to the regional economy of the multiplier effect is not only applicable to the film sector. In short, it is readily apparent from the observational and interview components of this ethnographic study that the gift economy is enormous in comparison to what the analyses from both statistical measures have revealed.

In the face of these interconnections and the rapid changes associated with digitisation and globalisation, a variety of business models, that is, a specific method or procedure for generating revenue, are being used by the creative industries in the region. While internet commerce has generated a slew of supposedly new ways of doing business it needs to be stressed that many of these apparently new methods of gaining revenue are simply reinventions of 'tried-and-true models' (Rappa 2010, online) indicating, yet again, that an immersion in a set of antecedent conditions is still vital to the introduction of any novelty.

For the creative industries, these revenue possibilities include the sale of goods, whether direct to customers or online, such as prints, CDs and DVDs, pottery, software and apps, files of audio-visual material, etc. A creative industries' operative may also charge for services provided. This is true for designers of all types, architects, and those delivering outsourced content to TV or radio or any other streaming service. Others, particularly those in the gallery, libraries, archives and museums (GLAM) sector, associated most readily with the visual arts and publishing sectors, have created a shared resource or durable asset. For example, a museum, be it real or virtual, can be accessed by a number of people. They can then be charged for its use. The move from the penny arcade to video games arcades through to the provision of virtual reality experiences is a good example of the way this type of tried and tested business model. Firms such as VRXP rely on it. For designers, this shared resource might come in the form of a co-working space, many of which have proliferated within the creative industries in the region as more and more work is outsourced, casualised or delivered on a more fully freelance basis and costs of production prohibit the use of independently owned infrastructure for many in the region. On the other hand, subscription services make money by offering an ongoing

benefit in return for a recurring fee. This model operates for companies involved in cable or satellite services such as Netflix but it's also a business model that older press outlets such as News Corp have come to rely on as they compete digitally. The Newcastle Herald, until recently wholly owned by Fairfax Media, has just moved to a subscription service. There are few in the region apart from larger corporate players, involved in this type of business activity. Many are, however, competing with international businesses, such as Netflix, who use this revenue model. Although there are very few left in the Hunter, video stores and book stores, and businesses like them, have tended to acquire an asset from a wholesaler, then sell that asset to a retail buyer at a higher price. This very traditional business model is now used by many older publishers moving online but it also serves their competitors very well such as wholly online distribution companies like Amazon or the Book Depository. Leasing is another option. Stores such as Video Ezy, most of whom have disappeared from the region, and online providers like iTunes, Google movies and Oz Flix have used this business model.

Other businesses market and sometimes sell an asset or service on behalf of a third-party, and in the process collect a percentage of the transaction price as a fee. These include literary, musical and theatrical agents but also more broadly digital companies such as Uber and Air B&B. Just as the agents in the real world own no inventory neither does Air B&B or Uber in the digital one. The cost of insurance and maintenance is borne by the actual owners of the inventory who are treated as subcontractors by the agent. Audience aggregation appears to be a favoured mode for social media who have borrowed their business model directly from what is now called legacy media. In this case, they get the attention of an audience and sell access to this aggregated audience to other businesses seeking to reach that audience. Of course, this

revenue generator is used by magazines, radio and TV but also social media behemoths like Facebook, who also demonstrate the value of big data in targeting those audiences. Facebook, despite being domiciled in the USA, has become critical to all creative industries' operatives in the region. Unlike other creative industries businesses such as radio or television, social media like Facebook does not have the cost of producing content – the aggregated audience does this for them. This includes many from the creative industries wishing to promote themselves. On the other hand, an older method whereby a buyer can take a predefined action across a fixed period of time in exchange for a fee, underpins the online revenues of Ticketek and the increasing use of Humanitix, and to a lesser extent many creative industries businesses in the Hunter who sell concert tickets in advance for performances of all kinds. These businesses are primarily sales brokers who charge a service fee. While it can be observed from the above that there is a complex and variable set of income streams operating across most creative industries, as noted many of these models are extensions, sometimes radical, sometimes not, of pre-existing revenue earning opportunities.

What can be said with certainty from analysis, observation and interview, is that, in an effort to maintain their productive output and competitive edge, companies and individuals working within this dynamic creative ecosystem in the region have become increasingly and excessively diversified in generating income streams. Discerning the difference between what a recording studio currently offers, as one example, and what advertising agencies do for income, is becoming increasingly difficult. At the same time, and interconnected with the prior situation, we have observed a rapidly growing trend toward outsourcing, freelancing and the casualisation of the workforce. As a result, many creative industries' operatives have been

forced to work cross-sectorally in order to gain an income, that is, for many of them there is a need to undertake multiple tasks in order to gain one income, with a commensurate set of core skills needing to be maintained by most of them. In this case we can claim that most operatives in the creative industries need to be specialised vertically as well as multi-skilled horizontally. This way of working has become known as having a necessarily T-shaped profile. As a result, it was observed that there is an increasing degree of mobility between occupations. This is coupled with an increasing set of difficulties for many casuals and freelancers to gain finance, particularly from banking institutions, to facilitate business expansion, finance a home or partake of what used to be called a 'normal' life.

Related to these ideas above is the idea that the tangible structures of production that typify traditional industries, that is, 'firms, labour, production network, industrial districts, and markets – that is the normal stock in trade of industrial investigation' (Hutton 2009, p. 139) are mutating. There are, as this research has identified, 'shifting boundaries of function, evolving technical divisions of labour, and emergent product sectors' (ibid). Based on the literature, laid out fully in Section 2 of the report, we note that the term 'industry', as a descriptor of certain organisational structures, arose co-incident with the advent of the industrial revolution and was used extensively by central figures such as Adam Smith [1776] and Benjamin Disraeli [1844] (OED 2018, online). Its conception continues to change. For example, in 1972 G.B. Richardson pointed out that industries are not islands. Instead 'there is a dense network of cooperation and affiliation by which firms are inter-related' (1972, p. 883) where 'industry and market boundaries are porous and "fuzzy" especially where globalisation is taking place' (McGee, Thomas and Pruett 1995, p. 261). As Todeva, Knoke & Keskinova (2007) indicate 'researchers have periodically noted an

'imprecision of industry definition and the 'fuzziness' of industry boundaries in economic environments ... (Venkatraman and Thomas 1988:546; see also McGee, Thomas and Pruett 1995; Cantwell and Santangelo 2006; Bernard, Redding and Schott 2006)' (Todeva, Knoke & Keskinova 2007, p. 3). As our own research confirms, in the twenty-first century there is an increasing tendency to recognise industries as loosely coupled systems of production (e.g. Dubois & Gadde, 2010). We claim the creative industries in the Hunter Region exhibit these tendencies. In observing what we see as increasing changes from creative industries to creative systems we also claim that current entrepreneurial approaches in the region are not only primarily employing extensions of more traditional business models but are, by necessity, adapting to pressures of globalisation and digitisation. As Schulz has asserted:

The technological advances made in the last decade have been breathtaking, but it is likely still just the beginning. The growth of new technologies, after all, has been exponential rather than linear, with ever larger advances coming at an increasingly rapid rate ... We are witnessing nothing less than a societal transformation that ultimately nobody will be able to avoid. It is the kind of sea change that can only be compared with 19th century industrialisation, but it is happening much faster this time. Just as the change from hand work to mass production dramatically changed our society over 100 years ago, the digital revolution isn't just altering specific sectors of the economy, it is changing the way we think and live' (2015, online).

These changes are of deep concern to many who depend on the creative industries to mediate their world through a variety of audio, visual and text based cultural forms but these bellwether industries exist in a set of structural conditions that include international legal frameworks, industrial settings, trade agreements, public and private sector investment, as well as the second and third legs of the triple bottom line (Elkington 1999), that is, a veritable host of sociocultural and environmental entanglements. In the face of these changes new occupations such as social media manager, transmedia storyteller, technopreneur or digital strategist are emerging at an exponential rate. However, focusing solely on the economic implications also belies the community building and social cohesion that emanates from such things as telling one's own stories, singing one's own songs or relying on each other to build successful teams whose sole aim is not simply to gain an income. If culture is about a whole way of life the creative industries are particularly adept at symbolizing this aspect of ourselves for ourselves and in succeeding in carrying these signifying practices to the rest of the world. It is, in fact, these activities, these signifying practices, that differentiate the creative industries from most other industries. That said the social and cultural value of these industries has not always equated to financial value, although in many cases it has.

In this case we can claim that the Hunter Region houses a set of complex and dynamic innovative ecosystems, that is, creative industries sectors which operate as subsystems of a broader creative system in action, where active creative agents are both constrained and enabled by the social, cultural, technological, economic, environmental, political and legal structures that afford their innovative activity.

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1. GENERAL SUMMARY

1.1 Methodology

Ethnography, as a primarily qualitative methodology (Fetterman 2011), enables an ongoing and thorough observation of a set of cultural systems in action and has allowed, in this case, a necessary contextual understanding of the Hunter creative industries to develop (Morley & Silverstone 1991, p. 156). This methodology has its basis in anthropology and usually explores human activity involving social relationships, identities and collective practices (Cohen 1993, p. 127). As Susannah Priest argues, groups, such as those researched here in the creative industries, ‘must be understood as whole systems, not isolated parts’ (1996, p. 25). Human culture, following Williams’ definition of it (1981), consists of both the way of life of a group of people and the signifying practices they engage in. It is created, used and interpreted by individuals and groups *in situ*. Ien Ang has also stated that ‘contemporary culture has become an enormously complex and thoroughly entangled maze of interrelated and interdependent social and cultural practices’ (1996, p. 63). As such, this research project required significant immersion in the detailed world of the participants. As Sara Cohen argues, ‘only in the light of such detailed knowledge are we justified in making more general statements about lived culture’ (1993, p. 127), for example regarding globalisation and its effects, the nature of the creative industries as drivers of cultural and economic value, the processes of creativity and cultural production and so on. This methodological approach, which goes deep into the lives and experiences of those being studied, reveals ‘the complex interrelatedness of contexts, events, activities and relationships’ (ibid).

Detailed research was undertaken on mapping the different participants and institutions, their activities and the networks involved in the creative industries in the Hunter region. This process involved a number of practical methods. As Bryman (2001) points out, ethnography includes:

- the immersion of the ethnographer in the group they are studying for a period of time;
- the observation of the group in their working environment;
- listening and engaging in conversations with group members;
- gathering data about groups through interviews with key informants;
- collecting detailed supporting data and documents relating to the group;
- developing an understanding of the group’s actions in context; and
- analysing, writing up and reporting the findings of the research (2001, p. 291).

Apart from this ongoing and detailed work, a descriptive quantitative approach was also undertaken to support the more extensive qualitative aspects of the study. This quantitative aspect involved two measures.

Measure 1 was an attempt to identify the types of occupations that exist within creative industries as well as the ages and gender of each non-identified participant. A search of 2011 Census data using the ANZSCO 6-Digit Occupation Codes as listed in the CIIC Report (2013, pp. 24-25) was applied to the 11 LGAs of the Hunter Region. By basing this measure on the underlying assumptions used in the CIIC report we attempted to give ourselves a point of comparison with this major national study. The LGAs focused on included Lake Macquarie, Newcastle, Maitland, Port Stephens, Cessnock, Great Lakes, Upper Hunter, Singleton, Dungog,

Gloucester and Muswellbrook. The 33 occupations by place of residence as used by the CIIC report were sorted into creative industries sectors as detailed below.

Measure 2 involved the use of the Creative Trident Methodology. Given this methodology has provided the statistical basis for a number of creative industries reports both here and overseas, this measure provided another solid point of comparison. The data for this measure was drawn from both the 2011 and 2016 Census and included ABS information which gave the number of persons employed, the total who stated income and mean income across 35 selected industries (4-digit IND06P) as well as all other industries by all occupations (6-digit ANZSCO). This data was not based on LGAs, as for measure 1 above, but instead was based on SA4 geographical areas. This data was then aggregated for ASGS 106 Hunter Valley (excluding Newcastle) and 111 Newcastle and Lake Macquarie. It should be noted that this geographical area does not include the Great Lakes or Gloucester unlike Measure 1. The collected data for Measure 2 was then used to calculate the specialist, support and embedded workers associated with the creative industries in this region (see Section 2.16 and Sections 5.2.1).

The various limitations of these approaches are detailed in Section 5 below. Notwithstanding these limitations, the resultant quantitative data was used to complement, inform and support the extensive qualitative aspects of the study and, as stated, was used as a largely descriptive method. This approach has been used by other studies of the creative industries (e.g. ENA 2009, Hunt & Fishel 2012) and has been supplemented well by qualitative aspects in others (e.g. Lea et al 2009). The quantitative data provided descriptive insights into the creative industries in the Hunter and as such contributed to the far more immersive aspects of the ethnography.

The qualitative methods, replete with their own sets of limitations, primarily included ongoing desktop searches, recorded 115 in-depth semi-structured interviews with key informants, and participant observations in the field of the creative system we were engaged with. The sectors of the creative industries used to initially order this process were derived from the NSW Creative Industries Taskforce appointed in 2012 by the NSW Department of Trade and Industry (NSWT&I 2012) and from the NSW Department of State and Regional Development (NSWSRD 2009, p. 7). The list they had used included advertising and marketing, architecture, graphic design, visual arts, music, performing arts, publishing, film, television, radio, and electronic games and software development. As per Figure 1 below, this sector list can be amalgamated into four broad groups, that is, design, the arts, information technology and the media (Flew 2012, p. 84).

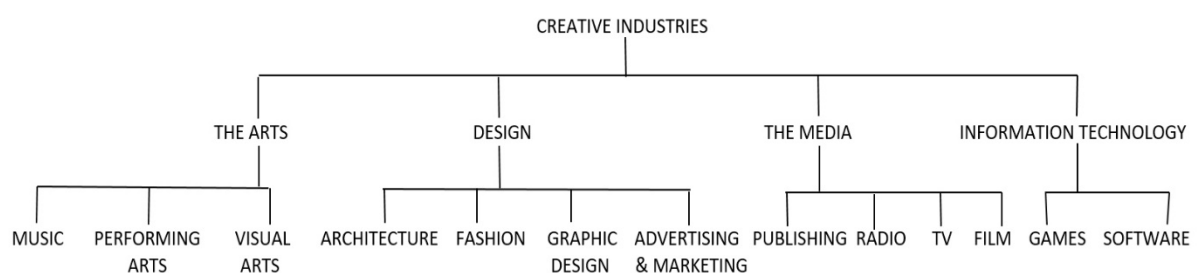


Figure 1 Creative industries lists represented as a hierarchical structure

After feedback we adapted this list to suit the region and settled on a suitable typology as follows: advertising and design, architecture, visual arts, music, performing arts, publishing, film, television, radio, and electronic games and software development.

We then conducted desktop research to see what existed online in each of these 11 sectors in the 11 LGAs that constituted the Hunter Region. This desktop search, coupled with what the

statistical analyses were revealing, not only fleshed out the descriptive picture the quantitative data supplied us with, but also allowed us to identify key informants. This identification of key informants was also supported by our own participant knowledge. We then targeted these informants for in-depth semi-structured interviews. For these 115 interviews we used a common set of questions focused on garnering field, domain and individual information, which we used as an organising principle. A number of these interviews were recorded in the field face-to-face or via telephone. A number were also video recorded.

The data revealed in this overall recursive process then informed not only the interim report we made to partners but also the forum we conducted mid-way through the research process. This forum of creative industries' personnel from the sectors we had identified was convened to garner further information about the creative industries and to inform the participants of research work completed to that point. This iterative procedure was then complemented with a focus group of key participants from the Upper Hunter. The indepth interviews continued apace as we moved toward the end of the qualitative research period. With a wealth of data collected we then applied the Miles and Huberman framework (Robson 2002; Punch 2014) for qualitative data analysis (QDA). The final report demonstrates the necessary 'thick description' ethnography entails (Geertz 1973, pp. 5-6 & 9-10).

A website was constructed to house some of these interviews, summaries of practitioners' experiences, various databases and filmed material we shot with certain interview subjects as well as the interim report and now the final report. As such the conduct of this research followed the key methods and principles of ethnography and it revealed a wealth of quantitative and qualitative data. The first action taken in this research process was a literature review (see Section 2 of the report). Our operational definitions came from this literature review.

1.2 Operational Definitions

This study, *Creativity and Cultural Production in the Hunter: An Applied Ethnographic Study of New Entrepreneurial Systems in the Creative Industries*, employs the following operational definitions.

Creativity: In line with the research literature into creativity (for summaries see Alexander 2003, Pope 2005, Sawyer 2011) most researchers dealing with creativity see it as the bringing into being of novel objects, processes and ideas that are valued in at least one social setting (Hennessey & Amabile 2010).

Innovation: While the term innovation has had both negative and positive connotations across its historical use (Godin 2013), following Rogers we note 'an innovation is an idea, practice, or object that is perceived as new by an individual or other unit of adoption. It matters little, so far as human behaviour is concerned, whether or not an idea is "objectively" new as measured by the lapse of time since its first use or discovery' (Rogers 1983, p. 11).

Culture: Following Williams (1981, p. 13) culture is defined here as 'the convergence between an anthropological and sociological sense of culture as a distinct "whole way of life"' (ibid) and the 'more specialised if also more common sense of culture as "artistic and intellectual activities" ... broadly defined to include all the "signifying practices"' (ibid) of, in this case, the creative industries.

Creative Industries: This concept is used here as an umbrella term covering a number of sectors which are all connected by three defining features. Firstly, they 'all require some input of *human creativity*'; second, they are *vehicles for symbolic messages*, that is, they are carriers of *meaning*; and third, they contain, at least potentially, some *intellectual property* that belongs

to an individual or group' [*italics in original*] (Davies & Sigthorsson 2013, p. 1). The creative industries are those industries that use signifying practices to intentionally produce symbolic artefacts for the purposes of commercial gain. These industries include all those sectors amalgamated within the four broad subdivisions of design, media, IT and the arts. These sectors are therefore constituted by advertising and design, architecture, fashion, publishing, film, TV, radio, new media, publishing, music, electronic games and software development and applications, performing arts and visual arts.

Hunter Region: As defined by the ABS (2013-17), the Hunter Region is constituted by the Newcastle, Lake Macquarie, Maitland, Port Stephens, Cessnock, Great Lakes, Upper Hunter, Singleton, Dungog, Gloucester and Muswellbrook Local Government Areas (LGAs).

Entrepreneurship: The European Commission states that 'entrepreneurship is first and foremost a mindset. It covers an individual's motivation and capacity, independently or within an organisation, to identify an opportunity and pursue it in order to produce new value or economic success. It takes creativity or innovation to enter and compete in an existing market, to change or even create a new market' (European Commission 2003). Added to these understandings, Mazzarol argues that, from a concrete point of view, 'entrepreneurship deals with the process of developing new business ventures and/or promoting growth and innovation in existing firms. Innovation is not just about new technology, but also about doing things better to enhance value to customers, employees and shareholders' (Mazzarol 2011, p. i).

Systems: For Lars Skyttner, systems are wholes whose 'primary properties derive from the interactions of their parts' (2006, p. 38). There are multilayered systems within systems where 'a system in one perspective is a subsystem in another. But the system view always treats systems as integrated wholes of their subsidiary components' (Laszlo 1972, p. 14). These complex interrelated systems produce behaviours and characteristics that are not simply reducible to their parts. Physical and biological systems are not coterminous with cultural or social systems although they share a very similar set of characteristics including interdependence, networks, self-organisation, complementarity, non-linear dynamics and emergence. While social systems exist in real time and real space they are largely premised on the experiences of the conceptual and the symbolic. Identities are built around sharing the ideas embedded in the symbolic domain and this identification creates the boundaries of the social system while allowing the system to organise itself around those shared cultural and social identities. Social and cultural systems, whether they are identified as systems, ecosystems or ecologies, are self-organised as interconnected networks built on shared knowledge and are populated by choice making agents.

1.3 Brief Literature Review

The Hunter region in NSW Australia is a place where creative systems in action (McIntyre Fulton & Paton 2016; Kerrigan 2013) and innovation ecosystems (Andersen 2011; McIntyre 2011, Lawlor 2014) intersect. They do so through the innovations of what have been called the creative industries, a rich admixture of design, the arts, the media and information technology (Flew 2012, p. 84). In order to understand how the *creative* industries operate as a system of production, and from there, investigate the entrepreneurial systems that have been enacted in the Hunter in these sectors, it was first worthwhile to see where the idea of innovation ecosystems and creative systems came from.

The rise of the idea of innovation ecosystems is well documented by Jorn Andersen (2011). He presents evidence to suggest that the advent of the term 'innovation ecosystems' can be traced

back to the introduction of the idea of a ‘national business system’ originally developed by German economist George Friedrich List in 1850. As Andersen (2011) explains, List was keen to build a manufacturing base at the national level to help Germany compete with British imperial interests and protect nascent strategic industries. List’s ideas were taken up in what is now called the developing world as well as being influential in Japan and China. Building on this thinking the English economist Alfred Marshall then looked closely at what was happening in Sheffield with steel and cutlery production and in 1899 suggested the notion of ‘agglomerations’ to explain the synergistic effect seen to be benefiting companies operating in close proximity to each other. As Flew (2012) indicates, Marshall identified ‘positive externalities arising for the co-location of firms and workers in related businesses’ (2012, p. 146). After WWII the economist Eric Dahmen, inspired by Joseph Schumpeter’s ideas on the relationship between entrepreneurship, capital and creative destruction, coined the term ‘development blocks’ to help explain the industrial transformations occurring in Sweden at the time. With these ideas as precursors Christopher Freeman and Bengt Lundvall suggested that there was a complex set of interactions occurring between entrepreneurs, companies and capital entwined with regulatory frameworks for labour markets, the markets for the resources used in production, national educational efforts and policies set in place to encourage economic development. As Andersen (2011) points out, Freeman and Lundvall observed, in a set of case studies, a series of interdependent interactions and interrelationships which they then called a ‘national system of innovation’.

Then, in a reversion to Rousseau’s (1754) distinctions between nature and man, concepts which were irrevocably tied up with the split between romanticism and rationalism (Watson 2005), business systems began to be described as ‘ecosystems’ or ‘ecologies.’ These latter terms appear to be a more palatable form of the term ‘system’ and have now become more popular as a result. This situation is unsurprising given the remnant Romanticism inherent in Western culture allied to what Watson has called ‘the modern incoherence’ (2005, pp. 606-623). This act of deference to the ‘organic’ can be seen, for example, in the establishment in 2010 of the Innovation Ecosystems Network (IEN) at Stanford University. At their recent summit the IEN declared that ‘business growth is catalysed, accelerated and sustained through relationships. In every location and around the world, relationships of people, organizations and resources are the ecosystem for innovation. The innovation ecosystem is context for political, technological, economic, and environmental changes’ (IEN, 2011 online). Henry Etzkowi and Loet Leydesdorff (2000), in a pre-echo of Mariana Mazzucato’s (2014) detailed work on the entrepreneurial state, suggested a specific set of structural relationships which are critical to these systems:

The Triple Helix of university–industry–government relations is compared with alternative models for explaining the current research system in its social contexts. Communications and negotiations between institutional partners generate an overlay that increasingly reorganizes the underlying arrangements. The institutional layer can be considered as the retention mechanism of a developing system. For example, the national organization of the system of innovation has historically been important in determining competition (Etzkowi & Leydesdor 2000, p. 109).

These ideas have also been explored by Amnon Frenkel and Shlomo Maital in their book *Mapping National Innovation Ecosystems: Foundations for Policy Consensus* (2014). It is worth noting how easily they slip between using the term ‘innovation system’ and ‘innovation ecosystem’. They go so far as to say that ‘innovation systems are a subset of all complex systems’ (2014, p. 229). They also quote Geoffrey West who argues that the collective

characteristics of complex systems ‘cannot easily be predicted from underlying components’ (quoted in Frenkel & Maital 2014, p. 229). What is being described here is the notion of emergence. It is a central facet of all systems. First mooted by Lewes in 1859, emergence describes a process whereby ‘novel and coherent structure, patterns and properties [arise] during the process of self-organization in complex systems’ (Goldstein 1999, p. 49). Frenkel and Maital go on to assert that:

The ‘whole’ of the innovation system in a nation or region is, as West notes, significantly different from the sum of its parts. He continues: A city is much more than its buildings and people. ‘Our bodies are more than the totality of our cells. This quality, called emergent behaviour, is characteristic of economies, financial markets, urban communities, companies, organisms, the Internet, galaxies and the health care system’. And, he might have added, emergent behaviour is also characteristic of national innovation ecosystems (2014, p. 229).

While Freeman and Lundvall observed, as suggested above, a series of interdependent interactions and industry interrelationships which produced emergent behaviour, this was then attributed to a ‘national system of innovation’ (in Andersen 2011). The creative systems approach, initially developed by Mihaly Csikszentmihalyi, ‘incorporates not just individual creators but also the social and cultural context in which they work. In many ways it satisfies Csikszentmihalyi’s call for an amalgam of the psychological and the sociological’ (McIntyre, Fulton & Paton 2016, pp. 1-2). From a sociological perspective Pierre Bourdieu (1977, 1990, 1993 & 1996) suggests that:

It is the interplay between a *field of works* which presents possibilities of action to an individual who possesses the necessary *habitus*, partially composed of personal levels of *social, cultural, symbolic and economic capital* that then inclines them to act and react within particular structured and dynamic spaces called *fields*. These fields are arenas of production and circulation of goods, ideas and knowledges. They are populated by other agents who compete using various levels of the forms of capital pertinent to that field. Bourdieu suggests that it is the interplay between these various spheres of cultural production that makes practice possible (McIntyre 2009, p. 7).

Psychologist Mihaly Csikszentmihalyi (1988, 1997, 1999 & 2014) proposed something remarkably similar in developing his systems model of creative action. He argues that:

Three major factors, that is, a structure of knowledge manifest in a particular symbol system (*domain*), a structured social organisation that understands that body of knowledge (*field*), and an individual agent (*person*) who makes changes to the stored information that pre-exists them, are necessary for creativity to occur. These factors operate through ‘dynamic links of circular causality’ (1988, p. 329) with the starting point in the process being ‘purely arbitrary’ (ibid) indicating the systems essential nonlinearity (McIntyre 2009, p. 7).

These creative systems are active and dynamic and they exhibit, like all systems - including ecosystems and ecologies - emergence, complementarity, interconnectedness and scalability, as features that identify them. Scalability, for example, describes the idea that a whole system is composed of a variety of sub-systems, each of which is complete in and of itself as a system but is at the same time a constituent of the larger system it is part of. These systems are scaled

vertically both above and below the one being focused on. To demonstrate this idea of scalability, as a creative system in action the creative industries in the Hunter Region are local, regional and global all at the same time. The global is constituted in some sense by a variety of regions and these of course are dependent for their constitution on the localities that constitute them. And of course, neighbourhoods operate within global spaces. It is through their human interactions that these spaces become local places (Tuan 1997, p. 73). As Knox and Marston argue in their book *Human Geography: Places and Regions in Global Context* (2014):

It is in specific locales that important events happen, and it is from them that significant changes spread. Nevertheless, the influence of places is by no means limited to the occasional innovative change. Because of their distinctive characteristics, places always modify and sometimes resist the imprint of even the broadest economic, cultural, and political trends (Knox & Marston 2014, p. 14).

When many think of the Hunter, they tend to think of the city of Newcastle - but cities do not exist in isolation. They are both historically and geographically located. As Fernand Braudel (1990) pointed out, the geography of a locality or region affects its patterns of settlement and has some effect on the systems of trade, culture and politics that develop there. The way linked villages, towns and cities come to define themselves and are defined further afield is dependent in many senses on their interactions which are both constrained and enabled by the geographical factors on offer and the histories that have been enacted there. Hinterlands feed cities and cities depend on their hinterlands for survival. Smaller towns draw trade, wealth, knowledge and ideas from their larger urban cousins and the urban areas are sustained by migrations of people and goods to and from them. As Braudel explains:

Every urban settlement is bound to live by maintaining a balance between what it receives (or takes) and what it gives (or returns). The balance has perpetually to be adjusted, the point of equilibrium is never fixed. And the particular way a town draws on the outside world while modifying itself internally, the better to attach itself to its surroundings and dominate them is never simple (1990, p. 189).

In 'explaining the system' (1990, pp. 161-262) Braudel points out cities and towns exist in 'circles of influence' (1990, p. 185). Similarly, cities operate within 'zones of urban attraction' (Braudel 1990, p. 259). The multi-faceted influence of a regional capital, 'political and cultural in the broadest sense of both terms' (ibid), tends to exceed its designated city limits. This system is scalable, interconnected and interdependent. As an example, the Hunter Region in NSW is a contested space operating as a system of many interactions and identities. It is not 'just there to be described' (McManus, O'Neill & Loughran 2000, p. 3). This can be seen in the 'emergence of the Hunter Region as a cultural bounding of physical space that has, itself, changed over billions of years' (ibid). Apart from the ongoing Indigenous presence in the valley:

There is the water catchment regional boundary, the political regional boundary, the regional economy and the Hunter Region of every individual's geographical imagination. For some people, the Hunter Region is centred on Newcastle, for others it is focused on the vineyards or the coalfields, while for other people the Hunter Region is an area somewhere north of the Central Coast. For other people it is not Sydney! (McManus et al. 2000, p. 3).

In an area as geographically, socially and industrially diverse as the Hunter Valley in NSW, with its urban concentrations of more than 350,000 people, and with rural and tourism centres and waterfront villages, there has been a fairly wide band of skills and market experiences on offer. Mining, defence, shipping, health, manufacturing, power generation, viticulture, education, agriculture and professional services are all evident in the region's profile but steel and aluminium production, shipbuilding, manufacturing and even coal production have all decreased their contribution in recent years. Alongside these recent industry dislocations, a devastating earthquake and an increasing problematising of the relationship between mining and agriculture, a number of innovative approaches to cultural and economic adaptation have become necessary as this region interacts with a neoliberal, globalised and digitised world (Davies & Sigthorsson 2013, McIntyre 2017, Kerrigan and Hutchinson 2016). As Schulz indicates 'the technological advances made in the last decade have been breathtaking ... It is the kind of sea change that can only be compared with 19th century industrialization, but it is happening much faster this time' (2015, online). With a fluid economic situation developing for what were traditionally significant and mature generators of jobs, and a shift in the related businesses that depended on them, there is an increasing recognition of, among other industries, the creative industries as an identifiable and potentially strong economic sector to help take the region forward. As was indicated in the recent Newcastle City Council (NCC) document, *Newcastle's Economic Development Strategy 2016-2019* (NCCI, 2016), alongside the recognition of the importance of innovation and creativity (ibid, p. 5), the creative industries were specifically named as a strategic growth sector (ibid p. 34). The NCC observed a strong set of links with the knowledge economy and the potential for future growth from the creative industries in the city. This situation may also be reflected in the region more broadly.

1.4 Statistical Analysis

As a composite the region is comprised of eleven local government areas (LGAs), that is, Lake Macquarie, Newcastle, Maitland, Port Stephens, Cessnock, Great Lakes, Upper Hunter, Singleton, Dungog, Gloucester and Muswellbrook. The region is also 'divided into the urban areas, based around Newcastle and Lake Macquarie, and the remaining semi-rural and rural areas. Together, Newcastle and the Lake Macquarie LGA's have 54.17% of the region's total population. Lake Macquarie has the larger of the two urban populations' (Wilkinson 2017, online). As per ABS Data by Region statistics (June 2017), the total population of the Hunter Region in 2017 was 675,199. As an example of scalability at work:

Newcastle's Gross Regional Product is estimated at \$16.985 billion. Newcastle represents 35.13 % of Hunter Region's GRP of \$48.351 billion, 2.95 % of New South Wales' Gross State Product (GSP) of \$576.716 billion and 0.97 % of Australia's GRP of \$1.755 trillion (Remplan 2017, online).

For Lake Macquarie its Gross Regional Product is estimated at \$9.933 billion. Lake Macquarie represents 20.54 % of Hunter Region's GRP of \$48.351 billion, 1.72 % of New South Wales' Gross State Product (GSP) of \$576.716 billion and 0.57 % of Australia's GRP of \$1.755 trillion (Remplan 2017a, online).

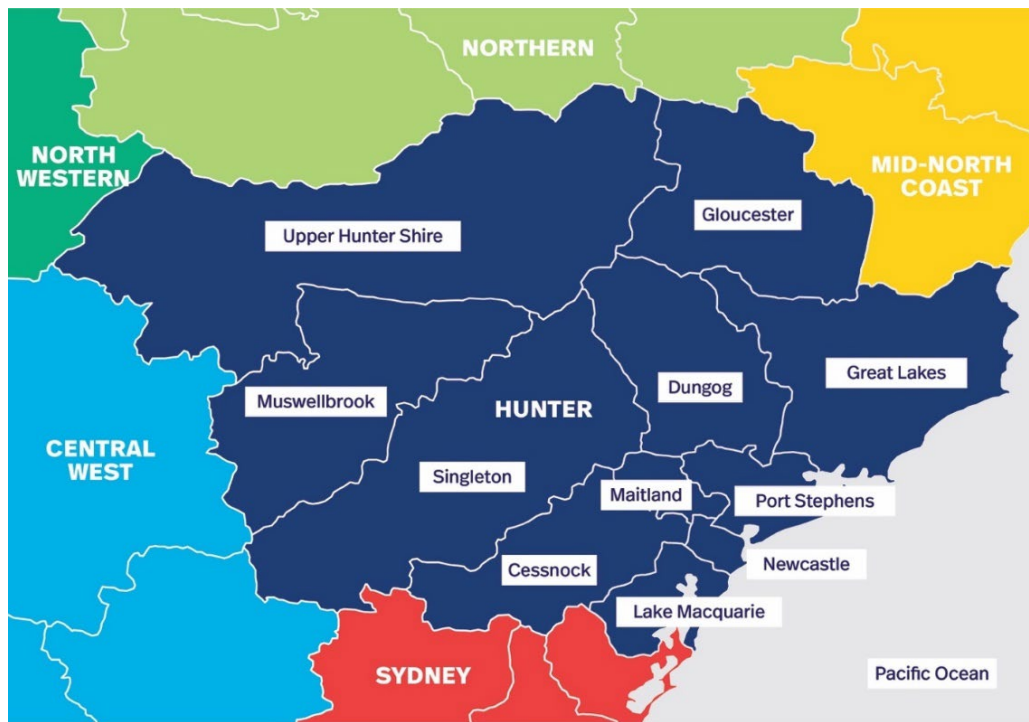


Figure 3 Map of Hunter Region Local Government Areas (LGAs)

Since the creative industries constitute approximately 2% of the employed population in the region, they are estimated in simple terms to contribute \$967 million or \$0.967 billion, close to \$1 billion, to the GRP of the Hunter Region.

	All Industries	Creative Industries
Population Figures		
Total Working	330,847	6,535
Employed	293,793	5,810
Self-Employed	37,054	719
Females Working	-	2,578
Males Working	-	3,957
Economic Contribution		
Contribution to GRP	\$48.351 billion	\$0.967 billion
Contribution to GVA	\$41.124 billion	\$0.820 billion

Table 1 Comparison of Total Industries with Creative Industries in the Hunter

Data Sources:

1) ABS 6-digit ANZCO statistics 2011 Census of Population and Housing. Counts of Employed Persons aged 15 years and over by selected 6-digit ANZSCO '06 Occupations, by Age, by Sex - Geography: Selected LGAs of Usual Residence (2011 Boundaries) - Reference Period: 9 August 2011

2) Self Employment estimates are based on World Bank calculations for Australia in 2011 of 11.1% 3) Economic Contribution to Gross Regional Product and Gross Value Add is based on REMPLAN data incorporating ABS June 2016 Gross State Product, 2013 / 2014 National Input Output Tables and 2011 Census Place of Work Employment Data.

As mentioned above the creative industries' sectors used in this analysis were initially based on a similar list generated from a report into the creative industries by the NSW Department of State and Regional Development (NSWSRD 2009, p. 7). These included advertising and

design, fashion, architecture, visual arts, performing arts, music, publishing, film, television, radio and electronic games and interactive content sectors.

With this typology as a guide and based on 6-digit ANZSCO '06 occupation codes, a tranche of ABS data was collected from the 2011 Census in the early phase of the research based on these groupings. The collected data shows that the advertising and design sector in the Hunter Region constitutes 43.9% of all people engaged in the creative industries. This sector contained not only traditionally recognised graphic design but also fashion, marketing and public relations although many of the occupations found linked to agencies, for example film makers and web designers, also occur across other sectors. This occupation data also indicated that 18.1% of the creative industries cohort in 2011 was engaged in the electronic games and interactive content sector. Once again this includes a wide variety of cross-sectoral occupations. The next largest sector was architecture at 13.4%. In total, these three sectors represented at least 75% of the total creative industries' occupations occurring in the Hunter Region in 2011. The urban centre of this region, as defined by the NSW Parliament (Wilkinson 2017, online), had, as would be expected, the greater number of people from the creative industries living in these areas. Of this urban centre Newcastle has the greater share with 2,539 people and Lake Macquarie has 2,074. Of the rural and semi-rural areas, Maitland houses 584 closely followed by Port Stephens with 481 people engaged in the creative industries living there. The Gloucester LGA has the lowest number of creative industries residents, followed by Dungog at 51, with the Upper Hunter contributing 65 to the overall total of 6,535.

LGA	Advertising and Design	Electronic Games & Interactive Content	Architecture	Fashion	Visual Arts	Performing Arts	Music	Publishing	Radio	Film	TV	Total
Cessnock (C)	133	45	27	5	61	9	15	12	6	6	4	323
Dungog (A)	24	21	6	0	0	0	0	0	0	0	0	51
Gloucester (A)	3	6	6	3	9	0	0	0	0	0	0	27
Great Lakes (A)	79	17	49	6	19	6	3	15	3	0	0	197
Lake Macquarie (C)	960	400	252	22	176	33	77	69	24	22	39	2,074
Maitland (C)	273	98	79	6	65	6	9	30	6	6	6	584
Muswellbrook (A)	27	6	6	0	9	6	3	9	6	0	0	72
Newcastle (C)	1061	508	361	34	182	60	82	136	42	12	61	2,539
Port Stephens (A)	207	76	61	19	50	9	14	24	0	15	9	484
Singleton (A)	66	3	20	3	18	0	0	6	0	3	0	119
Upper Hunter Shire (A)	37	0	9	3	4	0	3	6	0	0	3	65
Total	2870	1180	876	101	593	129	206	307	87	64	122	6,535

Table 2 Creative Industries Local Government Area (LGA) Cross Sector Tabulation

Data Source: ABS 2011 Census data using 6-digit ANZSCO '06 Occupations by Creative Industries Sector

A second round of statistical data was also collected. This data was drawn from *both* the 2011 and 2016 Censuses, resulting in a table from the ABS which contained the number of persons employed, the total who stated income as well as mean income for 35 selected industries (4-digit IND06P) and all other industries by all occupations (6-digit ANZSCO). Unlike the prior data this latter tranche was not drawn from LGAs but was based instead on SA4 geographical areas. Significantly the Trident Methodology, as developed at QUT, was used as the basis for these statistics as it:

... focusses on the activities that define creative production capacity in both occupations and industries. It includes three categories: (1) creative occupations within the core creative industries (what we term 'specialists'); (2) creative occupations employed in other (non-creative) industries (termed 'embedded' creatives); and (3) non-creative occupations ('support staff') employed in the creative industries (Higgs & Lennon 2014, p. 1).

The resultant data shows that the number of people employed in the creative industries in the Hunter Region has risen from 2011 to 2016 with 7,895 people employed in these industries in 2016.

Trident Employment (POR)	Employed 2011	Employed 2016	Share of Workforce 2011	Share of Workforce 2016	Share of Creative Employment 2011	Share of Creative Employment 2016	CAGR 2011 to 2016
Specialist	2,349	2,431	0.89%	0.89%	27.05%	25.33%	0.7%
Support	2,698	2,803	1.02%	1.03%	31.07%	29.21%	0.8%
Total Creative Industries	5,050	5,239	1.92%	1.93%	58.15%	54.60%	0.7%
Embedded	3,636	4,360	1.38%	1.60%	41.87%	45.44%	3.7%
Total Trident	8,683	9,594	3.30%	3.53%	100%	100%	2.0%
Creative Occupations	5,986	6,797	2.27%	2.50%	68.93%	70.84%	2.6%
Total Workforce	262,944	271,408					0.6%

Table 3 Comparison of Employment in the Greater Hunter Valley, 2011 & 2016, by Place of Residence (Source: Analysis of customised extract of ABS Census of Housing and Population). Analysis of customised extract of ABS Census of Housing and Population 2011 and 2016 Census - Number of persons employed, total who stated income and mean income for 35 selected industries (4-digit IND06P) and all other industries by all occupations (6-digit ANZSCO). Geographic Level: SA4 aggregated for Hunter Valley plus Newcastle and Lake Macquarie

The share of the total workforce also increased between 2011 and 2016 with a cumulative annual growth rate (CAGR) of 2.0% compared with an annual growth in the general workforce of 0.6%. While the percentage of specialist and support workers appears to have dropped marginally, there was certainly growth in the employment of embedded creatives.

Trident Earnings (POR)	2011	2016	Share of Workforce Earnings 2011	Share of Workforce Earnings 2016	Share of Creative Earnings 2011	Share of Creative Earnings 2016	CAGR 2011 to 2016
Specialist	\$92,813,812	\$121,498,468	0.8%	0.8%	27%	24%	5.5%
Support	\$136,277,492	\$193,338,340	1.2%	1.2%	39%	38%	7.2%
Total Creative Industries	\$229,091,304	\$314,836,808	1.9%	2.0%	66%	62%	6.6%
Embedded	\$120,162,744	\$194,641,616	1.0%	1.2%	34%	38%	10.1%
Total Trident	\$349,254,048	\$509,478,424	3.0%	3.2%	100%	100%	7.8%
Creative Occupations	\$212,976,556	\$316,140,084	1.8%	2.0%	61%	62%	8.2%
Total Workforce	\$11,818,150,032	\$16,074,953,024					6.3%

Table 4 Comparison of Earnings in the Specialist, Support and Embedded CI workforce 2011 to 2016. (Source: Analysis by Peter Higgs of customised extract of ABS Census of Housing and Population).

In addition, overall earnings in all sectors of the creative industries in the region increased between 2011 and 2016 but the share of earnings fell in the specialist and support segments

with commensurate growth in share of earnings for the embedded sector. What is significant is that cumulative annual growth rate of earnings for the total creative industries (specialist, support and embedded combined) at 7.8% has outpaced that of the total workforce where earnings grew at 6.3%.

The following sections highlight our ethnographic findings by sector.

1.5 Music

In terms of continuities, the field of contestation and cooperation revealed in the Hunter music industry can be best understood as a scalable interactive system not a collection of isolated parts. This field continues to be a dynamic network of interdependent choice-making agents who produce and circulate musical goods, ideas and knowledges across a wide variety of genres and styles. These domains of knowledge still present possibilities of action to each agent in the field be they musician, producer, DJ, venue proprietor, booking agent, promoter, media operative, policymaker or educator, and each brings something unique to this shared environment. They collaborate, compete, mentor and support each other through both a gift and financial economy trading various levels of the social, cultural, symbolic and financial capital necessary to operate inside this field. This basic framework has not changed.

However, musicians still struggle to earn income commensurate with the rest of the population with live performance remaining a principle source of income. Nonetheless, there are still a considerable number of musicians performing in the valley with many younger performers from the rock and EDM genres taking advantage of online promotional opportunities such as SoundCloud and Instagram. Facebook is ubiquitous for all genres including for the many community-based groups. While opportunities in the live realm are extensive, they have certainly diminished for popular musicians from their heyday in the eighties. The Lock-out laws and very tight noise restrictions for live venues in Newcastle, in particular, have stifled much of this activity in this regional capital. The equipment-hire companies that depend on these performances have managed to remain in business while instrument manufacturers and repair businesses remain at the boutique level. Instrument retail businesses that depend on both amateur and professional musicians in the region for their income have also diversified and taken advantage of the opportunities online retail has provided to move on to the national stage. The music sector overall has had to deal with digitisation, in particular, as this bellwether sector continues to change and adapt to these circumstances.

Social media has made a significant difference to the way musicians now publicise themselves and promote their work in the Hunter, with commercial online sites proving to be a boon to regional promotional opportunities. Despite these changes, formal and informal music education remains a vital part of the various support mechanisms available to the personnel working within the music sector of the creative industries in the Hunter Valley. This includes the delivery of a variety of tertiary courses staffed by industry professionals who mentor younger performers as they earn an income.

Community based folk music clubs and venues carry the torch for a more idealistic time while the many brass, pipe and concert bands and orchestras operating in the valley also provide opportunities for on-the-job training, as it were, in ensemble skills. The jazz scene has depended on these players bringing their skills to the wide array of jazz performances and styles present in the valley. Many of the virtuosos also go on to find what very limited work there is as session players in the local recording studios. These studios have had to diversify their operations with many now not only providing recording services but also moving into video production, drone services, professional photography, website design and artwork, songwriting, voice overs and

social network marketing. The locally focused media has been generally supportive although the larger networked radio organisations have done little to support regional musicians.

The changes wrought by the use of digital technologies have had an effect at the local and global level. The diminishing of income for international recording artists as a result of downloads, both legal and illegal, has meant these acts are chasing what they believe is a more lucrative return from the live sector and are increasingly capitalising on markets traditionally serviced by local industries. Given the small recording fraternity and the limited set of studios operating in the Hunter, and overall income derived from recording diminishing globally, most local musicians' income is tied to the regional live circuit but gig fees have not risen commensurate with other professions wages and fees for some years. The loss of performance venues, particularly in the city of Newcastle, as a result of urban redevelopment and the security issues which resulted in a night time curfew in the city, coupled with the rise of the festival touring circuit, has meant the opportunities for the local music industry continue to shrink. This has resulted in musicians in the region having to diversify the array of services they offer while also coping with a loss of income from their traditional sources. Promoters and agents have also had to diversify their business activities since the lucrative period of the eighties when structural features such as the national radio quota and appearances on nationally broadcast television programs provided central business drivers. Many of the key musicians from that period have found careers in education which helps complement the ongoing gift economy of this regional centre.

1.6 Radio

Systems, whether they are called innovation ecosystems or creative systems in action, are central to the creation of novelty and value in the sort of changing marketplaces that typify the creative industries. Radio, as a cultural form and as an economic concern, has continued to be resilient and adaptable inside this system. It is an important and mature sector within the creative industries sphere in the Hunter. It has a long and deep history within the region. It is populated by networked commercial businesses, government-funded stations with a strong online presence, a well-established community sector and a set of independent operators working outside the prior categories. Despite some inroads from the digital world, broadcast AM/FM is still a popular medium. This form of radio is still the leading audio platform with 85% of people listening to this medium in comparison to 'Spotify 21%, Podcasting 10%, Pandora 8%, Apple Music 6%, Google Play All Access 2%' (CRA 2017d, online).

For the commercial sector the major radio stations broadcast from the Newcastle and Lake Macquarie LGAs primarily reaching the lower part of the Hunter Valley from Swansea in the south to Singleton in the west, and to Bulahdelah and the Myall Lakes in the north. These are serviced by two major networks, that is, the Super Radio Network (SRN) and Southern Cross Austereo (SCA). In the Upper Hunter this area is serviced by Grant Broadcasters who are the second largest radio network in Australia, behind SCA and ahead of SRN.

The Australian Broadcasting Corporation (ABC) has a strong presence in the region. Content available as podcasts and iView first-release productions has now become an important point of audience contact for the ABC. The digital reach of the ABC includes the ability of regional audiences to listen live or go to the station website of not only 1233 ABC but also ABC NEWS, RN, ABC Grandstand, triple j, triple j Unearthed, Double J, ABC Classic FM, ABC Classic 2, ABC Jazz, ABC Country, ABC Extra, Radio Australia and Radio Australia Multi-language. Each of these broadcast and narrowcast stations can be accessed locally, national and internationally.

The community broadcasting sector is serviced by Great Lakes FM in Forster with other community radio stations in the Hunter Valley including 2CHR, Gloucester FM and Rhema FM as well as the oldest community station in the region, 2NURFM, located at the University of Newcastle. Central Hunter Community Radio (2CHR) serves the communities of Cessnock and Maitland and their surrounding districts. Most of these stations are run by volunteers and are mainly non-profit organisations.

One major example of the creative and innovative approach taken by those involved in the independent radio sector is that of Ison Live Radio (ILR) (now Australian Broadcast Media) which has operated out of Newcastle, NSW for some time. ILR produces weekly radio programs for radio stations all around the world in a range of formats. It is heard by over a million free-to-air radio listeners every week and produces direct-to-radio programming from their studios across the clock every day. It is delivered via the Internet or via satellite and operates from its own media server. One of the newest digital stations in this sector is the new2UW, a locally owned digital station. It purposefully follows a traditional format of news, music and talkback and intends to replicate the experience of listening to an old time AM station with local personalities populating each shift. They realise that up to 60 per cent of people are listening on mobile phones. They can tune in via an app or on the web or via digital radio.

Needless to say there are a number of dedicated yet idiosyncratic characters populating this entire sector of the creative industries. They are connected locally, nationally and globally.

1.7 Publishing

The publishing sector of the creative industries in the Hunter Region is in a healthy cultural state despite, and possibly because of, the disruptions the digital revolution has wrought. The region is well serviced for its size with non-periodical publishing which includes the one-off printing and sale of such things as books and reports while periodicals such as magazines and newspapers appear at regular intervals. While many of these have been paper-based, increasingly there are now a number of digitally based publishing and self-publishing options that have, to an extent, changed the basic structure of this industry. In terms of freely circulated publications, ads and subscriptions were the primary revenue stream. With the advent of online publications, acquiring an ongoing and significant consumer base via digital hits has become important. In this case social media sites, with very little to no investment, have become critical.

The region has had several local and regional mastheads as well as the national newspapers. All of them compete with international mastheads that operate online, some with Australian editions. Journalists have survived the transition to digital by moving across and between other creative industries sectors. This also seems to be a trait of those engaged in the magazine business who are all generally skilled in multiple professional roles. Writers, of course, remain important in the publishing sector. With the ongoing demise of newspapers in particular they have taken on freelance work, working to a brief or on spec for various outlets. There are still a limited number of staff writers operating as news journalists, feature writers or columnists. Authors, and now bloggers, are ever present with some writers, of necessity, performing both functions. Their roles may vary but the prime function is to produce engaging content. Authors also undertake a wide variety of promotional activities.

Magazines have been produced here for some time with a number competing successfully in the region with an overt intertwining of content and producers which is typical of this sector. Books have also been part of the cultural scene in the valley for many years with many exceptional authors living in the region. There have been a few notable publishing houses

operating in the region with the number of booksellers diminishing as bloggers increase their dynamic activities.

1.8 Advertising and Design

The advertising and design sector of the creative industries is located primarily in the urban centre of the valley. This sector does not include fashion or architecture (they are detailed in separate sections) nor does it contain those who are embedded as designers in other industries. Of those who identify as holding an occupation in this sector, there are 2,870 people working within design in the region, with most of these located in the larger urban centres, making this sector the largest in the region.

There is a wide variety of employment possibilities within the advertising and design sector and most are well represented in the Hunter. Many workers inside this sector develop their skills through a program of study at University or TAFE or at a private college. However, many are self-taught or learn 'on the job'. Digital skills are fundamentally important for many working in this sector but traditional skills continue to be important. The operatives work primarily in full service advertising agencies who increasingly offer a broad spectrum of services that increasingly intersect with design and PR agencies. These agencies offer services across the range of 'real world' and digital economy applications and while they are physically located in the Hunter Region, a number work nationally. These agencies tend to work on commissions which may be earned dependent on the media form targeted. The profit from these commissions will be placed against production costs and any fixed costs such as wages which is where many of the people identified in this study earn their income. Work is increasingly outsourced to specialist design houses or video companies. Nearly all projects are calculated on an hourly rate or else a fixed price will be agreed to be paid on completion of the project.

Many of the operatives who work within and for these agencies also operate within other areas of the creative industries such as music, film and the art world. The roles, and also the recognition of these important cultural workers, are being steadily blurred across sectors with many moving easily across sectoral boundaries. The design field in particular has claimed an increasingly wide array of activities that has moved beyond traditional graphic design and now includes activities such as jewellery design and many others. Not only did the advertising world give birth to design agencies but PR agencies have modelled themselves on this way of working. It is worth noting that the art collectives from an earlier time have now become collaborative workspaces, production hubs and co-working spaces generally run as design enterprises for those who fund and constitute them. Education and training for designers in the region has increasingly become an important adjunct to the creative activities of these fields with many educators moving between industry and academia.

1.9 Fashion

The fashion industry across the country comprises more than 7,000 firms and employs more than 36,000 people, many in regional Australia (DSI 2015, p. 5). Most of the people who self-identified as working in the fashion industry in the Hunter region for the 2011 Census were primarily domiciled in Newcastle, Lake Macquarie and Port Stephens areas. Most revenue in this sector of the creative industries is derived from the sale of products or from the services associated with it. Product sales form the basis of most revenue for manufacturing and retail within the industry. Selling products online is increasingly important with some Australian 'bricks and mortar' stores moving into the online space. Some businesses are operating fully

online. Large, established businesses based overseas are able to easily penetrate the Australian market using online methods. The services sector of the fashion industry includes design, styling and consultancy. Returns come in the form of commissions and contracts for collections and from direct sales if the business also maintains a retail outlet. Leasing or hiring of apparel is also an established way of earning revenue in the fashion industry. Fashion publishing in Australia includes a number of magazines and major newspapers also feature Australian fashion. Fashion blogging also provides an income for those able to generate sufficient online followers to represent a marketing asset.

Fashion designers and manufacturers have operated in the Hunter Region for a long time. While large-scale manufacturing of textiles and garments has ceased, niche businesses serve high-fashion, bridal, sports and leisure, dance and babywear markets as well as workwear. There is a small number of successful, innovative businesses, some new to the scene and some long-standing, most of which use social media for promotion linked to online sales. The industry operates globally in that international trends are followed, there is a small international market for Hunter-manufactured goods, and fabrics and trim are often imported. Increasingly, aspects of manufacture (for example, cutting and sewing) are outsourced either locally or off-shore. As well as online platforms, craft and design markets have opened up new opportunities. Fashion retail has maintained a strong presence in all of the major centres of the region, especially in the large malls. As well as the larger national and international franchises, there are a number of boutique stores targeting particular market segments. A small number of fashion designers operate their own retail outlets and manufacture locally, notably Jean Bas and High Tea with Mrs Woo. Some designers and fashion stylists had established reputations in the fashion industry either in the capital cities or internationally before returning to the Hunter and they have helped raise standards in the industry, for example through publications, events and teaching. A limited number of colleges and individual designers offer training in fashion design, fashion business and/or clothing manufacture.

1.10 Visual Arts

Those who work in the visual arts sector include photographers, business development managers, digital imaging specialists, corporate photographers, portrait artists, painters, sculptors, gallery owners, customer service managers, public relations officers, display designers, exhibit installers, furniture designers, glass blowers, illustrators, image sales executives, photojournalists, art librarians, library assistants and managers, scientific photographers, museum directors, curators, archivists, acquisitions specialists, multimedia artists, antique appraisers and refinishers, commercial artists, courtroom artists, art appraisers and auctioneers, art directors, gallery owners and managers, art historians, reviewers, art teachers, art therapists, artists' agents, caricature artists and cartoonist, as well as fashion photographers. Of the 593 person who identified as visual artists in the 2011 Census these were primarily drawn from occupations such as photographer, illustrator, painter, sculptor, signwriter, potter or ceramic artist, body artist and gallery or museum curator.

In the Hunter, teaching provides an important supplementary income for many painters, ceramists and sculptors in the region but employment, particularly in the University and TAFE sectors, has been casualised and opportunities for employment here are diminishing. Many artists instead offer private classes to supplement their income or to support their artistic activity. Sale of art works in galleries continues but post-GFC incomes have declined with a drop in prices of art works. Capital city galleries have provided access to a larger, more lucrative market, however, for the fortunate few, with regional artists able to double their prices having shown in Sydney. Many, particularly those who are craft or design-oriented, take advantage of

local and regional markets to sell both their original art works and associated merchandise such as T-shirts, mugs, posters, cards and prints. A very few artists have developed portfolios through designing for clothing companies and some have seen their prints sell well through retail outlets as well online marketplaces. A number of artists also operate out of cooperative studios, thus sharing and reducing their production costs. Museums and galleries remain important to these artists. Some artists exhibit internationally as well as nationally. Some find success in highly contested regional and national art prizes including the Moran Prize, The Archibald and Wynne Prizes, the locally-run Muswellbrook and Kilgour Prizes. The Brett Whiteley Travelling Art Scholarship has a prize worth \$40,000 with the added benefit of a three-month residency in Paris and Newcastle artist James Drinkwater was the region's most recent recipient. Hunter Region artists have undertaken artist's residencies both in the regions and internationally. It also works in the other direction with a residency scheme operating from The Lock-Up Cultural Centre in Newcastle which attracts national and international artists. Art training is provided by the University, within Creative Industries programs. Newcastle Art School (TAFE) operates despite cuts to government funding which have led to higher fees and reduced hours of delivery. Private art classes are also offered by regional artists.

Photographers in the region range from freelance commercial operators to those who see themselves as artists. Some are supported by active organisations such as the Muswellbrook Regional Arts Centre. Many of them work successfully throughout the Hunter Region and some have national and international profiles and are award winning. Many work on commission, gaining a lucrative income from portraiture and wedding photography while maintaining a deep interest in their own artistic practice. Others undertake briefs from advertising and design houses as well as architectural briefs and others in need of professional images such as real estate agents. A few are employed in the media while a very few publish books of their own photography. Many contribute regularly to online forums such as ABC Open, and all maintain professional websites. They are active on social media such as Instagram as their online existence becomes increasingly important.

Galleries, libraries and museums in the region have taken advantage of the digital realm. All have an online presence while a number are employing cutting edge technology. Consequently, while many museum exhibitions are creative productions in their own right, many from the GLAM sector have moved into the production realm themselves pursuing avenues such as virtual reality to aid their archival and community work. Regional libraries are at the forefront of these developments.

1.11 Performing Arts

The performing arts sector in the Hunter Region covers drama, musical theatre, dance, opera, circus and comedy. While the statistics compiled via the ABS for this study indicate minimal involvement at 2% of the total number of the creative industries numbers who declare work in this sector as their primary occupation, a further study by Shane Bransdon (2018) paints a slightly different picture. His study was focused specifically on theatre. Surveying half of the theatre companies in the urban part of the region he calculated that there are merely 16 full time equivalent (FTE) employment positions in the region in theatre with approximately 11,000 volunteer gigs being enacted (Bransdon 2018).

It is therefore not surprising, given the wealth of avenues for experience, if not the wealth of income, that this region continues to act as a significant 'rookery' for practitioners, some of whom go on to professional careers on the national and international stage. A number of these individuals later return to the region, bringing significant expertise and connections with them

which ‘raises the bar’ for the sector and helps the next generation of aspirants. The gift economy, nonetheless, is dominant for the many individuals, groups and organisations engaged in the performing arts in the region. The area has a small number of agencies which place actors, singers, dancers and other performers in paid positions and one of these has expanded their activities internationally.

A large number of performing arts companies operate in the region staging drama, musical theatre, opera, circus and comedy. Some mount large-scale, professional-standard shows with budgets of up to \$400,000 but the majority operate with meagre budgets of a few hundred dollars. Performers are rarely paid (except, often, for musicians working on music theatre productions) but some companies use profit-share mechanisms. A few companies are supported by grants but all rely heavily on the gift economy, as Bransdon’s work indicates, to survive with only a few principals deriving a wage from their artistic activity.

Since the demise of the Arts Health Institute, the main paid work for those in the performing arts sector in the region comes from teaching, employment with Councils, and precarious, usually ‘one-off’ engagements locally or, more often, in Sydney. Training institutions are numerous although Drama offerings at The University of Newcastle have been reduced and funding cuts to Hunter TAFE have put pressure on their dedicated school RIPA (Regional Institute of Performing Arts).

Private dance academies are well-established and well-attended right across the region with many of their students moving on to the national and often international stage. Teaching is the only employment their graduates would find in the Hunter if they stayed, however. Private drama schools are also numerous but cater almost exclusively for children. The region has a number of performance venues but several important venues have closed and there is a lack of mid-size venues (seating 400-600) in the urban centre. There are a number of performing arts festivals which are growing in popularity as is the use of non-traditional venues including for outdoor performances.

1.12 Film

This study’s ABS statistics derived from the 2011 Census reveal that full-time work in the Hunter film sector is minimal with one of the lowest levels, at 1%, of all people employed in the creative citing film as their primary occupation. This is not to say that filmic activity is minimal in the Hunter since the extent of the gift economy and those making films whose primary occupation is in other sectors, describes the larger story and structure of the national industry. This situation is replicated on a smaller scale in the Hunter region but it should be noted that the regional, national and international film industries are deeply intertwined.

Structurally all sectors of the film industry are represented in the Hunter, to a greater or lesser degree. Production houses which use the services of above-the-line operatives such as directors, cinematographers, editors, sound designers, film composers and actors are evident in the region, although they come and go. Below-the-line film workers such as booking agents, various crew members, rental businesses, catering, accommodation, transport, screen agencies, legal, insurance etc. are employed or volunteer on a project-by-project basis. In terms of promotion, film societies and an abundant set of festivals are prominent in the region. In terms of distribution, cinema exhibition is controlled by corporate multiplexes located in all the major regional centres. There are a few independent operators. Video rental has slumped as international online distribution services such as Netflix have taken over this share of the market.

All of these sectors are deeply connected at the industrial level through traditional business relationships described as B2B and B2C models. The B2B model describes the relationships between producers wanting to make films and the businesses and services that are needed to realise these productions. This situation is also encapsulated in foreign producers seeking to locate their film's production or post-production in Australia. For US productions, locating films in the Hunter, as it is elsewhere in Australia, is much more attractive when the Australian currency is around the 70 cents in the dollar mark. As an industry then, film is at the mercy of the global economy.

The type of foreign work, where Australian film workforces are employed at the cutting-edge of technology and use this to refine their own creative skills, is itself an attractive factor for other producers who are looking, for strategic reasons, to come all the way to Australia to create or finalise a film. Australian film crews have a reputation as being efficient and effective and because of the decades of association with Hollywood film production, Australian filmmakers are recognised as being at the top of their game. These are attractive factors for any producer. These highly skilled creative crews are also invested in telling their own cultural stories and are willing to take a reduced rate to work on lower budget Australian feature films to do so.

In the Hunter Region we can see the same scenarios playing out with the production of features such as *Mikey's Extreme Romance* or *Bathing Frankie*. This generosity, coupled with a desire to tell local or national cultural stories, is what drives producers to try and make low budget films and it represents the other extreme of big budget filmmaking – nano-budget or no-budget filmmaking. In this way filmmaking in the Hunter Region represents in large part, the gift economy that is endemic to most of the creative industries. One sector is enabled by the other and vice-versa.

As long as there are Hollywood blockbusters that produce huge box office revenues for big corporations there will also be the other end of the spectrum, the 'Mikeys' and the 'Frankies', that represent opportunities where Australians try to tell their own stories for themselves and their national and regional audiences. What the blockbusters provide is a ROI that permits an investment in the next film. This creative cycle is visible in the film system as it operates nationally and regionally. It is both the cultural success and economic profitability that allows this sector to keep generating new content be that at the global or the regional level.

1.13 Television

The post networked television era has not fully arrived in Australia nor has it arrived in the Hunter, though the transition to a multi-channel system is partially underway as digital terrestrial television (DTT) and subscription video-on-demand (SVOD) offers non-linear viewing for some genres. This latter process is marked by the ability of audiences to freely choose content and viewing times online. It appears that appointment television, linear and fixed viewing, which is offered through the live broadcasting of content, especially news or sport, remains attractive for regional broadcasters and for regional audiences.

There are 122 FTE people claiming work in the television sector of the creative industries in the Hunter. Of these, 37% are females and 63% are males. The ABS measure used in this study revealed that these people worked as directors, artistic directors or media producers or were identified simply as media professionals. As such it is worth noting that these statistics did not capture the wider set of occupations involved in television production and management which includes presenters, broadcast journalists, news directors, chiefs of staff, directors, camera operators, production managers, script supervisors, art directors, sound recordists, vision mixers, actors, variety artists, agents, costume designers, executive producers, gaffer, lighting

director, make-up and hair artists, location managers, transmission engineers, network operations assistants, marketing executives, public relations officers, researchers and others, all of whom had a place at local television facilities such as NBN.

NBN television is a networked television station and it has been broadcasting local content within the Hunter Region for 55 years. Even though its facilities no longer produce children's or talk programming, it still offers the network a viable business model when the genre of news is coupled with advertising. Together this combination has proven to be viable and sustainable when delivered as networked television in the Hunter Region and beyond as daily local news content has a cultural currency that cannot be found elsewhere. Similarly, because the news is being produced and broadcast freely to its audience, there exists an opportunity for local advertising to pay for the delivery of the networked content. This unique combination of factors built primarily on the supply of local content to a networked television service is sufficient for the regional broadcasting model to be a self-sustaining system.

As such it provides opportunities for smaller businesses to establish themselves as regional production houses that offer services locally and nationally. These businesses benefit from the lower overheads that are offered by being in the region. Additionally, the airport and train links to Sydney mean that many SMEs have been able to pick up work from outside the region which in turn continues to develop the creative skills and capacity of local screen-based workers. These regional television production activities use identical business models to those that are offered nationally and globally and can be both B2B and B2C. The broadcasting models offering content to viewers regionally are using free-to-air (FTA) advertising models which appear viable at the local level, whereas nationally they seem to be under threat of collapse. While the FTA models and production of advertising is viable for the three television channels operating out of Newcastle it is proving extremely difficult for new players to enter the market with Hunter TV being denied a narrowcasting frequency by ACMA. Bar TV has been able to remain viable by finding new markets through working with tier-three sporting associations who are willing to pay a significantly reduced fee for sports coverage. In learning how to do these sports broadcasts, Bar TV's services were recognised by Fox Sports, as being worthy of sub-contracting.

But the most valuable innovation in this sector is that a regional news service found a way to broadcast a non-linear news model which offers the viewer a viable mix of local, national and global news as a seamless package. The technical mastery required to create six slightly different news bulletins from one location when they are simultaneously broadcast demonstrates a level of creativity that has emerged from a need to deliver collective and localised news to regional areas. The replication of this model by Austereo across 15 other regional areas in Australia is proof that the production of local television content can be isolated from global trends and can operate as a self-sustaining system. This is heartening as it may signal the longevity of the advertising-supported broadcasting models which deliver free content via a digital network. Furthermore, it suggests that these financially viable models of broadcasting can deliver non-linear options where the choice is not retained by the viewer - the choice of content is curated by the expert, news editors at the point of production. This example embraces the non-linear functions offered through an expertly curated, multi-channel system while simultaneously endorsing the principals of legacy broadcasting where one well-crafted cultural message continues to be valued for many members of global and local communities.

1.14 Electronic Games and Interactive Content

Recent modelling by Price Waterhouse Coopers (2015) on economic opportunities created through digital change, identified that small businesses in the Hunter and Newcastle Federal electorates could unlock \$897m of increased private sector output across the coming decade through improved access and use of mobile and internet technologies. The electronic games and interactive software sector is integrally linked to such opportunities.

The analysis of Australian Bureau of Statistics (ABS) 2011 Census data for the Hunter Region revealed 1180 people who responded yes to representing the categories of 'Electronic Games and Interactive Content'. This is 18.1% of the cohort characterised as belonging to the creative industries. However, as with all areas of the creative industries there are overlapping sectors. These figures were calculated from a range of sub-sectors with occupations including web designers, developers, graphic designers and illustrators, multimedia designers and specialists, software and applications programmers, ICT business development manager, software engineers and applications programmers, developer programmers, ICT business and systems analysts, analyst/programmers, technical writers and systems analyst. This list does not take account of the many professionals who work, for example, in the games industry. A Triple AAA games development team typically includes approximately 50 people working full time for 2 years dependent on the project. This includes 2 producers, a project manager, a games designer (similar to a director on a film), a junior games designer, 5 level designers/builders, 15 programmers, 15 artists, 2 sound people, a music person, an interface designer, a cut scene animation team consisting of 4 people, 1 voice talent (note this figure is achieved by amalgamating 24 actors working for a month each over two years), and also a writer working across a multi-story multi-plot game (Velikovsky 2013). Very little of this work occurs in the Hunter.

What has emerged from our review of this relatively new sector is the distinctive and possibly unique characteristics of the scene in the Hunter, with significant elements reflecting the region's industrial history and collaborative culture, namely: the links to traditional sectors such as defence, mining and heritage interpretation through sophisticated simulations and VR; a regional support system that has emerged organically and is now being formalised to encourage ecosystem engagement and growth in creative digital start-ups, early-stage businesses and innovation within established companies; support of new industry opportunities such as I.O.T. and smart city and green technologies.

While the region demonstrates the popularity of the electronic games industry primarily through its retail outlets, we found little evidence of commercial game development for the leisure market or any considerable commercial development of software applications. We do however note that such activity may be 'hidden' from general statistical or public domain information. It is of note that Newcastle City Council has taken on the notion of being a smart city. Smart cities are generally accepted as cities that use technology to improve community life which means a reliance on ICT. Smart cities strategies broadly aim to enhance liveability, wellness, sustainability and efficiency and to support initiatives in the areas of community engagement, information sharing, environmental monitoring and personal welfare. This may open up opportunities in software development and interactivity in the future. The suggested outputs within the NSW ICT strategy are relevant to achieving the objectives and operations of smart cities while the development of data management systems and applications for business, civic and personal usage are central to work being undertaken locally, particularly in Newcastle and Lake Macquarie local government areas. As we go to print, we also understand that a significant new initiative in simulation development may be made in the Region's defence industry.

1.15 Architecture

Several issues emerged from this ethnographic investigation of architecture in the Hunter. The first of these revolves around the notion of competition. Most architects working in the region face growing competition from building designers, building contractors, engineering concerns and industrial/ interior design firms. These firms and professionals are not as well educationally qualified as architects are required, indeed regulated to be, yet they are undertaking similar functions in the marketplace. This situation has had an effect on the educational sphere where changes in role and demand for architects is now becoming mirrored in the educational field through lower demand and a changing approach to curriculum.

In terms of regional representation of employment in this sector, it is of note that there are low numbers of architects in rural areas, reflecting a general difficulty experienced by all professions in attracting suitable people and providing sufficient work, thus making it difficult to prepare for registration or link to other professionals. This inadequate representation is mirrored in both gender and ethnicity representation in the Hunter. While those females working in the architectural sector are represented by this study's statistical analysis at 45.5% of all people working in all related occupations in the sector, female and indigenous people actually working as architects appear to be relatively few in number. While women have comprised over 40 per cent of architecture students for many years, female participation in the profession drops sharply after graduation. It continues to drop, apparently due to long hours, relatively low pay and scarce mentoring options pre-registration. All of these factors lead to difficulty in accommodating family responsibilities.

There are also structural changes to consider as many architects face a progressive emptying out of the middle tier of business. Most architects in the region now work as sole traders or for large firms increasingly moving toward multinational agglomeration, using cost saving processes such as off-shoring and casualising what were once in-house positions. The process of digitisation, globalisation and the political-economic reality they work in has driven local reactions to these global imperatives.

1.16 Support Organisations

The creative industries, like all others, do not exist in a vacuum. Once operatives within these industries acquire enough knowledge to become contributors to help complete the jigsaw puzzle they are part of in their own sector and also, increasingly, across sectors, they need support to access information, finance, advice and support as they make their way through an increasingly complex world. Educational opportunities at all levels are available in the Hunter Region with many courses on offer focused specifically at the creative industries. Local, State and Federal instrumentalities have been set up to ensure that the viability of these and other industries serves to benefit the region. The business world also recognises the need to help budding entrepreneurs realise their objectives and at the same time provide research and project support where possible. A number of businesses are focused at this exact task training, advising, consulting, encouraging and, at times, financing those willing to take risks in the creative industries.

1.17 General Conclusion

As detailed more fully in each section of the final report, which outlines each sectors history, structure, business models, operational methods and important personnel, it can be claimed that these creative industries sectors - music, performing arts, visual arts, architecture, fashion, advertising and design, publishing, radio, television, film, and electronic games and software

development – constitute important parts of a diverse and continually dynamic creative system focused on disseminating, profiting from and valuing the signifying practices used to produce symbolic messages.

Some sectors of the creative industries are mature while others are emerging. Radio, architecture, television, and advertising and design, for example, are well established in the commercial sphere while publishing, the performing and visual arts and music have maintained a long and deep sociocultural tradition in the region. Local communities have sustained them for a long time. Unsurprisingly electronic games and software development are emergent sectors which could, if encouraged and financed adequately, stimulate activity in nearly all of the other sectors as many operatives from other sectors are in demand within this sector, particularly for the production of games.

The system - or ‘ecosystem’ if the notion of systems appears unpalatable – these sectors all form part of, is not only comprised of specialist, support and embedded persons who make the most obvious statistically measurable set of operatives within the creative industries, that is, the recognised professionals, but also those members of the industry who are counted elsewhere in other industries such as in mining, health, agriculture and so on. This perspective also recognises that the education, retail and manufacturing arms are a part of this ecosystem. For example, those working at Musos Corner in Newcastle West and at Eckersley’s in Hamilton see themselves as very much part of the music industries and their art worlds respectively. Looking at the creative activity in this region as a creative system in action also accounts for the all-important pro-ams, as well as the numerous amateurs, volunteers and audiences who comprise a very important set of contributors to this entrepreneurial system. This system *in toto* produces economic, social, cultural and symbolic value for the economy and the broader community.

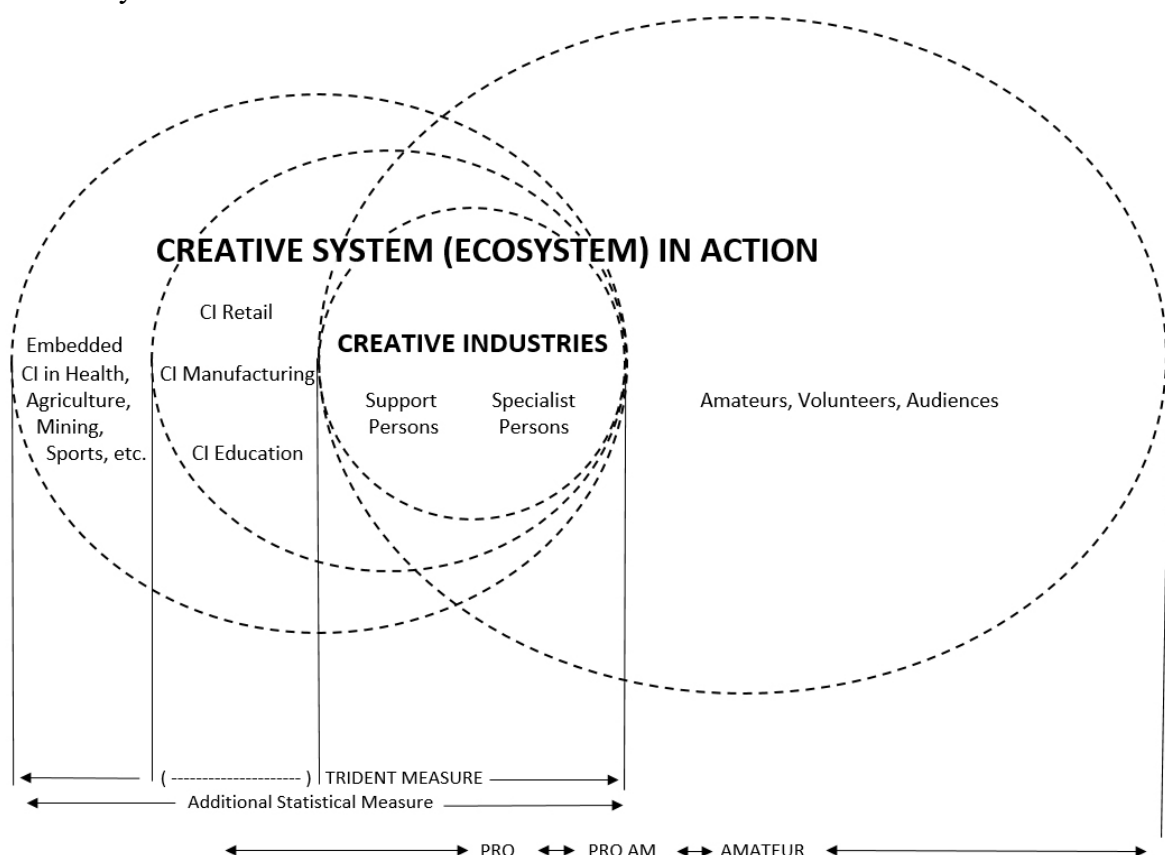


Figure 2 The Creative System (Ecosystem) in Action

There have been ongoing and, at times, remarkable changes in this system. This has certainly occurred across the short lifespan of this research project. Apart from the variations in the way people have been deriving income and the means by which they have been producing a variety of symbolic messages, it needs to be noted that one of the significant changes is in that of attitudes within the region to the notion of the creative industries itself. From the beginning of the study it was observed that culturally specific beliefs and assumptions, particularly about creativity and the way it is believed to work, played a major part in actions taken by many significant institutions and active decision-making entities. Many of these exhibited little understanding of what the creative industries actually are. A number, relying on what could be called a well-worn set of myths, beliefs and assumptions, would either want to divorce creativity completely from the notion of an industry, or have little real cognisance of the social, cultural, symbolic or indeed economic input the creative industries are contributing to the region. Towards the latter part of the project it was noticeable from observation and interviews that the term ‘creative industries’ had grown, if not in acceptability certainly in recognition, within the region. For example, the Newcastle City Council in their *Newcastle’s Economic Development Strategy 2016-2019* document (Newcastle City Council, 2016) not only reinforced the importance of innovation and creativity (ibid, p. 5) but directly recognised the creative industries as a strategic growth sector (ibid p. 34). Prior to actions such as this there tended to be an understanding of the creative industries, certainly from within the business community, as primarily ‘basket weaving’, as one respondent put it. It has come as a surprise to some that the creative industries are indeed strong contributors to the regional economy just as many of the more traditionally focused industries are. Coupled with the recognition of the creative industries’ contribution it was observed that there is also now a tendency on the part of financial donors, patrons and investors, to expect more than ‘art for art’s sake’ from the recipients of these funds. Economic indicators are increasingly part of the selection criteria for many involved in sponsorships and grants from these sectors, with the notable exception being for what has been called ‘straight arts funding’.

It was also observed that many participants inside the creative industries themselves tended to view these industries, again unsurprisingly, from within their own specific sectoral lens. It was not uncommon, as one example only, to hear people working within the design community to refer to themselves as the ‘creatives’ within the region, neglecting to observe the possibility that creativity was occurring across all the other sectors as well.

Similarly, regional understandings have tended to be focused at the urban centre. It was difficult for many, including for the researchers on this project, to look beyond the urban hub and not just focus on Newcastle in particular. Scalability, as a property of systems, is nonetheless still deeply operative in this regional system. As discussed more fully in the body of the report, the hinterland remains deeply interconnected with the urban centre, just as this regional hub is still deeply connected to the state capital, and, significantly, with the rest of the world. The movement of people, ideas, projects, goods and services between and within this scaled system was one of the characteristics found to be true of this creative system in action. While the project found very little clustering in the way it had been envisaged by Michael Porter. It did find that regional understandings and actions tended to be focused at the urban centre of the region, consisting of Maitland, Lake Macquarie and Newcastle LGAs, within what is a highly scalable regional system. The hinterland was highly active itself and also fed into what the urban centre was producing. The internet provided a way for many to bypass this clustering effect although traditional face-to-face activity was still vital to success for many.

Observations and in-depth interviews revealed that quite a number of operatives are ‘glocally’ oriented, that is, many of them are locally embedded but globally active. Each sector revealed at least one story, and often many more, where particular people developed their skills within the regional system to the point where they could trade on them internationally and move out into the wider world. This regional creative drain was often reversed as, after approximately a decade of this activity, many have moved back to the region to live and raise a family bringing an international level of expertise, and a desire to continue to operate at that level, to the region. This situation was coupled with those who found their way to the Hunter in an attempt to escape the overcrowding and real estate pressures felt in larger urban agglomerations. Many of this latter group have been surprised by what they found in this region and have generally relished the lifestyle opportunities it affords. Either way it was observed the region gained a net benefit in terms of the input of the international expertise that has become part of the fabric of the region.

Commensurate with these migratory patterns often associated with the creative industries, is the affordances provided by the infrastructure the creative industries now have at their disposal. This infrastructure is substantial and is both physical and digital. Production hubs, studios, theatres, museums and galleries, retail outlets, warehouses and office space as well as standard electricity, road and air transport infrastructure are all still highly important. However, there was not a single SME, organisation or individual found in the ethnographic study who has not come to rely on the internet and its necessary software, hardware and telecommunications infrastructure to carry out their current social, cultural and financial activities. The promise of the NBN has become substantial.

There is a growing concern over the necessity for extensive storage and fast broadband speeds. Apart from diminishing the isolation of regional centres, the internet in particular has presented commercial opportunities not apparent to earlier incarnations of the creative sector. Whether they engage with the NBN or wait for the far faster 5G network, many practitioners employ newer digital technologies, applications and platforms to varying degrees in the creation, distribution and promotion of their products and services. In short, internet access is now *de rigueur* for the creative industries.

While some more traditional and established creative industry businesses are ambivalent in their engagement with the digital environment, simply having a website, for example, a number of innovative and emerging players are much more *au fait* with the digital economy and adept at using the tools it offers. Further, they engage with other creatives locally, nationally and internationally to extend their knowledge bases, communication networks and markets. Many creative businesses do also deploy social media and many, especially those in the design and advertising field, appear to understand its benefits. However, based on an examination of these companies’ websites, a number still engage with social media only as a form of mass communication. For example, all the key advertising agencies in Newcastle emphasize the importance of an aesthetic ‘look’ and use a form of engagement in their websites through the use of video clips, but a number do not use social media as a form of conversation. In this case it can be claimed that social media is primarily treated as a mass communication channel in the region and is designed to send out information with little expectation of reply or desire for comment as part of a genuinely encouraged conversational interaction. There are of course many exceptions since many of the cooperatives and collaborative spaces detailed in the final report are much more dynamic in terms of blogging and open creative expression. What is common to each sector is an increasingly necessary presence on social media, some businesses

operating solely online and others using a mix of traditional and more innovative entrepreneurial approaches.

These entrepreneurial strategies are, of course, linked to the way people gain income for their businesses and the finances available to them. Many artists, musicians, filmmakers, photographers and so on, start out by investing their own money which may come from a 'day job' or they take a risk with personal credit. Many seek, or are offered, personal loans from friends or family but in doing so run the risk of harming those personal relationships. Unsecured loans typically made by banks or credit unions are usually for relatively small amounts and usually don't require collateral which means the interest rates are high - if indeed such a loan would be extended to the freelancers or contract workers increasingly typifying the creative industries. A secured loan usually requires collateral and many creative industries professionals have taken the risk of using their homes for this purpose. Once a business idea is fully formed, whether it's a software application or a film project, those working in the creative industries will then move beyond self-funding and possibly seek what is known as 'angel' investment. Angel investors usually don't make business decisions but venture capitalists require much more control. The further a creative practitioner or business moves along this hierarchy of funding the more control they cede to the investor. As the NSW Business Chamber reports 'while innovation is fundamental to the development of a strong Digital Economy, funding innovation is a barrier for many companies ... The lack of angel and venture capital funding results in SMEs being largely self-funded' (NSW Digital Economy 2012, p, 29). As a result, one further method of gaining funding which has become increasingly popular in the region, although not overly so, is crowdfunding. Reward-based models are the most popular, representing 43% of the crowdfunding market (ibid). As Buff and Alhadeef suggest:

The reward-based model permits artists to raise funds before work has commenced, as the funds are only realized if the goal is met, and artists can cover costs or break even before the work has started. However, the authors also indicate that of the 22,000-plus projects that have been launched on Kickstarter, only 54% have reached their funding goal (2013, p. 28).

They assert that trying to budget for a crowdfunding campaign can be quite problematic since it is often hard to estimate, prior to initiating the production, 'the distribution of rewards fans will choose. Moreover, it is even harder to guess what an average pledge will be, and this is a critical piece for a successful crowdfunding campaign' (ibid).

Apart from the general issues surrounding finance for creative industry professionals and small business owners, there is also the question of the effect of the gift economy. There is little doubt that the gift economy is a significant part of the creative system at work. The gifts exchanged in these processes, many of which go unaccounted for in many business models, are both tangible and intangible. Exchange in the gift economy is not only an economic transaction, it is also a good in itself resulting in social capital or the strengthening of personal relationships. This personal interaction is fundamental to the establishment of networks - social capital can be converted into economic capital. Additionally, the use of social, cultural or symbolic capital will often supersede financial capital as the basis of the gift economy. The actions of gifts in the Hunter Region are not only linked to the formal and thus more measurable economy, as seen in the figures above indicating Gross Regional Product, but this informal gift economy is highly operative and one where not only professionals exchange the gift but volunteers, amateurs and pro-amateurs dominate in its operation. It was observed that many sectors,

whether they are mature or emergent, have come to rely on these amateurs and pro-amateurs to support their industrial structures.

Just as there is a huge amateur base that professional sports people come from and utilise, the creative industries also rely on an army of volunteers, amateurs and pro-amateurs to underpin much of the activity in each of the sectors. This idea reinforces the point that we are looking not just at an industry measure via ABS statistics but a creative system that encompasses all of those individuals and the vital contribution they make. There is a deep connection, as one example between the 16 FTE positions available in the theatre world and the approximately 11,000 volunteer positions that undergird the 41 active theatre companies in the region. Businesses like Musos Corner do not cater solely to fully professional musicians; they would go out of business if they did. It is the amateur and pro-amateur musicians - the weekend warriors - that support them. The economic contribution to the regional economy of the multiplier effect is not only applicable to the film sector. In short, it is readily apparent from the observational and interview components of this ethnographic study that the gift economy is enormous in comparison with what the analyses from both statistical measures have revealed.

In the face of these interconnections and the rapid changes associated with digitisation and globalisation, a variety of business models, that is, a specific method or procedure for generating revenue, are being used by the creative industries in the region. While internet commerce has generated a slew of supposedly new ways of doing business it needs to be stressed that many of these apparently new methods of gaining revenue are simply reinventions of 'tried-and-true models' (Rappa 2010, online) indicating, yet again, that an immersion in a set of antecedent conditions is still vital to the introduction of any novelty.

For the creative industries, these revenue possibilities include the sale of goods, whether direct to customers or online, such as prints, CDs and DVDs, pottery, software and apps, files of audio-visual material, etc., etc. A creative industries' operative may also charge for services provided. This is true for designers of all types, architects, and those delivering outsourced content to TV or radio or any other streaming service. Others, particularly those in the gallery, libraries, archives and museums (GLAM) sector, associated most readily with the visual arts and publishing sectors, have created a shared resource or durable asset. For example, a museum, be it real or virtual, can be accessed by a number of people. They can then be charged for its use. The move from the penny arcade to video games arcades through to the provision of virtual reality experiences is a good example of the way this type of tried and tested business model. Firms such as VRXP rely on it. For designers, this shared resource might come in the form of a co-working space, many of which have proliferated within the creative industries in the region as more and more work is outsourced, casualized or delivered on a more fully freelance basis and costs of production prohibit the use of independently owned infrastructure for many in the region. On the other hand, subscription services make money by offering an ongoing benefit in return for a recurring fee. This model operates for companies involved in cable or satellite services such as Netflix but it's also a business model that older press outlets such as News Corp have come to rely on as they compete digitally. The Newcastle Herald, until recently wholly owned by Fairfax Media, has just moved to a subscription service. There are, however, few in the region, apart from larger corporate players, involved in this type of business activity. Many are, however, competing with international businesses, such as Netflix, who use this revenue model. Although there are very few left in the Hunter, video stores and book stores, and businesses like them, have tended to acquire an asset from a wholesaler, then sell that asset to a retail buyer at a higher price. This very traditional business model is now used by many older publishers moving online but it also serves their competitors very well such as wholly

online distribution companies like Amazon or the Book Depository. Leasing is another option. Stores such as Video Ezy, most of whom have disappeared from the region, and online providers like iTunes, Google movies and Oz Flix have used this business model.

Other businesses market and sometimes sell an asset or service on behalf of a third-party, and in the process collect a percentage of the transaction price as a fee. These include literary, musical and theatrical agents but also more broadly digital companies such as Uber and Air B&B. Just as the agents in the real world own no inventory neither does Air B&B or Uber in the digital one. The cost of insurance and maintenance is borne by the actual owners of the inventory who are treated as subcontractors by the agent. Audience aggregation appears to be a favoured mode for social media who have borrowed their business model directly from what is now called legacy media. In this case, they get the attention of an audience and sell access to this aggregated audience to other businesses seeking to reach that audience. Of course, this revenue generator is used by magazines, radio and TV but also social media behemoths like Facebook, who also demonstrate the value of big data in targeting those audiences. Facebook, despite being domiciled in the USA, has become critical to all creative industries' operatives in the region. Unlike other creative industries businesses such as radio or television, social media like Facebook does not have the cost of producing content – the aggregated audience does this for them. This includes many from the creative industries wishing to promote themselves. On the other hand, an older method whereby a buyer can take a predefined action across a fixed period of time in exchange for a fee, underpins the online revenues of Ticketek and the increasing use of Humanitix, and to a lesser extent many creative industries businesses in the Hunter who sell concert tickets in advance for performances of all kinds. These businesses are primarily sales brokers who charge a service fee. While it can be observed from the above that there is a complex and variable set of income streams operating across most creative industries, as noted many of these models are extensions, sometimes radical, sometimes not, of pre-existing revenue earning opportunities.

What can be said with certainty from analysis, observation and interview, is that, in an effort to maintain their productive output and competitive edge, companies and individuals working within this dynamic creative ecosystem in the region have become increasingly and excessively diversified in generating income streams. Discerning the difference between what a recording studio currently offers, as one example, and what advertising agencies do for income, is becoming increasingly difficult. At the same time, and interconnected with the prior situation, we have observed a rapidly growing trend toward outsourcing, freelancing and the casualization of the workforce. As a result, many creative industries operatives have been forced to work cross-sectorally in order to gain an income, that is, for many of them there is a need to undertake multiple tasks in order to gain one income, with a commensurate set of core skills needing to be maintained by most of them. In this case we can claim that most operatives in the creative industries need to be specialized vertically as well as multi-skilled horizontally. This way of working has become known as having a necessarily T-shaped profile. As a result, it was observed that there is an increasing degree of mobility between occupations. This is coupled with an increasing set of difficulties for many casuals and freelancers to gain finance, particularly from banking institutions, to facilitate business expansion, finance a home or partake of what used to be called a 'normal' life.

Related to these ideas above is the idea that the tangible structures of production that typify traditional industries, that is, 'firms, labour, production network, industrial districts, and markets – that is the normal stock in trade of industrial investigation' (Hutton 2009, p. 139) are mutating. There are, as this research has identified, 'shifting boundaries of function, evolving

technical divisions of labour, and emergent product sectors' (ibid). Based on the literature, laid out fully in Section 2 of the report, we note that the term 'industry', as a descriptor of certain organizational structures, arose co-incident with the advent of the industrial revolution and was used extensively by central figures such as Adam Smith [1776] and Benjamin Disraeli [1844] (OED 2018, online). Its conception continues to change. For example, in 1972 G.B Richardson pointed out that industries are not islands. Instead 'there is a dense network of cooperation and affiliation by which firms are inter-related' (1972, p. 883) where 'industry and market boundaries are porous and "fuzzy" especially where globalization is taking place' (McGee, Thomas and Pruett 1995, p. 261). As Todeva, Knoke & Keskinova (2007) indicate 'researchers have periodically noted an 'imprecision of industry definition and the 'fuzziness' of industry boundaries in economic environments ... (Venkatraman and Thomas 1988:546; see also McGee, Thomas and Pruett 1995; Cantwell and Santangelo 2006; Bernard, Redding and Schott 2006)' (Todeva, Knoke & Keskinova 2007, p. 3). As our own research confirms, in the twenty-first century there is an increasing tendency to recognize industries as loosely coupled systems of production (e.g. Dubois & Gadde, 2010). We claim the creative industries in the Hunter Region exhibit these tendencies. In observing what we see as increasing changes from creative industries to creative systems we also claim that current entrepreneurial approaches in the region are not only primarily employing extensions of more traditional business models but are, by necessity, adapting to pressures of globalisation and digitisation. As Schulz has asserted:

The technological advances made in the last decade have been breathtaking, but it is likely still just the beginning. The growth of new technologies, after all, has been exponential rather than linear, with ever larger advances coming at an increasingly rapid rate ... We are witnessing nothing less than a societal transformation that ultimately nobody will be able to avoid. It is the kind of sea change that can only be compared with 19th century industrialization, but it is happening much faster this time. Just as the change from hand work to mass production dramatically changed our society over 100 years ago, the digital revolution isn't just altering specific sectors of the economy, it is changing the way we think and live' (2015, online).

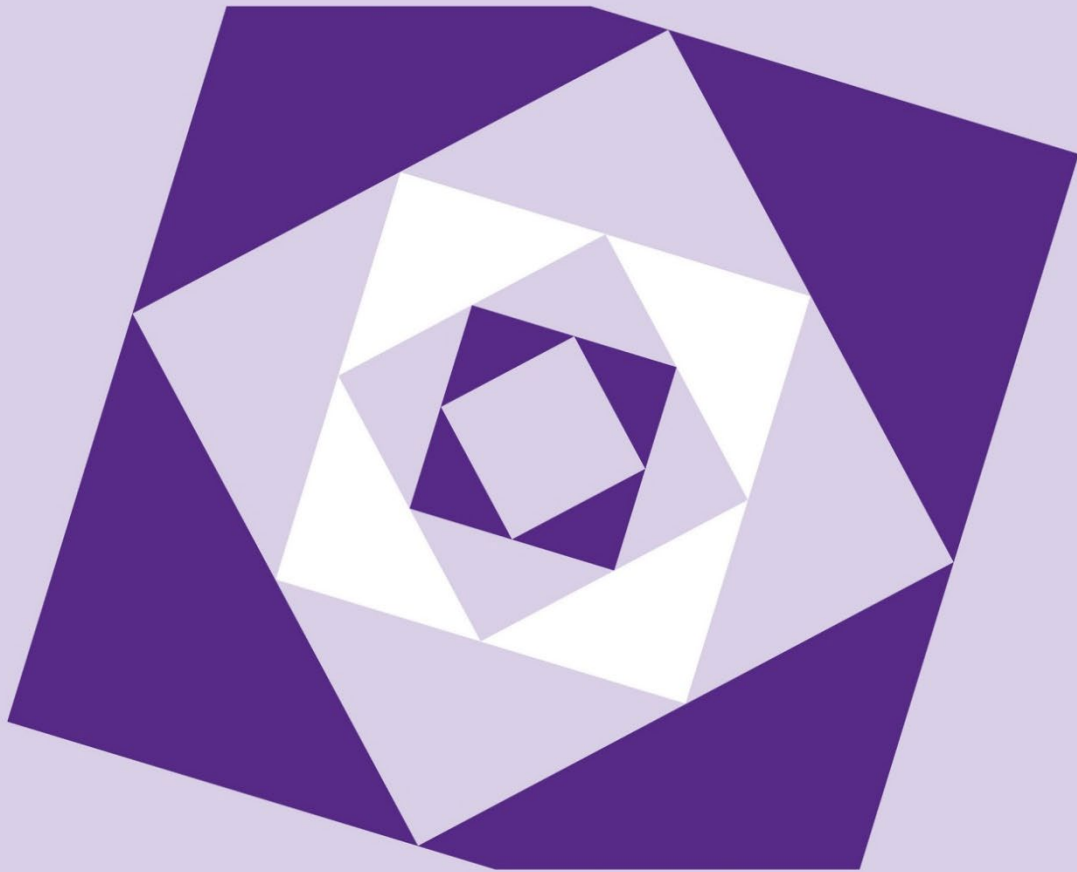
These changes are of deep concern to many who depend on the creative industries to mediate their world through a variety of audio, visual and text based cultural forms but these bellwether industries exist in a set of structural conditions that include international legal frameworks, industrial settings, trade agreements, public and private sector investment, as well as the second and third legs of the triple bottom line (Elkington 1999), that is, a veritable host of sociocultural and environmental entanglements. In the face of these changes new occupations such as social media manager, transmedia storyteller, technopreneur or digital strategist are emerging at an exponential rate. However, focusing solely on the economic implications also belies the community building and social cohesion that emanates from such things as telling one's own stories, singing one's own songs or relying on each other to build successful teams whose sole aim is not simply to gain an income. If culture is about a whole way of life the creative industries are particularly adept at symbolising this aspect of ourselves for ourselves and in succeeding in carrying these signifying practices to the rest of the world. It is, in fact, these activities, these signifying practices, that differentiate the creative industries from most other industries. That said the social and cultural value of these industries has not always equated to financial value, although in many cases it has.

In this case we can claim that the Hunter Region houses a set of complex and dynamic innovative ecosystems, that is, creative industries sectors which operate as subsystems of a

broader creative system in action, where active creative agents are both constrained and enabled by the social, cultural, technological, economic, environmental, political and legal structures that afford their innovative activity.

Creativity & Cultural Production in the Hunter

An applied ethnographic study of
new entrepreneurial systems in the
creative industries.



Final Report:

Literature Review, Operational Definitions and Methodology

Associate Professor Phillip McIntyre

Professor Mark Balnaves

Associate Professor Susan Kerrigan

Evelyn King

Claire Williams

The University of Newcastle | April 2018, ARC Grant LP 130100348



2. LITERATURE REVIEW

2.1 Introduction

If we wish to know in detail about something there is no point in starting from scratch. That would, colloquially speaking, only reinvent the wheel. It is almost a certainty that a good deal of research will already have taken place around whatever the topic is you are interested in. A review of the research literature allows us to see what research has taken place and what has already been published (QUT 2017 online), helping to answer the question ‘what do we already know about this topic?’

A literature review thus gives us an overview of key concepts, allows us to identify major relationships or patterns and enables us to see the big picture against which this specific research operates. The literature review also allows us to identify any strengths and weaknesses in preceding work, in this case on the creative industries, to see if there are any gaps in that research and identify whether there are any forms of conflicting evidence or contradictory ideas at work in that literature (QUT 2017 online).

The material from the literature review we have brought together here has informed the data collection, discussion and analysis undertaken for this research project and has thus provided a solid background to the investigation. For example, one can see in the literature that there is a significant crossover between the idea of creative, cultural and copyright industries (Hartley 2005, p. 30-31). As Terry Flew writes in his book *The Creative Industries: Culture and Policy* (2012) terminology describing these industries ‘changes across countries, with some referring to the cultural industries, the copyright industries, the digital content industries, and even the cultural and creative industries or – as in China – the cultural creative industries’ (2012, p. 4). Despite the arguments over terminology that appear in the literature, the idea that there is a relationship between culture and economics has a long history and it starts for our purposes with the notion of the ‘culture industry’ and its pluralised form the ‘cultural industries’.

2.2 Culture Industry to Cultural Industries

To set the scene we can say that Adam Smith, a professor of moral philosophy at the University of Glasgow and compatriot of David Hume, writing in the latter part of the eighteenth century, is considered, with some dispute (Rothbard 1995), to be the founding figure of modern economics. His hefty tome, *An Inquiry into the Nature and Causes of the Wealth of Nations* (1776) which first appeared in 1776, argues for an ideal free market economy with governments limited to taking care of such things as public education, the judiciary and the army. This book appeared, along with work from Jeremy Bentham and Thomas Malthus, during the British Agricultural Revolution, a time of dramatically increased food production which solved for a time the problems of scarcity and enabled greater population coverage of certain geographic areas. While Smith’s book ‘attracted a host of admirers and commentators, Bentham provided a psychology for the economic man, and Malthus erected that very pillar of the classical system, the doctrine of population’ (Lekachman 1962, p. 242). Then, following on the works of Smith, Ricardo published *Principles of Political Economy and Taxation* (1817) in the 1810s, setting the ground for later work by Karl Marx, including his publication of that other significant early economic text, *Das Kapital* (1867), and his own critiques of the then nascent field of political economy. These fundamental ideas, especially those of Marx coupled with borrowings from Freud and others, were the precursors for the work of the Frankfurt School of critical theorists. The members of the Frankfurt School:

... were the first social theorists to see the importance of what they called the 'culture industry'. [For them] mass culture and communications stand in the centre of leisure activity, are important agents of socialization and mediators of political reality, and should be seen as primary institutions of contemporary societies with a variety of economic, political, cultural, and social effects (Holt & Perren 2009, p. 95).

The term 'culture industry' was employed by these researchers, in particular Theodor Adorno and Max Horkheimer, to identify the processes of industrialisation of culture 'and the commercial imperatives that drove the system' (ibid) which, employing a set of assumptions common to the period (Petrie 1991), were anathema to them. Writing in the 30s and 40s Adorno, a middle-class German intellectual and also a classical pianist, was appalled by popular music, radio and Hollywood films, remembering that popular music was of course at this time predominantly jazz. These forms were what constituted the culture industry and they were seen as trivial, base and meretricious by Adorno and Horkheimer. This set the culture industry apart from and opposed to, and did not therefore include, high culture, fine art and all those forms thought not to be contaminated by a connection to commercial imperatives. In this case it shouldn't be forgotten that the term 'culture industry' was designed to shock and was instigated as a pejorative.

David Hesmondhalgh, on the other hand, asserts that a number of French sociologists, in particular Bernard Miege, preferred to use the plural term 'cultural industries' instead of the singular term 'culture industry' as the latter 'suggested a "unified field" where all the different forms of cultural production that coexist in modern life are assumed to obey the same logic. [Miege and his compatriots] were concerned instead to show how complex the cultural industries are' (2007, p. 16). For Hesmondhalgh, adopting Miege's notion of the 'cultural industries', these industries now include broadcasting, film industries, the content aspects of the internet industry, music industries (including recording, publishing and live performance), print and electronic publishing, video and computer games, and advertising and marketing (2007, p. 12-13). As you can see the so-called 'high' cultural forms, like fine art, are not included in the cultural industries as defined by Hesmondhalgh.

Hesmondhalgh does acknowledge that amalgamating this list of industries under the term 'cultural industries' has some definitional difficulties attached to it. In terms of the adjectival prefix, culture, Raymond Williams, for one, asserted that:

There is some practical convergence between (i) the anthropological and sociological senses of culture as a distinct 'whole way of life'... and (ii) the more specialised if also more common sense of culture as 'artistic and intellectual activities', though these, because of the emphasis on a general signifying system, are now much more broadly defined to include not only the traditional arts and forms of intellectual production but also all the 'signifying practices' - from language through the arts and philosophy to journalism, fashion and advertising - which now constitute this complex and necessarily extended field (Williams 1981, p. 13).

With this as a starting point Hesmondhalgh recognises that if culture is defined using the broad anthropological understanding, that is, the idea of culture as a whole way of life:

... it is possible to argue that all industries are cultural industries in that they are involved in the production and consumption of culture. For by this definition, the clothes we wear, the furniture in our houses and workplaces, the cars, buses and trains we use for transport, the food and drink we guzzle are all part of our culture

and they are nearly all produced industrially, for profit (Hesmondhalgh 2011, p. 11).

The way to differentiate industries that contribute to culture and those that are 'cultural' is to identify whether or not they produce material that is, following Williams, centred on signifying systems and signifying practices, that is, those that intentionally concentrate on making meaning. This contraction allows for the fact that:

All cultural artefacts are texts in the very broad sense that they are open to interpretation. Cars, for example, signify and most cars involve significant design and marketing inputs. However, the primary aim of nearly all cars is not meaning, but transport (Hesmondhalgh 2011, p. 11).

Hesmondhalgh also has a desire to not simply be pessimistic about the actions of the cultural industries. For many, the industrialisation of culture is seen as an appalling development. As we saw above this was certainly the case for Theodor Adorno. What do we make of an industry where the products it makes have the specific function 'of providing ideological legitimation of the existing capitalist societies and of integrating individuals into the framework of mass culture and society' (ibid)? Rather than seeing all culture industries negatively, as Adorno did, Hesmondhalgh argues instead that we must recognise that the realm of these industries is a contested and ambivalent one. Rather than be overly concerned about the extent to which cultural industries serve the interests of the powerful, where 'content and audiences are commodified, real diversity decreases, opposition and alternative voices are marginalised, public interest in communication is subordinated to private interests [and] access to the benefits of communication are unequally distributed' (McQuail 2010, p. 97), Hesmondhalgh argues that there are also, at exactly the same time, reasons to celebrate the cultural industries and the social and cultural benefits their various representations have circulated. The cultural industries actually produce exciting new directions and innovations in culture. For Hesmondhalgh, recognising this doesn't call for complacency, but rather creates an awareness that there are always struggles to be observed around whose ideas become dominant and whose become subordinated and which of these can be seen most prominently within the innovative creations of the 'cultural industries'.

As an extension of the term 'cultural industries', the more recent development of the notion of 'creative industries' has taken hold. Creative industries are taken to be, certainly by the Department of Culture, Media and Sport in the United Kingdom, 'those industries which have their origin in individual creativity, skill and talent which have a potential for job and wealth creation through the generation and exploitation of intellectual property' (DCMS 2001). As with the idea of the cultural industries there are evident problems with this definition as well. In order to expose them we need to understand, firstly, the research into both creativity and innovation and all that entails and implies. We will start with the concept of innovation.

2.3 Innovation

Innovation, as a term, can be partially traced back to the Latin *innovare*, a noun of action or doing. It is defined in this sense as the action of innovating or the action of altering what is already established 'by the introduction of new elements or forms' (OED online). It appears in English usage in the mid 1500s with this basic understanding of changing a thing into something new, that is, 'to alter; to renew', already established. However, as Benoit Godin points out, 'for most of history innovation has nothing to do with economics (technology) or with creativity' (2015, p.5). It was seen as a political concept in as much as the actions of innovation were seen to disturb the essential social order and was thus treated as a negative force. Kings and the

clergy banned it. From the Renaissance onward, the word innovator was used as an insult. For example, in 1828 the term innovation was still being used in a derogatory way. As Godin explains, ‘Antoine-Chrysotome Quatremere-de-Quincy (1755-1849), archaeologist, critic of arts and perpetual Secretary at the French Royal Academy of Fine Arts’ (Godin 2015, p. 3) pointed out that ‘nothing is easier than the role of the innovator’ (ibid) whose prime purpose is to lead us to ‘disorder, anarchy, dissolution and confusion’ (ibid). Godin points out that ‘Quincy is only one of many writers before the twentieth century who holds a representation of innovation as essentially pejorative’ (2015, p. 3). Then in the twentieth century the term’s value was reversed.

Innovation changes meaning in modern times. The term shifts meaning at the moment that it becomes thought of as instrumental to man’s [sic] needs or goals – moral, political, social and material. From then on, innovation is a concept that serves narratives, broadly defined, to make sense of both the past and the future in a positive sense (Godin 2015, p. 5).

Godin (2015, pp. 283-284) argues that over the twentieth century, innovation has become a normative concept and is now always seen as good. He suggests that discourses of policy imperatives have brought the modern concept of innovation into being. What is now a largely utopian and idealistic understanding became a ‘panacea for every socioeconomic problem’ (2015, p. 284). In the end the notion of innovation has become primarily industry and market centred. While this sense, that innovation is a positive agent of change in primarily economic terms, has been a fundamental characteristic of most views of innovation during the twentieth and on into the twenty-first century, the definitions found in the recent literature have continued to mutate. They have been added to, modified and changed in the continuous usage of the term. For example, there have been ongoing discussions that there are personalities who may be more innovative than others. As the management guru and supporter of the Austrian economist Joseph Schumpeter, Peter Drucker (1946, 1969, 1983), declares ‘there are, of course, innovations that spring from a flash of genius’ (1991, p. 11). Schumpeter certainly thought so initially. In his early explorations of the term he thought that innovations came from entrepreneurs who were wild spirited individuals or ‘unternehmergeist.’ He later amended this thinking in the face of the evidence he was encountering and became committed to a process of macroeconomic innovation where the facilities big business could bring to bear on innovation were just as crucial, if not more so than particular personalities. What Schumpeter did in concerning himself with these ideas was not instigate but help set in motion a tradition of economists looking at innovation in relation to technology. This ‘economic tradition regarding technological change’ is concerned with innovation as technological invention when it is ‘applied to the production process’ (Godin 2015, p. 261). It is in 1939 that a now relatively common meaning, that is, ‘the action of introducing a new product into the market; a product newly brought on to the market’ (OED online), first appears in concise form and which provides the basis of understanding of the term for the business community. Although he was not the first to eulogise innovation as an economic good (Godin 2015), at this time Schumpeter writes in *Business Cycles* (1939):

We will simply define innovation as the setting up of a new production function. This covers the case of a new commodity, as well as those of a new form of organization such as a merger, of the opening up of new markets, and so on. Recalling that production in the economic sense is nothing but combining productive services, we may express the same thing by saying that innovation combines factors in a new way, or that it consists in carrying out new combinations (Schumpeter 1939, p.89).

He also makes a clear distinction between invention and innovation just as Allen does in *Science, Innovation & Industrial Prosperity* (1967). Allen states that ‘innovation is the bringing of an invention into widespread, practical use ... Invention may thus be construed as the first stage of the much more extensive and complex total process of innovation’ (OED online). However, Schumpeter’s view is a little more subtle suggesting a more distinct approach where inventions are new objects brought into the world, but innovations are those new ideas, products and processes that are accepted and profited on (Schumpeter 1939, p. 84-102). There is a more slightly modified position taken by Dodgson and Gann (2010):

We think about innovation as ideas, successfully applied in organizational outcomes and processes. Innovation can be thought of as practical and functional; the outcomes of innovation are new products and services, or they are the organizational processes supporting innovation that occur in departments such as R(earch)&D(velopment), Engineering, Design, and Marketing (Dodgson and Gann 2010, p. 14).

While this perspective perceives innovation as firstly the generation of ideas and secondly the products or services generated from those ideas, like the preceding views it also firmly locates it within the economic sphere, where it has been corralled and used now for some time as though this is the only realm in which innovation occurs. For example, Drucker asserts that innovation is ‘the effort to create purposeful, focused change in an enterprise’s economic or social potential’ (1991, p. 9).

Economic theories of innovation were developed to explain the process of technology generation and dissemination, its determinants and effects – particularly within a free enterprise system. In an attempt to explain this phenomenon, two schools of thought were developed: one with neoclassical economic theory (Romer 1986, 1990; Grossman and Helpman 1989); while the other consisted of the various approaches which can be grouped together under the heading ‘evolutionary economics’ (for example: Saviotti and Metcalfe 1991; Hodgson 1993, 1995; Freeman 1994) (Hofer & Polt 1998, p. 6).

The latter evolutionary economic school has tended to move toward examining the way innovation acts in dynamic and systemic ways and how innovations occur and diffuse over time. This way of thinking suggests ‘the innovation process can be described as the succession of invention, innovation and diffusion’ (ibid). The latter stage of this process, the diffusion of innovation, was taken up in the work of Everett Rogers (1983). We will return to Rogers in a moment.

Meanwhile, this association with the economic has become entrenched in policy settings where innovation has become a central platform for economic change, development and ongoing positioning for better placed competition. There is now a belief, according to the Science and Technology Policy Branch of what was the Department of Industry Science and Resources (1998) in Australia, that ‘innovation is the key to success in the modern economy’ (Bryant & Wells 1998, p.v). This declaration is now generally accepted as a truism. It is seen in the turn toward innovation as the saviour of national economies. As an example, in 2015, the newly elected Prime Minister Malcolm Turnbull declared that ‘the Australia of the future has to be a nation that is agile, that is innovative, that is creative’ (Turnbull in Thomsen 2015, online). He went on to say that ‘our innovation agenda is going to help create the modern, dynamic 21st century economy Australia needs’ (in Borello & Keany 2015, online). But as Dodgson and Bessant assert if innovation is to be implemented well ‘effective innovation policies need fully to comprehend the nature of the innovation process itself’ (1996, p. 19).

Peter Drucker, seemingly eschewing his ideas on innovative geni, goes on to say that ‘most innovations, however, especially the successful ones, result from a continuous purposeful search for innovation opportunities’ (ibid); in other words not from a flash of brilliance but from concerted hard work. In further examining the nature of innovation it can be seen that ‘innovations vary widely, in scale, nature, degree of novelty and so on’ (Tidd et. al 1997, p. 27) but there are a number of what could be called levels or types that are identifiable. These could include the development of individual products, the installation of new technological processes, the introduction of less tangible objects such as service delivery and the advent of complex product systems and so on. It is generally agreed that ‘history making innovations, those based on new knowledge - whether scientific, technical or social - rank high ... they are what people usually mean when they talk of innovation’ (Drucker 1991, p. 15).

These diverse levels of innovation have led to a range of models being applied to the process of innovation that extend from the simple linear ones where single functional activities dominate - demand pulls the process and the introduction of novel technologies push it - through to complex interactive feedback driven coupling models. The most recent view is that innovation is systemic (Tidd et. al 1997, pp. 29-30).

Dodgson and Bessant suggest, along with others such as Tidd, that the sources, determinants and outcomes of innovation, as empirically perceived in research terms, now point to the complexity and systemic nature of the innovation process (1996, p. 21). These ideas that innovation is systemic are reinforced by the earlier declaration by Brooks (1982) that there are also social as well as technological dimensions to innovation which may also be described in reference to socio-technical systems. Similarly, Smith also sees innovation as a systems phenomenon arguing that ‘innovation should not be seen in terms of individual acts of learning or discovery’ (1998, p. 39). It is more likely that innovation is ‘a process of interactive knowledge-creation, in which, for example, skills in marketing are used to channel relevant information about user needs into the development processes which shape the technical and performance attributes of products’ (ibid). Bryant & Wells (1998, p. v) also argue that innovation is not linear but systemic.

These latter ideas are thus a far broader set of understandings of what constitutes and brings innovation into being than those suggested in the earliest uses of the term. And this shift in focus raises a necessary question: if innovation does come about through a systemic process then this necessitates a rethink of the way innovation is dispersed throughout a sociocultural politico-economic system; this is where we return to Rogers.

Writing in his influential book *The Diffusion of Innovation* (1983), Everett Rogers presented the following definition:

An innovation is an idea, practice, or object that is perceived as new by an individual or other unit of adoption. It matters little, so far as human behaviour is concerned, whether or not an idea is ‘objectively’ new as measured by the lapse of time since its first use or discovery (Rogers 1983, p. 11).

A certain relativism had now, by necessity, become apparent in understandings of what innovation might be. Rogers additionally defined diffusion as ‘the process by which an innovation is communicated through certain channels over time between members of a social system’ (1983, p. 7) firmly linking the action of innovation to its systemic context. It is therefore not an excessive leap to take to see the advent of the notion of innovation ecosystems.

2.4 Innovation Ecosystems

According to Jorn Andersen (2011), the advent of the term ‘innovation ecosystems’ can be traced back to the introduction of the idea of a ‘national business system’ originally developed by German economist George Friedrich List in 1850. As Andersen (2011) explains List was keen to build a manufacturing base at the national level to help Germany compete with British imperial interests and protect nascent strategic industries. List’s ideas were taken up in what is now called the developing world as well as being influential in Japan and China. Building on this thinking the English economist Alfred Marshall then looked closely at what was happening in Sheffield with steel and cutlery production and in 1899 suggested the notion of ‘agglomerations’ to explain the synergistic effect seen to be benefiting companies operating in close proximity to each other. As Flew indicates, Marshall identified ‘positive externalities arising for the co-location of firms and workers in related businesses’ (2012, p. 146).

Then, continues Andersen (2011), after WWII the economist Eric Dahmen, inspired by Joseph Schumpeter’s ideas on the relationship between entrepreneurship, capital and creative destruction, coined the term ‘development blocks’ to help explain the industrial transformations occurring in Sweden at the time. With these ideas as precursors Christopher Freeman and Bengt Lundvall suggested that there was a complex set of interactions occurring between entrepreneurs, companies and capital entwined with regulatory frameworks for labour markets, the markets for the resources used in production, national educational efforts and policies set in place to encourage economic development. As Andersen (2011) points out, they observed, in a set of case studies, a series of interdependent interactions and interrelationships which they then called a ‘national system of innovation’.

With these ideas acting as antecedents Michael Porter published *The Competitive Advantage of Nations* (1990) and set out his thinking on ‘clusters’. These he defined as ‘a geographically proximate group of interconnected companies and associated institutions in a particular field, linked by commonalities and continuities [noting that] the geographical scope of a cluster can range from a single city or state to a country or even a group of neighbouring countries’ (Porter quoted in Flew 2012, p. 146). This co-location offered, as Flew sets out, three competitive advantages. First, there are productivity gains derived from specialist skills and readily available skilled labour, as well as access to knowledge transfer from proximate universities and training institutions. Second, clusters also presented innovation opportunities brought about by the pressure to gain advantage since costs are roughly equivalent for all competitors in the cluster. Third, new business formations develop because they are in receipt of better business information, better access to resources and more opportunities to transfer or exit existing businesses (Flew 2012, p. 147). Andersen notes that despite their close reliance on the preceding formulations, Porter’s ideas have been very successful, stating that ‘more than 100 regions and/or nations have experimented or implemented some kind of cluster policy based on Porter’s framework’ (Andersen 2011, online).

Then in an almost classic reversion to Rousseau’s (1754) distinction between the tree and the machine, nature and man, concepts which became irrevocably tied up with the split between romanticism and rationalism (Watson 2005), business systems began to be described as ‘ecosystems’ a supposedly less threatening use of the term ‘system’, one that was seen as an apparently more ‘organic’ term. The term ‘ecosystem’ has now become more popular as it implies a closer point of origin to the supposedly true spirit of humanity. This act of deference to what Watson has called the modern incoherence (2005, pp. 606-623) can be seen, for example, in the establishment in 2010 of The Innovation Ecosystems Network (IEN) at Stanford University. This network set out to ‘describe the mix of local and global alliances that synergize regional business clusters; and, enhance sharing of insights among the diverse groups

of people involved in technology-based business development' (IEN, 2011 online). At their recent summit at Stanford University the IEN declared that 'business growth is catalysed, accelerated and sustained through relationships. In every location and around the world, relationships of people, organizations and resources are the ecosystem for innovation. The innovation ecosystem is context for political, technological, economic, and environmental changes' (IEN, 2011 online).

These ideas have also been explored by Amnon Frenkel and Shlomo Maital in their book *Mapping National Innovation Ecosystems: Foundations for Policy Consensus* (2014). It is worth noting how easily they slip between using the term 'innovation system' and 'innovation ecosystem'. For them:

Innovation systems are a subset of all complex systems. And according to a leading expert on the theory of complexity Geoffrey West (2013, p. 7): 'What makes a complex system so vexing is that its collective characteristics cannot easily be predicted from underlying components. The whole is greater than, and often significantly different from, the sum of its parts.' This is why the rich datasets on innovation indicators help raise interesting questions, but stop short of providing effective answers. The 'whole' of the innovation system in a nation or region is, as West notes, significantly different from the sum of its parts. He continues: A city is much more than its buildings and people. 'Our bodies are more than the totality of our cells. This quality, called emergent behaviour, is characteristic of economies, financial markets, urban communities, companies, organisms, the Internet, galaxies and the health care system'. And, he might have added, emergent behaviour is also characteristic of national innovation ecosystems (Frenkel & Maital 2014, p. 229).

As Andersen concludes, at the same time as these ideas have been mutating and developing, the notion of an innovation ecosystem also came to be linked to the rise of ICT 'platforms such as Apple's iPhone, Google's Android, cloud computing and software platforms dominated by companies like Microsoft, Amazon etc.' (Andersen 2011, online). Most of these had connections with Silicon Valley located close to and drawing on the vibrant nearby city of San Francisco in the state of California in the USA. It was, and still is, populated by digital entrepreneurs.

2.5 Entrepreneurs

When economists or marketers discuss entrepreneurs they generally start with the individual. As mentioned above Schumpeter is a good example. In his initial exploration of innovation in the 1930s Schumpeter's entrepreneurs, his 'unternehmergeist,' were wild spirited individuals. Arriving at 2003 this is the same point at which The European Commission starts its own appraisal. For them 'entrepreneurship is first and foremost a mindset. It covers an individual's motivation and capacity, independently or within an organisation, to identify an opportunity and pursue it in order to produce new value or economic success. It takes creativity or innovation to enter and compete in an existing market, to change or even create a new market' (European Commission 2003). Added to these understandings Mazzarol argues that, from a concrete point of view, 'entrepreneurship deals with the process of developing new business ventures and/or promoting growth and innovation in existing firms' (Mazzarol 2011, p. i). Taking the economist's classic understanding, for Mazzarol 'innovation is not just about new technology, but also about doing things better to enhance value to customers, employees and shareholders' (ibid). However, it's not just the commercial world that now busies itself with entrepreneurial behaviour. As Mair and Noboa explain the concept of social entrepreneurship

is becoming an increasing common one. But what is meant by this term? He explains that ‘social entrepreneurship (SE) involves innovative approaches to address issues ... social entrepreneurs are moved by different motivations to discover and exploit a distinct category of opportunities’ (2006, p. 121). This adaptation of the term is not a solitary one. As the notion of entrepreneurship has been popularised this has also had an effect on what or who could be classified as an entrepreneur. As competition in an individualised and atomised environment has become the norm:

... the creative and innovative nature of entrepreneurship has come to be seen as a way of enhancing competitiveness of organisations attempting to encourage employees to tap into their creative and innovative talents and seeking to promote innovation. The word ‘intrapreneur’ is commonly used to describe entrepreneurs within large organisations ... they make things happen (Mazzarol 2011 p. 111).

And then there are technopreneurs. These are usually seen as an entrepreneur or ‘entrepreneurial manager who is seeking to commercialise a disruptive technology’ (Mazzarol 2011 p. 313). What is important to mention here in relation to technopreneurs like Bill Gates, Steve Jobs, Mark Zuckerberg or Travis Kalanick is the concept of ‘disruptive innovation’.

While Clayton Christensen’s (1997) work on disruptive innovation was initially applied to very large organisations and their use of technology, the idea has since been extrapolated fairly widely, and at times wildly, to other areas. What went missing in the popularising of this formulation is the idea that creativity and innovation depend not only on the new but also the old. The question of complementarity seemed to disappear from, or not even register on, many people’s thinking. What has been pointed out a number of times is that no innovation, even of the type entrepreneurs favour, has ever occurred in a vacuum (Csikszentmihalyi 1999, p. 315). We can see from the research that there is just as much dependence on continuity as there is on change since both tradition and innovation are necessary in order for things to change (Negus & Pickering 2004). As Negus and Pickering have stated ‘creative talent requires a tradition so that it can learn how to go further within it or beyond it. Innovation should be understood by rejecting those approaches which set it squarely against tradition and established cultural practice’ (2004, p. 91). From this we can deduce that the idea that disruption is the sole hallmark of creative innovation tells only half the story. As Andrew Russell argues ‘histories of the Internet thus far have been preoccupied with creation, invention, and innovation. The most prominent example is the subfield’s foundational text, Janet Abbate’s *Inventing the Internet*, but other leading books carry the same innovation bias’ (Russell 2016, p. 1).

Russell argues that very little work has been carried out on the notion of maintenance and how it is the necessary complementary mirror of innovation. By focusing on the everyday ‘labour of upkeep necessary just to keep things going, we are called back to the ordinary and difficult present, away from the otherworldly, glittering future’ (Vinsel 2016, p. 3). Vinsel asserts that ‘the vast majority of labour in our culture is not focused on introducing or adopting new things, but on keeping things going’ (quoted in Bliss 2016, online). It could be suggested that the idea of entrepreneurial innovation as the sole hallmark of economic success is problematic. Innovation requires productive infrastructures to be maintained just as much as they require shifts in actions. The paradigmatic thinking that resulted in the notion of disruptive innovation as the penultimate driver of economic success misses a very crucial half of the story. Despite these critiques, the standard argument is still held as a truism that entrepreneurs, no matter who they are or where they operate, thrive best within vibrant and dynamic innovation ecosystems.

2.6 Smart and Creative Cities

Linked to the idea of an innovation ecosystem are the notions of smart cities and creative cities, the city of San Francisco being only one example of the latter. The idea of 'smart cities' is a recent one. What literature there has been is summarised well by Chourabi et al. in the paper 'Understanding Smart Cities: An Integrative Framework' published as part of the System Science conference held in Hawaii in 2012. As an example of this literature Caragliu, Del Bo and Nijkamp (2011) argue that:

Urban performance currently depends not only on a city's endowment of hard infrastructure (physical capital), but also, and increasingly so, on the availability and quality of knowledge communication and social infrastructure (human and social capital). The latter form of capital is decisive for urban competitiveness. Against this background, the concept of the 'smart city' has recently been introduced as a strategic device to encompass modern urban production factors in a common framework and, in particular, to highlight the importance of Information and Communication Technologies (ICTs) in the last 20 years for enhancing the competitive profile of a city (Caragliu et al. 2011, p. 65).

Smart cities are seen to encourage and facilitate 'a commercial and cultural innovation 'ecology' that supports, attracts, and enables industries, businesses, and entrepreneurs working in 'smart' sectors to drive development of smart city services, creative applications, and interactive urban environments' (NCC 2015, p. 67). In the twenty-first century mind, smart cities are focused on people using digital technologies to enhance effective and efficient performance while encouraging wellbeing and creativity.

We should be able to see from the above the links smart cities are thought to have with innovation ecosystems. Increasingly referred to as 'innovation ecologies' in an effort to equate them with a supposedly organic growth, the machinery of smart cities is also now inevitably coupled with the idea of a creative city. Caragliu, et al. argue that 'the presence of a creative class, the quality of and dedicated attention to the urban environment, the level of education, and the accessibility to and use of ICTs for public administration are all positively correlated with urban wealth' (2011, p. 65). Nonetheless, Komninos, Tsarchopoulos and Kakderi argue that, while much of the literature concentrates on beneficial applications of the smart city idea, 'the whole city planning process and involvement of citizens and end-users in the design and implementation of e-services for urban renewal is still a largely unknown field' (2014, p. 29). They conclude 'a holistic approach for planning smart cities and designing e-services collaboratively in the form of a strategic planning roadmap' (ibid) is vitally important. To add to this position, Kourtit and Nijkamp (2012) had suggested that:

Smart cities are supposed to be supported by appropriate and trustworthy governance structures and by open-minded, creative people, who through a joint effort are able to increase local productivity, the *sine qua non* for accelerated economic growth. In smart cities, the productivity rise is higher than the rise in local problems. Clearly, smart cities are an ideal-typical urban constellation but, in reality, we observe various smart appearances in urban systems, such as creative districts, smart urban villages, or sustainable knowledge-based urban spaces. The background concept of smart cities is based on the fact that cities house, in principle, a variety of creative talents and are able to offer novel and sustainable solutions. The agglomeration advantages generated in modern urban constellations are critical parameters for exploiting the potential benefits of innovative urban spaces (Kourtit & Nijkamp 2012 p. 93).

In support of these contentions Gregory Hywood (2004), in discussing Richard Florida's book *The Rise of the Creative Class* (2002), contends that rather than economic development being determined mainly by processes of efficiency and organisation:

... creativity has been the engine of growth and the future of cities and nations will be increasingly determined by the ability to draw the talent behind new ideas. He [Florida] wrote of an economy driven by 'super creatives' – those in science, engineering, architecture, design, media, arts, music and entertainment whose economic function is to create new ideas, new technology and/or creative content. Florida argues that to attract such people it should be a deliberate act of public policy to create the necessary bohemian and culturally diverse environments so beloved by the creative class. Secondary to this core are the 'creative professionals' in business, law, finance, health care whose role is to translate these ideas into the broader community and economy (Hywood 2004, p. 13).

Florida's work has certainly had an impact and has also had its critiques. The major assumption that can be seen underpinning these ideas is that the context or sociocultural situation in which creativity and innovation occurs, and is carefully nurtured, is vitally important, pointing once again to the idea of systems in action.

As occurs with most systems it has to be noted here that the urban ones being discussed are also linked systemically to the contexts they exist in. These contexts are thus scalable. For our purposes a context can be seen as the spatial, temporal and discursive spaces which are interconnected or woven together with other connected spaces or structures that precede or follow the object of our attention and also operate hierarchically both above and below it. These contextual interconnections have an effect on the object that is located in that context. Cities do not exist in isolation. They are both historically and geographically located. As Fernand Braudel (1990) pointed out, the geography of a locality or region effects its patterns of settlement and has some effect on the systems of trade, culture and politics that develop there. The way linked villages, towns and cities come to define themselves and are defined further afield is dependent in many senses on their interactions which are both constrained and enabled by the geographical factors on offer and the histories that have been enacted there. Hinterlands feed cities and cities depend on their hinterlands for survival. Smaller towns draw trade, wealth, knowledge and ideas from their larger urban cousins and the urban areas are sustained by migrations of people and goods to and from them.

Every urban settlement is bound to live by maintaining a balance between what it receives (or takes) and what it gives (or returns). The balance has perpetually to be adjusted, the point of equilibrium is never fixed. And the particular way a town draws on the outside world while modifying itself internally, the better to attach itself to its surroundings and dominate them is never simple (Braudel 1990, p. 189).

In 'explaining the system' (1990 pp. 161-262) Braudel points out cities and towns exist in 'circles of influence' (1990, p. 185). Similarly, cities operate within 'zones of urban attraction' (Braudel 1990, p. 259). The multi-faceted influence of a regional capital, 'political and cultural in the broadest sense of both terms' (ibid), tends to exceed its designated city limits. This system is scalable, interconnected and interdependent. As an example, the Hunter region in NSW is a contested space operating as a system of many interactions and identities. It is not 'just there to be described' (McManus, O'Neill & Loughran 2000, p. 3). This can be seen in the 'emergence of the Hunter Region as a cultural bounding of physical space that has, itself, changed over billions of years' (ibid). Apart from the ongoing Indigenous presence in the valley:

There is the water catchment regional boundary, the political regional boundary, the regional economy and the Hunter Region of every individual's geographical imagination. For some people, the Hunter Region is centred on Newcastle, for others it is focused on the vineyards or the coalfields, while for other people the Hunter Region is an area somewhere north of the Central Coast. For other people it is not Sydney! (O'Neill et al. 2000, p. 3).

While it is a contested space the urban agglomeration connected to a rural hinterland and centred on Newcastle has moved from being a convict settlement to a coal town, to a steel city and now a post-industrial city intent on reinventing itself as a smart city. This brings us to one more book we need to appraise before we close this section of our literature review on smart and creative cities.

Marcus Westbury's book *Creating Cities* (2015) is a useful one in that it partially sees the world in systemic terms. Westbury identifies the connectivity those in Newcastle now experience where every action taken in individual projects that are part of the Renew campaign for urban renewal:

... is a microcosm of a wider network. Each is distinctive. Most of them are very much from and of Newcastle; they literally could not have happened anywhere else. Yet virtually all of them are connected. They are part of global movements, networks, dialogues and markets (Westbury 2015, p. 155).

In this case we can see an emphasis on interconnected systems and networks of the type described by Castells (2000) and the diffuse nature of networked power that is typically seen in systems of the type described by Foucault (quoted in Jordan & Weedon 1995, pp. 479). These ideas de-emphasise the notion of hierarchies in favour of diffuse networks of power with nodes of varying influence who employ the power they have to succeed. Westbury goes on to, in an almost anti-Romantic point of view, echo the research literature on creativity, suggesting that:

Perhaps the most damaging myth of all is the idea that artists or creatives or whatever you want to call them are somehow special. That people who do things are some kind of 'other' force that butts up against the status quo with special insights and talents and visions. I don't actually think that's true. It is the very ordinariness of action and imagination that I find reassuring. It is the diversity of people and places it comes from that I find solace in. It is the realisation that the propensity for imagination and action is a force like any other. It responds to invitations and opportunities, to collaborations and connections, and often lies dormant within communities and individuals (Westbury 2015, p. 156).

Given this view of creativity, and its possible links to the research literature, it is now time to examine this evidence and try to understand the thinking on creativity that emanates from it.

2.7 Creativity

Keith Sawyer, author of *Explaining Creativity: The Science of Human Innovation* (2006), argues that rational explanations of creativity requires us 'to look critically at our own cultural assumptions about how creativity works, and scientific studies of creativity fail to support our most cherished beliefs about creativity' (2006, p. 33). Research in the broader interdisciplinary domain of creativity and cultural production, based primarily in psychology (e.g. Sternberg & Kaufman 2010), sociology (e.g. Alexander 2003), philosophy and literary theory (e.g. Pope 2005) and media, communication and cultural studies (e.g. Negus & Pickering 2004, McIntyre 2012), has steadily worked toward the idea that a confluence of multiple factors, including

biological, psychological, cultural and social factors, all need to be in place in order for creativity to occur.

Underpinning this research literature is the notion of creativity itself. It has had a differing history to that of the concept of innovation. However, perceptions of it appear to have recently arrived at the same basic conclusion that has been applied to innovation, that is, that it is systemic. To begin exploring these ideas we can see that:

European conceptions of creativity have changed over the centuries. And once you leave Europe, you'll find an even wider range of conceptions of creativity cross culturally...The scientific explanation of creativity has found that many of our beliefs about creativity are inaccurate or misleading. That's why I call them creativity myths (Weisberg 1986). These creativity myths are so widely believed that they sometimes seem obvious, common sense (Sawyer 2006, p. 18).

In the West (Niu & Sternberg 2006, pp. 18-38) creativity is commonly seen by many to emanate from a 'divine agent' (OED online) and it refers to an activity thought 'to bring into being, cause to exist; esp. to produce where nothing was before, "to form out of nothing"' (ibid). This biblical sense of creativity helped set the stage for inspirationist approaches to perceiving creativity. These were taken up by the Romantics who rapidly anthropocentrised the supposedly divine nature of creativity. This development can also be partly traced back to Kantian thought on aesthetics and further uses from there (Petrie 1991). They resulted in the idea that creative individuals possess a gift or talent that is beyond the grasp of mere mortals since 'according to the romantic, intuitive talent is innate, a gift that can be squandered but cannot be acquired – or taught' (Boden 2004, p. 15). Both positions, the inspirational and the romantic, lead eventually to the stereotypical view of the quasi-neurotic artist (Freud 1976). However, given the research into the phenomenon of genius and its relationship to creativity (e.g. Howe 1999, Weisberg 1993) these are conceptions of creative people, and from there creative activity, that are difficult to sustain (Gardner 1993). As Keith Sawyer (2006, 2011) suggests, and as was mentioned above, we need to 'look critically at our own cultural assumptions about how creativity works' (2006, p. 33). As Margaret Boden also asserts, the inspirational and romantic views common to the West:

... are believed by many to be literally true. But they are rarely critically examined. They are not theories, so much as myths: imaginative constructions, whose function is to express the values, assuage the fears, and endorse the practices of the community that celebrates them (2004, p. 14).

Working away from these romantic and inspirationist myths there have also been a number of levels and differentiations being applied to the perceived differences between 'ordinary' creativity and what is seen as 'extraordinary' creativity. Some of the terms used to account for these differences include: 'big "C" versus little c; paradigm shifting versus garden variety; eminent versus everyday' (Schiffer 1998, online).

Looking at the same set of differentiations, Margaret Boden applied a further set of names to the same phenomena. She called these 'P & H creativity'. For her P or psychological creativity is valuable if that person hasn't had that idea before. It is irrelevant to the individual if other people have had the idea and how many times they've had the idea. H or historical creativity, on the other hand, possesses value if it is both P creative and no-one in human history has ever had the idea before. Most importantly she states that 'there can be no psychological explanation of this historical category. But all H-creative ideas, by definition, are P-creative too' (Boden 1994, p. 77). In making these declarations Margaret Boden highlights the similarities that exist between all ways of being creative, the ordinary and the extraordinary. Furthermore, creativity

can be seen to be a contextually-dependent process. As Csikszentmihalyi argues, 'it is impossible to tell whether or not an object or an idea is creative by simply looking at it. Without historical context, one lacks the reference points necessary to determine if the product is in fact an adaptive innovation' (1988, p. 327).

While these are useful additions to our understanding, there is a further critical and related addition to the definition of creativity that must be accounted for. This is the notion of 'social validation' since acts of creativity, like acts of innovation, are thus only creative within a specific sociocultural framework. Morris Stein published an article called 'Creativity and Culture' in *The Journal of Psychology* in the early fifties. In this article he worked his way through a definition of creativity that was phrased as follows - 'The creative work is a novel work that is accepted as tenable or useful or satisfying by a group in some point in time' (Stein 1953, p. 311). In an echo of Rogers' definition of innovation cited above, this fundamental operation of value distinction within a society makes creativity itself culturally relative, 'since what is valued by one person or social group may or may not be valued - praised, preserved, promoted - by another' (Boden 1994, p. 77). These conceptions have thus moved quite some way from what Simonton calls 'psychologically reductionist' accounts.

Psychologists have tended to view creativity as an individual level phenomenon. That is, they have tended to concentrate on the cognitive processes, personality traits, and developmental antecedents associated with individual creators. This focus follows naturally from the very nature of psychology as a scientific enterprise dedicated to understanding individual mind and behaviour. Yet this tradition of 'psychological reductionism' has also inspired an antithetical conception of creativity as an exclusively societal-level event. In the extreme form, that is a complete 'sociocultural reductionism', the individual becomes a mere epiphenomenon without any causal significance whatsoever (Simonton, 2003, p. 304).

Looking across this research literature from psychology (for summaries see Sternberg 1999, Runco and Pritzker 1999, Kaufman and Sternberg 2010, Sawyer 2006 & 2011) we can see that the psychodynamic school, seen in works by Sigmund Freud and others (see Sternberg 1999), has centred its exploration of creativity on the tensions thought to exist between conscious and unconscious drives. These ideas led to a number of speculative and commercially successful applications of associated concepts of creativity based on the idea that 'creative' thinking is somehow different to 'ordinary' thinking. However, the validity of the ideas being sold, such as lateral thinking, divergent and convergent thinking, brainstorming and so on, has been subject to minimal empirical scrutiny (Sternberg 1999, pp. 5-6). The positivist turn in psychology then produced psychometric approaches which attempted to measure aspects of creativity quantitatively (Sawyer 2006). The problematics of these attempts led, in part, to the development of cognitive approaches to the study of creativity. This approach sought an explanation of this basic human phenomenon by grappling with the cognitive processes thought to underpin creativity (Zolberg 1990). Following this approach B.F. Skinner, and the group that became known as the behaviourists, saw creativity as a cognitive behaviour pattern largely unconscious to the individual (Bergquist 1999). Weisberg (1993), on the other hand, proposed and sought empirical evidence for the idea that ordinary cognitive processes applicable in everyday situations held the most appropriate solution to understanding creativity. The social-personality approaches that developed alongside the cognitive school suggested that personality variables, motivation, and the sociocultural environment a creative individual existed in were also sources of creativity (Amabile 1996, Sternberg 1999). Finally, neuropsychology, with an insistence on a monist version of the alleged brain/mind duality, began explaining aspects of creativity in terms of the relationships between neurochemical processes and certain cognitive

states. It focused some attention on the connection between the action of neurotransmitters, such as dopamine and serotonin, and how these are related to creative activity (e.g. Greenfield 2008).

On their own each of these schools of thought provides an explanation for creativity that is primarily focused on individual and isolated aspects of the phenomenon. In Simonton's terms, as suggested above, they are mostly psychologically reductionist (Simonton 2003). As such the individual factors they look at can be seen as necessary but most certainly not sufficient to explain creativity. To assist in bringing these areas of thought together Beth Hennessey and Teresa Amabile conducted a review of the psychological literature on creativity for the *Annual Review of Psychology* in 2010. They came to the conclusion that:

... more progress will be made when more researchers recognize that creativity arises through a system of interrelated forces operating at multiple levels, often requiring interdisciplinary investigation. Figure 1 presents a simplified schematic of the major levels at which these forces operate. The model is simplified because, as noted, existing research does cross levels. And, in fact, the 'whole' of the creative process must be viewed as much more than a simple sum of its parts (Hennessey & Amabile 2010, p. 571).

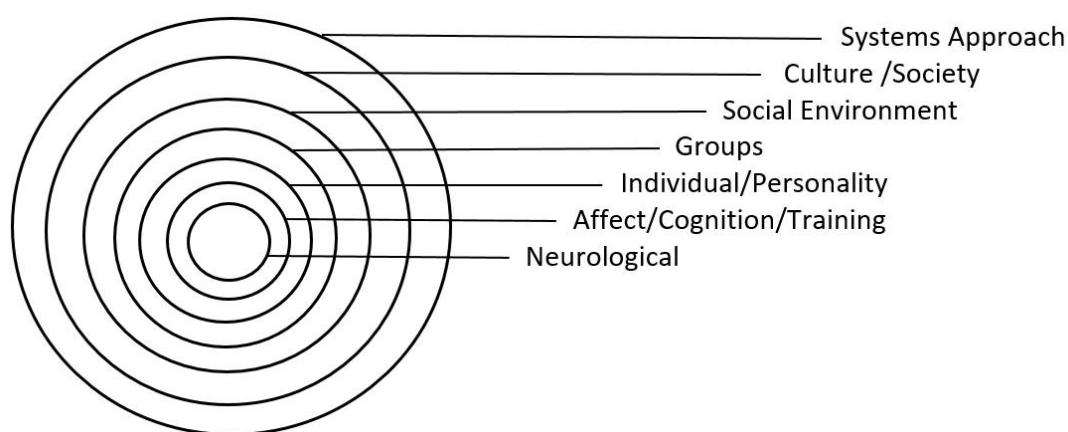


Figure 3 The increasingly large concentric circles in this simplified schematic represent the major levels at which creativity forces operate
(Original in Hennessey & Amabile 2010, p. 571)

Added to these appraisals it should be noted that psychology, as a discipline, tends to view creativity as an activity just as pertinent to science, business and engineering as it does to art and cultural production. Sociology, surprisingly, tends to see things more narrowly. This discipline has tended to focus its work into creativity on a subset, that is artistic activity, where there is also a tendency to conceive of art as a collective practice. For example, Howard Becker's (1982) development of the concept of 'art worlds' supplied a fresh counter to psychologically reductionist points of view. Becker refutes the notion that individuals alone are totally responsible for art works and supplies evidence to suggest that artistic output is dependent on a network of cooperating individuals. Similarly, Richard Peterson produced evidence that there are a series of what he calls 'constraints' that have an effect on the form and content of cultural production. For him these constraints are primarily social in character. He lists them as law, technology, industry structure, organisational structure, markets and occupational careers (Peterson 1985, p. 64). He argues that 'the nature and content of symbolic products are shaped by the social, legal and economic milieu in which they are created, edited, manufactured, marketed, purchased and evaluated' (ibid p. 46) in an increasingly complex network of influence (ibid p. 45). Janet Wolff (1981), in her work on the social production of

art, also contended that creative work must be seen as a collective enterprise. She argued, in an expanded precursor to Peterson, that individuals, as decisive agents, are highly dependent on the structures that both enable and constrain their activity. She asserts, in a manner similar to empirical sociologist Pierre Bourdieu, that ‘structures enable human practices, by providing the conditions of action and offering choices of action’ (1981, p. 24). Bourdieu (1977, 1990, 1993 & 1996), also principally concerned with the way agency and structure interact in the process of bringing new cultural products into being, presented a complex view of cultural production. It can be summarised in part as:

The interplay between a field of works which presents possibilities of action to an individual who possesses the necessary habitus, partially composed of personal levels of social, cultural, symbolic and economic capital that then inclines them to act and react within particular structured and dynamic spaces called fields. These fields are arenas of production and circulation of goods, ideas and knowledges. They are populated by other agents who compete using various levels of the forms of capital pertinent to that field. Bourdieu suggests that it is the interplay between these various spheres of cultural production that makes practice possible (McIntyre 2009, p. 161).

Bourdieu added to these ideas in his book *Rules of Art*, here paraphrased by Inglis and Hughson (2003):

For the most part, individuals are not fully aware that everything they do is expressive of the habitus they have been socialized into. Instead, the habitus disguises itself by making people see the world in common-sense way, and these ways do not allow actors to turn their critical reflection upon the habitus. People just experience things ‘as they are’.... This commonsensical view of the world is what Bourdieu (1977 p. 80, 164) calls *doxa*, the unexamined ways of acting that are at the root of each group’s mode of being in the world (Inglis and Hughson 2003, p. 167).

For Bourdieu ‘what people call “creation” is the conjunction of socially constituted habitus and a certain position (status), either already constituted or possible in the division of labour of cultural production’ (Bourdieu 1980, pp. 208-212 in Zolberg 1990, p. 125). He went further to state that:

The heritage accumulated by collective work presents itself to each agent as a space of possibles, that is, as an ensemble of probable *constraints* which are the condition and counterpart of a set of *possible uses*. Those who think in simple alternatives need to be reminded that in these matters absolute freedom, exalted by the defenders of creative spontaneity belongs only to the naïve and ignorant [*italics in original*] (Bourdieu 1992, p. 235).

By seeing creativity as an interactive and dynamic process rather than one based on a set of Romantic or inspirationist assumptions, Bourdieu provides a far less Ptolemaic, or person centred, and much more Copernican, or holistic and systemic, view of creativity than some of the earlier individually focused and psychologically reductionist accounts.

With these developments firmly in mind, and after scouring for commonalities in the literature on creativity (for reviews see Rothenberg & Hausman 1976, Zolberg 1990, Bergquist 1999, Sternberg 1999, Runco & Pritzker 1999, Alexander 2003, Negus & Pickering 2004, Pope 2005 and Sawyer 2011) one could argue that:

Creativity is a productive activity whereby objects, processes and ideas are generated from antecedent conditions through the agency of someone, whose knowledge to do so comes from somewhere and the resultant novel variation is seen as a valued addition to the store of knowledge in at least one social setting (McIntyre 2008, p. 1).

This definition, though more detailed, accords with what Beth Hennessy and Teresa Amabile identified in their review of the literature in 2010. As they state, most researchers around the world now ‘agree that creativity involves the development of a novel product, idea, or problem solution that is of value to the individual and/or the larger social group’ (2010, p. 572). Erica McWilliams from the Creative Industries Faculty at QUT and long-term contributor to the Centre for Creative Industries and Innovation (CCII) located there, summarises this movement of thought well. She states that ‘recent scholarship has sought to unhook creativity from “artiness”, individual genius and idiosyncrasy’ (McWilliams 2009, p. 282).

This second generation thinking on creativity, in research terms at least, has suggested that the phenomenon of creativity comes about through a multifaceted interactive process and is centred in the confluence of a number of factors (Amabile 1983 & 1996, Gruber 1988, and Sternberg & Lubart 1991; Weisberg 1993; Feldman, Csikszentmihalyi & Gardner 1994; Dacey & Lennon 1998; Simonton 2003; and Csikszentmihalyi 1988, 1997, 1999, 2015). Each of these so-called confluence approaches includes to some varying degree social, cultural and psychological factors which need to be in place for creativity to occur. Like the developments in the study of innovation there has been a steady progression toward the idea that creativity comes about through the actions of a multi-factorial system at work. For example, assertions have been made that creativity results from the dynamic operation of ‘a system composed of three elements: a culture that contains symbolic rules, a person who brings novelty into the domain, and a field of experts who recognize and validate the innovation’ (Csikszentmihalyi 1997, p. 6).

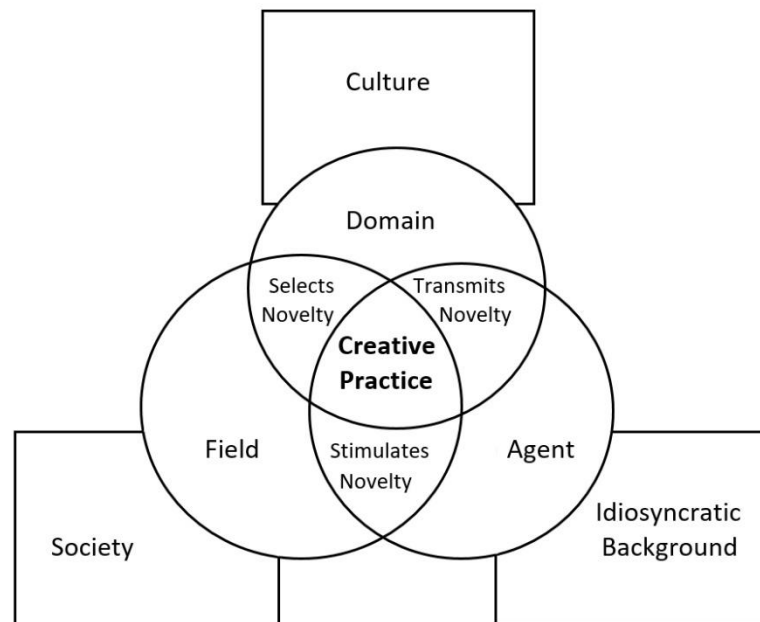


Figure 4 Systems Model of Creativity according to Kerrigan (2013, p. 114)

While this model typifies creativity as an emergent property of the interaction of an interconnected system at work, it is important to realise that each component in this non-linear system is integral to it with one being no more important or less necessary than the other. In short ‘each of the three main systems – person, field and domain – affects the others and is

affected by them in turn' (Csikszentmihalyi 1988, p. 329). Each component is a necessary factor in creativity but not sufficient, in and of itself, to produce novelty. It is, from this perspective, a creative system that produces novelty. As Beth Hennessy remarked in 2017 in the *Journal of Creative Behaviour*:

As early as the late 1960s, Barron was already writing about an 'ecology of creativity', a perspective operationalizing creativity as the confluence of social and psychological processes (Montuori & Donnelly, 2016). Csikszentmihalyi was also a pioneer in the effort to conceptualize and investigate creativity as the product of social and cultural influences as well as cognitive and psychological factors (Csikszentmihalyi, 1988) ...While psychologists have tended to view creative breakthroughs as stemming from the talents and efforts of idealized lone 'geniuses', creative behavior never occurs in isolation (see also Montuori & Purser, 1995). There have long been at least a few voices calling for the reconceptualization of creativity from a systems perspective. But in 2010 when we published our review, this perspective was largely overshadowed by a decontextualized, even reductionist, approach. Researchers and theorists were doing all that they could to break down questions of creativity into the absolutely smallest components they could control and measure. An exploration of the most recent literature reveals that this situation may, in fact, be changing. A growing number of publications are now reflecting a systems perspective ... Entire volumes of journals have recently been devoted to the interface between creativity and culture, with much of this work having been carried out in workplace settings (see, for example, *Management and Organizational Review* [2010], Vol. 6, Number 3). And McIntyre (2013) offers a comprehensive review of research and theorizing leading to an emerging view of creativity as a system in action. At long last, psychologists are beginning to apply a sociological perspective to the study of creativity; and they have also come to finally appreciate and benefit from the important work being done by sociologists (see Chan, 2011; Reuter, 2015) (Hennessey 2017, pp. 342-343).

Given this shift towards creative systems and interdisciplinary thinking, if, as has been argued above, innovation ecosystems are, logically, systems then what constitutes a system is also important to understand.

2.8 Systems

General systems thinking had discerned that there are 'systems of organized complexity wherever we look. Man [sic] is one such system, and so are his societies and his environment' (Laszlo 1972, p. 12). But there is a caveat. As Capra and Luisi explain:

Human social systems exist not only in the physical domain but also in a symbolic social domain. While behaviour in the physical domain is governed by the 'laws of nature' behaviour in the social domain is governed by rules generated by the social system itself (Capra & Luisi 2014, pp. 136-137).

In this case we can't say with confidence that human systems operate by a predictable set of universally applicable formal laws as the material world has appeared to do. This of course includes creative systems and their counterpart, so called innovation ecosystems or ecologies. Since we can say these are largely self-referential systems we can also assume they do behave as most other systems would. As in all systems it is increasingly difficult to understand complex entities, like the social world, just by considering the individual parts or even by assuming one perspective such as a structuralist account or a phenomenological explanation. As Bourdieu

(1993) has suggested, a meaningful grasp of reality needs to consider the complex relationships that exist between objective structures and subjective experiences of individual agents. We can no longer conceive of things as isolated atomistic events (Laszlo 1972, p. 13).

While social systems exist in real time and real space they are premised on the experiences of the conceptual and the symbolic. Identities are built around sharing the ideas embedded in the symbolic domain of culture and communication and this identification creates the boundaries of the social system while allowing the system to organise itself around those shared cultural and social identities. Social systems are thus autopoietic or self-organised culturally as networks of communication (Luhmann 1990). Remembering Raymond Williams' formulation (1981) from above, that culture equals a whole way of life plus the intellectual activities and artefacts that typify particular societies, we can see that:

Culture arises from a complex, highly nonlinear dynamic. It is created by a social network involving multiple feedback loops through which values, beliefs and rules of conduct are continually communicated, modified, and sustained. It emerges from a network of communication among individuals; and as it emerges, it produces constraints on their actions. In other words, the social structures, or rules of behaviour, that constrain the actions of individuals are produced and continually reinforced by their own network of communication. The social network also produces a shared body of knowledge – including information, ideas and skills – that shapes the culture's distinctive way of life in addition to its values and beliefs. Moreover, the culture's values and beliefs affect its body of knowledge (Capra & Luisi 2014, p. 310).

In summing up these ideas Keith Sawyer pointed out that 'many social systems are complex systems that share many systemic properties with other complex systems, including the human mind' (2010, p. 368). Furthermore, one cannot fully understand complex entities by simply considering their individual parts. An adequate grasp of reality must also include relationships and situations, not just atomistic details and events (ibid, p. 13). All of this raises the possibility that complex social systems generate novelty (cf. the concept of 'distributed creativity' (Sawyer & De Zutter, 2009). If so, a complete scientific explanation of creativity would have to include detailed accounts, at one and the same time, of both psychological and sociocultural mechanisms (Sawyer 2010, p. 368).

This conclusion, one that reinforces the idea that creativity results from a systemic process in action, is very similar to the point that studies of innovation arrived at, as discussed above, where the idea of innovation ecosystems now tend to dominate. This situation necessarily draws our attention to the relationship between the notions of 'innovation' and 'creativity'.

2.9 The Relationship between Innovation and Creativity

As Nemiro asserts 'creativity and innovation, for the most part, have been characterized as two separate processes' (2004, p. 14). For example, Rosenfeld and Servo declare that 'they are different. Creativity refers to the generation of novel ideas – innovation to making money with them. Creativity is the starting point for innovation' (1991, p. 29). This way of thinking has become commonplace now, especially within the business community. For example, in 2013 Drew Marshall wrote in the *Business Insider Australia* that 'creativity is about unleashing the potential of the mind to conceive new ideas' while 'innovation is about introducing change into relatively stable systems. It's also concerned with the work required to make an idea viable' (Marshall 2013, online). However, there are problems with this way of thinking. For example, if 'creativity involves the development of a novel product, idea, or problem solution that is of

value to the individual and/or the larger social group' as most scholars working in this area around the world now agree (Hennessey & Amabile 2010, p. 572), then it would be logically impossible for creativity to be solely 'having an idea'. While the simplistic idea that creativity is having an idea and innovation is carrying it out, this understanding takes little to no account of the copious research into creativity, as outlined briefly above. Nemiro suggests that creativity and innovation 'may be more closely related than their apparent separation may imply' (2004, p. 14).

What one can say with some surety, however, is that both sets of ideas have moved steadily towards the notion of convergence, the confluence of multiple sets of factors in operation. Both creativity and innovation have initially been described as personality based and both have had these ideas quickly refuted. Both bodies of literature have concerned themselves with the generation of ideas, both have concerned themselves with products and processes, both have described this phenomena as an activity or a process of doing or bringing into being some idea, process or product and both have eventually been described as dynamic, interactive and systemic. It may be that, as Jacques and Ryan suggested some time ago, that creativity and innovation mean primarily the same thing (1978, pp. 16-25). The similarities of conception are strikingly obvious. Even the definitions that have been arrived at are strikingly similar. For example, Rogers attests, as stated above, that 'innovation is an idea, practice, or object that is perceived as new by an individual or other unit of adoption' (Rogers 1983, p. 11) while, as Hennessey and Amabile state and has been reiterated from above, most researchers around the world now 'agree that creativity involves the development of a novel product, idea, or problem solution that is of value to the individual and/or the larger social group' (2010, p. 572).

And yet the distinctions persist. Where do these divisions come from? One answer may be found in history where, as Godin suggests, 'over the twentieth century engineers, industrialists and theorists appropriated the word innovation' (2015, pp. 198-199). This position has been building for some time. The representation of innovation which 'developed over the last 65 years focuses on technological goods, firms and markets' (Godin 2015, p. 199) as though the word innovation has no other application. Similarly, the term creativity has been appropriated by the art community as though it has no other application other than for art and culture. As one example of this discursive split we can examine the claim that 'what the arts, social sciences and humanities call creativity, science and technology calls invention or discovery' (PMSEIC 2006, p. 6).

While many from the business community see creativity as a precursor to innovation it can also be seen that innovation can just as readily be seen as a component part of creativity. As Negus and Pickering indicate in their book *Communication, Creativity and Cultural Value* (2004), both convention and tradition are not oppositional to creativity nor are they unrelated to innovation:

It is a common misconception to regard innovation and traditions as diametrically opposed to each other. When innovation is valued as a defining characteristic of the creative process, tradition often becomes set up against it as inevitably static and unchanging. In this view tradition inhibits and is seen as an impediment to be overcome. We want to challenge this notion of tradition. As with convention in its primary negative sense, tradition shouldn't be taken as the antithesis of innovation. Rather than seeing them as deeply divided, we want to consider tradition and innovative forms and practices as informing and supporting each other. It is only by thinking about their interrelationship that we can understand processes of creativity and cultural change (Negus & Pickering 2004, p. 91).

What is significant about Negus and Pickering's claim is that they see innovation, coupled with tradition and convention, as a contributor to creative action. 'New' is meaningful only in reference to the 'old'. Original thought does not exist in a vacuum. It must operate on a set of already existing objects, rules, representations or notions' (Csikszentmihalyi 1999, p. 315). This position doesn't simply imply an either-or situation, that is, that either innovation is a precursor to creativity or that creativity is a precursor to innovation, but that, once again, we are observing a complex, complementary and dynamic process, or system, at work.

To pursue this idea further we now see two descriptive categories of industries in operation according to whether they are seen as 'creative' industries or they are seen as 'innovation' industries. As an example, the QUT Creative Industries Faculty, which until recently housed the author of the influential book *Creative Industries* (2005), declares that creative industries include architecture, design and visual arts, music and performing arts, film, radio and television, writing and publishing, advertising and marketing, and creative software applications. The innovation industries, on the other hand, have been designated by policy processes. The Department of Innovation, Industry, Science and Research (DIISR 2011, online), as it was then named, lists innovation industries as the aerospace, automotive, biotechnology, books and printing, building and construction, chemicals and plastics, defence, future manufacturing, information and communications technologies (ICT), manufacturing, marine, nanotechnology, pharmaceuticals and health technologies, pulp and paper, space, steel, textiles, clothing and footwear (TCF) (DIISR 2011, online). This Department operated programs to improve the efficiency and competitiveness of Australian industry and sought to build an innovation culture within Australia. Their work has been taken up again under the banner of the National Innovation and Science Agenda (NISA). But before we move on to looking at specific policies it may be best to briefly examine the contexts these policies came into being within.

2.10 The Contexts Creative Industries Exist Within

Dayan Thussu gave a succinct account of many of the recent contextual events that have provided the setting for the operation of creative industries:

In the 1980s and 1990s fundamental ideological changes in the global political arena led to the creation of pro-market international trade regimes which had a huge impact on international communication. The processes of deregulation and privatization in the communication and media industries combined with new digital information and communication technologies to enable a quantum leap in international communication, illustrated most vividly in the satellite industry. The resulting globalization of telecommunications has revolutionized international communication, as the convergence of the telecommunications, computer and media industries have ensured that much information passes through a digitally linked globe today more than ever before in human history (Thussu 2000, p. 82).

As Handke and Towse explain in their book *Handbook on the Digital Creative Economy* (2013) the 'process of digitization is already having a considerable impact on the creative industries ... digitization transforms the way creative works are generated, disseminated and used. Digitization has also enabled the development of new types of creative goods and services' (Handke & Towse 2013, p. 1). Dayan Thussu contends that with the advent of digital distribution, a wide variety of revenue earning opportunities became available 'as the media and telecommunications sectors intersect globally. The expanding bandwidth, coupled with the rapid globalization of fixed and mobile networks, as well as the digitization of content and

growing use of personal computers worldwide' (2006, p. 99) has helped a multitude of businesses capitalise on emerging markets and also experiment with new commercial products and business models. At the same time globalisation, digitisation and the uptake of neoliberal political and economic frameworks, all operating hand in glove, have not only helped produce economic and financial change but also political, social, cultural, ethical, legal and environmental change on a scale not been seen since the industrial revolution. In a recent edition of *Communication Research and Practice* (2015) Servaes writes that:

The 1990s, with the fall of the Berlin Wall and the explosive growth of the World Wide Web as preludes, have been marked by the collapse of the physical, virtual and institutional barriers that have kept people apart. The ever closer trade relationships among nation-states, the growing power of transnational corporations, information and communication technologies (ICTs), Internet, and discussions on e-governance, the emergence of global health and environmental issues, and a common style of consumption of material and cultural products have all helped to bring about what is described as 'globalization' of our world or the world becoming a 'global village.' However, globalization is not a product of the 1990s, or even the twentieth century, as many historians will explain (see, for instance, Hopkins, 2002). Therefore, Held, McGrew, Goldblatt, and Perraton (1999, p. 414) conclude that 'globalization is neither a wholly novel, nor primarily modern, social phenomenon. Its form has changed over time and across the key domains of human interaction, from the political to the ecological (Servaes 2015, p. 242).

This idea is reinforced by Timothy Havens and Amanda Lotz in their book *Understanding Media Industries* (2016). They suggest that globalisation 'involves a variety of complex and sometimes contradictory social and economic developments that have been taking place for centuries' (2016, p. 221). However, they observe that given the fundamentally global character of the Internet the practices and forms of globalisation 'may change profoundly as digitization continues to change the media industries' (ibid). And it is not just the media industries that are being subject to disruption in this process. On the Der Spiegel International website Schulz asserts that things are changing and changing fast:

The technological advances made in the last decade have been breathtaking, but it is likely still just the beginning ... We are witnessing nothing less than a societal transformation that ultimately nobody will be able to avoid. It is the kind of sea change that can only be compared with 19th century industrialization, but it is happening much faster this time. Just as the change from hand work to mass production dramatically changed our society over 100 years ago, the digital revolution isn't just altering specific sectors of the economy, it is changing the way we think and live (Schulz 2015, online).

As a recent Four Corners current affairs documentary program called 'Future Proof' noted, 'there are startling and credible predictions that more than five million Australian jobs will simply disappear in the next 15 years as a result of technology. That's 40% of the jobs that exist in Australia today' (Thompson et al. 2016, online). If this is true there will be a direct effect on all industries including those in health, education, agriculture, manufacturing, mining and certainly those in the creative industries. Prior to this in 2012 Deloitte, one of the big four global accounting firms, had produced a report that projected the degree of what has been called 'digital disruption' across eighteen major industries. Their following 2015 report 'Harnessing the 'Bang': Stories from the Digital Frontline' (2015) states that they did not anticipate how much their original analysis would reverberate globally. In that report they specifically warned

that ‘two thirds of the Australian economy, both public and private, would experience significant digital disruption within the next five years. The stark reality is that it has been more like five months for 65% of the Australian economy – including Deloitte’s own professional services sector – to realise we are in the cross hairs of digital disruption’ (2015).

There are many examples of disruption in the creative industries, following the early bellwether example of the music industry, and the digital disruption wrought there as automation through digitisation sweeps through most national economies. Many of these disruptive technological changes have emanated from Silicon Valley where the CEOs of companies such as Google, Facebook, Apple, Airbnb and Uber have been called ‘the new masters of the universe’ (Shulz 2015, online). As Shulz writes ‘their goal is never a niche market; it’s always the entire world. But far from being driven by delusional fantasies, their objectives are often realistic, made possible by a potent cocktail unique in economic history: globalization combined with digitalization’ (2015, online). While they share a love of money with older capitalists there is an identifiably fundamental difference to their predecessors. As Schulz argues they want to determine not only what is consumed but how it should be consumed and how we should live as a result. ‘They aren’t stumbling haphazardly into the future, rather they are ideologues with a clear agenda’ (2015 online). The beliefs that hold Silicon Valley together run much deeper than the values that drive Wall Street. Silicon Valley wants to reshape the world and they believe ‘that technology can change humanity for the better’ (ibid). But they eschew the idea that they should be bound by any external interference or regulation put in place by policy makers for whom they have little use. State intervention, to them, is an anachronism:

Their message seems to be: If societal values such as privacy and data protection stand in the way, then we simply have to develop new values. They see the roots of their technological crusade in the counterculture of the 1960s, the era that formed Apple co-founder Steve Jobs. But their worldview is a libertarian one, in the tradition of radical thinkers such as Noam Chomsky, Ayn Rand and Friedrich Hayek (Schulz 2015 online).

To understand the ideas driving many of the CEOs from Silicon Valley we need to look closely at the ideology that underpins the control these new capitalists hope to exert. In many ways it is a local variant of what has become known as ‘neoliberalism’. As Rosamund Davies and Gauti Sigthorsson write in *Introducing the Creative Industries: From Theory to Practise* (2013), ‘the influence of neoliberalism on government policy [was an] important factor in changing organisational structures, mainly through the privatization of state owned institutions and businesses and the relaxation of state-control through deregulation’ (2013, p. 47). This had the effect of hollowing out mid-sized companies and left an ‘ecology’ of multinational corporations engaged in vertical disintegration outsourcing a lot of work to SMEs, a highly casualised workforce or an increasing pool of contractors and freelancers (Hesmondhalgh & Baker 2011). For the creative industries this situation has given rise to ‘a handful of high profile global players, stars and multinational companies, dependent on vast shoals of project-based micro enterprises’ (Evans quoted in Davies & Sigthorsson 2013, p. 49). This structural phenomenon has been dubbed the whales and plankton ecology of the creative industries (ibid).

During this period the neoliberals discovered and redefined the work of Joseph Schumpeter (Plehwe & Mills 2012, online). For example:

Herbert Giersch, Germany’s eminent neoliberal economist and president of the Mont Pelerin Society, declared the new age of Schumpeter to replace the age of Keynes. Schumpeter is of course no friend of neoliberalism, and Giersch had to play an intellectual trick: he nominally adopted Schumpeter’s concept of

entrepreneurship and dynamism whilst divorcing it from Schumpeter's commitment to macroeconomic innovation (Plehwe & Mills 2012, online).

Schumpeter had argued that innovation and change comes from entrepreneurs, initially focusing on what he identified as wild spirited individuals, agreeing with a widespread Romantic understanding of how creativity and innovation were thought to come about. However, Schumpeter, based on the evidence he was seeing, quickly accommodated himself to the idea that structural entities such as the institutions of big business were possibly the major drivers of innovation, having the necessary capital to do so. In this regard, William Janeway, a Cambridge-educated, venture capitalist and academic, argues in *Doing Capitalism in the Innovation Economy* (2012) that there is something more going on which is fundamentally antithetical to the neoliberal project where 'small' government is supposedly optimal for private enterprise. For him 'government investment builds the platform on which venture capitalists and entrepreneurs can 'dance'' (Parramore 2012, online). Janeway insists that business innovation, speculative capital and the action of the state, contrary to neoliberal ideas, are locked in a necessary and ongoing relationship, which he calls a three-player game (2012, p. 273). It is not just private enterprise operating in a completely unfettered free market that delivers innovation. This idea is reinforced in the work of Justman (2013) and that being presented by increasingly influential economist Mariana Mazzucato.

Mazzucato is Professor in the Economics of Innovation at the Science Policy Research Unit (SPRU) of the University of Sussex. In her book, *The Entrepreneurial State: Debunking Public vs. Private Sector Myths* (2014), Mazzucato uses empirical evidence to demonstrate that private enterprise very much depends on the state to make bold, high-risk investments in innovative processes and technologies before private sector venture capitalists and entrepreneurs take steps to capitalise on what the state has provided for them. Carlota Perez, another economist seeking the middle ground between Schumpeter and Keynes, asserts in the foreword to Mazzucato's book, that 'debunking myths is never easy. Swimming against the tide requires determination, a serious commitment to the truth and massive evidence' (2014, p. xxi). As just one example of what Perez was pointing to about Mazzucato's work is the level of detail Mazzucato produced about the work of Steve Jobs and Steve Wozniak. These founders of the cornerstone technology that underpins much work in the creative industries, the Apple computer, are often cited as great free-spirited entrepreneurs who manifest the ideals of the independent innovator. But the story that they had access to other than public funds (which helped them start their company), and the fact they used the 'technologies that resulted from major government research programmes, military initiatives, public procurement contracts, or that were developed by public research institutions, all backed by state or federal dollars' (Mazzucato 2014, p 93) is seldom built into their myth. These structures had not constrained their innovations, as neoliberalism predicted, but had, as Janet Wolff, Anthony Giddens and Pierre Bourdieu variously asserted, actually enabled them. However, as David Harvey has suggested in his book *A Brief History of Neoliberalism* (2007), as a conceptual apparatus neoliberalism, by taking the best that liberalism had to offer in terms of individual liberty but narrowing its focus down to 'the market', has become 'so embedded in common sense as to be taken for granted and not open to question' (2007, p. 5).

It is against this political, technological and economic context, related as it is to globalisation and digitisation, that the idea of the creative industries has become increasingly important. The changes these contextual factors have wrought are of deep concern to many who depend on the creative industries to mediate their world through a variety of audio, visual and text based cultural forms. In essence these industries exist in a set of structural conditions that include international legal frameworks, industrial settings, trade agreements, public and private sector investment, including the second and third legs of the triple bottom line (Elkington 1999), as

well as a veritable host of sociocultural, environmental, economic, political and technological entanglements. Given this background we have enough information on hand to assess the research literature on the creative industries themselves and make some comparison of this with the research into creativity and innovation described above. This will help us see, as suggested above, that there are problems with the standard DCMS definition of the creative industries.

2.11 Creativity and the Creative Industries

Creative industries are taken to be, certainly by the Department of Culture, Media and Sport in the United Kingdom, ‘those industries which have their origin in individual creativity, skill and talent which have a potential for job and wealth creation through the generation and exploitation of intellectual property’ (DCMS, 2001). As with the idea of the cultural industries there are evident problems with this definition but, armed with all of the foregoing literature, we can now make some comparisons of this body of research with the literature coming from creative industries. In doing so we can not only observe the correspondences and disjunctures in the movements of thought to be found there, but also see why the DCMS definition is problematic. These are the questions we are trying to answer in this section: Are the narrative trajectories or the basic movements of thought about creativity, similar for those researching creativity in comparison with those investigating creative industries? How do those researching the creative industries understand creativity?

What is first revealed in answering these questions is that the term ‘creativity’ appears to have been conceived differently, at different times, by the various researchers who pursue the study of creative, cultural or copyright industries. For example, David Hesmondhalgh, who favours the term cultural industries, has argued persuasively that ‘if I am right in focusing attention on the role of the cultural industries as systems for the management of symbolic creativity then a key issue here will be the relationship between symbol creators and cultural industry organisations’ (2011, p. 69). In concluding his exceptional work, largely from a political economist’s perspective, Hesmondhalgh argues, via Bill Ryan, that ‘if the “fundamentally irrational” process of symbolic creativity “conflicts with the calculating, accumulative logic of modern capitalism” (Ryan 1992, p. 104), this helps to explain the very tangled and contradictory dynamics we have observed’ (Hesmondhalgh 2011, p. 306) in the cultural industries. However, Ryan in his book *Making Capital from Culture* (1992) characterised creativity as a process that ‘presumes the free flight of the imagination unbounded by non-artistic considerations’ (1992, p. 154). If creativity is *not* fundamentally irrational, as many of those researching creativity now accept (e.g. Alexander 2003, Pope 2005, Negus & Pickering 2004, Sternberg & Kaufman 2010, Sawyer 2011, McIntyre 2012), then this creates a problem for Ryan’s overall critique. Despite this, it is clear that ‘however dubious the romantic conceptions of opposing creativity or art to commerce may be, it has had the long term effect of generating very important tensions between creativity and commerce, which are vital to understanding the cultural industries’ (Hesmondhalgh 2011, p. 20). He justifiably reinforces this idea by also stating that ‘it is impossible to understand the distinctive nature of cultural production without an understanding of the commerce/creativity dialectic’ (2011, pp. 20-21). This is of course pragmatically important as this dialectic is often treated by those working within many forms of cultural production as though it was an absolute and concrete entity, rather than a discursive construct, as Hesmondhalgh points out. It therefore needs to be taken seriously. As Thomas’ dictum states, ‘if men [sic] define situations as real, they are real in their consequences’ (Thomas & Thomas 1928, p. 572). Once a person takes on the belief and acts as though it is in effect real then ‘gradually a whole life policy and the personality of the individual himself [sic]’ (Thomas, 1967, p. 42) becomes premised on the belief system and they act according to that belief system.

Despite these critiques of the doxa of Romantic art, and the distinctions between art and commerce that reside within them, they appear to have been also accepted uncritically by Richard Caves. In his book, *Creative Industries: Contracts between Art and Commerce* (2000) Caves tends to see creativity through the narrow prism of artistic activity. However, as we have seen from the above, much of the research literature on creativity does recognise that creativity is a basic human attribute just as applicable to science, engineering and mathematics as it is to painting, sculpture, movie-making and music production (e.g. Florida 2002; Weisberg 2006; Simonton 2004). This is what Richard Florida (2002) was pointing to when he saw that the future of cities around the planet depended on their capacity to attract the creative people necessary to sustain and motivate economic activity. He implicitly recognised that creativity is not simply the same thing as artistic activity since creative industries depend on all sorts of creative activity in order to function. Stuart Cunningham (2012) hints at this problematic in his elucidation of Howkins' broad definition of creative industries. The problem in defining creativity as simply the function of arts and culture and excluding the creative aspects of other activities such as information technology, engineering, business or science, perpetuates, to use Cunningham's phrase, 'the arts-science divide that has bedevilled the west' (2012, p. 208). This is a divide that is premised on the binaries developed by the revolution in thinking that was Romanticism and, as Peter Watson suggested above, these 'constitute the modern incoherence' (2005, p. 610). This incoherence is not part of Eastern thinking where they appear not to be 'hung up on associated artistic bohemian values' (O'Conner & Gu Xin 2012, p. 220). It is, instead, a belief that is largely peculiar to the West and, one could claim therefore, not a universal way to understand the phenomenon of creativity (Niu and Sternberg, 2006, pp. 18-38). As Eisenberger and Shannock (2003) argue in their article 'Rewards, Intrinsic Motivation, and Creativity: A Case Study of Conceptual and Methodological Isolation', published in the *Creativity Research Journal* (2003), 'Romanticism's emphasis on self-determination has had a strong influence on Western culture's view of intrinsic motivation and creativity' (2003, p. 122). The problem here is that, to repeat it from above, a rational explanation of creativity 'requires us to look critically at our own cultural assumptions about how creativity works' (Sawyer 2006, p. 33) and furthermore, research studies into this phenomenon 'fail to support our most cherished beliefs about creativity' (ibid.).

Terry Flew, in his book *The Creative Industries: Culture and Policy* (2012, pp. 102-103), presents an overview of the origin of creative industries' policy, the models that have been employed to illustrate it, the changes in terminology, the nature of creative work, how the market for creative industries operates, the effect globalisation has on cities and the creative spaces that exist there, and what there is of public policy focused at these industries. Importantly for us his book also very briefly outlines some of the various assumptions made about creativity. He explores the work of Raymond Williams (1958) and the work of Davis and Scase (2000). The latter sees the creative process as having three important characteristics, that is, autonomy, non-conformity and indeterminacy (in Flew 2012, p. 103). However, the idea of autonomy appears to be one aligned with a desire for an absence of constraint (Hume 1952) and, if so, is linked to the foundational characteristics of what Mario Praz et al. (1970) and Duncan Petrie (1991) call the Romantic agony. Davis and Scase appear to have made the same cultural assumptions as those Sawyer points out above. The evidence suggests that creation, even of the paradigm shifting sort, is reliant on a certain amount of conformity as it is 'is usually less radical a departure from the existing framework than we tend to believe' (Bailin 1988, p. 89). Sharon Bailin asserts:

There is not a real discontinuity between achieving highly within the rules of a discipline and achieving highly when it entails going beyond or changing some rules. The latter is, rather, an extension of the former. It would be incorrect to

view any discipline or creative activity as taking place within rigid boundaries and being totally delimited and defined by rules. Instead, the possibilities for what can be achieved are really open-ended. Furthermore, one never breaks down all the rules, since to do so would be to abandon the discipline (1988, p. 96).

John Hartley, editor of the influential compendium *Creative Industries* (2005) and for many years one of the principal researchers at the ARC Centre of Excellence for Creative Industries and Innovation at the Queensland University of Technology (QUT) has more recently advocated for a general paradigm shift in thinking about creativity. He asserts that the objective now is to 'understand creative innovation as a general cultural attribute rather than one restricted only to accredited experts such as artists, and thus to theorize creativity as a form of emergence for dynamic systems' (Hartley 2012, p. 199). This shift in thinking certainly parallels the development in the more general research literature on creativity, summarised briefly above. It also parallels the conclusion coming from much of the specific research literature on creativity within psychology (Hennessy and Amabile 2010). Hennessey and Amabile claim that more researchers in psychology are beginning to recognise 'that creativity arises through a system of interrelated forces operating at multiple levels, often requiring interdisciplinary investigation ... in fact, the "whole" of the creative process must be viewed as much more than a simple sum of its parts' (2010, p. 571).

In tracing this shift in thinking about creativity, Brian Moeran and Ana Alacovska, the editors of *Creative Industries: Critical Readings Vols 1-4* (2012), which is a collection of much of the important writing on the creative industries, placed a set of varied entries about the concept of creativity in their compendium. These entries parallel some of the developments in thinking from the research literature on creativity mentioned above. Leaving aside the rhetoric of the fourth entry, the first that concerns us here, from Olsen, relies on seeing creativity as primarily person centred and cognitive, the second, from Negus and Pickering, moves beyond this to question many of the cultural assumptions that underpin thinking about creativity in the West, and the third, from Peter Tschmuck, author of *Creativity and Innovation in the Music Industry*, accepts that creativity is a systemic process. Confluence models of creativity start to appear in the narrative of Hartley et al. The authors declare, citing Mockro and Csikszentmihalyi, that:

The key point to note therefore is that creativity is part of a complex dynamic system of feedback, one in which novel ideas and acts may result in creativity – but only in the context of an interaction with a symbolic system inherited from previous generations and with a social system qualified to evaluate and accept novelty (Hartley et al. 2013, p. 67).

Then the authors mention one of the more interesting ideas about western understandings of creativity. While there is an emphasis on innovation, newness, originality or most often novelty in many common western perceptions of creativity (Niu and Sternberg 2006), this cultural assumption, what Hartley et al. argue is primarily derived from an ideological base, neglects the fact that tradition and convention are just as essential to creativity as novelty is. As Negus and Pickering have asserted, creativity 'builds on one or more existing cultural traditions ... In this sense creative talent requires a tradition so that it can learn how to go further within it or beyond it' (2004, p. 91). For Robert Weisberg, one of the central protagonists in many of the debates on creativity that occur within psychology, 'true originality evolves as the individual goes beyond what others had done before' (1988, p. 173). If this is the case, as Bailin (1988), Weisberg (1988) and Negus and Pickering (2004) have all argued, 'commitment, training, discipline and access to the traditions and conventions of the domain of knowledge are just as critical to creativity as rule-breaking and unconventional behaviour' (McIntyre 2011, p. 246).

Working further into these entries in *Key Concepts in Creative Industries* (2013, p. 65-69) Hartley et al. then highlight another of the debates that have circulated in the literature, particularly that coming from sociology. They present a seeming paradox suggesting that ‘much value creation in the creative industries is due to “mundane” or “humdrum” labour, the work of accountants, lawyers and a range of technical staff located on the boundary where commerce meets art’ (Hartley et al. 2013, p. 68). Attributing creativity only to those things that are done by those whose work is designated as a core activity, as opposed to a non-core activity done by humdrum or mundane workers, as Becker (1982) clearly points out, is problematic. The temptation is to put the core activity at the centre of creative action. But once we move past having individual creators at the centre of creative action the supposed paradox ceases to be a paradox. To accomplish this one must accept the idea of creativity as an emergent property of a system at work. A system produces creativity, not individuals alone, and that system has many causal factors involved including a field of active contributors, some of whom would be seen in the earlier discourse as merely humdrum workers. This necessary shift in thinking would go some way to resolving the issues raised by authors such as Dawson and Holmes when they argue in their book *Working in the Global Film and Television Industries: Creativity, Systems, Space, Patronage* (2012), in a manner similar to Howard Becker (1982), that:

The practice of drawing sharp distinctions between above-the-line and below-the-line workers needs to be interrogated and that we need other ways to understand creativity in an industry with a complex social division of labour involving large numbers of people working cooperatively (2012, p. 14).

As they conclude, ‘creativity, then, is not a quality possessed by individuals but a characteristic determined by the social nature of production’ (2012, p. 15). One may not necessarily agree with their use of the word ‘determined’ however. As the sociologists Pierre Bourdieu (1996) and Janet Wolff (1982) have at various times asserted, creativity is not some metaphysical process that operates beyond the action of external conditions but is deeply entwined with the structures it emerges from. As such creativity is circumscribed, not determined, by those structures which provide the conditions for its possible emergence. If this is the case it is also misleading to only call these structural factors ‘constraints’ (e.g. Peterson 1982) since they do both; they enable and constrain at one and the same time. They provide the conditions which give rise to the possibility of action, the decision-making and choice-making that is the hallmark of creativity.

2.12 The Creative Industries

With the above as background we can now ask: what is the problem with the DCMS definition of the creative industries? To familiarise ourselves with that definition again, Stuart Cunningham, the Director of the ARC Centre of Excellence for Creative Industries and Innovation at the Queensland University of Technology (QUT) states that the most common definition used to identify creative industries includes ‘those industries which have their origin in individual creativity, skill and talent which have a potential for job and wealth creation through the generation and exploitation of intellectual property’ (2011, p. 1). Since the term and this definition primarily arose out of a policy desire (Hesmondhalgh 2007; O’Connor 2012) it has come to represent a ‘seemingly heterogeneous set of industries possessing an underlying commonality around creativity as a primary driver’ (Flew 2012, p. 83). To put the problem simply, if creativity is not solely artistic activity, which is demonstrably true from a research point of view, then we can’t say creativity is a distinguishing factor of the creative industries since *all* industries are, by definition, creative. *All* industries have their origins in some form of creativity, skill and talent and *all* are engaged in the pursuit of wealth creation. However not all

are doing this via the exploitation of intellectual property. But here resides another problem; the notion of intellectual property does not just refer to copyright but also to patents. Many industries have built their wealth creation on patents but do not reside within our common-sense understanding of creative industries. Those industries built on patents include the pharmaceutical industries, biotechnology industries, the electronics industry, financial services in their use of business methods patents, and petroleum and refining industries, to name just a few. Notwithstanding John Howkins' claim in *Creative Economy* (2001) that many of these must be included, none of these industries could be seen, from a 'common sense' framework, as 'creative' industries. The DCMS definition is therefore far too loose to suffice. So how do we move closer to delineating the creative industries?

Davies and Sigthorsson write in *Introducing the Creative Industries: From Theory to Practise* (2013) that the notion of the 'creative industries' operates as an umbrella term that covers a wide set of sectors which are all connected by three defining features. Firstly, they 'all require some input of *human creativity*'; second, they are *vehicles for symbolic messages*, that is, they are carriers of *meaning*; and third, they contain, at least potentially, some *intellectual property* that belongs to an individual or group' [italics in original] (2013, p. 1). Points one and three are problematic, as discussed immediately above, but it is the second of these features that is most significant. Symbolic creativity is of a different order to other forms of creativity. Not all industries have as their primary function the task of intentionally generating meaning and for Davies and Sigthorsson 'a tremendous range of economic activity arises from the creation of *pleasure and meaning*' [italics in original] (2013, p. 1). David Hesmondhalgh, a strident critic of the term creative industries, also prefers the term 'symbolic creativity' using it to move well beyond a Romantic emphasis on artistic activity and all that entails. He suggests that:

The invention and/or performance of stories, songs, images, poems, jokes and so on, in no matter what technological form, involves a particular type of creativity – the manipulation of symbols for the purposes of entertainment, information and perhaps even enlightenment (2013, p. 4).

The idea that creative industries are engaged in the creation of symbolic meaning attempts to give some solidity to the production, management, circulation and selling of, as Raymond Williams puts it, signifying practices. There are a number of creative sectors that do this.

The UK Creative Industries Mapping Document 2001 (Varbanova 2001) lists 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. On the other hand, a recent report to the NSW Department of State and Regional Development 'breaks down the creative industry into the following sectors: advertising, architecture, design, visual arts, music, performing arts, publishing, film, television, radio, electronic games' (NSWSRD 2009, p. 7). Others list similar sectors such as advertising, architecture, design, art, craft, fashion, performing arts, publishing, music, performing arts, film, TV and radio, software and video games (e.g. Howkins 2011, pp. 88-117). This diverse group of sectors is commensurate with the above definition – they all 'require some input of human creativity; second, they are vehicles for symbolic messages, that is, they are carriers of meaning; and third, they contain, at least potentially, some intellectual property that belongs to an individual or group' [italics in original] (2013, p. 1). For many of these industries copyright is paramount. For the World Intellectual Property Organization (WIPO) the core copyright industries include motion picture and video, radio and television, photography, music, software and databases, press and literature, theatrical productions, operas, visual and graphic arts and advertising services (PWC 2012, p. 9). No matter which creative industries' model is used (DCMS, NESTA, KEA etc.) and no matter which report on the

creative industries is accessed, these lists and models most often include design, the arts, information technology and the media industries as broad subdivisions within the creative industries (Flew 2012, p. 84). We could map out a version of these lists which would look like the following:

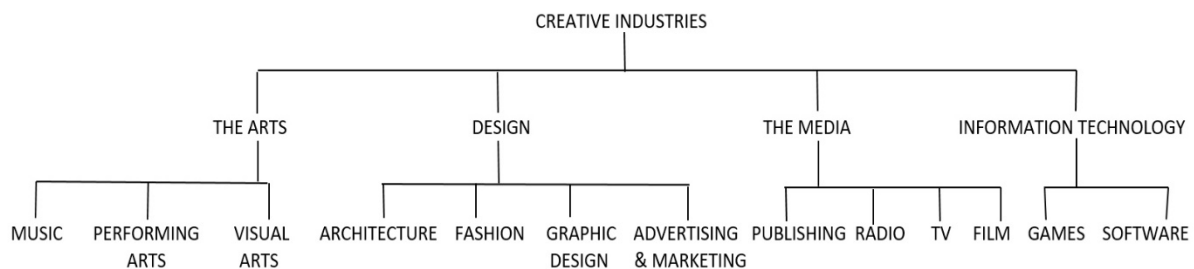


Figure 5 Creative industries lists represented as a hierarchical structure

While this structure is not intended to be comprehensive, all-encompassing or definitive, it is worth noting here that this hierarchical representation could have another layer scaled down to sectors that subsist under these others. For example, under publishing we could include books, magazines, print, zines, blogs etc. and then at a lower scale list the occupations that are associated with each of them such as journalist, editor, publisher, printer and so on. Graphic design might include UX design, animation, illustration and the many other hybrids that are proliferating in this area. Visual arts might include painting, sculpture, photography and so on. Advertising and marketing might also include functions such as public relations, strategic communication and others. Radio would include all forms of broadcast and narrowcast radio, including, free-to-air, digital radio, podcasting and streaming services. This is true of each of the eleven sub-sectors of design, the media, IT and the arts. And of course, this map could be scaled upward as well so that creative industries themselves sit alongside agriculture, mining, health, education, finance, manufacturing, biotechnology and all other designated industries that make up various parts of the economy. Representing the creative industries in this hierarchical tree pattern does not imply that one scale level in this system is any more or less important than any other scale level. There are no top down or bottom up hierarchies in systems.

2.13 Creative Industries Reports

There have been a number of reports that have attempted to also describe and, importantly, quantify the creative industries internationally, nationally and regionally (e.g. Cox 2005, Work Foundation 2007, NESTA 2006, CIIC 2013, Lhermitte et al. 2015, etc.). A broad review of these reports suggests that there is general agreement that:

- The creative industries deliver economic value and provide the foundation for other significant sectors.
- The creative industries play a key role in innovation and solving problems and challenges and they contribute to strategies to respond to community objectives for sustainability, liveability, social cohesion and urban densification.
- Cultural and arts sub-sectors of the creative industries are important in the personal and social lives of people, the development of ideas and future-shaping.

Despite these ongoing attempts to report on these industries ‘the economic weight of cultural and creative industries (CCI) in mature and emerging economies is partially described, misunderstood and undervalued’ (Lhermitte et al. 2015, p. 11). While differing models and definitions of the creative economy, industries and workforce certainly illuminate the sector,

the lack of a workable operational definition, an agreed nomenclature and a common taxonomy of sectors, makes comparability between reports difficult. As a result, while an understanding of the broader concepts and measures of activity help to ascribe value, those developing policy and considering action for economic development tend to lack data that is highly differentiated, localised and insightful.

There are a range of creative industries' definitions and descriptors used across both the international scene and national and local policy areas. As mentioned above in the introduction to this literature review, there is a substantial crossover discernible between the idea of creative, cultural and copyright industries (Hartley 2005, p. 30-31). In general, terminology labelling these industries 'changes across countries, with some referring to the cultural industries, the copyright industries, the digital content industries, and even the cultural and creative industries or – as in China – the cultural creative industries' (2012, p. 4). Additionally, there is a persistent use of variable *clustering* systems for data gathering. For example, architecture is sometimes clustered with design and visual arts and sometimes with the built environment and yet it can be argued on one level that these business and professional profiles and industry organisations are distinctly different. In some papers, software is seen as the major economic contributor but in one (NSW CIT 2013, p. 9) it is not included in the analysis at all, other than in a fleeting referral to the increasing influence of digital technologies across all sectors. This situation makes comparisons and trend-watching from publicly-available data difficult. The difficulty is further compounded when figures are broken down into creative goods and services or attributed to the various work contexts of practitioners. While such variability across reports can drive new insights, it can also lead to confusion in measurement and particularly in policy direction.

To elaborate, the United Nations Conference on Trade and Development (UNCTAD) reported in 2008 that international trade in creative industries has shown sustained growth in the last decade with traded *creative goods and services* (combined) at a record \$547 billion in 2012, as compared with \$302 billion in 2003. They go on to state that:

Creative industries are among the most dynamic sectors in world trade. Over the period 2000-2005, international trade in creative goods and services experienced an unprecedented average annual growth rate of 8.7 per cent. The value of world exports of creative goods and services reached \$424.4 billion in 2005, representing 3.4 percent of total world trade, according to UNCTAD. Nowadays in the most advanced countries, the creative industries are emerging as a strategic choice for reinvigorating economic growth, employment and social cohesion (UNCTAD 2008, p. 4-5).

One of the basic assumptions of this report is that the concept of 'creativity' has to be enlarged 'from activities having a strong artistic component to 'any economic activity producing symbolic products with a heavy reliance on intellectual property and for as wide a market as possible' (ibid). In this case they come much closer to what the research into creativity is telling us (see Section 2.7 above), in contrast to many other reports such as the Cox Review (2005) or the Work Foundation (2007) report which uncritically use historically specific sets of cultural assumptions.

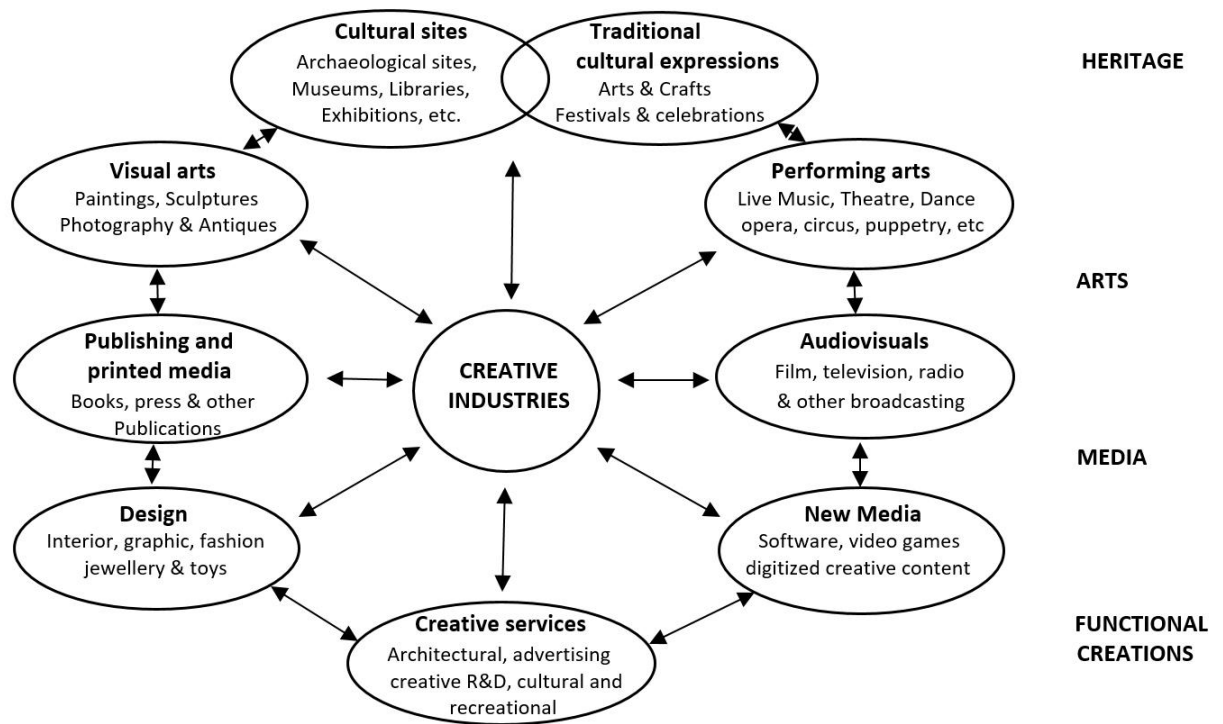


Figure 6 UNCTAD classification of Creative Industries
(original in UNCTAD 2008, p. 14)

The UNCTAD report also attempts a definition of the creative industries stating that these:

are the cycles of creation, production and distribution of goods and services that use creativity and intellectual capital as primary inputs; constitute a set of knowledge-based activities, focused on but not limited to arts, potentially generating revenues from trade and intellectual property rights; comprise tangible products and intangible intellectual or artistic services with creative content, economic value and market objectives; are at the cross-road among the artisan, services and industrial sectors; and constitute a new dynamic sector in world trade (UNCTAD 2008, p. 13).

Then, in order to help visualise these industries they produced a graphic that ‘makes a distinction between ‘upstream activities’ (traditional cultural activities such as performing arts or visual arts) and ‘downstream activities’ (much closer to the market, such as advertising, publishing or media related activities)’ (UNCTAD 2008, p. 13).

UNCTAD argues that ‘the second group derives its commercial value from low reproduction costs and easy transfer to other economic domains. From this perspective, cultural industries make up a subset of the creative industries’ (UNCTAD 2008, p. 13). This report divides the creative industries into a number of sub-sectors which cover ‘activities rooted in traditional knowledge and cultural heritage such as arts and crafts, and cultural festivities, to more technology and services-oriented subgroups such as audio-visuals and the new media’ (ibid). UNCTAD classifies these into four groups centred on heritage, arts, media and what they call functional creations, and these are themselves divided into nine subgroups.

For UNCTAD this set of sector and sub-sectors helps ‘facilitate an understanding of the cross-sectoral interactions as well as of the broad picture. This classification could also be used to provide consistency in quantitative and qualitative analysis’ (ibid).

Contrasted to the UNCTAD position, the figures provided by Marc Lhermitte, Solenne Blanc and Bruno Perrin, the consultants from Ernst & Young Ltd who compiled the *Cultural Times: The First Global Map of Cultural and Creative Industries* (2015) report for the Confederation of Authors and Composers Societies, are slightly different. They quote Irina Bokova, the Director General of UNESCO, who states that ‘capitalising US\$2,250 billion and nearly 30 million jobs worldwide, the creative and cultural industries are major drivers of the economies of the developed as well as the developing countries indicating that they are among the most rapidly growing sectors worldwide’ (Lhermitte et al. 2015, p. 5).

While these two reports show trends moving in the same direction, the underlying assumptions about trade, capitalisation and jobs vary widely. For example, the Ernst & Young report indicates that the Asia-Pacific Region is the world’s biggest cultural and creative industries’ market (33% of global market) followed by Europe (32%) and North America (28%) (Lhermitte et al. 2015, p. 16). Consistent with that, UNCTAD indicates that creative industries’ exports from developing countries, led by Asia, have been growing faster than exports from developed countries but it is exports of creative *goods* where, from 2003 to 2012, ‘export earnings rose from \$134 billion to \$197 billion with developing countries playing an increasingly important role in international trade’ (UNCTAD 2015, pp. v-vii) while total exports value of creative services, as opposed to creative goods, dropped to \$74 billion in 2012, from \$276 billion in 2008. It should be noted here that while there were acknowledged methodological issues which were reflected in that data, the UNCTAD Report (2015) also suggested that increasing demographics [sic], better access to ICTs and dynamic shifts to new lifestyles associated with both creative products and services, means that the creative services sectors continue to grow as the knowledge-based economy expands. In this regard Guillermo Valles, The Director of the Division on International Trade in Goods and Services, and Commodities, at UNCTAD asserts that:

[The] creative economy leverages creativity, technology, culture and innovation in fostering inclusive and sustained economic growth and development ... generate(s) income through trade (exports) and intellectual property rights and create(s) new jobs in higher occupational skills, particularly for small and medium sized enterprises. With advancement in technology especially the digital revolution, education and innovation, creative and knowledge-based industries have emerged as among the dynamic sectors of the global economy (UNCTAD 2015, p. ii).

Within the countries surveyed for the UNCTAD report:

Personal, cultural and recreational services had the largest shares of trade of creative services and accounted for nearly 42 per cent of total services exports. Advertising, architectural and research and development services, including audio-visual services, were other core activities [while] royalties and license fees based on intellectual property rights have outpaced global economic growth in recent years (UNCTAD 2015, pp. 18-19).

The estimates produced for the Ernst & Young report, in the absence of reliable aggregated statistical data, were based for each region on ‘national statistics, market research analysis, existing CCI studies (such as WIPOs), industry reports and technical interviews’ (Lhermitte et al. 2015, p. 117). Where they could not obtain regional data, they made estimates of employment and revenues using their own tailor-made assumptions. In doing this they:

Scaled up available data from the main markets in each region with a representative sample (for instance, Brazil, Mexico, Argentina and Colombia for

Latin America). [They] used world data and applied a market share scaling-down factor. When absolutely no data was available for any country in a region, [they] used a ratio based on data collected in other regions, adjusted by indicators to take into account the structural specificities of each region (productivity ratios, literacy rates, GDP per capita, etc.) (Lhermitte et al. 2015, p. 117).

They also ‘conducted 150 interviews during the study to construct [their] key hypothesis and market assumptions’ (ibid). Lhermitte et al. concluded that ‘in 2013, cultural and creative industries worldwide generated revenues of US\$2,250b and employed 29 million people’ (2015, p. 117). They noted that ‘the 11 CCI sectors are an integral, massive and universal cornerstone of the global economy. In 2013, they generated US\$2,250b of revenues (3% of world GDP) and 29.5 million jobs’ (ibid) and that ‘creative industries and cultural tourism have become strategic assets for local economies’ (ibid). They also recognised that not only was there a significant formal contribution to regional economies, but most importantly much of the output of the creative industries escaped detection in the official estimates of most countries’ GDP. This primarily informal exchange of goods and services was at times central to certain regional cultures as it is how they have operated culturally for some time. However, its existence also includes physical piracy as well as unauthorised internet distribution of protected works, but they go on to caution that the informal economy *in toto* must not simply be ‘considered as criminal activities: it represents cultural activities and content traded by creators using informal distribution channels’ (Lhermitte et al. 2015, p. 28).

These ideas also serve as a timely reminder that, as the UNESCO 2013 special edition of the *Creative Economy Report: Widening Local Development Pathways* contends, the ‘creative economy is not a single superhighway, but a multitude of different local trajectories found in cities and regions’ (UNESCO 2013, p. 12) around the world. Apart from activity going on in the developing world, for the BRICS countries - Brazil, Russia, India, China and South Africa, which are seen as the countries with greatest economic potential as a result of their demographics, there is a growing contribution from the creative industries to their economies. Nonetheless, there is much more to be done before they can fully leverage that potential. *The Creative Industries and The BRICS* (2014) report reviews the state of the creative economy in each of these countries and was carried out for the Confédération Internationale des Sociétés d'Auteurs et de Compositeurs [International Confederation of Societies of Authors and Composers] (CISAC). The report states that ‘the modern global economy today relies on creativity like never before and the creative economy makes up a growing proportion of national economic output and job creation in many countries around the world’ (CISAC 2014, p. 10). With this as the benchmark, the report declares that there is plenty of untapped potential in the creative industries. In drawing this conclusion, the report assesses the economic contribution of the creative industries to the GDP of these countries which stands at around 1-6% only. The report asserts that ‘total exports of core copyright goods and services (including audio visual goods and services, new media goods, publishing goods etc.) from the BRICS significantly lags behind mature markets’ (CISAC 2014, p. 4). BRICS countries are also ‘lagging behind their ability to generate income from the use of their intellectual property (including from creative goods and services)’ (ibid). In 2011 Korea alone generated US\$4.5 billion from its intellectual property assets, while the average for the BRICS markets was less than US\$0.5 billion (ibid). In summary, this report does two things at once. It maps the state of the creative economy in the BRICS countries and, like most reports on the creative industries, recommends policy initiatives to help each BRICS nation develop its creative economy.

In the bloc of countries that now constitute Europe, the European Commission has been active in recognising, understanding and promoting their highly valuable creative sector. For example,

in the *Innovative Instruments to Facilitate Access to Finance for the Cultural and Creative Sectors (CCS): Good Practice* (2016) report, the European Commission recognised that:

Cultural and creative industries (CCIs) are, at the dawn of the 21st century, undergoing considerable change as a result of increased digital technologies, the economic crisis of the past several years, and considerable changes in the regulatory framework. Support to CCIs has, likewise, evolved rapidly, witnessing core changes in intellectual property law, increased support through state aid, and a greater recognition of their potential contribution to the economy. Despite the considerable potential of CCIs, estimated to be responsible for over 3% of the EU's gross domestic product and jobs, they remain undervalued and unrecognized, especially in terms of their ability to access start-up capital and financing. The challenges facing CCIs are compounded by a lack of clear evidence and information in the sector, which further limits the ability of financial backers to recognize their potential, as well as other legislative hurdles, such as intellectual property rights, varying tax regimes, and mobility issues (EC 2017, online).

The role played by the creative industries is not only recognised at the international level. At the national level there have been a number of reports produced. For example, the formative UK Mapping Document (Varbanova 2001) which gave both a national and internal regional perspective, concluded that the creative industries in the UK generate 'revenues of around £112.5 billion and employ some 1.3 million people. Exports contribute around £10.3 billion to the balance of trade, and the industries account for over 5% of GDP. In 1997-98, output grew by 16% compared to under 6% for the economy as a whole' (Varbanova 2001, p. 10).

The influential *Cox Review of Creativity in Business: Building on the UK's Strengths* came out in 2005. One of its major flaws was that it privileged from within one disciplinary area what are now seen, in research terms, as highly contestable concepts and used these as its basic and uncritically examined assumptions. For example, it noted that creativity was 'the generation of new ideas' with innovation being 'the successful exploitation of new ideas' (Cox 2005, p. 2). As was examined above (see Section 2.9 above), these ideas can be seen as largely conventional truisms rather than evidence based and rational understandings of both concepts. Nonetheless, this report sought to:

Improve the effectiveness of government support and incentive schemes ... tackle the issue, in higher education, of broadening the understanding and skills of tomorrow's business leaders, creative specialists, engineers and technologists, take steps to use the massive power of public procurement, both centrally and locally, to encourage more imaginative solutions from suppliers, [and] raise the profile of the UK's creative capabilities by way of a network of centres of creativity and innovation across the UK, with a national hub in London (Cox 2005, p. 4).

The National Endowment for Science, Technology and the Arts (NESTA) in the UK also produced a report in 2006 entitled *Creating Growth: How the UK can Develop World Class Creative Businesses*. This report echoed the idea that the creative industries made up a very significant part of the UK economy. It stated that these industries 'constitute a larger part of the economy and employ more people than the financial services sector' (2006, p. 3). The estimates reveal that:

The creative industries account for eight per cent of the UK economy — a total of £56.5 billion. Exports by the creative industries contributed £11.6 billion to the

UK's balance of trade in 2003. The UK has led the world in terms of developing the creative industries as a focus for policy, and there has been a rapid growth in initiatives across the UK to support the development of creative businesses. The global market value of the creative industries increased from \$831 billion in 2000 to \$1.3 trillion in 2005. For example, global revenues from cinema admissions amount to \$25 billion, the same size as the market for computer and video games. Similarly, the world market for mobile music is expected to reach \$6.4 billion by 2009. Policymakers from across national governments, and not just the traditional advocates for these sectors, need to concentrate on the opportunities and challenges facing these industries from an economic point of view (NESTA 2006, p. 3).

The NESTA report concludes with the idea that 'a growing market is out there to be won by creative businesses that are willing and able to innovate, and that do not see any inherent conflict between creative and commercial excellence' (NESTA 2006, p. 49). However, not all the report had to say was glowingly positive. They also criticised the DCMS approach, which had become increasingly popular with policymakers. One problem for them was the inclusion of sectors NESTA did not conceive of as 'creative', that is, they used the commonly conflated understanding that being 'creative' was somehow equal to being 'artistic' or 'cultural'. This of course ignores the recent empirically and rationally validated research into this phenomenon (see Section 2.7).

The most obvious example is the inclusion of software and computer services in the DCMS figures. This sector accounts for up to 37 per cent of GVA (£20.7 billion), 33 per cent of employment, and 43 per cent of the total number of businesses in the creative industries as a whole. Further, the frequently quoted figure of 1.8 million people employed in creative occupations consists of nearly 770,000 people who are employed outside of the creative industries. These jobs have not been generated by the creative industries, and so cannot be regarded as directly indicative of the economic significance of the creative industries (NESTA 2006, p. 53).

They also suggested that the DCMS definition was too broad, it did not 'differentiate between sectors on the basis of their size' (NESTA 2006, p.53), it was 'descriptive rather than analytical' (ibid) and it didn't reflect 'differences in market structures, distribution mechanisms and consumption patterns between the creative sectors' (ibid). This situation had a number of practical implications for NESTA as they argued the DCMS definition also did 'not differentiate between sectors on their capacity to generate high levels of commercial growth. Some sectors have significantly less commercial capacity, for a number of reasons' (ibid). While it wasn't intended as such the DCMS definition did carry the freight of providing a conceptual basis for the creative industries, and NESTA, realising the DMCS definition's limitations, argued that a reconceptualisation of the creative industries was in order. They set about building a graphic visualisation of it.

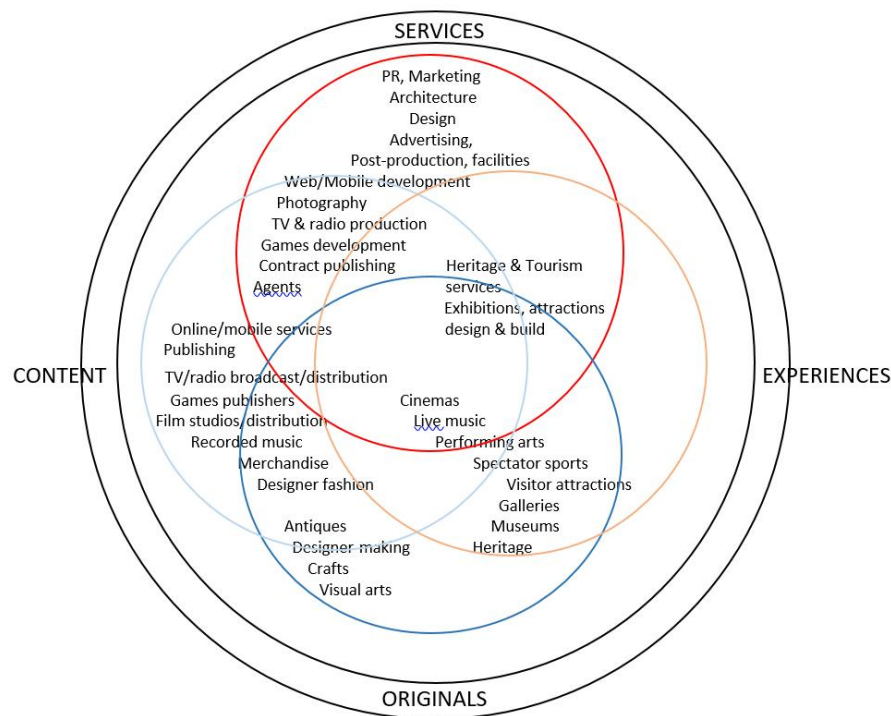


Figure 7 NESTA's Refined Model of the Creative Industries
(original in NESTA 2006, p. 55)

According to NESTA this refined model identifies the sectors with the highest probability of economic growth since it differentiates between what it calls creative service providers and content producers on the one hand and experience providers and producers of originals on the other. For NESTA creative service providers and content producers tend to 'create and in some cases own IP, and it is this IP that can be more easily reproduced and exploited in order to drive sustained economic growth for the UK' (NESTA 2006, p. 55). Alternatively experience providers and producers of originals generally 'offer fewer opportunities for such growth, because they are based on uniqueness rather than reproducibility' (ibid). Of the former two, creative content producers tend to 'offer greater capacity for profit growth because of the easily exploitable nature of IP (once created, produced and manufactured, such IP can often be reproduced at minimal cost, for example, CDs and DVDs)' (ibid). The creative service providers generally present opportunities 'for employment growth because any significant increase in demand from clients normally needs to be met by an increase in staff to serve the clients' (ibid). The NESTA report goes on to say that:

For these reasons, this model also better reflects the perspective of private investors in the UK. Larger private investors (that is, venture capital funds) have tended to focus on creative content producing enterprises, particularly television production companies and television and radio broadcasters, rather than creative services or creative products. Again, this is because creative content producing enterprises are better placed to exploit the IP that they have generated (NESTA 2006, p. 55).

Another UK report presents another graphic reconceptualisation of the creative industries. The *Staying Ahead: The Economic Performance of the UK's Creative Industries* (2007) report was commissioned by the Department for Culture, Media and Sport (DCMS). It provided an analysis of the creative industries, what factors shaped their success in the UK and what were the challenges this sector faced (Work Foundation 2007, p. 9). It gave an overview of the creative industries as well as detailing their economic performance. It set out what the

knowledge economy is, before defining the creative industries and identified the drivers of those industries. However, one major problem is that it perpetuates the Cox Report's naïve conception of creativity and innovation. For them creativity 'is about the origination of new ideas – either new ways of looking at existing problems, or of seeing new opportunities, while innovation is about the successful exploitation of new ideas. It is the process that carries them through to new products and services or even new ways of doing business' (Work Foundation 2007, p. 16). In making these assumptions they demonstrate that they've paid scant attention to the copious rational research into creativity (See Section 2.7 above). Instead they echo some well-worn cultural assumptions. Drawing on the work of Nelson (2005) and Foray (2005) they state, rather naïvely, that 'the creative industries are not underpinned by a large scientific or technical base with formal logical structures. The process of learning and creating tends to be intuitive, iterative and trial and error rather than analytical and explicit' (Work Foundation 2007, p. 102).

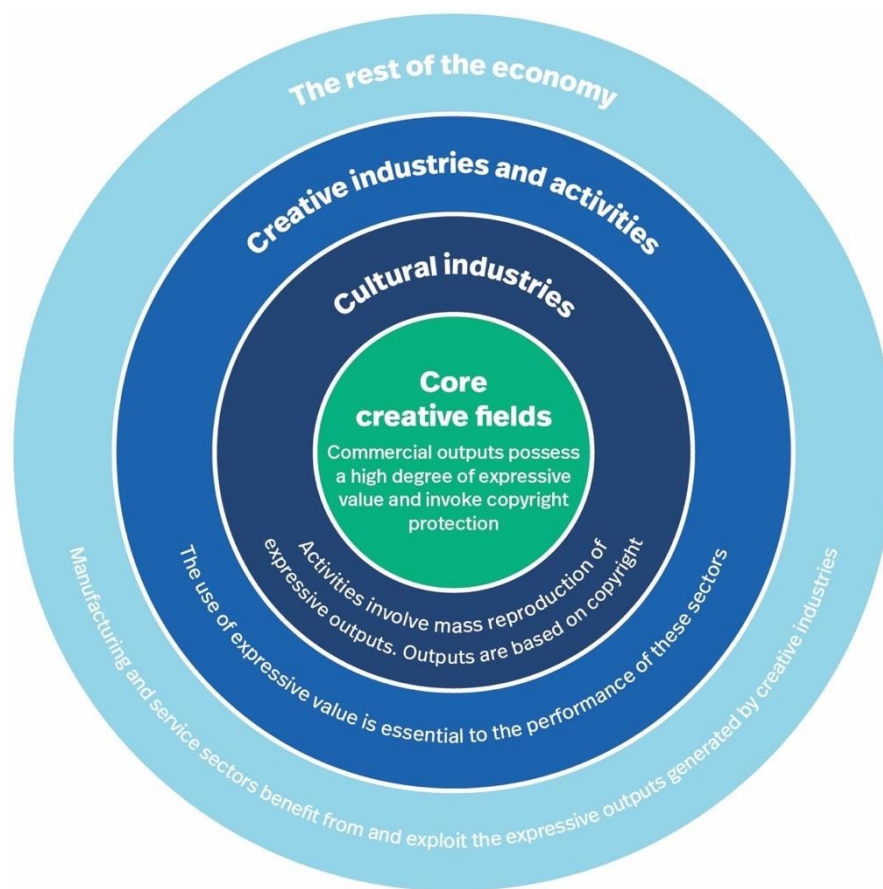


Figure 8 A Stylized Typology of the Creative Industries
(original in Working Foundation 2007, p. 103)

With these simplistic and problematic conceptions as a basis they then offer a stylised typology of the creative industries. They base this on an analysis set out in *The Economy of Culture* report from the KEA European Affairs for the European Commission:

We deploy the notion of expressive value to map the creative industries in a series of concentric circles radiating out from the 'bull's-eye' of core expressive value creation. The 'bull's-eye' represents where pure creative content is generated. This is the domain of the author, painter, film-maker, dancer, composer, performer and software writer (Working Foundation 2007, p. 102).

They do suggest that the ‘bull’s-eye’ does not only represent traditional art forms but also ‘the writing of computer software, the establishment of a 2.0 website or the evolution of a new character in a video game all belong here’ (Working Foundation 2007, p. 104). Drawing uncritically on the ‘pure art’ versus commerce dichotomy, underpinned as it is by Romantic thinking, they suggest the next ring represents those industries that focus ‘primarily or solely on the commercialisation of pure expressive value – the cultural industries – such as music, television, commercial-radio, publishing, computer games and film in the industrial classification’ (ibid).

The next concentric circle represents the focus of the creative industries. These are analytically first cousins to the cultural industries; distinct while belonging to the same family of activity. Architecture, design, fashion, computer software services and advertising are all creative industries whose market offerings pass both an expressive and workability test. They deliver both expressive and functional value. They tend to respond to the close demands of clients for creative offerings that work to their specifications; they constitute intermediate input in sectors in the wider economy (Working Foundation 2007, p. 105).

Further on in 2017 Peter Bazalgette produced his *Independent Review of the Creative Industries* report. This report was commissioned by the UK Business and Culture Secretaries and drew heavily on industry knowledge in the UK, in particular the Creative Industries Council and the Creative Industries Federation. Bazalgette himself is a television executive and author who began his working life at the BBC. He became Deputy Chair of the National Film School, President of the Royal Television Society, Chair of Arts Council England and moved on to become the Executive Chair of ITV. He is well-known for the successful *Big Brother* television franchise. In his report Bazalgette noted that the UK creative industries ‘exported £19.8bn of services in 2014 (9% of the UK total) and is a net exporter of creative services overall’ (Bazalgette 2017, p. 56). As a result:

The Creative Industries are of central importance to the UK’s productivity and global success. We have two great assets: the English language and our national capacity for creativity. But the skills and business models of this sector and of the wider creative economy are those which many experts judge to be of increasing importance: blended technical and creative skills; collaborative interdisciplinary working; entrepreneurialism and enterprise. Not only are the Creative Industries themselves likely to grow as a proportion of our economy, other industries rely on creative disciplines – such as Design and Advertising – to thrive. The cultural and creative sectors are the engine of the UK’s international image and soft power (p. 4).

Bazalgette went on to claim that ‘it is human creativity that drives the success of this sector’ (2017, p. 5). With the UK being one of a limited number of net exporters of music, Bazalgette also claims that, along with other creative occupations, these industries ‘are highly resistant to automation with 87% of creative workers in the UK at low or no risk’ (ibid). However, as Tim Cross points out, AI and machine learning are set to allow software to write songs for mass consumption by 2025 (2017, p. 144). This prediction itself may be askew since songwriting and composition software such as Magenta and AIVA are rapidly proving that prediction to be far too conservative. Nonetheless, Bazalgette suggests that the UK’s:

Creative strength cannot be taken for granted as if it were an endless natural resource: it needs to be nurtured through our education and skills systems else we risk falling back as countries such as China move forward. The digital era, often referred to as the Fourth Industrial Revolution, represents an enormously exciting

opportunity for a further wave of growth and innovation. But we will need to work hard to harness the value of the IP in these sectors and invest in R&D to secure our reputation as the most innovative place to make creative content. We need to exploit technologies such as Virtual and Augmented Reality, 5G, 3D printing and other new techniques to keep innovation strong. We need to reimagine this as a ‘creative-tech’ sector. The value that they bring is not only to the Creative Industries themselves but also as enablers to the wider economy (Bazalgette 2017, p. 5).

This report acknowledges that the creative industries in the UK are extremely innovative, but it also recognises that they are constituted predominantly, as elsewhere in the world, ‘by an abundance of SMEs, micro-businesses and individuals spread across the arts, design, cultural, digital, entertainment and media sectors’ (2017, p. 28). As a result, there is limited ‘capacity for strategic, cross-sectoral R&D which, if properly recognised and supported, could propel growth’ (2017, p. 28). In this case Bazalgette argues that leveraging government financial support is essential.

While the UK has produced a number of national level reports like this, boosting the very real potential of the creative industries, in the USA an understanding of the creative industries has tended to be limited to two basic groups. Attempts to quantify it have been, as Terry Flew (2012, pp. 39-42) has indicated, bifurcated between a poorly funded arts sector and the commercially oriented global powerhouses of the entertainment and software industries. Each, the arts sector and the commercial giants, collects data on their own spheres. However, it is at the regional and local level that the creative industries as a concept has gained some traction in the USA particularly with the success of Richard Florida’s work on creative cities (ibid).

China on the other hand has produced a number of reports primarily on what is known as the cultural/creative industries. Many of the reports coming specifically from China have been done in tandem with European scholars such as Justin O’Connor (e.g. O’Connor & Gu 2006) or observed offshore, as it were, by scholars such as Michael Keane. His document ‘*China’s Creative Industries: Challenges Matched by Opportunities*’ (2014) indicates that:

Cultural projects (xiangmu) are the subject of numerous government-funded reports. The proposition that greater investment in cultural and creative industries will transfer the unattractive ‘world factory’ label elsewhere while resolving environmental problems is appealing; it is a good news story. The cultural and creative industries range from esoteric kunqu opera to animated videos, artworks, toys and fashion accessories. Artifacts are displayed for sale in theme parks, galleries and online sites. Content is generated in software farms, media clusters, incubators, factories and art zones (Keane 2014, p. 11).

Many Asian countries, as revealed by the UNCTAD study, are benefiting from a dynamic creative industries sector ‘and are putting in place tailored cross-cutting policies to enhance their creative industries. China, which is leading this process, became the world’s leading producer and exporter of value-added creative products’ (2008, p. 5). Keane argues that there are now visible signs of the Chinese ‘government’s intention to fast-track the cultural economy. All first-tier cities and most second-tier cities have poured funds into constructing cluster projects’ (Keane 2014, p. 11). He goes on to note that ‘the digital landscape is evolving at a frightening pace’ (ibid, p. 12) while ‘intellectual property remains a key hurdle’ (ibid).

Further south, Boni Pudjianto, the Director of International Marketing for the Indonesian Agency for Creative Economy (Badan Ekonomi Kreatif – BEKRAF), which ‘deals with policy making, coordination between Government bodies, guiding and supporting the creative sectors’ (2016, p. 21), reported at the Asia-Pacific Digital Societies Policy Forum in 2016 that there are

sixteen 'creative subsectors under the Indonesian Creative Economy. These include Apps & Games, Architecture, Interior Design, Visual Communication Design, Product Design, Fashion, Film, Animation & Video, Photography, Craft, Culinary, Music Publishing, Advertising, Performing Art, Fine Art, Television & Radio' (ibid). This agency 'aims to expand Indonesia's creative economy with a target to reach a 12 percent contribution to GDP by 2019, almost twice the 7.1 percent in 2014. It also aims for a 13 million-member workforce by 2019, 1 million more than in 2014 and a rise from 5.8 percent contribution to exports in 2014 to 10 percent in 2019' (Yosephine 2015, online).

The 2003 *Economic Contributions of Singapore's Creative Industries* document (Heng, Choo & Ho 2003) charts the scope of the creative industries in Singapore. It sees these as 'comprising both 'upstream' arts and 'downstream' applications' (Heng et al. 2003, p. 51). They contend that:

One can think of the creative industries as comprising basic and applied arts industries. Basic or 'upstream' arts refer to traditional arts such as the performing, literary and visual arts, whereas 'downstream' arts refer to the applied arts such as advertising, design, publishing and media-related activities. While 'upstream' art activities may have commercial value in themselves, 'downstream' art activities derive their commercial value principally from their applications in other economic activities [and] suggests the existence of a mutual relationship between upstream and downstream arts, so that each is an essential component of the arts 'ecosystem' (Heng et al. 2003, p. 52).

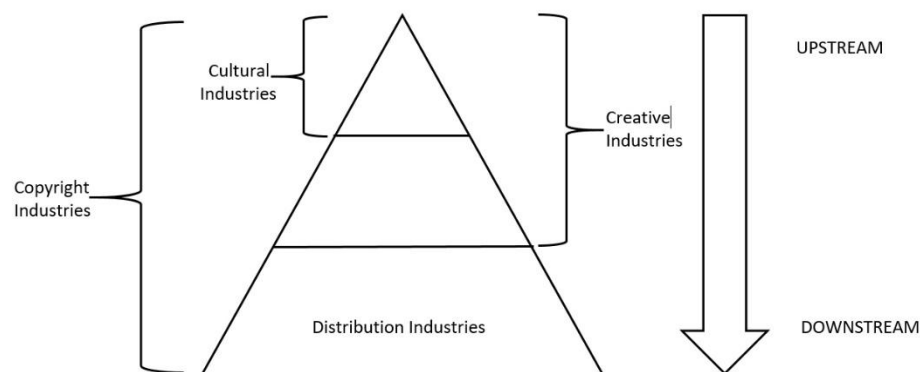


Figure 9 Composition of the Creative Cluster
(original in Heng et al. 2003, p. 52)

This composite view allowed the researchers to ascertain the economic impact of the creative sectors in Singapore and 'benchmarks Singapore's creative industries against those of leading countries, to give an idea of Singapore's current position and scope for advancement. The final part discusses policy implications for Singapore' (ibid). The paper recognises that the creative industries are fuelled by the 'intersection of the arts, business and technology. It leverages on the multi-dimensional creativity of individuals - artistic creativity, entrepreneurship and technological innovation - to create new economic value' (ibid) for Singapore. They present evidence to state that:

From 1986 to 2000, the creative industries grew by an average of 17.2 percent per annum, as compared to average annual GDP growth of 10.5 per cent. Growth of the creative cluster during this period was 14.0 per cent per annum. The creative industries had consistently grown faster than Singapore's overall GDP in the periods 1986–1990, 1990–1995 and 1995–2000 (Exhibit 3). Growth in the creative industries had maintained a relatively high rate of around 12.9 per cent

per annum between 1995 to 2000, as compared to 5.8 per cent for the overall economy. If the distribution industries, which have grown more weakly in recent years, are taken into account, the growth of the creative cluster, at 8.6 per cent per annum, still exceeded GDP growth during the period 1995–2000 (Heng et al. 2003, p. 55).

In Australia there have been a number of reports on the creative industries at the national, state, regional and city level. These include Higgs et al. (2007), Grace (2009), PWC (2012), NR Arts (2012), CIIC (2013), NSWTF&I (2013), Essential (2013), Lea et al. (2013) to name just a few. Of these, Peter Higgs, Stuart Cunningham and Janet Pagan (2007) found in their *Australia's Creative Economy: Basic Evidence on Size, Growth, Income and Employment* (2007) report, that in 2001, 437,000 people comprised what they called the creative workforce. They found that this workforce 'was equivalent to 5.4% of the total Australian workforce. Almost 300,000 people were employed in firms specialising in the production of creative goods and services while an additional 137,000 people worked in Creative Occupations (CO) embedded in other industries' (2007, p. 4). Not surprisingly, they found there were more people undertaking creative occupations by working inside other businesses than those working in businesses designated specifically as creative industries. They also noted that 'during 2001, the value of salaries and wages of people in the creative workforce was almost \$21 billion, representing 7% of the earnings from all Australian employment' (ibid). Interestingly they also found that:

Approximately 155,000 creative enterprises were registered for the Goods and Services Tax (GST) on the Australian Business Register (ABR), which was 6.6% of the total number of GST-registered enterprises in operation at the end of April 2006; There were some 253,000 creative enterprises without GST registration, mostly sole traders, representing 10.8% of the total number of non-GST-registered enterprises in operation at the end of April 2006 (Higgs et al. 2007, p. 4).

Moving forward in time to 2013, the then Australian Federal Minister for Industry, now chief executive of the Queensland Resources Council, Mr Ian MacFarlane, stated in the *Valuing Australia's Creative Industries Final Report* from the Creative Industries Innovation Centre (CIIC) at UTS, that 'Australia depends not only on its traditional industries, but on its creativity and innovation – qualities on which our vibrant creative industries are built' (2013, p. 5). MacFarlane also stated that:

These industries contribute more than \$90 billion to our economy annually in turnover, add more than \$45 billion to GDP and generate annual exports of \$3.2 billion. And quite separate is the intangible but undeniable worth of knowing our nation creates great software, films, TV, radio, music, theatre, dance, design, media, writing, marketing and architecture ... These agile, sophisticated and digitally savvy businesses and the creative professionals they support are more significant in number than you might expect. In 2011 there were more than 600,000 people working in the creative industries in Australia and over 120,000 creative businesses (CIIC 2013, p. 5).

Drawing in part on the Creative Trident methodology developed at the Centre for Creative Industries and Innovation at QUT, and discussed more fully below, the CIIC report presented information on a number of creative industries' sectors. However, they warned that:

Due to their dynamic nature, the creative industries are not simply defined and consist of a wide variety of businesses and individuals. They include cultural sectors like the visual and performing arts, as well as those sectors that are often

dubbed digital media or multimedia including film and television, broadcasting, computer animation, web design and music. They also include a range of other sectors like architecture and urban design, industrial design, designer fashion, writing and publishing. Understanding the extent of the creative economy is even more problematic due to the way that creative and non-creative workers and businesses intersect (CIIC 2013, p. 7).

For this report they divided the creative industries into a number of segments and reported on them accordingly (CIIC 2013, p. 11-12):

- **MUSIC AND PERFORMING ARTS:** In 2011/12, music and performing arts contributed around 2% of total IGP and 3% of total employment for the creative industries. In 2011, the music and performing arts segments workforce totalled 34,277 people. Embedded creatives make up the majority of this workforce at 52.2%.
- **FILM TELEVISION AND RADIO:** In 2011/12, the film, television and radio segment contributed around 14% of total IGP and 11% of total employment for the creative industries. Pay television experienced the highest growth in IGP between 2004/5 and 2011/12 at around 6%. Overall, the film, television and radio segment has performed significantly below the GDP for the broader economy. In 2011, total workforce in the film, television and radio segment totalled 42,688 people. Around half of this workforce are support workers.
- **ADVERTISING AND MARKETING:** In 2011, the advertising and marketing segment workforce totalled 183,270 people. The largest proportion of the workforce (83.4% or 152,816 people) are embedded creatives – i.e. advertising and marketing occupations in other industry categories.
- **SOFTWARE AND INTERACTIVE CONTENT:** In 2011/12, the software and interactive content segment contributed around 50% to both total IGP and total employment for the creative industries. Internet publishing and broadcasting experienced the highest growth in IGP and employment between 2004/5 and 2011/12. In 2011, the software and interactive content sector workforce totalled 197,062 people. The largest proportion of the workforce (51.8%) is support workers.
- **WRITING PUBLISHING AND PRINT MEDIA:** In 2011/12, writing, publishing and print media contributed around 18% of total IGP and 13% of total employment for the creative industries. IGP growth within this segment has been relatively weak compared to the broader economy. The writing, publishing and print media sector workforce totalled 55,645 people in 2011. The largest proportion of the workforce is support workers and these make up 61.8% of the workforce.
- **ARCHITECTURE:** In 2011/12, the architecture segment contributed around 10% of total IGP and 9% of total employment for the creative industries. In 2011, the workforce of the architecture segment totalled 47,382 people. The largest proportion of the workforce is specialist creatives which represent 44.5% of the workforce.
- **DESIGN AND VISUAL ARTS:** In 2011/12, design and visual arts contributed around 6% of total IGP and 9% of total employment for the creative industries. Growth in IGP for design and visual arts is much lower than GDP growth with professional photographic services experiencing significant decline between 2004/5 and 2011/12. In 2011, the design and visual arts workforce was 94,140 people. The largest proportion of the workforce is embedded workers which represent 62.2% of the workforce (CIIC 2013, p. 11-12).

The CIIC report goes on to say that ‘within the creative industries, the creative segments are shown to have varying structure and varying levels of performance’ (CIIC 2013, p. 12).

Working our way down to the level of the state, in 2013 the NSW Creative Industries Taskforce (CIT), appointed by the then NSW Deputy Premier, Minister for Trade and Investment and Minister for Regional Infrastructure and Services, Mr Andrew Stoner, estimated that, as per the 2011 Census, the NSW creative industries directly employed approximately 147,600 people. This number accounted for a 39.6% share for NSW of national employment in the creative industries. This is also equivalent to 4.7% of total NSW employment. In addition, approximately another 65,300 people in NSW worked in creative occupations within other (non-creative) industry sectors. This number represents 35.7% of the embedded creative people working in other industries across Australia.



Figure 10 NSW Employment by Industry
(original in NSW CIT 2013, p. 11)

For the Taskforce, Census data also highlighted the changes in employment growth of various components of the NSW creative industries with employment growing more quickly for specialists. Average annual employment growth over the five years to 2011 was:

- 4.8% per annum for ‘Specialists’ (creative occupations within the creative industries). This figure compares with national growth over the same period of 4.3% per annum.
- 2.3% per annum for ‘Support’ employees (non-creative occupations within the creative industries), compared with 2.4% per annum for Australia.
- 1.0% per annum for ‘Embedded’ creative workers (creative occupations within ‘non-creative’ industry sectors). This compares with national growth of 1.4% per annum over this period (ibid).

The creative industries delivered a reasonable share of the NSW economy which in 2009-10 was around 3.9%, compared with 3.3% at the national level, and is expected to grow at a faster rate than the rest of the NSW economy over the next 10 years, that is, 3.1% to 2020, compared with 2.7% per annum for the NSW economy overall (ibid).

In summary, the Taskforce found that NSW creative industries directly employ almost as many people as the financial and insurance services industries in NSW and more people than mining, agriculture, rental and real estate services, and the wholesale trade, as shown in the graph below (NSW CIT 2013, p. 11).

There is a further set of state based and regional matters, particularly relating to infrastructure, that have been reported. For example, Price Waterhouse Coopers reported in 2017 that, with 27% of the NSW population living in regional and rural areas, it has been estimated that a 10% increase in Regional Australia's internet connectivity would result in a 0.53% increase in regional output, compared with a 0.38 % increase in metro areas since, as of 2012, 34% of people from outer regional and remote areas over 15 did not use the internet, compared with 23% in capital cities (NSWDI 2012, p. 22). It is easy to see then that an increase in the use of digital technologies in the regions would be an encouraging development particularly for the regional economic sphere. It has been estimated, for example, that small businesses in the Greater Newcastle area could unlock an additional economic output of nearly \$100,000 each, over ten years, through better use of internet and mobile technologies (PWC 2017, online).

In terms of specific Australian cities that are *not* one of the major east coast metropolitan centres, the creative industries that feature in Darwin, for example, were mapped in the report *Creative Tropical City: Mapping Darwin's Creative Industries* (Lea et al. 2009). This report indicated the creative industries generated a diverse set of jobs and, in 2006, 'these industries employed 1,918 people in Darwin across 44 industrial sectors and over 130 types of jobs' (Lea et al. 2009, p. 14). This comprised 3.5 per cent of the total workforce in Darwin making the sector comparable to other more visible industries. Startlingly, it employed more people than mining, finance and insurance, agriculture, forestry and fishing combined. While not as numerically significant 'as government administration, defence and communities services (all of which employ substantially more people)' (ibid) the comparison would be more favourable if 'part-time, intermittent and "pro-am" creative workers were to be included (these types of workers are not successfully captured in the census)' (ibid). Significantly the creative industries share a direct link with the tourism industry 'through activities such as festivals and cultural tours' making the creative industries statistically equivalent with the tourist industry 'in terms of its contribution to Darwin's workforce' (Lea et al. 2009, p. 14). The report indicates more generally that:

CI is relatively invisible, tending to be associated with fringe activities or the visual and performing arts, and not viewed as a core industry sector in its own right. It gets less policy attention in terms of framing the future of Darwin than its close cousin, tourism. Yet, as this report reveals, CI is not just culturally but also commercially important to the city of Darwin and its future. While traditional resource industries and tourism remain vulnerable to sudden changes in global conditions, the creative industries are the means by which communities have the diversity, talent and resourcefulness to respond to rapid global, technological and political shifts. CI is the link. CI is important to the pressing need to diversify the north's industry base, away from over-dependency on traditional resource extraction sectors and public-sector subsidy, toward a more resilient, entrepreneurial and innovative modality (Lea et al. 2013, pp. 4-5).

Townsville City Council, in a project led by James Cook University, also recognised the importance of the creative industries. The mayor of Townsville, Cr Jenny Hill recognised, in the face of global opportunities and challenges, that 'Townsville needs to grow, sustain and engage with our creative and innovative businesses, and identify how to reconstruct declining uncompetitive industries and create new ones' (2015, p. 3). The report, entitled *Growing the Creative Industries in Townsville* focused specifically on architecture, design, advertising and marketing, software and digital content and film and investigated both supply and demand side issues for these subsectors of the creative industries. The reports noted that:

The supply of creative industries services is quite strong. While there are some instances where specialist skills are lacking in the city or not easily identifiable, in general the majority of services needed for effective industry activity can be found within the city (Daniel, Fleischmann & Welters 2015, p. 6).

Raising the need for these sole traders and SMEs to brand and profile themselves more readily the report also noted that:

There is a significant loss of creative work to capital cities, online or other providers, with many major projects lost to local practitioners. While at one level this is a challenge, it also represents an opportunity for creative industries practitioners to look at collaborating, clustering and developing a stronger brand presence in order to win some of the lucrative contracts and projects that will continue to be available (Daniel et al. 2015, p. 6).

The report also recognised that all creative industries' sector are changing very quickly mainly due to rapid advances in technology and digitisation and globalisation more generally. While competition is coming from global and capital city providers the operatives on Townsville are also being 'challenged by the rise of the self-taught practitioner in such areas as photography, film and design, with entry costs to the market declining and with no regulation of entry or operation' (Daniel et al. 2015, p. 10). The creative industries' professionals in Townsville have thus had to work hard to 'maintain currency and to keep up to date with the latest industry developments' (ibid).

Being located in Townsville, northern Australia, does pose challenges for those in creative industries in terms of their professional development. Distance and associated cost is the major issue for those who want to attend seminars, events and trade shows which are typically held in capital cities. In addition, costs can escalate for local businesses in terms of equipment, with many forced to purchase items that they may readily be able to hire in capital cities. For many in the industry, it is also necessary to diversify their practice rather than be a specialist (ibid).

Nonetheless, most industry professionals get around many of these issues by adopting four key strategies which present as feasible solutions to the comparative relative isolation of this regional city. These strategies, which are typical for many regional centres include:

- Online learning in both paid work time and through self-education
- Networking and holding local industry events
- Selective travel to events beyond Townsville
- Sharing of equipment and resources (Daniel et al. 2015, p. 10).

Wollongong in NSW has also had researchers focus their attention on it as a small creative economy. As Gordon Waitt and Chris Gibson wrote in 2009:

The City of Wollongong was one of the first Australian municipal authorities to embrace culture, establishing a creative cities agenda and the aspiration to become the City of Innovation prior to the 'Richard Florida phenomenon'. That this was the case is in itself a challenge to presumptions about large cities driving the creativity agenda. Yet, despite early aspirations to creative transformation, Wollongong has struggled to achieve sustained successes in repositioning the city's economy and image (Waitt & Gibson 2009, p. 1224).

Wollongong has clung to its manufacturing industry, which affords it a unique set of circumstances that differentiates this city from others. It cannot claim to be completely post-industrial with the city still 'clustered around the port and steel mills' (Waitt & Gibson 2009, p. 1228). In their study Waitt and Gibson cite two reports. The first *Point of Take Off: Cultural Policy Framework and Cultural Plan 1998–2003* and also *The Wollongong Cultural Industries Audit* in which 'culture, creativity, the arts and cultural industries appeared as an integral part of Wollongong's social and economic future' (ibid, p. 1229). Both of these reports suggested that 'for too long Wollongong Council had ignored the economic potential of culture' (ibid) with the first of them outlining 'the metropolitan economy of Wollongong in the context of globalisation' (ibid). They conclude by suggesting that:

At the civic authority level, the regeneration of cities through creativity/new economy is less a tale of investment, new companies, new industrial formations and more about how these are imagined as part of regeneration fantasies for cities (Waitt & Gibson 2009, p. 1244).

They also concluded that:

Where it did occur, the story of creative regeneration in Wollongong had little to do with official planning schemes, global trends, desires on the part of creative producers to cluster together or the rise of the sorts of entrepreneurial creative cultures documented in larger cities elsewhere. Instead, organically developed creative 'hamlets' emerged along a scattered string of beachside villages. This was more to do with changing narratives of proximity to Sydney, the circulation of discourses in Australia of beach-side living as idyllic quality of life ... and the vernacular pursuits of grass-roots artists, musicians, writers and documentary makers who could work from home studios and would prefer scenic locations in which to live and be inspired ... but who could only afford relatively inexpensive property prices (Waitt & Gibson 2009, p. 1243).

As far as specific regionally focused reports are concerned Essential Economic P/L delivered its *Creative Industry in Rural Victoria: Economic Analysis* in 2013 to Rural Councils Victoria. It found that approximately 5,500 creative businesses are located in rural Victoria, representing approximately 7% of all businesses. While this proportion is lower than the Regional Cities (10%) and Metropolitan Melbourne (17%), some rural locations have similarly high levels of creative businesses' (Essential 2013, p. 72). There were 11,030 residents in rural areas in Victoria who are employed in the creative sector, representing 3.5% of all rural workers. However, only 62% of the jobs they engage in are provided in country areas themselves

indicating that ‘many workers in the sector commute to other locations for employment (especially those who live close to major regional and metropolitan centres)’ (ibid). Compared with the metropolitan centre of Melbourne, rural areas also have a much lower share of ‘jobs associated with IT, computer, telecommunications, engineering design and advertising’ (ibid), but the share of jobs in the more traditional creative industries ‘such as newspaper publishing, printing, libraries, archives, arts education, photographic services, and employment for creative artists, musicians, writers and performers’ is much higher (Essential 2013, p. 72).

On the Mid North Coast of NSW, a predominantly rural region, the *Mid North Coast Creative Industries Research Project* reported that the creative industries directly employ 1,765 people from within this region. The report estimates that the value of the creative industries to the region sits at \$80.6m (Grace 2009, p. 6). In terms of employment most of this was concentrated in the more urbanised and demographically larger centres of Coffs Harbour and Port Macquarie. The report noted that it did not set out ‘to provide comprehensive economic analysis from the outset, rather an overview of the current situation’ (Grace 2009, p. 8). It did indicate that ‘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’ (Grace 2009, p. 6).

The *Northern Rivers Arts and Creative Industries Strategy 2009-2012 Mapping Report* which was prepared by Positive Solutions for Arts Northern Rivers, set out to ‘provide a blueprint for managed, strategic, longer term engagement in the development of the creative industries in the region by industry stakeholders, the three levels of government, and the business sector’ (NR Arts 2012, p. 5). This report found that the number of people employed in the creative industries in each of the Local Government Areas (LGAs) that comprised the Northern Rivers Region sat at 1,866 people in 2001 and, following a growth rate of 3.9%, sat at 2,254 people in 2006. This growth rate was above the growth rate for all other industries in the region (NR Arts 2012, p. 22). Architecture, Design and the Visual Arts, as one category, constituted 33% of this employment, while Publishing (27%), Software and Digital Content (15%), Film, TV and Radio (9%), Music and Performing Arts (8%), and Advertising and Marketing (8%), comprised the rest. The report also found that ‘mean incomes in the region are highest in the software/digital content sector and the advertising and marketing sector and lowest in music and the performing arts’ (NR Arts 2012, p. 26). Significantly for this current study, the NR report also ‘compared the development of creative industries employment in Northern Rivers with that in several other Australian regions’ (NR Arts 2012, p. 27) which they believe could be used to eventually compare progress.

Region	1996	2001	2006	% inc 96-06
Hunter CI	3,132	4,019	4,566	46%
Hunter all industries	177,904	148,779	163,219	
Illawarra CI	2,719	3,548	3,646	34%
Illawarra all industries	133,261	136,768	123,149	
Northern Rivers CI	1,230	1,625	2,055	67%
NR all industries	30,911	18,623	63,457	
Western District CI	588	465	442	-25%
Western all industries	8,905	6,391	15,239	
South West CI	789	1,065	1,174	49%
SW all industries	20,258	3,276	27,199	

*Table 5 Comparison of Creative Occupation Employment Numbers by Region
(original in NR Arts, 2012, p. 27)*

Region	1996	2001	2006
Hunter	\$95,021,212	\$149,181,136	\$217,269,104
Illawarra	\$83,724,628	\$145,550,132	\$186,515,058
Northern Rivers	\$27,946,048	\$44,239,988	\$71,986,356
Western District	\$15,166,684	\$13,278,200	\$16,277,404
South West	\$20,681,752	\$30,198,220	\$47,847,956

*Table 6 Total creative occupation earnings for the five regions
(original in NR Arts 2012, p. 28)*

It was indicated that the earnings for creative occupations across the five regions compared in the report, looking at three Census periods, had the Hunter region with the highest earnings figure (NR Arts 2012, p. 28).

They also found that ‘between 1996 and 2001 total creative industries earnings rose 58%, and from 2001 to 2006 a further 63% ... Mean (individual) income across the creative industries as a whole remained lower than that in each of the other benchmark regions’ (NR Arts 2012, p. 28).

The report stated that:

In common with other regions, the software and digital content sector displayed the highest levels of earnings in the Northern Rivers. It is notable that the growth rate was highest in music and the performing arts (and equally notable that this was from an extraordinarily low level) and that despite the growth rate over a ten-year period, the average earnings in this sector are still the lowest of any field of the creative industries (NR Arts 2012, p. 28).

Region	1996	2001	2006	CAGR* 1996-2001	CAGR* 2001-2006
Hunter	\$30,339	\$37,119	\$47,584	4.12%	5.09%
Illawarra	\$30,792	\$41,023	\$51,156	5.91%	4.51%
Northern Rivers	\$22,720	\$27,225	\$35,030	3.68%	5.17%
Western District	\$25,794	\$28,555	\$36,827	2.06%	5.22%
South West	\$26,213	\$28,355	\$40,756	1.58%	7.53%

*Table 7 Regional Comparisons of Mean Income for all Creative Occupations
(original in NR Arts 2012, p. 28)*

In the Hunter Region, specifically in the regional capital, Newcastle, there has been a concerted effort to create an innovation ecosystem that belatedly recognised the importance of the creative industries to this nascent ecosystem. Dr Sarah Pearson, then employed as the University of Newcastle's Pro Vice Chancellor Industry Engagement and Innovation, produced a report entitled *Connecting Innovation to Opportunity* (2017) which was primarily supported by the Hunter Founder Forum. This report was completed to review and identify the region's support pathways for business growth and innovation through mentoring, capability building and connecting to opportunity. Its significance for this study lies in the fact that the resulting region-wide strategy draws together the major support, education and training organisations in a collaborative approach to supporting industries related to creativity, invention and innovation.

While it was not specifically focused on the creative industries they were briefly recognised as an integral element and their contribution to other endeavours became evident in this process.

The report has been accepted by local decision makers and resulted in the formation of a dedicated organisation (Hunter iF Limited). It is hoped by its organisers that it will help direct the region's strategic approach to innovation support and industry growth. The broad findings are therefore impactful to the creative industries and provide an added insight into the sector. In the report Dr Pearson noted that the Hunter region 'has a heritage of innovation and ingenuity, of reinvention and resilience, of gritty creativity and industry' (2017, p. 9). She noted that the region has been resilient enough to survive 'economic downturns and natural disasters ... which has led to a cohesive, supportive community culture' (ibid). The people who live and work here 'believe in their "place", relating strongly to it and wanting to see it thrive' (ibid). In order to assess what has been going on in this community and where the gaps and opportunities were Pearson put in place an innovation ecosystem framework developed by herself 'based on her experience building an innovation ecosystem in Canberra (CBR Innovation Network, CBRIN), her visits to international innovation ecosystems, and literature searches' (Pearson 2017, p. 11). This framework covered innovation activity as it relates to existing companies, large and small as well as government input and diverse startups. Pearson then identified various important themes built around certain questions which included: Where do innovation ideas come from - do we have all the parts of the ecosystem working together on this? Is there support for growing ideas - are there accelerators, incubators, mentors, professional service providers and so on? Is the culture and infrastructure set up for success - does the Hunter value entrepreneurship, design and making? Can we access markets - do local companies and government purchase local goods and services? Are companies here helping get products and services to global markets? Do we have any programs to help with exporting? Do we have plenty of talent - are there experienced business people and entrepreneurs here? Are there people with the right skills here? Does the Hunter have good access to funding - is there plenty of early stage and late stage funding? Does the Hunter have the right leadership, collaboration and connectivity - are the right stakeholders stepping up to lead? Are we working collaboratively in our innovation ecosystem? Is the system well connected, locally and globally? These and many other questions formed the basis of the conclusions Pearson drew. In terms of the generation of ideas Pearson reported that:

The Hunter has a well-educated community; a world class research driven university that is increasing its engagement with, and commitment to industry and entrepreneurship; a TAFE dedicated to advanced manufacturing and future industries; national labs represented by CSIRO; ideation programs such as hackathons ... and is planning significant open data activity ... A focus will also need to be made on the quality of ideas (Pearson 2017, p. 13).

Pearson noted that the Hunter Region has a number of accelerator and incubator programs which included CSIRO ON, the Regional Incubator, Slingshot and the partnership between Slingshot and UON through the ICON Accelerator. She also reported that:

Several training programs are available (such as Lean Startup and Business Model Canvas workshops); many events (though possibly too many and conflicting). The Integrated Innovation Network (I2N) is also setting out to connect and leverage investment in growth support across several innovation hubs in the region for startups and SMEs (Pearson 2017, p. 13).

The report also indicated that the Hunter has a strong culture of entrepreneurship, design and making largely as a result of its legacy in manufacturing. The region's:

Liveability is very good (great flexibility for work and play, access to entertainment and cultural/sporting activities, easy life) and creativity is flourishing; access to co-working spaces is good ... However, it was universally recognised that more needs to be done to celebrate and promote success, tell the failure and what next stories, and to build reputation and brand ... internet access could be improved; 'Makers Spaces' and prototyping facilities are not available (ibid).

Pearson also recorded that a few market access/export programs are in existence but many participants stated that 'local companies, the university and government could improve in terms of their local procurement (a nationwide issue)' (ibid). In addition 'local large companies could become more absorptive and open in terms of innovation; and more could be made of leveraging the global connections people in the Hunter have' (ibid). It was also noted that the Hunter has the necessary talent with:

A lot of experienced business people, entrepreneurs and 'Makers' either living here or connected emotionally here; there is a willingness to connect creatives with STEM (but programs need to be put in place to make that systemic); there is a high level of university and TAFE education. Focus will need to be given to growing a high-quality pipeline of talent and ideas, as well as quantity (ibid).

In terms of leadership, collaboration and connectivity a number of Hunter Councils were seen to be 'showing strong innovation leadership, as is the university and members of the innovation community' (ibid). Pearson also encouraged pride in the 'interest, passion and commitment of many to drive the innovation agenda in our region' (ibid). In addition, Pearson recommended that there was a necessity to build 'a quality pipeline of ideas' (ibid). Specifically, maker spaces and prototyping facilities were necessary, as well as 'help for existing large and small companies to innovate and grow (including a scale up incubator for SMEs); and support for professional service providers wishing to help start-ups' (ibid). She noted that the region needed to build a 'common brand and compelling message as well as delivering a collaborative South by South West (SXS) type large scale innovation event to attract investment and businesses' (ibid). The 'iF Report' also sketched a regional construct of the creative industries that sees them as an integral, and integrated part of the regional industry ecosystem. It noted that:

People are at the heart of what the Hunter is good at. People with talent; people innovating in manufacturing, engineering, design and the creative industries; people with a deep skill base and experience; people with ideas; people networking through entities such as HunterNet, Ai Group and Hunter Business Chamber (HBC). The networking culture, a happening culture and a supportive can-do culture is key (Pearson 2017, p. 16).

Pearson briefly recommended that an 'engagement with UON's School of Creative Industries (SOCI) would also be highly valuable' (2017, p. 6). This school had been set up in response to the recommendations of the Allen Consulting Group (ACG) report delivered to UON in 2013. This report, entitled *Scoping a Research and Innovation Cluster in the Creative Industries in Newcastle and the Hunter Region*, used Higgs and Cunningham's (2007) trident methodology, outlined more fully below, and ventured a best estimate of numbers employed in the creative industries in the region. At the same time, they cautioned that 'the data is only available at the 4-digit ANZSCO occupation level, while creative occupations are defined by Cunningham at

the more specific 6-digit level' (ACG 2013, p. 33). ACG suggested that this process likely 'overestimates the size of the sector' (ibid). With that caveat in mind they asserted that for the Hunter region, '11,500 people were employed in the creative industries in 2011' (ACG 2013, p. 31).

Source: ABS 2011a.		Creative	Industry -Other	Total
Occupation	Creative	2,431	6,862	9,293
	Other	2,273	251,386	253,659
	Total	4,704	258,248	262,952

*Table 8 Creative Employment Trident in Newcastle and Hunter Region 2011
(original in ACG 2013, p. 34)*

ACG then asserted for 'Newcastle and the Hunter Valley, the creative industries represent 4.4 per cent of employment compared with 6.6 per cent in NSW and 7.2 per cent in Australia' (2013, p. 34).

4-digit occupation	Newcastle and Lake Macquarie	Hunter Valley excluding Newcastle	Total	Total Growth 2006-2011
Actors, Dancers and Other Entertainers	85	23	108	7%
Advertising and Marketing Professional	415	156	571	33%
Advertising, Public Relations and Sales Managers	1,027	425	1,452	15%
Architects and Landscape Architects	234	30	264	10%
Architectural, Building and Surveying Technicians	836	481	1,317	40%
Archivists, Curators and Record Managers	53	20	73	13%
Artistic Directors, and Media Producers and Presenters	94	18	112	-12%
Authors, and Book and Script Writers	45	20	65	36%
Fashion, Industrial and Jewellery Designers	68	17	85	49%
Film, Television, Radio, and Stage Directors	73	23	96	7%
Graphic and Web Designers, and Illustrators	380	142	522	36%
ICT Support Technicians	419	168	587	28%
Interior Designers	55	21	76	7%
Jewellers	29	12	41	-25%
Journalists and Other Writers	232	84	316	15%
Multimedia Specialists and Web Developers	91	17	108	108%
Music Professionals	159	42	201	-1%
Other Engineering Professionals	162	58	220	29%
Other Miscellaneous Clerical and Administrative Workers	230	110	340	1%
Other Miscellaneous Technicians and Trade Workers	218	186	404	41%
Other Specialist Managers	584	345	929	33%
Performing Arts Technicians	122	44	166	5%
Photographers	125	64	190	29%
Software and Applications Programmers	567	158	725	15%
Urban and Regional Planners	166	80	246	30%
Visual Arts and Crafts Professionals	34	45	79	-18%
TOTAL	6,504	2,789	9,293	23%
Source: ABS, 2011 Census of Population and Housing				

*Table 9 Number of People Employed in Creative Occupations in Newcastle and Hunter
(original in ACG 2013, p. 37)*

In terms of the Hunter's proximity to the NSW state capital of Sydney, the largest conurbation in Australia and home to many of the major creative industries in the country, ACG noted that while 'proximity to Sydney presents advantages for Newcastle and the Hunter region, it also presents some challenges. Newcastle residents are able to commute to Sydney for work or training' (ACG 2013, p. 54). Most importantly, they contended that 'Sydney may capture benefits of Newcastle's endeavour' (ibid). In terms of the economic context in 2013, they more broadly asserted that:

While the region's reliance on mining is forecast to grow, the manufacturing industry is forecast to decline, indicating further diversification of the economy will be needed in the future. The creative industries have an important role in this diversification: as a source of employment growth; more broadly, by helping to retain talented young people in the region; and helping to attract and retain people and families with high levels of educational attainment, incomes and aspirations. These contributions will help to build labour force participation levels, help to ensure that important services are available in the region and add to the human capital base in the region - a key element in investment attraction for high value-adding industries (ACG 2013, p. 31).

The report also suggested that:

The economic and social importance of creative industries is emphasized by their contribution to GDP, employment, income, as well as innovation, social cohesion and creativity. While the economic contribution of the creative industries can be quantified to an extent - using measures such as employment numbers and industry value added - quantitative measures do not fully capture the contribution of creative industries (ACG 2013, p. 6).

2.14 Cultural Activity and Cultural Beliefs

While recognition of the creative industries' contributions at the city, regional, state and national levels are significant, as we can see from the above, two further important factors provide insight into the impact of the creative industries in Australia. These factors also, perhaps, provide a point of confusion for policy makers as well. These are the notions of the importance of cultural activity in its own right, which also includes the cultural beliefs and assumptions associated with it, and the related matter of the benefit of copyright to the creative industries. We will briefly examine the former first.

Justin O'Connor, then at the CCII at QUT, along with Stuart Cunningham and Luke Jaaniste, was commissioned by the Australia Council of the Arts to investigate a number of questions. These included: 'What unifies the groups of industries collected together under the name creative industries? Are the arts a part of the creative industries? What is the input of the arts to the creative industries? And are they just a subsidized input to the creative industries?' (Keele in O'Connor et al. 2011, p. 3). Their report, entitled *Arts and Creative Industries: A Historical Overview; and An Australian Conversation* (2011) appears to have embedded in it what could be called a remnant romantic view of the creative process. Art, for them, is similar in essence to R.G. Collingwood's earlier prescriptions about what constitutes this activity (see McIntyre 2012, pp. 156-159) as it is bound up 'in a moment of transcendence or autonomy – self-determination, freedom and play... It's in that space, or distance, in which a work creates its own rules, gives itself its own reason for existing' (O'Connor et al. 2011, p. 101). They argue against the idea that creativity could more readily be seen as 'the creation of novelty or unknown

economic value per se' (O'Connor et al. 2011, p. 95) despite the copious research work that rationally and empirically eschews Romanticism of the type Collingwood embraces. From an empirically based research point of view creativity is the bringing into being of novelty that is valued in at least one social setting. Nonetheless, O'Connor et al. then go on to argue that judgements of value, so central to these latter rational definitions of creativity, are 'now made at the level of a landscape, of an ecosystem rather than specific productions' (2011, p. 100). Then they move much closer to rational based confluence approaches to understanding creativity, and how it functions, when they also talk about the 'dynamics of creative ecosystems' (2011, p. 99), with multiple factors of production intersecting within the spatial scale of this ecosystem as it operates across an 'integrated global industry' (ibid). They summarize part of their findings by stating that:

Creative industries contributed enormously to our common culture; it is inconceivable to have a contemporary cultural policy that does not take into account the central role of commercial culture within our everyday lives. The newer 'creative industries' – not just new cultural forms, such as computer games, but new cultural means of creation and communication – have complicated but not removed this issue...Many of those working in the arts and creative industries – including most of those interviewed in this report – see themselves as operating between these two spheres. They might work for one or the other across the course of a day or week, but equally their work, though never receiving public subsidy, might be described as 'artistic'. Indeed, those working in commercial culture not only value 'the arts' but also see their own commercial activity as involving high levels of artistic or cultural purpose (O'Connor et al. 2011, p. 5).

Skirting around, through and over the 'modern incoherence' (Watson 2005, pp. 606-623), the primary question for O'Connor et.al then became a normative one; whether or not the creative industries should 'be approached in purely economic terms; if they are central to contemporary culture, how should they be supported to enhance this cultural contribution?' (2011, p. 5). According to the Australia Council itself, cultural activity makes a substantial contribution to the Australian economy in its own right, contributing \$50 billion to Australia's GDP, which is comparable to the GDP share of cultural activity in the USA. This contribution includes over \$4.2 billion in economic benefits from the arts. Expenditure on culture by Australian governments in 2012–13 was \$7 billion including over \$1.3 billion on the arts (Australia Council 2015, p. 4). In the face of these figures Irina Bokova, Director General of UNESCO, also reminds us that:

in addition to its economic benefits, the cultural and creative industries generate non-monetary value that contributes significantly to achieving people-centred, inclusive and sustainable development (Lhermitte et al. 2015, p. 5).

Similarly, the Australia Council argues that;

New analysis using the internationally recognized wellbeing valuation approach is one way of calculating the value of intangibles. It suggests that people who engage with the arts have higher life satisfaction. This is a significant finding given the level of engagement by Australians with the arts. Nearly all Australians consume at least one form of art and half participate in arts creation each year. Geographic location does not impact on arts engagement as much as you might expect, and creative participation has increased amongst some groups with historically lower levels of participation (2015, p. 4).

Furthermore, the role of ethnic and Indigenous creative products, in this case meaning artistic products, is also culturally significant which points to a certain set of cultural anomalies in the Western common-sense conception of creativity. Some cultures respect and often demand the creative work stay within the parameters of traditional work while others, particularly individualist oriented ones typical of current North Atlantic cultures, are oriented toward innovation (Sawyer 2006, pp. 140-150). NSW is one of the most culturally diverse locations in the world with more than one million residents speaking a language other than English (NSW Digital Economy IAP 2012, p. 9). Aboriginal and Torres Strait Islander arts are distinctive in this mix and recognized as such. The Indigenous visual arts sector is a major contributor to the arts economy, central to this being our 'unique position as home to the world's oldest continuous living culture' (Australia Council 2015, p. 4). NSW's Indigenous culture also provides unique and distinct opportunities to produce Indigenous cultural products (NSW CIT 2013, p. 14) while traditional Indigenous stories, visual arts, dance and music are particularly expressive of the world they come from.

2.15 The Importance of Copyright

Apart from the multiple complexities of entwining economic and cultural activity, and the assumptions, common sense beliefs and naturalised myths that underpin each, the issue of copyright also appears crucial to the future of many of the creative industries. However, the Australian Law Reform Commission identified three problems with the current copyright system. As Terry Flew reported in his article 'Copyright and Creativity: An Ongoing Debate in the Creative Industries' in the *International Journal of Cultural and Creative Industries* (2015, pp. 4-17), these include what they see as the regular over-estimation of 'the extent to which the benefits of copyright laws accrue to content creators, as distinct from copyright distributors' (2015, p. 15). For Flew this means that most of the financial benefit goes to the 'top tier' in a limited number of creative industries' sectors. There also appear to be 'negative impacts of unduly restrictive prohibitions on the re-use of copyrighted materials [which] impact on the creators of original creative works' (ibid). Finally, the idea that copyright is crucially important has had, somewhat surprisingly to Flew, 'the effect of putting artists and content creators on the side of the incumbent creative industries' firms, and the protection of their established business models, at a time when there is considerable flux in these industries' (ibid). Writing in *Electronic Watermarks: A High Profile for Intellectual Property in the Digital Age* (2006) Paul Levinson takes up the challenge of addressing the facts of creativity, as opposed to viewing copyright through its idealised and often Romantic form:

Of course, remuneration is by no means the only compensation creators seek - the joy of self-expression, the thrill of possible fame, are major players in the drive to create. And pursuit of these profound psychological rewards is no doubt facilitated by the Internet and the Web, where writers can easily publish their own work and make it available to millions of people. This heightening of authorial presence is usually taken as an argument against the need for intellectual property: the new digital regime pays its participants in self-fulfilment and reputation, so who needs money? But money, not self-fulfilment, pays the rent, gets one fed, buys the clothes on your back; and neither does reputation, except insofar as it can be translated into compensation for further intellectual work. Thus, the separation of the psychological from the economic, the exaltation of the first and the denigration of the second, only begs the question of how creators can be expected to labour over long periods of time absent adequate compensation. The error here is to assume that the psychological aspects of creation can be separated

from the economic at all, to be used as a de facto compensation in lieu of money. Once we recognize the way these two impulses necessarily operate hand in hand, we discover something new about the digital revolution. To the extent that it catapults the author into prominence (which, again, is not complete or uncomplicated, since, [...] author/reader distinctions can be unclear in hypertext [Levinson 1997, Chapter 13]), it works not against but strongly in support of intellectual property rights. The creator, as we have seen, received short shrift even after the introduction of the printing press and the onset of copyright protection. [Yet] digital communication, with all of its complications, may be the most important torch-bearer of intellectual property since Gutenberg (Levinson 2006, p. 65).

While these are, as you can see, very real-world issues for many content creators, it was noted in the Australian Law Reform Commission issues paper *Copyright and the Digital Economy* (ALRC 2012) that, among other matters, reform should take place in the context of the ‘real world.’ This paper stated that:

Digital technology has, arguably, been accompanied by changed consumer attitudes to copyright—specifically, less willingness to recognise that copyright is a form of property, owned by a creator (or more usually, the assignee of a creator). Even where copyright is recognised, infringement may be seen as justified. There is a spectrum of ‘real world’ use which ranges from incidental ‘de minimus’ use of material to transformative, creative use of material. Clarifying which activities infringe copyright now, and whether certain activity should continue to be categorised as infringement, is part of this Inquiry. One concern is that, at present, ‘worthy individuals and citizens, many of them children (some maybe even judges), are knowingly, ignorantly or indifferently finding themselves in breach of international and national copyright law. And they intend to keep on doing exactly as before.’ Laws that are irrelevant and do not fit with community practice are undesirable. This is not to suggest necessarily that the solution is ‘free use’ for consumer practices (although it might be) but means of licensing or exempting what is currently widespread infringement should be considered (ALRC 2012, online).

One person who straddles the ‘real world’ of being both a content creator and a publisher is Phillipa McGuiness, author of *Copyfight* (2015). In an impassioned plea she asks ‘is our default to stack everything in favour of the consumer and lose sight of the interests of the artists?’ (2015, p. 27). Furthermore, as the ACG (2013) report attests:

The public are not used to paying for some creative services - they expect the artists’ exposure to an audience to be enough of a reward. Examples of this are when a young band is not reimbursed for playing a gig at a local hotel or a fashion designer is not rewarded financially for putting on a fashion show for a local charity (ACG 2013, p. 55).

Needless to say, in the same year as the issues paper was released by the ALRC, the Australian Council on Copyright (ACC 2012) asserted that copyright legislation is a key piece of infrastructure that supports the creative industries, industries which comprise an increasingly important part of modern economies:

In 2010-11, Australia’s copyright industries employed 906,591 people or 8.0 per cent of the Australian workforce and generated economic value of \$93.2 billion, the equivalent of 6.6 per cent of gross domestic product (GDP). They generated

just over \$7 billion in exports, equal to 2.9 per cent of total exports. However, the relative value of copyright exports has declined as prices for natural resources and some agricultural commodities have been at record highs in recent years (ACC 2012, p. 4).

Given these often divergent and at times conflicting views, the beliefs about creative action that underpin them and the globalised and digitised contexts they exist in, there is a certain complexity in analysing how copyright payments contribute to these figures. For example, direct payment for royalties occur through collection agencies and they go to support creative industries' professionals such as songwriters, writers and so on. But for a number of sectors there are also partial connections to copyright 'where a portion of the industries' activities are related to copyright through manufacture, performance, exhibition, broadcast, communication or distribution and sales' (Australian Copyright Council, 2012, p. 4). Interdependent activities are also 'undertaken that support and facilitate the creation of copyrighted works and other protected subject matter' (ibid) and there are further complications where there are what are termed non-dedicated support regimes which are also dependent on copyright. This latter situation arises 'where part of the activities is related to broadcast, communication, distribution and sales in protected subject matter, but they are not included in the core copyright industries' (ibid). This complexity points to attempts to pinpoint precisely where the economic activity is in terms of copyright. The World Intellectual Property Organisation (WIPO 2013) has developed a methodology to account for this but the complexities involved also highlight the growth of various statistical processes which also try to account for the diversity of activity which is not part of specialised creative industries.

2.16 Specialist, Embedded and Support Workers

One approach to the difficulties of cross or multi-sector analysis for the creative industries is provided through the Creative Trident methodology developed at QUT by the Centre of Excellence for Creative Industries and Innovation (CCII). Terry Flew writes in reference to it that:

One of the difficulties that arises in making claims about the size and significance of the creative industries is that there has not, until recently, been a conventional methodology for determining the number of people working in these industries, and there has been a systematic tendency to underestimate the number of people working in creative industries occupations. The major issue is that there are two ways in which data derived from sources such as censuses and the Standard Industrial Classification (SIC) data can be used to measure the creative industries workforce. The first starts from the industries themselves, counting the number of people employed in creative industries. The second starts from occupational data and counts the number of people working in creative occupations where creative occupations are conflated in some way to artistically related occupations. The first counts the number of people engaged in so called non-creative occupations but working for creative industries firms (e.g. a sales person at a video store, a ticket seller at a theatre, or an accountant for a performing arts company), but misses those who are engaged in creative occupations but not working in the creative industries (e.g. a web designer employed by a bank or a musician employed as a teacher). Both approaches understate the actual number of people engaged in creative industries employment, while producing different figures (Flew 2012, p. 93).

The CCII at QUT developed the Creative Trident approach to help avoid some of the problems this situation appears to present. The CCII collected data on those employed in the creative industries and their conclusion was that 299,916 people were employed in the creative industries in Australia in 2001. As Flew points out, of that figure 134,450 (44.8%) were employed in creative occupations. The number employed in creative occupations was 271,467, of whom 137,017 (50.5%) were employed in other industries. Putting these two sets of figures together in the Creative Trident, there were 436,933 people in the sector, of whom:

- 134,450 were employed in creative occupations in the creative industries (Specialists);
- 137,017 were employed in other industries (Embedded Creatives);
- 165,466 were employed in business and support occupations in creative industries, who are often responsible for managing, accounting for, and technically supporting creative activity [Support] (Flew 2012, pp. 93-94).

Reflecting the tighter analysis provided by tools such as the Creative Trident classifications, the CCII reported on these three groups of practice. These include: specialist creatives who are creatively occupied and work within CI (28%); support workers who are not creatively occupied but do work within CI (29%); and embedded creatives: who are creatively occupied but work outside CI (43%). They went on to assert that:

According to the (Australian) 2011 Census, 432,965 people had creative occupations (as opposed to people working in the creative industries themselves). This was an increase of 21% since the 2006 Census. The creative occupations represent 4.4% of total occupations. In 2011, almost 40% of employment within creative occupations related to advertising and marketing, followed by software development and interactive content (22%) and design and visual arts (19%) (ibid).

In explanation, the CIIC Report states that with the size of the total creative workforce in 2011 at 611,307 people, (6.2% of total employment):

Almost half of those employed in creative occupations are working within non-creative industries – i.e. almost half of the total creative workforce is classified as embedded creatives, ‘this pattern being repeated across Australia with embedded creatives making up the largest proportion of the total creative workforce in all states’. Furthermore, it appears that, overall, embedded creatives have higher incomes than those working directly in the creative industries themselves (CIIC 2013, pp. 10-11).

Apart from the ACT, the creative workforce tends to be concentrated in New South Wales with almost 40% of the workforce in that State, embedded creatives being found in most industry types with the largest proportion being in manufacturing, wholesale trade and professional scientific and technical services where more than 10% of their workforce is made up of embedded creatives, mostly in the advertising and marketing occupation category (CIIC 2013, pp. 10-11).

2.17 Creative Work

While the numbers being employed in the creative industries appear heartening, the assumptions that creative work is inherently free and easy ‘have proved somewhat less than convincing’ (Banks & Hesmondhalgh 2009, p. 419). Workers within the creative industries in

Europe and elsewhere face a range of difficulties that can 'reflect the often exploitative and precarious nature of the work process' (2009, p. 419). As of 2009 Banks and Hesmondhalgh found that creative work is often project-based and irregular, contracts tend to be short-term, and there is little job protection. There is a predominance of self-employed or freelance workers; career prospects are uncertain and often foreshortened; earnings are usually slim and unequally distributed, and insurance, health protection and pension benefits are limited. Creatives, they report, 'tend to be younger than other workers, and to hold second or multiple jobs. Women and ethnic and other minorities are underrepresented and disadvantaged in creative employment' (Banks & Hesmondhalgh 2009, p. 420).

Internationally, according to Lhermitte et al. (2015), cultural and creative workers also display certain qualities. This study found that these industries were characterised by youth, high productivity, independence and entrepreneurship and a high level of education. However, CCI work in some countries also provides some economic opportunities for women in some sectors compared with more traditional industries (Lhermitte et al. 2015, p. 18) although that report does not indicate whether they remain under-represented. In the UK, as Banks and Hesmondhalgh (2009) suggest, because of an oversupply of creative labour, there is a correspondingly large contribution made through the 'gift' economy or for low wages. These characteristics tend to confirm the pattern of differences in income between embedded workers and those working directly in creative workplaces. For the 44,000 practicing professional artists working in Australia many predominantly have portfolio careers, with just 17% working full-time on their creative practice (Australia Council 2015, p. 4) attesting to the idea that people who work in certain sectors of the creative industries often have several occupations, working across a number of creative sectors, or work where their creative occupation is not their main employing occupation. For example, a person who teaches drama at TAFE but performs in their spare time would be assessed as belonging to the Education and Training industry rather than the creative industries (Allen Consulting 2013, p. 33).

Creative labour in the UK, outside larger or specialist workplaces or where workers are embedded in other industries, tends to be individualized and reliant on individual talent, personalized according to certain modes of work, thus reducing opportunities for collective approaches to negotiations. This situation encompasses a different view taken of the 'creative' or 'knowledge' economy than in other areas. Self-employment and freelancing are becoming dominant modes of work and high-success role models do not reflect the reality of many others. In their study Banks and Hesmondhalgh (2009) concluded that UK creative industries policy was increasingly linked to educational and employment policy, in the interests of asserting national identity and consolidating economic interests. They suggest that 'there must be serious concerns about the extent to which this business-driven, economic agenda is compatible with the quality of working life and of human well-being in the creative industries. After 10 years, the direction of UK creative industries policy is looking increasingly bleak' (Banks & Hesmondhalgh 2009, p. 428). As Mark Deuze reports, 'people in all sectors of the economy have to come to terms with the challenges and opportunities of contingent employment, precarious labour, and an overall sense of real or perceived job insecurity' (2007, p. 2). If the reports from Deloitte (2012, online), mentioned above, and the Oxford Martin Working Paper *The Future of Employment: How Susceptible are Jobs to Computerisation?* (Frey & Osborne 2013) are both correct, many workers will find it necessary to create income from wherever they can, rather than gain employment, as digitally-driven automation takes hold. For some it will be business as usual.

Hesmondhalgh and Baker (2011) point out that 'the great army of freelancers sustaining the cultural industries have little access to the financial and psychological benefits accruing from strong union representation' (2011, p. 137). This view is leavened, and perhaps supported, by the idea that

numerous creative freelancers reported ‘pleasure in autonomy and freedom, that their work was complex, challenging, interesting and varied. It may be demanding, but it offers considerable opportunity for a sense of completion, and of having done a job well. There was widespread appreciation of the fact that this is work socially recognised as interesting, even glamorous’ (ibid, p. 138). Dawson and Holmes also report in *Working in the Global Film and Television Industries: Creativity, Systems, Space, Patronage* (2012), that while the rewards are primarily non-material and the creative industries continue to attract freelancers willing to undercut each other for these non-material rewards, this increasing casualisation, sub-contract and freelance work may actually be detrimental to creativity and innovation as these workers move toward risk averse behaviour in order to maintain network contacts and regular contracts (2012, pp. 6-7) in an effort to please their clients. These clients are, of course, those who have increasingly outsourced their content production, design capability and IT support. There is little doubt they will continue to pursue these activities so long as they see a financial advantage in them.

It is believed that the natural attributes of the creative workforce, and in particular those in the Design sector able to deliver ‘design thinking’, provide a capability to drive innovation and competitive advantage in other industries. This ability to generate new ideas is seen as valuable in innovation and in meeting competition. It is argued that to be competitive there is a necessity to find smarter ways of conducting business and of building knowledge for business, moving from a position of relying on commodity knowledge production to a point where there is a need to constantly innovate on the basis of creative ideas (NSW CIT 2013, p. xx). This situation, coupled with globalisation, means that many of the skills and services at the heart of business competitiveness wind up being outsourced to regions with low costs and large pools of technical expertise. The corollary is that income for a very few may accrue well beyond their dreams, but for the majority of people working long term in the creative industries, income continues to remain relatively low, highlighting the fact that patronage, of one type or another, has always been important to the creative industries and will remain vital so long as societies need symbol creators.

Symbol creators (Hesmondhalgh 2006, pp. 4-5), those who are involved in the invention and/or performance of all cultural forms no matter what technologies they use, produce their work as a result of a variety of forms of patronage. As Csikszentmihalyi suggests, ‘in our culture, a huge number of talented and motivated artists, musicians, dancers, athletes, and singers give up pursuing their domains because it is so difficult to make a living in them’ (Csikszentmihalyi 1997, p. 333). Their ability to continue working is often linked to the actions of those who finance creative works.

2.18 Finance

The NSW Business Chamber argues that ‘small business will struggle to grow without access to finance’ (quoted in NSW Digital Economy 2012, p. 29). This report goes on to state that:

While innovation is fundamental to the development of a strong Digital Economy, funding innovation is a barrier for many companies. This financing gap is noticeable both in the form of new players entering the market and the contraction of established SMEs exploring new territories for products or services. In both circumstances, a lack of certainty about the business environment makes funding relatively risky and often discourages banks or other funding sources. Further, the lack of angel and venture capital funding results in SME’s being largely self-funded (ibid, p. 29).

These forms of self-funding can range across what Kaufman (2012) calls a hierarchy of funding. He describes various methods of obtaining funding all of which have their application within the creative industries. Many artists, musicians, filmmakers and photographer start out by

investing their own money which may come from a 'day job' or they take a risk with personal credit. Many seek or are offered personal loans from friends or family but run the risk of harming these personal relationships. Unsecured loans typically made by banks or credit unions are usually for relatively small amounts and usually don't require collateral which means the interest rates are high - if indeed such a loan would be extended to the freelance or contract worker increasingly typical of the creative industries. A secured loan usually requires collateral and many creative industries' professionals have used their homes as collateral. However, as is most often the case, 'if you don't make the payments, the lender can seize the property signed as collateral' (Kaufman 2012, pp. 200-201). Once a business idea is fully formed, whether it's a software application or a film project, those working in the creative industries will then move beyond self-funding and seek what is known as 'angel' investment. This type of investor usually offers:

Capital in exchange for partial legal ownership of the business. Some angels offer advice, but they usually can't make business decisions. Venture capitalist are very wealthy and they offer very large amounts of capital. It happens in 'rounds' and there's a lot of negotiation involved. VCs require a lot of control, usually a seat on the company's board of directors. Public stock offerings involve selling partial ownership of the company to investors on the open market. Whoever owns the most shares of the company controls it, so 'going public' is very risky in terms of control. Public Stock Offerings are usually used by angel investors and VCs to exchange ownership for money (Kaufman 2012, pp. 200-201).

The caveat is that the further a creative practitioner or business moves along this hierarchy of funding the more control one cedes to the investor. As a result, one further method of gaining funding that has become increasingly popular is crowdfunding. Buff and Alhadeef (2013) point out that crowdfunding involves 'online contributions by the general public, above all, to a diverse pool of creative projects' (2013, p. 28). They identify four types of crowdfunding:

- 1) Equity-based: Contributors expect a financial return.
- 2) Lending-based: Contributors expect a financial return.
- 3) Reward-based: Contributors expect a reward depending on the size of their donation.
- 4) Donation-based: Contributors expect nothing in return (ibid).

Reward-based models are the most popular, representing 43% of the crowdfunding market (ibid). Buff and Alhadeef suggest that:

The reward-based model permits artists to raise funds before work has commenced, as the funds are only realized if the goal is met, and artists can cover costs or break even before the work has started. However, the authors also indicate that of the 22,000-plus projects that have been launched on Kickstarter, only 54% have reached their funding goal (2013, p. 28).

They also assert that trying to budget for a crowdfunding campaign can be quite problematic since it is often hard to estimate, prior to initiating the production, 'the distribution of rewards fans will choose. Moreover, it is even harder to guess what an average pledge will be, and this is a critical piece for a successful crowdfunding campaign' (ibid).

Apart from the general issues surrounding finance availability for creative industries' professionals and small business owners, there is also the question of the effect of the gift economy. There is little doubt that the gift economy is a significant part of the creative industries' sector, but it should also be noted that gift giving as a form of exchange is a very ancient process that has persisted into the twenty-first century (Malinowski 1922, Mauss 1925,

Bourdieu 1977, Cheal 1988). In terms of how this works in the modern context, Offer (1997) explains that gift giving and reciprocity 'abounds at work; it affects management, agriculture, marketing, entrepreneurship, and politics' (1997, p. 450). The gifts exchanged in these processes, many of which go unaccounted for in many business models, are both tangible and intangible and can be 'dear or cheap, substantive or symbolic. It is not costless' (Offer 1997, p. 452). Exchange from this perspective is not only an economic transaction, it is also a good in itself, a 'process benefit ... usually in the form of a personal relationship'. This personal interaction is fundamental to the establishment of networks. Access to social capital, which can be converted into economic capital relies on it 'especially where personal interaction dominates exchange' (Offer 1997, p. 472). As Bourdieu (1977, 1993, 1996) has pointed out, the use of social, cultural or symbolic capital will often supersede financial capital as the basis of the gift economy. This gift economy is not only linked to the formal and thus more measurable economy but is highly operative in the informal one as well.

Outside the formal economy, it is estimated that informal CCI sales in emerging countries totalled some \$33 billion in 2013, providing 1.2 million jobs, the majority being in the performing arts where author rights are not paid and where many performances are free (Lhermitte et al. 2015, p. 9). This underlines the point that valuing the creative economy is difficult in regions where the patterns within the informal economy can vary with levels of regional wealth. Additionally, there is the underestimated value of the 'underground' economy where the exchange of cultural and creative goods is hidden from official view through piracy, busking, private sales or other transfers (Lhermitte et al. 2015, p. 13). The issues surrounding both the gift economy which gives to formal and informal businesses, and the informal economy, which competes with and is thought to detract from, the formal economy, are highlighted through the growth of the internet economy. In NSW in 2012, this economy was worth \$50 billion or 3.6% of GDP and was estimated to reach \$70 billion by 2016. Australia's Digital Economy ranked 9th out of 70 countries in 2012 and at the time was predicted that by 2010, the ICT sectors contribution to the NSW economy will be 4.9% (NSW Digital Economy 2012, p. 15).

In referring to the arts sector, however, the Australia Council (2015) notes that the main source of income is consumer spending with ticket sales for performing arts events generating \$1.5 billion in 2013. Private support for the major performing arts companies through donations grew by 81% between 2009-2013 while both crowd funding and arts tourism has also been significant. Added to this there is a very large exchange of creative outputs through the gift economy where artists and other practitioners and professionals give their time freely to support community initiatives such as events and fundraisers.

These financial complexities provide, along with the multiple changes facing all businesses, many challenges to traditional funding models. One of these has been the advent of what has been termed the 'weightless' economy. This is an economy based on the trade of intangibles such as software, databases and intellectual property, which is characterised by high set-up costs and low costs for reproduction and distribution (Investopedia, 2017) and what appears, at first sight, to be emergent and untested web-based business models.

In terms of clarifying the concept of business models, there appears to be two competing definitions. These are 'the revenue model and the integrated model. The revenue model identifies the cash flows and finances on which the firm rests. The integrated model, in contrast, looks at the business more as a whole, and includes the strategy and structure of the firm's organization' (Searle & White 2013, p. 46). It is clear that Osterwalder, Pigneur and Tucci (2005), in examining information systems, adhere to the second school. They suggest there are

a number of ways to conceive of, describe and clarify what a business model is. They prefer to describe a business model as:

The blueprint of how a company does business. It is the translation of strategic issues, such as strategic positioning and strategic goals into a conceptual model that explicitly states how the business functions. The business model serves as a building plan that allows designing and realizing the business structure and systems that constitute the company's operational and physical form (Osterwalder, Pigneur & Tucci 2005, p. 2).

On the other hand, Michael Rappa, the founding director of the Institute for Advanced Analytics and Professor in the Department of Computer Science at North Carolina State University, appears to belong to the first school of thought. He suggests that at its most basic level a business model is a method or procedure for generating revenue. For Rappa:

The business model spells-out how a company makes money by specifying where it is positioned in the value chain. Some models are quite simple. A company produces a good or service and sells it to customers. If all goes well, the revenues from sales exceed the cost of operation and the company realizes a profit. Other models can be more intricately woven. Broadcasting is a good example. Radio and later television programming has been broadcast over the airwaves free to anyone with a receiver for much of the past century. The broadcaster is part of a complex network of distributors, content creators, advertisers (and their agencies), and listeners or viewers. Who makes money and how much is not always clear at the outset. The bottom line depends on many competing factors (Rappa 2010, online).

Rappa suggests that internet commerce has generated a slew of supposedly new ways of doing business but stresses that many of these supposedly new methods of gaining revenue are simply reinventions of 'tried-and-true models' (ibid). To explore these models a little more fully we can see that traditional businesses may, as Rappa (2010) and others (e.g. Kaufman 2012) explain:

1. *Sell a product* by creating a single concrete item for sale at more than its cost to make, thus realising a profit. For the creative industries, these might include the sale of goods such as prints, DVDs, computer hardware, software and apps and customers purchasing files of audio-visual material. Much of this activity has moved online.
2. A business may also *render a service and charge a fee for that service*. Service providers might include designers, architects, and those delivering outsourced content to TV or radio or any other streaming service.
3. Alternatively, those in the gallery, libraries, archives and museums (GLAM) sector might *create a shared resource or durable asset* such as a museum, be it real or virtual, that can be accessed by a number of people. Then they can *proceed to charge for its use*. The move from the penny arcade to video games arcades through to the provision of virtual reality experiences is a good example of this type of tried and tested business model. For designers, this shared resource might be co-working spaces which have proliferated within the creative industries as more and more work is outsourced, casualised or delivered on a more fully freelance basis.
4. On the other hand, *subscription services make money by offering an ongoing benefit which allows the provider to charge a recurring fee*. This model operates for companies

involved in cable or satellite services such as Netflix but it's also a business model that older press outlets such as News Corp have come to rely on as they compete digitally.

5. Other businesses might acquire an asset from a wholesaler, then sell that asset to a retail buyer at a higher price. This very traditional business model is now used by many older publishers moving online but it also very well serves their competitors such as wholly online distribution companies like Amazon or the Book Depository.
6. *Leasing, as another revenue generator, involves acquiring an asset, then allowing others to use the asset for a certain amount of time in exchange for a fee.* Stores such as Video Ezy and online providers like iTunes. Spotify, Google movies and Oz Flix use this business model.
7. Other businesses might *market and sell an asset or service they don't own on behalf of a third-party, usually collecting a percentage of the transaction price as a fee.* These include literary, musical and theatrical agents but also more broadly digital companies such as Uber and Air B&B. Just as the agents in the real world own no inventory neither does Air B&B or Uber in the digital one. The cost of insurance and maintenance are borne by the actual owners of the inventory who are treated as subcontractors by the agent.
8. Audience aggregation appears to be a favoured mode of the larger forms of social media who have borrowed their business model directly from what is now called legacy media. In this case, they *gain the attention of a group of people with certain demographic and psychographic characteristics, then sell access to this aggregated audience to advertisers* and other businesses seeking to reach that audience. Of course, this includes magazines, radio and TV but also social media behemoths like Facebook.
9. On the other hand, offering 'the ability to *take a predefined action for a fixed period of time in exchange for a fee*' (Rappa 2010) is an older business method that garners revenue for its users and certainly underpins the online revenues of Ticketek who sell concert tickets in advance for performances of all kinds in the creative industries although this company can also be seen as a sales broker who charges a service fee.
10. Then there are models that are as old as business itself. These include *loaning an amount of money for a predefined period then collecting a payment for that service plus interest.* Of course, a wealth of internet commerce depends on credit card transactions via Visa, Mastercard or PayPal. Banks have also automated and digitised much of their business, but the core activity is still that of a loan supplemented with online credit activity and fees from eftpos transactions.
11. Others will *take on the risk of something unfortunate happening, selling policies against this occurrence in exchange for a set of predetermined payments* with pay outs occurring on claims against the policy when and if the unfortunate event occurs.
12. Finally, one can *generate revenue through the use of capital by purchasing a stake in a current or potential business, then collecting a portion of the profit as a one-off payment or extracting an ongoing dividend.* While this business model occurs for shareholders it underpins the actions of venture capitalists and angel investors both of whom are significant for start-ups within the creative industries as it is for other well-established creative industries players.

While it can be seen from the above that there is a complex and variable set of income streams operating across most creative industries, it has to be noted that the so-called FLAG companies (FB, Amazon, Netflix and Google) are themselves leading US stocks. In addition, these

companies buy up others such as Instagram, Snapchat and Twitter and these smaller companies have been changing hands at huge prices before having established a revenue stream. It is their *potential* to create income after generating an audience that has become their prime value. In this case we can see that companies like Google, Apple, Facebook and Amazon appear to have adopted some much more fundamental and largely successful long-term business strategies that 'have led them to make decisions with no apparent economic sense, but which have contributed to developing their position as the world's largest value providers' (Lhermitte et al. 2015, p. 89). These strategies, using the tactics typical of gift economies, include seeing no essential difference between a paying and a non-paying customer. 'Everyone is a customer, even without money; in fact, the customer base is essential for all growth' (ibid). These giants of the new economy also think in terms of 'customer commitment rather than financials' and pursue the idea that 'sustainable customer value prevails over short-term profitability'. In this way building a customer base is the primary objective that has then allowed them to monetise what quickly becomes a fast-growing asset. In doing so they have relied on an increasingly neoliberal political sphere where the freedom to innovate is seen as directly commensurate with an alleged free market where, as Mazzucato (2014) and Janeway (2012) variously explain, the state has been instrumental in providing an 'innovation-friendly environment' (Lhermitte et al. 2015, p. 89). This situation allows new businesses to 'supercharge performance and pioneer the future' (ibid). Given the competitive and complex global environment in which this has occurred, there is no doubt that 'risk, novelty and innovation play central roles in the development of new creative industries' products and services' (Flew 2013, p. 29). If this is the case, then the notion of entrepreneurship and the context they work in becomes an important one. Entrepreneurs, as discussed more fully above, are generally seen as creative and innovative people who are motivated risk takers and in taking those risks through processes of trial and error, failure and success, have learned to be resilient. They are deeply concerned with the generation of wealth and revenue through value creation. They are also subject to the same contextual factors as all other business operatives are.

2.19 Trade in Creative Goods and Services

The measured drop in international trade in creative services between 2008 and 2011, mentioned above, was mirrored in Australia, with a steady decline since 2007/8, a period defined in many ways by the Global Financial Crisis. During this period, growth in the Industry Gross Product (IGP) for creative industries was significantly lower than the GDP average growth rate, over three and seven-year periods, for all the industries within the Australian economy. Creative industries grew by about 1% per annum, compared with a growth of 3% per annum in the broader economy, with the reasons varying across creative industry segments:

For example, advertising and marketing were affected particularly strongly by the GFC and have continued to feel its effects in the following years. For other segments such as writing, publishing and print media, music and performing arts and to a lesser extent film, television and radio, the broad effects of economic slowdown have been compounded by the effects of technological changes and shifting consumer preferences which have resulted in profound movement away from the consumption of traditional media. Within the creative industries, music and performing arts, software development and design and visual arts show the strongest performance in terms of real annual output growth over the past 5 years. Film television and radio remained stable and all other industry sectors experienced a decline (CIIC 2013, p. 9).

Creative industries, and the many entrepreneurs who operate within them, seem particularly subject to volatility in line with contextual market events, although many non-creative sectors, such as manufacturing, resources and agriculture, also showed a similar responsiveness to identified global trends. Not surprisingly, given the digital revolution under way, the 2011 Australian Census reported that of the 347,744 who were employed in creative industries categories, software development and interactive content sectors made up the largest category with roughly 41% of total creative employees.

While total jobs in creative industry categories have maintained a steady share of total national jobs at 3.5%, there has been considerable movement *within* the creative industries. Significant employment growth was experienced in software and interactive media with a small proportion of growth in design, music and visual arts. Writing, publishing and print media, although maintaining its position with the second largest share of employment, experienced falling job numbers in the last five years and a declining share of employment in the creative industries (ibid).

One could argue that the consumption of creative products is more discretionary and that consumption decisions relate to satisfaction of personal needs, wants and expenditure thus resulting in excessive volatility during economic downturns, but it is not only the sale of creative goods that affect the economic situation of the creative industries. As the CIIC Report (2013) we need to note both the direct stimuli generated by the creative sector and its flow on effects. In other words, there is a considerable flow-on contribution to the Australian economy as a whole from the industries in each creative segment as well as the creative industries as a whole, in terms of total output, value added and employment. ‘Every dollar in turnover generated by creative industries (i.e. initial revenue stimulus) results in 3.76 times total revenue for all other industries in the Australian economy’ (CIIC 2013, p. 64).

Creative industry segments	Total output multiplier	Value-added multiplier	Employment multiplier
Advertising and marketing	4.02	3.56	2.91
Architecture	4.02	3.56	2.91
Design and visual arts	3.95	3.53	2.88
Film, television and radio	3.52	3.21	3.57
Music and performing arts	3.57	3.10	1.84
Software development and interactive content	4.02	2.83	3.13
Writing, publishing and print media	3.14	2.30	3.24
The creative industry sector	3.76	3.00	2.92

*Table 10 Multiplier Effect of Creative Industries Segments
(original in CIIC Report 2013, p. 64)*

Among the different creative industry segments, advertising and marketing and architecture have the highest total output and value-added multipliers, indicating a stronger linkage with industries in the national economy. In terms of employment generation, the film, television and radio segment has the highest flow-on effect. Table 7 compares the multipliers of creative industries with the multipliers of all other industries. Importantly, industries in the creative sector have higher flow-on contributions to the Australian economy than all other sectors taken as a whole in terms of all three measures (ibid, p. 64).

Creative industry segment	Total output multiplier	Value-added multiplier	Employment multiplier

Creative industries	3.76	3.00	2.92
All other industries^	3.59	2.80	2.47

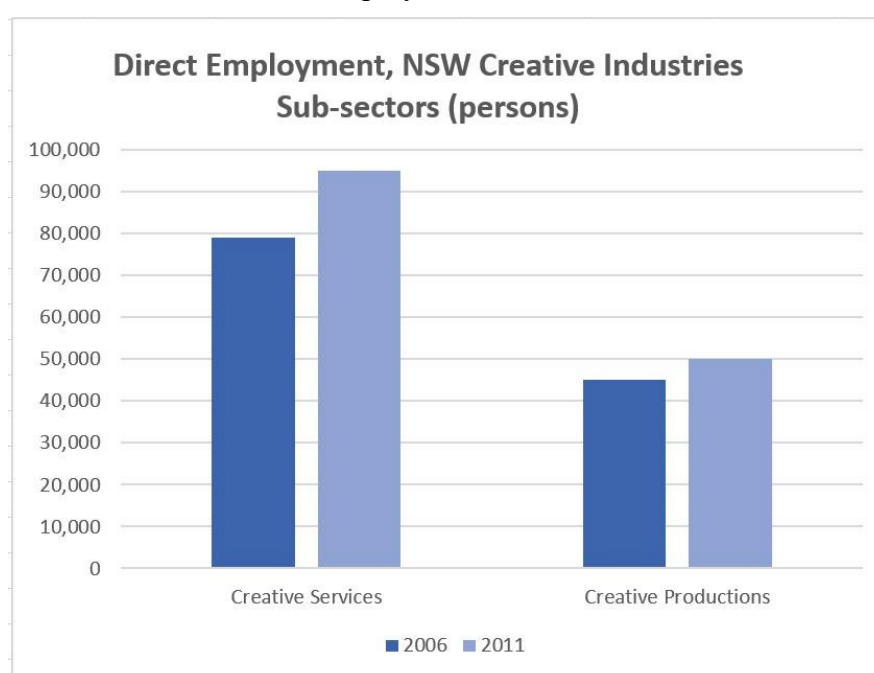
*Table 11 Comparison of Multiplier Effects for Creative and All Other Industries
(from original in CIIC Report 2013, p. 64)*

2.20 Businesses and Occupations – Patterns of Operation

The NSW Creative Industries Taskforce report asserts, via its advisor Stuart Cunningham from the CCII at QUT, that the creative industries can be broken down into two distinct segments. These are:

- Creative services (major creative business-to-business, B2B, activities of industries such as architectural services, software publishing, advertising services, computer system design services, jewellery and silverware manufacturing, and professional photographic services).
- Cultural production (mostly business-to-consumer, B2C, activities of organisations involved in music publishing, movie making, libraries, museum and archives operation, performing and creative arts, and traditional media publishing and broadcasting).

The creative services sub-sector is the largest segment of the creative industries in NSW, accounting for nearly two thirds of the workforce employed directly within the creative industries, that is, approximately 97,000 workers. This sub-sector, creative services, has also driven growth in the direct creative workforce, accounting for 2.6 percentage points of the 3.4% per annum increase in direct creative employment from 2006-2011.



*Graph 1 Direct Employment, NSW Creative Industries Sub-sectors –
Source: ABS Census of Population and Housing, 2006; 2011 (original in NSW CIT 2013, p. 12)*

Within creative services, computer system design and related services is both the largest industry and the largest contributor to growth in the sub-sector. This growth in occupations like design and marketing is being driven by the digitalisation (sic) of the broader economy.

Cultural production, on the other hand, accounts for around 35% of direct creative industries' employment in NSW which grew slowly in the five years preceding the 2011 Census. Over half of the cultural sector's employment growth came from an increase in the number of creative

artists, musicians, writers and performers. In the same period, NSW creative industries' exports, which comprised approximately 3% of total NSW goods and services exports, experienced trend growth of 0.4% per annum (nominal) (NSW Creative Industries Task Force 2013). In Australia, around 75% of creative businesses turn over less than \$200,000 a year, compared with around 65% of all businesses in Australia. Creative industries are therefore mostly small businesses with 98% of creative businesses employing fewer than 20 employees.

Between 2008 and 2011, the business entry and exit rates in the creative industries broadly followed the pattern for the rest of the economy but in terms of the change in business numbers, creative industry growth tracked slightly higher than the rest of the economy (CIIC 2013, p. 4), with some industry categories appearing to be more volatile in terms of entry and exit rates, these being music and performing arts, film, television and radio, advertising and marketing, software development and interactive content, design and visual arts (ibid).

Within the overall creative industries, the sectors have varying structure and varying levels of performance. Software and interactive content stands out as being the strongest segment – contributing the greatest amount in terms of Industry Gross Productivity (IGP) for the creative industries. Writing, publishing and print media, although still the second largest segment in IGP terms, suffered declining IGP and was the only segment to have falling employment in the 5 years prior to 2013 (CIIC 2013, p. 12). This situation is symptomatic, perhaps, of an industry in stagnation and experiencing major structural change. Three segments demonstrated significantly higher exit than entry rates in those years: writing publishing and print media, architecture, and music and performing arts. This is indicative of these industries being in decline in the 2008-2011 period (ibid p. 43).

Table 8 below presents data on types of entities indicating that CI firms have a higher propensity to be micro enterprises than businesses in the economy as a whole (Higgs 2007). Additionally, 40% of CI GST- registered entities are sole traders compared with 35% across all industries while sole traders account for 85% of non-GST registrations within creative industries compared with 69% across all industries. Across both GST and non-GST enterprises within the creative industries, 88% are either sole traders or private companies compared to the average across all industries of 74% (ibid, p. 13).

Type of Entity	Without GST Registration		With GST Registration	
	Creative Industries	All Industries	Creative Industries	All Industries
Individual or Sole Trader	85%	69%	40%	35%
Private Company	6%	13%	42%	31%
Other Partnership	4%	3%	4%	5%
Family Partnership	2%	6%	5%	14%
Other Entities	2%	3%	2%	2%
Trusts	1%	6%	7%	12%
Public Company	0%	0%	1%	1%
Total (All entities)	100%	100%	100%	100%

*Table 12 Types of Entities in Creative Industries and across Australian Industries for May 2006
(Original in Higgs 2007, p. 13)*

In NSW, the industry pattern is also categorised by a high proportion of small businesses: 7% of all NSW Small to Medium Enterprises (SMEs). Of the approximately 50,000 businesses

operating within the NSW creative industries, 97.4% were small businesses (0-19 employees), 2.3% were medium (20-199 employees) and 0.3% were large (NSW CIT 2013, p. 13).

The United Nations Commission for Trade and Development, in its Creative Economy Report (2010, p. 16) highlights the importance of clustering for firms working in the creative economy for labour markets, information flow and consequent efficiency, productivity and sustainable development – suggesting a solution to challenges of a sector characterised by small businesses.

2.21 The Future of Creative Industries Work

Given the above figures at the international, national and regional level, Bruno Perrin makes the point that the cultural and creative industries ‘need more structuring, supportive policies and robust protection of creative content. To boost their economic potential, the balance between creation, access (distribution) and care of cultural heritage is a must’ (in Lhermitte et al. 2015, p. 7). He also argues that ‘to leverage a more creative world, we need to promote author’s rights, look for growth through global markets, balance online monetisation and nurture talent’ (ibid, p. 9). Such strategies, ones that exist so thoroughly in the regulatory and bureaucratic domain, seem counter-intuitive to the Romantic bohemian construct of ‘the artist’ typical of the West and its common-sense culturally derived assumptions. However, these assumptions need to be examined critically and, as stated above, once we take a rational view there is a general failure ‘to support our most cherished beliefs about creativity’ (Sawyer 2006, p. 33). From this latter perspective, when we speak openly of business models and operational systems, we are in fact speaking of the transition from the world of ‘art and culture’, and all its attendant Romantic assumptions, to that of the world of ‘industry’. Once we leave behind the western normative assumptions built around the supposed split between art and commerce, that is, to repeat it again, a manifestation of the modern incoherence, it is then that we can continue to speak openly about economics.

In this regard, the NSW Creative Industries Taskforce freely acknowledged the contribution of the sector to the NSW economy claiming it was due to both ‘their direct economic activities and their contribution to the competitiveness of other sectors within the NSW economy’ (NSW CIT 2013, p. 10). This taskforce worked openly with practitioners from the creative industries, many of whom still adhere to the doxa of Romanticism, to seek their views on what is needed to take the sector forward. Unsurprisingly, these practitioners see that real advantage and benefits are delivered when governments commit to, and help lead, a long-term plan. They also believe that recognising, valuing and protecting the intellectual property produced by creative enterprise is integral to driving innovation, productivity and growth. In line with Phillipa McGuinness’s arguments, many practitioners noted that they simply could not exist without proper payment for their ability to transform their knowledge and ideas into products and services. The Taskforce argued that a suite of strategies and approaches is needed to protect copyright. In this case, more funding from Government is needed for the publicly funded arts and cultural sub-sectors as well as the more commercially oriented sub-sectors, particularly for assistance to help investment in the significant risk-taking that is inherently necessary in the industries; to support start-ups and to support new infrastructure. This latter necessity may take the form of a creative industries’ portal, digital equipment and access to affordable high-speed broadband.

The Taskforce also saw that some industry sub-sectors, television, film, music, communications and design in particular, have sought tax concessions, or improved concessions and other incentives to assist the economic and cultural development of the industries. The performing

arts industries sought greater flexibility in the planning system to accommodate a broader and more malleable range of creative pursuits, such as holding one-off public events and permitting mixed-use in industrial and residential zones. The industries consider that the NSW Government procurement system does not provide fair access for creative enterprises to win government work and pointed out that the lessons from regional NSW show that one operational model does not suit all regions, recognising that measures of growth and strategies for development need to be tailored to specific regions but that improvements to NSW creative industries' global positioning could be achieved through high leverage activities like improved branding and communication and through better coordination and promotion of awards, festivals and events by promoting year-round activity.

In summary, the Taskforce's composite suggestions for the delivery of a stable future for creative work included mentoring and advisory services, export and benchmarking advice, collaboration with industry, research and government, clusters, networks and co-working spaces, cooperative research centres and innovation hubs, industry placements, better government programs in procurement, business development, education and training, career and business development, export programs, incentives, a focus on design and design thinking, activating the benefits of technology and broadband, improved access to venues and spaces, particularly to support the visitor economy. While these suggestions are seen by the Taskforce to underpin the industries that are currently contributing economically, no discussion of the future of creative industries in 2017 could be complete without a considered recognition of the rapidly increasing impact of the advances in digital technology.

Many of Australia's traditional copyright industries (e.g. music, movies, games, software, books, newspapers, television, etc.) have been challenged by the 'perfect storm' generated by the simultaneous move to digitisation, the enhanced ability for consumers to use the Internet to compare prices, the increase in unauthorised copying and the increased competitiveness of overseas products because of the high Australian Dollar. The combined impact of these three forces has been lower or negative growth in a number of copyright industries, and the apparent demise of some distribution models (most visible in the closure of high-profile book and music retailers). In this environment, there is a need for an appropriate regulatory model to support copyright businesses' innovation and sustainable growth (ACC 2012, p. 4).

Further to the broad societal contributions of the creative industries is the increasing recognition of the role that they can play in innovative responses to urbanisation. At the global level, Lhermitte et al. claim that 'cultural infrastructure is a catalyst for urban development as CCI make cities more liveable, providing the hubs and activities around which citizens develop friendships, build local identity and find fulfilment' (2015, p. 9). At the regional level, the NSW Creative Industries Taskforce states that the 'Government has acknowledged the importance of the creative industries to the overall NSW economy, as well as its profound positive contribution to our lifestyle and society' (2013, p. 4). Given this acknowledgement, the Industry Action Plan arising from the Taskforce's work aims to leverage NSW's premier status and natural advantage in the creative industries as a key opportunity to ensure that NSW, through Sydney, is 'recognized as a global creative centre and an Asia Pacific leader in creative industries [as] smart, creative businesses located in cities such as New York, London, Paris, Stockholm, and Tokyo enjoy a halo effect based on the creative reputations of their home towns' (ibid). The action plan, oriented as it is toward the future, suggests that 'achieving such a vision would return immense economic and social benefits to NSW' (ibid). Furthermore, the future of creative work can also be seen, for the creative industries, in the regions as:

Investing in regional cities' economic performance makes good sense. Contrary to popular opinion, new research shows regional cities generate national economic

growth and jobs at the same rate as big metropolitan cities ... Success will see regional cities in 2031 produce twice as much as all the new economy industries produce in today's metropolitan cities (Pearson, 2017).

The Allen Consulting Group (2013), in reporting to the University of Newcastle, noted that the appeal of the creative industries lies in how it intersects with other industries and sectors, and is able to revitalise and energise them. They suggested that the role of creative industries in the regeneration of urban areas in decline, the significance of universities and incubators as catalysts and the need for working space where creative people can network were all wrapped up in the future of creative industries in the region (ACG 2013, p. 79). Multiple factors will aid this transition to the future, none more so than those factors in the control of government policymakers.

2.22 Federal, State and Local Creative Industry Policy

As many become enmeshed in an increasingly digitised world, the creative industries have become seen by many policymakers as a means of diversifying the national industry base away from an over-dependence on traditional resource extraction sectors and public-sector subsidy. Policymakers now believe many national and regional economies need to be quickly moved 'toward a more resilient, entrepreneurial and innovative modality' (Lea et al. 2009, p. 5). This situation has been recognised by policy makers around the world (for discussion see Heng 2003, Wang 2004, Lee & Lim 2004, Siwek 2006). Furthermore, as John Hartley et al. (2013) assert:

The creative industries paradigm challenges many of the traditional assumptions of cultural policy. It proposes that both commercial and state supported forms of cultural activity are wellsprings of creativity, and therefore worthy of attention from a policy perspective. There is not an artificial line drawn between the arts and the media industries, or between tangible and digital content, on the basis of one being perceived to have more cultural value than the other (Hartley et al. 2013, p. 70).

This is not to say that 'all creative sectors are the same or have similar policy requirements' (ibid) but what it does is, at times contentiously, level the field in terms of what policymakers are conceivably prepared to do. As Justin O'Connor notes 'it has been common to present the rise of the cultural and/or creative industries within the policy field in terms of the increasing emphasis on economic arguments for culture. This is a serious oversimplification' (2011, p. 35). He suggests that there is a continued belief that the economic importance of the creative industries should bring with it a 'recognition of the importance of culture to this new economy' (ibid) but this is often not forthcoming. There is also a related assumption of the liberating 'possibilities for local economic development' (ibid) which was itself related to the idea that 'in a post-industrial world, cities were uncoupled from reliance on natural resources and could mobilize culture and knowledge in more autonomous ways' (ibid). For O'Connor there has also been an overestimation of the mobility of these industries which 'remained ever more concentrated in global urban centres' (ibid). Lastly, the notion that:

Industrial cities, at a time of rapid de-industrialisation - with its concomitant and chaotic re-organisation of local, national and global space - ... could develop the intellectual capacity, policy tools and politico-financial resources to engage in the construction of a new kind of economy - one that might re-write the laws of industry-era economics itself - was always doomed (O'Connor 2011, p. 35).

Notwithstanding these critiques, policymakers all around the world have pursued these ideas with what appears to be alacrity. The recent policy approach in Australia, at federal, state and regional level, has been neatly encapsulated by Arts Northern Rivers (Arts NR 2013, p. 8):

Federal arts and creative industries policy exists at a sectoral or issue-based level, currently mainly through the priorities of the Australia Council and its art-form boards ... Existing policy statements emphasise the importance of improving mobile and broadband access, increasing the range of creative and cultural content, and enhancing technical and business skills development and networking, as part of an 'innovation' agenda. State policy echoes these themes and adds the encouragement of capital allocations for innovation. Arts and cultural policy also states a continued commitment to the development of contemporary Aboriginal Culture, an emphasis on sustainability of the arts, and ... proposes greater integration of the operation of Local Government cultural facilities including libraries, museums, and art galleries ... Existing regional strategies are focused on economic development [many of the policies and strategies being adopted focus on] the importance of the creative industries in relation to economic development, and as a way to meet the employment challenges of fast paced population growth (Arts NR 2012, p. 8).

This Arts Northern Rivers report also echoes many of the recommendations policymakers around the country have been adopting which include:

- developing representative and peak bodies for the creative sector;
- supporting the development of a diverse range of education and training programs targeted to the creative industries sector, and developing strategies to strengthen the business development capability of creative industries in the region;
- facilitating development of and market access for the local music industry; and
- supporting the development of Indigenous creative industries (Arts NR 2012, p. 8-9).

Specific proposals often include: 'provision of managed workspaces and clusters, business model development, business planning and advisory support and peer support networks, financing mechanisms and strategies, market research and development, industry branding and collaborative marketing strategies' (Arts NR 2012, p. 8-9).

In terms of the Hunter Region it appears, in summary, that the City of Newcastle is the only city within the region where planning documents *specifically* note the creative industries as an industry sector to be supported and monitored for its growth potential. Other Councils in the region recognise the strength of the cultural significance of artistic pursuits and their value, particularly for heritage, cultural participation, vibrancy and expression alongside tourism (especially Maitland, Port Stephens and the Wine Country Councils). Some (notably Lake Macquarie and Muswellbrook) do so by default through their partnerships with the University of Newcastle in the development of Innovation Hubs.

Generally, councils operating within the NSW State policies for Local Government plan, deliver and evaluate their programs within a consistent integrated planning and reporting framework as described by the NSW Office of Local Government (2007, online). This involves community engagement where the creation of community strategic plans can be conducted in areas like land-use, tourism, cultural, economic development and heritage. These community strategies are developed and managed through programs that are annually delivered through an operational plan where resourcing of these strategies is perpetually monitored and reviewed.

The creative industries, often mistakenly seen as a relatively small and fragmented sector, are generally not fully recognised in economic development planning in a region where the major industries are often substantial sectors. These include tourism, defence, mining, power generation and agriculture. What might explain this approach is that there is often a process of conflation at work where, despite the commonality of creativity across all industries, as seen in the above literature review, or the consistent inclusion of IT, design and the media in lists of creative industries sectors, they are commonly conflated down to artistic pursuits alone.

As one example, *Newcastle 2030 Community Strategic Plan (Revised 2013)* was prepared by The City of Newcastle Future City Group (2013). The plan notes Newcastle's cultural heritage and its strengths in performing and visual arts and its range of cultural festivals and architectural quality (2013, p. 21). However, these are not reflected in its analysis of economic strengths (2013, p. 23) other than to mention creativity and innovation as part of the city's values (2013 p. 24). In outlining the city's strategic directions, the plan undertakes a serious investigation of being 'smart and innovative' noting in particular the emerging green economy and aspirations to be known as innovative, creative and attractive (2013, p. 33). Noting once again the process of conflation at work, the importance of arts and culture in the liveability of cities is briefly mentioned (2013, pp. 47-48) and under objective 3.2 of the plan (2013, p. 50) an attempt is made to 'support the cultural and creative industries to provide opportunities for participation, employment and skill building' (ibid). In a process that takes little account of the research into creative industries, the 'responsible' parties to action this objective are limited to 'regional/local arts groups' (ibid) with the key partners named being the 'entertainment industry and NSW Government' (ibid).

The 2030 Newcastle City Council plan (2013, pp. 65-69) states that 'innovation has the potential to create competitive advantage for the city with the development of new technologies and services' and moves to celebrate innovation and creative pursuits but with a focus on technology and related services noting, however, the importance of cultural expression for the tourism economy and the need to grow small business in the arts sector and cultural clusters. Alongside this narrowing of what constitutes the creative industries, the achievement indicators are limited to increased enrolments in courses of study for the green economy and creative industries – indicators that seem removed from the notion of jobs and sustainable businesses.

On the other hand, *Newcastle's Economic Development Strategy 2016-2019* (Newcastle City Council, 2016) reinforces the importance of innovation and creativity (ibid, p. 5) and here we find a clear focus and operational approach (ibid, p. 9) specifically naming the creative industries sector and noting the need for smart specialisation. This is currently backed by projects that aim to translate these goals into actions through joint projects with other regional bodies. Particular mention is made of the importance in the visitor economy and in destination management plans through events and festivals (ibid, p. 27), of the role digital technologies can play in enhancing creativity and business (ibid, p.29) and of the need to endorse the place that small organisations take in specific strategies to support business growth in subsets of the creative industries (ibid, p. 30). Council goes further to recognise the creative industries as a strategic growth sector (ibid, p. 34), noting that 4,070 people are directly employed in Newcastle in the creative industries with 3,000 students enrolled in creative industries' programs at the University of Newcastle which include not only programs in the arts but also strongly attended program in design, IT and communication and media. Council further notes the strong link to the knowledge economy and the potential for future growth from the creative industries area. Innovation hubs and cooperatives, skills development, smart city services and applications, and enhancement of, once again, the city's creative and cultural profile are all seen as appropriate actions.

With no consolidated industry profile, the creative industries tend to become fragmented in policy terms and assume value only as enablers of other activities or in their form as group or individual artistic expression. What appears to be a lack of cohesion, or even a closely shared set of field and domains of knowledge across what we term the ‘creative industries’, suggests there is little commonality on which to craft an economic development strategy for local government.

Increasingly, international attention is being paid to the importance of regions as economic zones. This situation will become increasingly significant in the face of predictions for future global urbanisation. The Hunter division of Regional Development Australia (RDA Hunter), in recognising that significance, has adopted the European model of Smart Specialisation as a tool for ‘innovation-driven growth’ (2015). Smart Specialisation ‘is an OECD framework implemented widely across the European Union to deliver regional economic transformation through analysis of local competencies and discovery of new areas of opportunity’ (ibid, p. 2). The creative industries were nominated as one of the 7 areas of specialisation evident in this region.

Having worked our way through many of the broader ideas that inform this study, moved through this to the international focus on creative industries and then through to the national and state level and on into regional understandings with this literature review, we then arrived at the work that has taken place specifically on the Hunter region and its urban heart of Newcastle. It is now time to define what we consider to be the important terms we believe are relevant to this study.

3. OPERATIONAL DEFINITIONS FOR THIS STUDY

Based on the above detailed literature review, this study, *Creativity and Cultural Production in the Hunter: An Applied Ethnographic Study of New Entrepreneurial Systems in the Creative Industries*, employs the following operational definitions.

Creativity: ‘Creativity is a productive activity whereby objects, processes and ideas are generated from antecedent conditions through the agency of someone whose knowledge to do so comes from somewhere and the resultant novel variation is seen as a valued addition to the store of knowledge in at least one social setting’ (McIntyre 2008, p. 1). To put this more succinctly and in line with the research literature into creativity (for summaries see Alexander 2003, Pope 2005, Sawyer 2011), creativity is defined as the bringing into being of novel objects, processes and ideas that are valued in at least one social setting.

Innovation: ‘An innovation is an idea, practice or object that is perceived as new by an individual or other unit of adoption. It matters little, so far as human behaviour is concerned, whether or not an idea is “objectively” new as measured by the lapse of time since its first use or discovery’ (Rogers 1983, p. 11).

Culture: Following Williams (1981, p. 13) culture is defined here as ‘the convergence between an anthropological and sociological senses of culture as a distinct “whole way of life”’ (ibid) and the ‘more specialised if also more common sense of culture as “artistic and intellectual activities” ... broadly defined to include all the “signifying practices”’ (ibid) of, in this case, the creative industries.

Creative Industries: This concept is used here as an umbrella term covering a number of sectors which are all connected by three defining features. Firstly, they ‘all require some input of human creativity; second, they are vehicles for symbolic messages, that is, they are carriers of meaning; and third, they contain, at least potentially, some intellectual property that belongs to an individual or group’ [italics in original] (Davies & Sigthorsson 2013, p. 1). The creative industries are those industries which use signifying practices to intentionally produce symbolic artefacts for the purposes of commercial gain. These industries include all those sectors amalgamated within the four broad subdivisions of design, media, IT, and the arts. These sectors are therefore constituted by advertising and design, architecture, fashion, publishing, film, TV, radio, new media, publishing, electronic games, software development and applications, performing art and visual arts.

Hunter Region: As defined by the ABS (2013-17), the Hunter Region is constituted by the Newcastle, Lake Macquarie, Maitland, Port Stephens, Cessnock, Great Lakes, Upper Hunter, Singleton, Dungay, Gloucester and Muswellbrook Local Government Areas (LGAs).

Entrepreneurship: The European Commission states that ‘entrepreneurship is first and foremost a mindset. It covers an individual’s motivation and capacity, independently or within an organisation, to identify an opportunity and pursue it in order to produce new value or economic success. It takes creativity or innovation to enter and compete in an existing market, to change or even create a new market’ (European Commission 2003). Added to these understandings, Mazzarol argues that, from a concrete point of view, ‘entrepreneurship deals with the process of developing new business ventures and/or promoting growth and innovation in existing firms. Innovation is not just about new technology, but also about doing things better to enhance value to customers, employees and shareholders’ (Mazzarol 2011, p. i).

Systems: For Lars Skyttner, systems are wholes whose ‘primary properties derive from the interactions of their parts’ (2006, p. 38). There are multilayered systems within systems where ‘a system in one perspective is a subsystem in another. But the system view always treats

systems as integrated wholes of their subsidiary components' (Laszlo 1972, p. 14). These complex interrelated systems produce behaviours and characteristics that are not simply reducible to their parts. Physical and biological systems are not coterminous with cultural or social systems although they share a very similar set of characteristics including interdependence, networks, self-organisation, complementarity, non-linear dynamics and emergence. While social systems exist in real time and real space they are largely premised on the experiences of the conceptual and the symbolic. Identities are built around sharing the ideas embedded in the symbolic domain and this identification creates the boundaries of the social system while allowing the system to organise itself around those shared cultural and social identities. Social and cultural systems, whether they are identified as systems, ecosystems or ecologies, are self-organised as interconnected networks built on shared knowledge and are populated by choice making agents.

4. METHODOLOGY

This research project has attempted to capture a dynamic model of culture as a living and ever-changing system of creative activity. The principal methodological framework employed for *Creativity and Cultural Production in the Hunter* is that of ethnography.

In line with the focal theory being employed for this project, that is the systems model of creativity (Csikszentmihalyi 1988, 1999, 2015), groups such as those researched here in the creative industries, ‘must be understood as whole systems, not isolated parts’ (Priest 1996, p. 25). Ethnography, as a form of qualitative methodology, enables an ongoing and thorough observation of a set of cultural systems in action and has allowed, in this case, a necessary contextual understanding to develop (Morley & Silverstone 1991, p. 156). This methodology has its basis in anthropology and usually explores human activity involving social relationships, identities and collective practices (Cohen 1993, p. 127). Human culture, following Williams’s definition of it (1981), consists of both the way of life of a group of people and the signifying practices they engage in. It is created, used and interpreted by individuals and groups *in situ*. As Muriel Saville-Troike (1982, p. 3) asserts, what culture is cannot be separated from how and why it is used. By examining this culture in its socially situated form, the creative processes of its producers and consumers have revealed fundamental aspects of the various sectors of the creative industries being studied.

Since, as Ien Ang has stated, ‘contemporary culture has become an enormously complex and thoroughly entangled maze of interrelated and interdependent social and cultural practices’ (1996, p. 63) this form of research explores human activity through an identification of patterns of authentic human activity. It required significant immersion in the detailed world of the participants. As Sara Cohen argues, ‘only in the light of such detailed knowledge are we justified in making more general statements about lived culture’ (1993, p. 127) for example regarding globalisation and its effects, the nature of the creative industries as drivers of cultural and economic value, the processes of cultural production and so on. This methodological approach, which goes deep into the lives and experiences of those being studied, reveals ‘the complex interrelatedness of contexts, events, activities and relationships’ (ibid).

As Sarah Cohen points out, ethnography, whether it is done virtually or traditionally, involves an intensive research practice (1993, p. 125). The ethnographer must become immersed in the group’s activities ‘for an extended period of time, watching what happens, listening to what is said, asking questions - in fact, collecting whatever data is available to throw light on the issues that are the focus of the research’ (Hammersley & Atkinson 1995, p. 1). As James Lull argues, ‘identifying patterns of authentic human activity requires substantial immersion in its natural contexts, immediate and referential. The culminating critical incidents that often reveal so much about communication activity are meaningful and valid only when they are considered referentially’ (1990, p. 19). This research process (ethnography), was thus not an easy option or alternative to a purely quantitative methodological approach. It involved an intensive research practice that required getting involved in the communities under consideration. Building up good relations with people and gaining access to their lives can require a considerable investment of time which has, in this case, been essential to collecting enough adequate data to gain a contextual, comprehensive and holistic view of this creative system in action. Detailed research was undertaken on mapping the different participants and institutions, their activities and the networks involved in the creative industries in the Hunter region. This process involved a number of practical methods, as Bryman (2001) points out, including:

- the immersion of the ethnographer in the group they are studying for a period of time;

- the observation of the group in their working environment;
- listening and engaging in conversations with group members;
- gathering data about groups through interviews with key informants;
- collecting detailed supporting data and documents relating to the group;
- developing an understanding of the group's actions in context; and
- analysing, writing up and reporting the findings of the research (2001, p. 291).

Apart from this ongoing and detailed work, a descriptive quantitative approach was undertaken to support the more extensive qualitative aspects of the study. This quantitative aspect involved two measures.

Measure 1 was an attempt to identify the types of occupations that exist within creative industries as well as the ages and gender of each non-identified participant. A search of 2011 Census data using the ANZSCO 6-Digit Occupation Codes as listed in the CIIC Report (2013, pp. 24-25) was applied to the 11 LGAs of the Hunter Region. But basing this measure on the CIIC report we could at least have some point of comparison with this major national study. The LGAs focused on included Lake Macquarie, Newcastle, Maitland, Port Stephens, Cessnock, Great Lakes, Upper Hunter, Singleton, Dungog, Gloucester and Muswellbrook. The 33 occupations by place of residence were those used by the CIIC report and these were then sorted into creative industries' sectors as detailed below.

Measure 2 involved the use of the Creative Trident Methodology. Given this methodology has provided the statistical basis for a number of creative industries' reports both here and overseas, this measure should provide another solid point of comparison. The data for this measure was drawn from the 2011 Census and included ABS information which gave the number of persons employed, the total who stated income and mean income across 35 selected industries (4-digit IND06P) as well as all other industries by all occupations (6-digit ANZSCO). This data was not based on LGAs, as for measure 1 above, but instead was based on SA4 geographical areas. This data was then aggregated for ASGS 106 Hunter Valley (excluding Newcastle) and 111 Newcastle and Lake Macquarie. It should be noted that this geographical area does not include the Great Lakes or Gloucester. The collected data for Measure 1 was then used to calculate the specialist, support and embedded workers associated with the creative industries in this region (see Section 2.16 above and Sections 5.2.1 below).

The various limitations of these approaches are detailed in the statistics section below. Notwithstanding these limitations, the resultant quantitative data was used to complement, inform and support the extensive qualitative aspects of the study and was a largely descriptive method. This approach has been used by other studies of the the creative industries (e.g. ENA 2009, Hunt & Fishel 2012) and has been supplemented well by qualitative aspects in others (e.g. Lea et al. 2009). For this research project the quantitative data provided some descriptive insights into the creative industries in the Hunter and as such contributed to the far more immersive aspects of the ethnography.

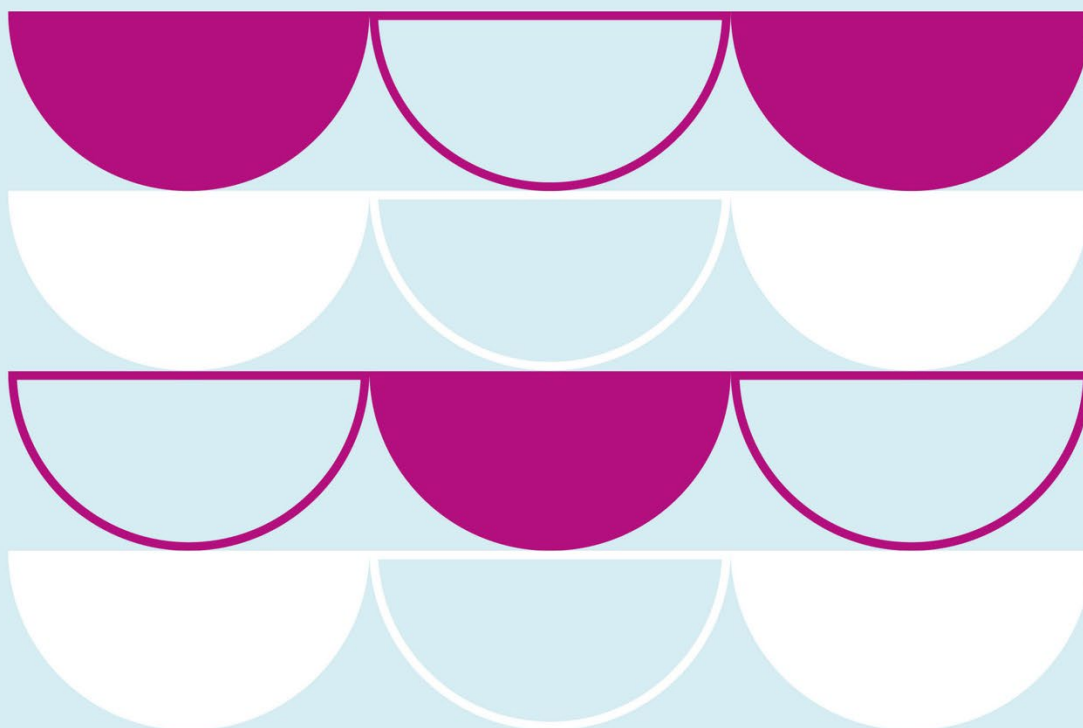
The qualitative methods included, specifically, ongoing desktop searches, recorded in-depth semi-structured interviews with key informants, and, most importantly, extended observations into the systemic properties of these industries. The sectors of the creative industries used to order this process were derived from NSW Creative Industries Taskforce appointed in 2012 by the NSW Department of Trade and Industry (NSWT&I 2012) and from the NSW Department of State and Regional Development (NSWSRD 2009, p. 7). The list used here includes advertising, architecture, design, visual arts, music, performing arts, publishing, film, television, radio, and electronic games and software development. As per *Creative industries*

lists represented as a hierarchical structure (Figure 6 above), this sector list can be amalgamated into four broad groups, that is, design, the arts, information technology and the media (Flew 2012, p. 84). A forum of creative industries' personnel from these sectors was convened midway through the research period to garner information and to inform the creative industries' participants of research work to that point. This iterative process was complemented with a focus group of key participants in the Upper Hunter. A website has been constructed to house some of these interviews, summaries of practitioners, various databases and filmed material as well as the report itself.

As such the conduct of this research followed the key methods and principles of ethnography and as you will see it revealed a wealth of quantitative and qualitative data. The first action taken in this research process was a literature review (see Section 2 above) and the next, a statistical analysis of the creative industries in the Hunter Region.

Creativity & Cultural Production in the Hunter

An applied ethnographic study of
new entrepreneurial systems in the
creative industries.



Final Report:

Creative Industries in the Hunter Region – Statistical Measures

Associate Professor Phillip McIntyre
Professor Mark Balnaves
Associate Professor Susan Kerrigan
Evelyn King
Claire Williams

5. THE CREATIVE INDUSTRIES IN THE HUNTER REGION: STATISTICAL MEASURES

5.1 Statistical Measure 1

In an area as geographically, socially and industrially diverse as the Hunter catchment, with its urban concentrations of more than 350,000 people, and with rural and tourism centres and waterfront villages, there is a wide band of skills and market experience. Mining, defence, shipping, health, manufacturing, power generation, viticulture, education, agriculture and professional services are all evident in the region's profile but steel and aluminium production, shipbuilding, manufacturing and even coal production have all decreased their contribution in recent years.

Alongside these significant and mature generators of jobs and related businesses there is little recognition of the creative industries, as the research literature understands it (see Chapter 2 above), as an identifiable and potentially strong economic sector. However, regional economies are by nature less concentrated and are more often hostage to smaller markets than are larger centres. This study, as will become evident, indicates that successful creative practitioners in the Hunter region are known for their collaborative activities and are increasingly making national and international linkages.

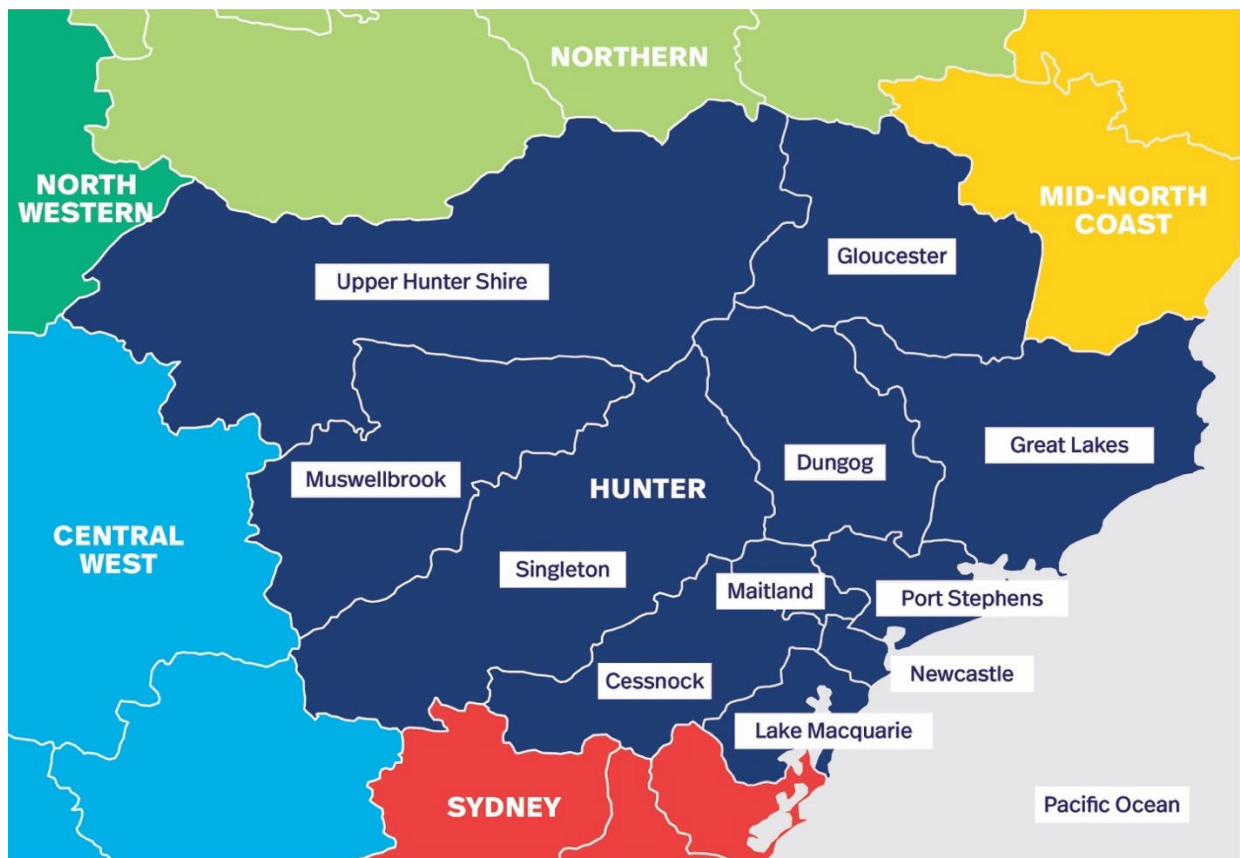


Figure 11 Map of Hunter Region Local Government Areas (LGAs)

They continue to address both commercial and non-commercial outputs, perhaps reflecting a pragmatic approach to earning a living within the smaller markets of a regional area, whilst still engaging in their cultural/creative practice outside their business operation. The profile of their professional practice, within this small-market, lower-concentration economy, may often be embedded within other industries and in collaborative projects that sit labelled by other names. Job titles or project names may not reflect the statistical categories traditionally used and many practitioners don't identify as such in Census returns, all of which results in lower reporting of

their creative industries' status. Nonetheless as significant cohort of creative industries practitioners operates right across the Hunter region.

This region is comprised of eleven LGAs, that is, Lake Macquarie, Newcastle, Maitland, Port Stephens, Cessnock, Great Lakes, Upper Hunter, Singleton, Dungog, Gloucester and Muswellbrook. The Hunter region is also 'divided into the urban areas, based around Newcastle and Lake Macquarie, and the remaining semi-rural and rural areas. Together, Newcastle and the Lake Macquarie local government areas (LGAs) have 54.17% of the region's total population. Lake Macquarie has the largest of the two urban populations' (Wilkinson 2017, online).

As per the ABS Data by Region statistics (June 2017), the total population of the Hunter Region is 675,199 with the break up per LGA as follows:

	Population	Median Wage	Median Age
Lake Macquarie	204,166	\$49,068	40.5
Newcastle	161,225	\$50,251	35.5
Maitland	76,607	\$51,279	35
Port Stephens	70,447	\$45,995	42.6
Cessnock	55,862	\$46,856	36.6
Great Lakes	36,720	\$38,021	54.3
Singleton	24,071	\$59,604	34.3
Muswellbrook	17,209	\$56,801	34
Upper Hunter	14,537	\$46,535	38.5
Dungog	9,195	\$45,507	45.4
Gloucester	5,160	\$39,118	50.6
HUNTER POPULATION	675,199		

Table 13 Population, Mean Wage and Mean Age in Hunter Region
(Source -ABS 2017, Data by Region) <http://stat.abs.gov.au/itt/r.jsp?databyregion&ref=CTA2#/> (accessed 23/6/17).

5.1.1 Gross Regional Product

Gross Regional Product (GRP) is defined by Remplan (2017 online) as:

the net measure of wealth generated by the region. GRP can be measured by using the incomes approach, where all incomes earned by individuals (wages and salaries), firms (gross operating surplus) and governments (taxes on products or services) are added. Alternatively an expenditure approach can be taken where all forms of final expenditure, including consumption by households, consumption by governments, additions or increases to assets (minus disposals) and exports (minus imports), are added. The expenditure approach does not include intermediate expenditure, as this would lead to double counting. eg. the wheat and flour in a loaf of bread. These methodological approaches are the same as those used to calculate Gross State Product (GSP) at a state level and Gross Domestic Product (GDP) at a national level (REMPLAN 2017, online).

The Hunter Region's Gross Regional Product (GRP), that is, its net measure of wealth generated, is \$44.435 billion. This calculation is made using Australian Bureau of Statistics' (ABS) June 2016 Gross State Product, 2013/2014 National Input Output Tables and 2011 Census Place of Work Employment Data. It is calculated by the Regional Economic Modelling and Planning System (i.e. Remplan) initially developed at Latrobe University (Remplan 2017b, online).

Together, Newcastle and the Lake Macquarie LGAs have 54.17% of the region's total population. Lake Macquarie has the larger of the two urban populations (Wilkinson 2017, online). As per ABS Data by Region statistics (June 2017), the total population of the Hunter Region in 2017 was 675,199. As an example of scalability at work:

Newcastle's Gross Regional Product is estimated at \$16.985 billion. Newcastle represents 35.13 % of Hunter Region's GRP of \$48.351 billion, 2.95 % of New South Wales' Gross State Product (GSP) of \$576.716 billion and 0.97 % of Australia's GRP of \$1.755 trillion (Remplan 2017, online).

For Lake Macquarie its Gross Regional Product:

Is estimated at \$9.933 billion. Lake Macquarie represents 20.54 % of Hunter Region's GRP of \$48.351 billion, 1.72 % of New South Wales' Gross State Product (GSP) of \$576.716 billion and 0.57 % of Australia's GRP of \$1.755 trillion (Remplan 2017a, online).

Since the creative industries constitute approximately 2% of the employed population in the region, they are estimated in simple and approximate terms to contribute close to \$1 billion, that is, \$967 million or \$0.967 billion, to the GRP of the Hunter Region.

GRP Expenditure Method	Lake Macquarie	Newcastle	Hunter Region	New South Wales	Australia
Household Consumption	\$10,096.616M	\$7,934.662M	\$33,148.717M	\$369,540.041M	\$1,078,556.54M
Government Consumption	\$2,582.928M	\$2,938.636	\$9,848.449M	\$115,983.648M	\$347,535.384M
Private Gross Fixed Capital Expenditure	\$3,213.042M	\$3,614.820M	\$12,217.897M	\$145,459.135	\$436,074.759M
Public Gross Fixed Capital Expenditure	\$683.977 M	\$778.171 M	\$2,607.936 M	\$30,713.259 M	\$92,029.732 M
Gross Regional Expenses	\$16,576.563M	\$15,266.289M	\$57,822.999M	\$661,696.083M	\$1,954,196.417M
plus Regional Exports	\$5,249.431M	\$12,448.537M	\$30,658.735M	\$166,481.796M	\$467,411.933 M
minus Domestic Imports	-10,777.988M	-\$8,816.509M	-34,100.021M	-177,936.469M	-\$395,568.280M
minus Overseas Imports	-\$1,803.935 M	-\$3,512.023M	-\$9,946.262M	-111,728.410M	-\$371,176.070M
GRP/GSP/GDP	\$9,244.070M	\$15,386.294M	\$44,435.452M	\$538,513.000M	\$1,654,864.000M
Population	189,005	148,534	620,532	6,917,656	21,507,719
Per Capita GRP/GSP/GDP	\$48,909	\$103,588	\$71,609	\$77,846	\$76,943
Per Worker GRP/GSP/GDP	\$179,204	\$175,865	\$185,110	\$179,742	\$168,44

Table 14 Gross Regional Product (GRP), Gross State Product (GSP) and Gross Domestic Product (GDP). Sourced from REMPLAN data incorporating Australian Bureau of Statistics' (ABS) June 2016 Gross State Product, 2013 / 2014 National Input Output Tables and 2011 Census Place of Work Employment data.

5.1.2 Gross Value Added

The Gross Value Added (GVA) data ‘represents the marginal economic value that is added by each industry sector in a defined region’ (ibid). It is ‘calculated by subtracting local expenditure and expenditure on regional imports from the output generated by an industry sector’ (ibid) and the result becomes ‘the major element in the calculation of Gross Regional Product’ (ibid). Alternatively, GVA can be arrived at by adding together the wages and salaries ‘paid to local employees, the gross operating surplus and taxes on products and production’ (ibid).

The Gross Value Added of the Hunter Region stands at \$41,123.670 million as per the latest Remplan data, which incorporates Australian Bureau of Statistics (ABS) June 2016 Gross State Product, 2013/2014 National Input Output Tables and 2011 Census Place of Work Employment Data (ibid).

All Industries	Lake Macquarie	Newcastle	Hunter Region
	\$ Value Added in Millions		
Rental, Hiring & Real Estate Services	1,547.09M	1,723.27M	5,898.99M
Financial & Insurance Services	615.237M	1,558.42M	2,820.22M
Health Care & Social Assistance	711.073M	1,478.31M	3,092.01M
Manufacturing	896.646M	1,285.85M	3,823.91M
Electricity, Gas, Water & Waste Services	292.421M	1,019.86M	1,980.30M
Professional, Scientific & Technical Services	327.942M	1,008.02M	1,918.48M
Education & Training	458.249M	981.715M	2,132.71M
Construction	608.555M	954.79M	2,886.89M
Transport, Postal & Warehousing	223.923M	819.722M	1,543.91M
Public Administration & Safety	289.761M	730.524M	2,551.92M
Wholesale Trade	323.582M	622.641M	1,431.90M
Retail Trade	615.237M	619.984M	2,130.72M
Administrative & Support Services	187.122M	439.507M	1,037.00M
Accommodation & Food Services	254.092M	362.966M	1,212.84M
Information Media & Telecommunications	81.283M	336.496M	525.667M
Other Services	187.54M	277.619M	843.89M
Mining	579.954M	221.208M	4,431.97M
Arts & Recreation Services	43.546M	72.746M	202.116M
Agriculture, Forestry & Fishing	31.44M	33.544M	658.221M
Total	\$8,274.694 M	\$14,547.188 M	\$41,123.67 M

Table 15 Gross Value Added for Lake Macquarie, Newcastle and Hunter Region.

Sourced from Remplan data, incorporating Australian Bureau of Statistics (ABS) June 2016 Gross State Product, 2013/2014 National Input Output Tables and 2011 Census Place of Work Employment data.

The urban centre of the region, constituted by Lake Macquarie, Maitland and Newcastle LGAs, contributes 75.49% of the \$41.124 billion value added in Hunter Region (ibid). The Hunter Region itself contributes ‘1.65 % of the \$501.134 billion value added in New South Wales and 0.54 % of the \$1.545 trillion value added in Australia’ (ibid). The GVA of the Hunter Region is \$41.124 billion.

5.1.3 Gross Value Add for the Creative Industries

The creative industries' contribution to the regional GVA is constituted, at least according to this measure, by the Information Media & Telecommunications and the Arts & Recreation Services industry categories. It is estimated to be \$727,783million. Of this figure \$534,072million or 73.4% was contributed by the urban centre of the region which is commensurate with the total industry figure.

Creative Industries	Urban Centre	Hunter Region
	\$ Value Added in Millions	
Information Media & Telecommunications	417,770	525,667
Arts & Recreation Services	116,292	202,116
TOTAL	\$534,072	\$727,783

Table 16 Gross Value Add for the Creative Industries in the Urban Centre and the Hunter Region. Estimated from Remplan data, incorporating Australian Bureau of Statistics (ABS) June 2016 Gross State Product, 2013/2014 National Input Output Tables and 2011 Census Place of Work Employment data.

5.1.4 Occupations by Creative Industries Sector

The occupations within the creative industries, as opposed to ABS industry sectors, are contained in the list immediately below. These are the same 6-digit ANZSCO '06 Occupations codes used in the *Valuing Australia's Creative Industries Final Report* (CIIC 2013, pp. 30-31). These are then divided into a standard set of sectors (note 'nec' stands for 'not elsewhere classified', and 'nfd' stands for 'not further defined' where there is inadequate information to place responses in other categories that require more detailed information):

6-digit ANZSCO '06 Occupations by Creative Industries Sector

Advertising and Design

225111 Advertising Specialist
 131113 Advertising Manager
 212411 Copywriter
 232411 Graphic Designer
 232511 Interior Designer
 225100 Advertising and Marketing Professionals, nfd
 131100 Advertising, Public Relations and Sales Managers, nfd
 225113 Marketing Specialist
 225000 Sales, Marketing and Public Relations Professionals, nfd
 225311 Public Relations Professional
 232312 Industrial Designer
 131112 Sales and Marketing Manager
 225112 Market Research Analyst
 131114 Public Relations Manager

Electronic Games and Interactive Content

232414 Web Designer
 261212 Web Developer
 232400 Graphic and Web Designers, and Illustrators, nfd
 261211 Multimedia Specialist
 261399 Software and Applications Programmers, nec
 225212 ICT Business Development Manager
 261313 Software Engineer

261300 Software and Applications Programmers, nfd
232413 Multimedia Designer
261200 Multimedia Specialists and Web Developers, nfd
261312 Developer Programmer
261100 ICT Business and Systems Analysts
261111 ICT Business Analyst
261311 Analyst Programmer
212415 Technical Writer
261112 Systems Analyst

Architecture

232111 Architect
232100 Architects and Landscape Architects, nfd
232112 Landscape Architect
312111 Architectural Draftsperson
232000 Architects, Designers, Planners and Surveyors, nfd
232611 Urban and Regional Planner
312100 Architectural, Building and Surveying Technicians, nfd
312199 Architectural, Building and Surveying Technicians, nec
233916 Naval Architect

Fashion

232313 Jewellery Designer
399411 Jeweller
232300 Fashion, Industrial and Jewellery Designers, nfd
399912 Interior Decorator
232311 Fashion Designer

Visual Arts

211311 Photographer
232412 Illustrator
211411 Painter (Visual Arts)
211400 Visual Art and Crafts Professionals, nfd
211413 Sculptor
211000 Arts Professionals, nfd
399611 Signwriter
211499 Visual Arts and Crafts Professionals, nfd
211412 Potter or Ceramic Artist
451814 Body Artist
224212 Gallery or Museum Curator

Performing Arts

210000 Arts and Media Professionals, nfd
211111 Actor
212316 Stage Manager
211113 Entertainer or Variety Artist
211100 Actors, Dancers and Other Entertainers
211112 Dancer or Choreographer
212111 Artistic Director
211199 Actors, Dancers and Other Entertainers, nec

Music

211211 Composer
211200 Music Professionals, nfd
211214 Singer
211213 Musician (Instrumental)
211299 Music Professionals, nec

Publishing

212400 Journalists and Other Writers, nfd
212211 Author
212412 Newspaper or Periodical Editor
212212 Book or Script Editor
212200 Authors, and Book and Script Editors, nfd
212499 Journalists and Other Writers, nfd

Radio

212113 Radio Presenter
211212 Music Director

Film

212318 Video Producer
212399 Film, Television, Radio and Stage Directors
212317 Technical Director
399514 Make Up Artist

Television

212300 Film, Television, Radio and Stage Directors, nfd
212312 Director (Film, Television, Radio or Stage)
212100 Artistic Directors, and Media Producers and Presenters, nfd
212000 Media Professionals, nfd

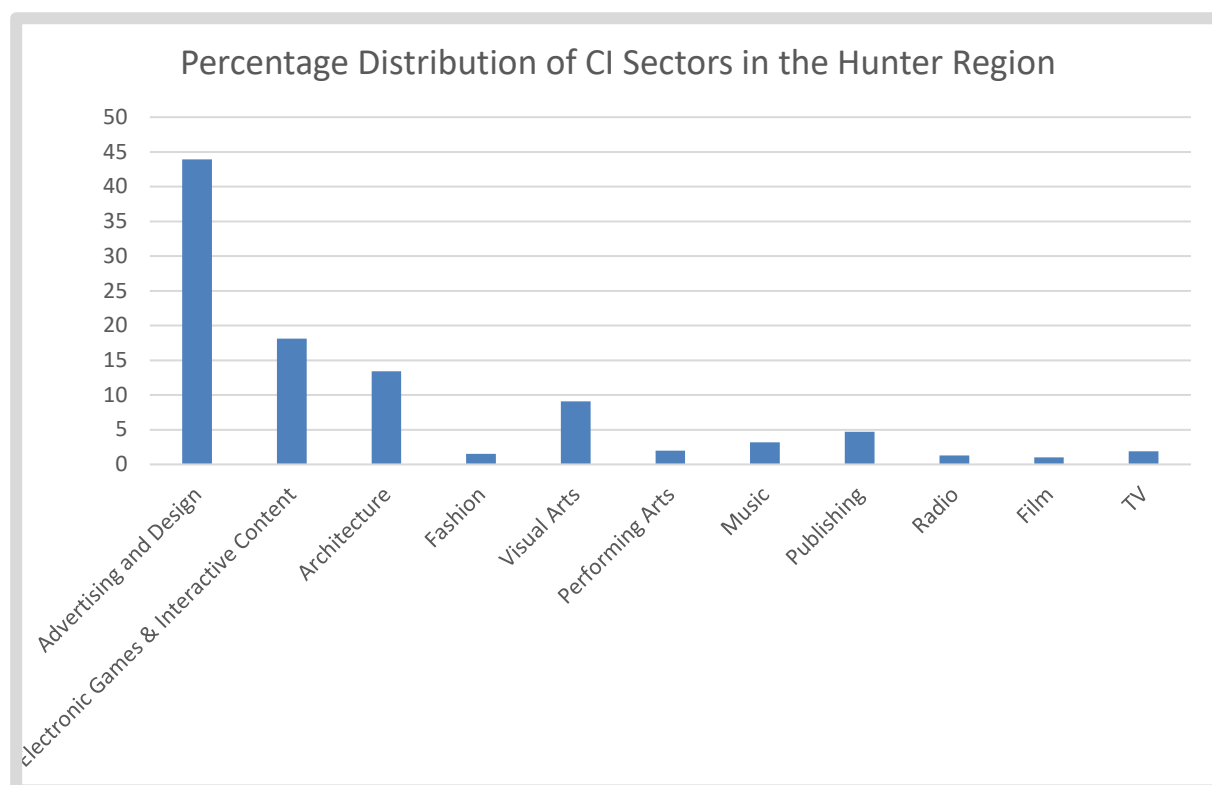
It should be noted that while this list of occupations looks intuitively accurate there are a number of questions as to its veracity. For example, this 6-digit ANZSCO '06 Occupations by Creative Industries Sector list only indicates two occupational roles for the radio sector. Yet occupations in radio generally include Station Manager, Program Director, Music Director, Traffic Scheduler, Creative Director, Audio Engineer, Technical Officer, Sales Manager, Accountant, Sales Representative, Audience Research Executive, Announcer/Presenter, Stringer, Broadcast Journalist, and News Director/Producer. (For a complete list of occupations in each sector please see 'Field' section below). This over-simplification holds true for each of the sectors listed above. Therefore, the following statistics (Table 13) must be read with this major caveat in mind as they are based on the supplied 6-digit ANZSCO '06 Occupations from the above list, rather than the number of occupations each sector is actually constituted by.

CI Sector	Frequency	Percent	Valid Percent	Cumulative Percent
Advertising & Design	2870	43.9	43.9	43.9
Games & Software	1180	18.1	18.1	62
Architecture	876	13.4	13.4	75.4
Fashion	101	1.5	1.5	76.9
Visual Arts	593	9.1	9.1	86
Performing Arts	129	2	2	88
Music	206	3.2	3.2	91.1
Publishing	307	4.7	4.7	95.8
Radio	87	1.3	1.3	97.2
Film	64	1	1	98.1
TV	122	1.9	1.9	100
Total	6535	100	100	

Table 17 Percentage Share of Occupations in the Creative Industries.

Source: Customised Data Report from the ABS using 2011 Census Place of Residence data across selected 6 digit ANZSCO '06 Occupations, by Age and by Sex within the 11 LGAs of the Hunter Region (2011 boundaries).

Based on the 6-digit ANZSCO '06 Occupations as listed above, the ABS customised data shows that the advertising and design sector in the Hunter Region constitutes 43.9% of all people engaged in the creative industries. This sector also contains marketing and public relations although these occupations also occur across all sectors. There are 18.1% engaged in the electronic games and interactive content sector, but likewise it should be noted here that this percentage is based on all digitally-oriented occupations, including all those who work within other creative industries' sectors. The Trident methodology (Higgs and Cunningham), was designed to circumvent the problems these classifications present. The next largest sector is Architecture at 13.4%. In total, these three sectors represent at least 75% of the total creative industries people living in the Hunter Region. The lowest level of occupation numbers is within the film sector at 1% followed by Radio at 1.3%, Fashion at 1.5%, Television at 1.9% and Performing Arts at 2%. These percentages can be illustrated graphically in the following way:



Graph 2 Percentage Share of Occupations in the Creative Industries.

Source: Customised Data Report from the ABS using 2011 Census Place of Residence data across selected 6 digit ANZSCO '06 Occupations, by Age and by Sex within the 11 LGAs of the Hunter Region (2011 boundaries).

In order to see how many creative industries occupations are represented in each LGA in the Hunter Region, a cross tabulation of these two factors, i.e. Occupation and LGA, reveals that the urban centre of this region, as defined by the NSW Parliament (Wilkinson 2017, online), has, as expected, the greater number of people from the creative industries living in these areas.

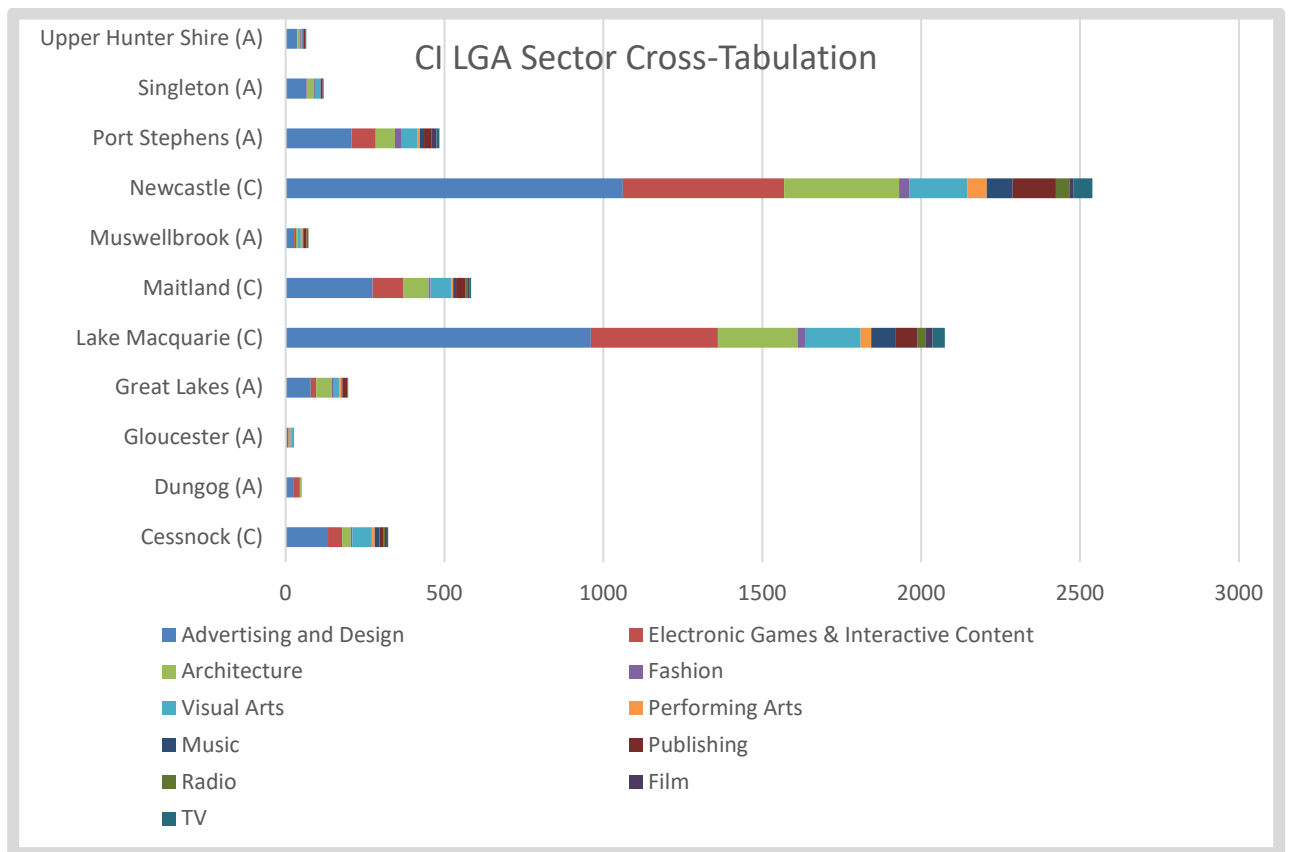
Of this urban centre Newcastle has the greater share with 2,539 people and Lake Macquarie has 2,074. Of the rural and semi-rural areas, Maitland houses 584 closely followed by Port Stephens with 481 people engaged in the creative industries. The Dungog LGA has the lowest number of creative industries' residents with the Upper Hunter contributing just 65 to the overall total of 6,535.

Table 14 provides a cross sector tabulation that can be graphically represented to illustrate the significance of the urban centre to the creative industries in the Hunter Region:

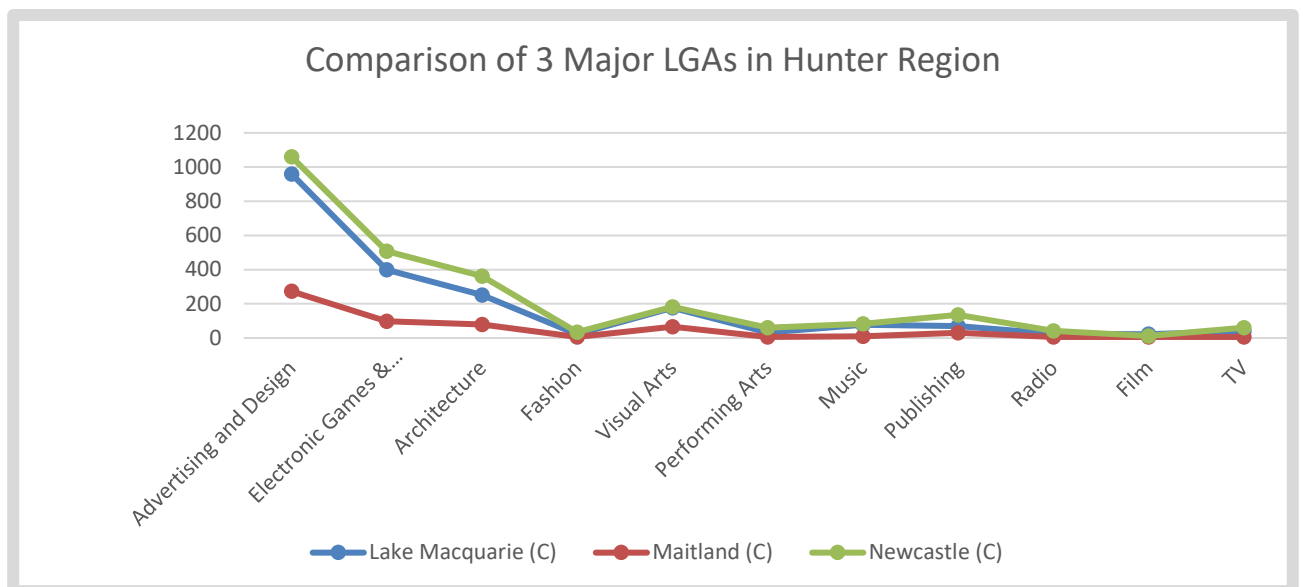
LGA	Advertising and Design	Electronic Games & Interactive Content	Architecture	Fashion	Visual Arts	Performing Arts	Music	Publishing	Radio	Film	TV	Total
Cessnock (C)	133	45	27	5	61	9	15	12	6	6	4	323
Dungog (A)	24	21	6	0	0	0	0	0	0	0	0	51
Gloucester (A)	3	6	6	3	9	0	0	0	0	0	0	27
Great Lakes (A)	79	17	49	6	19	6	3	15	3	0	0	197
Lake Macquarie (C)	960	400	252	22	176	33	77	69	24	22	39	2,074
Maitland (C)	273	98	79	6	65	6	9	30	6	6	6	584
Muswellbrook (A)	27	6	6	0	9	6	3	9	6	0	0	72
Newcastle (C)	1061	508	361	34	182	60	82	136	42	12	61	2,539
Port Stephens (A)	207	76	61	19	50	9	14	24	0	15	9	484
Singleton (A)	66	3	20	3	18	0	0	6	0	3	0	119
Upper Hunter Shire (A)	37	0	9	3	4	0	3	6	0	0	3	65
Total	2870	1180	876	101	593	129	206	307	87	64	122	6,535

Table 18 Creative Industries Local Government Area (LGA) Cross Sector Tabulation.

Source: Customised Data Report from the ABS using 2011 Census Place of Residence data across selected 6 digit ANZSCO '06 Occupations, by Age and by Sex within the 11 LGAs of the Hunter Region (2011 boundaries).



Graph 3 Creative Industries Local Government Area (LGA) Cross-Sector Tabulation by LGA.
Source: Customised Data Report from the ABS using 2011 Census Place of Residence data across selected 6 digit ANZSCO '06 Occupations, by Age and by Sex within the 11 LGAs of the Hunter Region (2011 boundaries).



Graph 4 Comparison by CI Sector of the 3 Major LGAs in the Hunter Region.
Source: Customised Data Report from the ABS using 2011 Census Place of Residence data across selected 6 digit ANZSCO '06 Occupations, by Age and by Sex within the 11 LGAs of the Hunter Region (2011 boundaries).

The comparison of the three major LGAs in the region is seen in Graph 4 above. The creative industries can also be divided, following Flew (2012), into four major sectors. These are Design, the Media, Information Technology (IT) and the Arts.

Using the NSW Creative Industries Taskforce sector categories (NSWT&I 2012), and the NSW Department of State and Regional Development (NSWSRD 2009, p. 7) as a basis, it can be seen that the Design subsector is constituted by Architecture, Fashion and Advertising and Design (including marketing and public relations). The Media subsector is constituted by Publishing (including newspaper, magazines, books and new media), Film, Television (broadcast and digital) and Radio (broadcast and digital). The Information Technology subsector is constituted by Electronic Games (including popular and serious games) and Interactive Content (including software and app development). The Arts subsector includes Visual Arts (including painting, sculpture and photography) and Performing Arts (including popular and serious music, in all its forms, as well as theatre and dance). These subsectors are broken down per LGA in Table 15.

LGA	Design	The Arts	Media	IT	Total
Cessnock (C)	165	85	28	45	323
Dungog (A)	30	0	0	21	51
Gloucester (A)	12	9	0	6	27
Great Lakes (A)	134	28	18	17	197
Lake Macquarie (C)	1234	286	154	400	2074
Maitland (C)	358	80	48	98	584
Muswellbrook (A)	33	18	15	6	72
Newcastle (C)	1456	324	251	508	2539
Port Stephens (A)	287	73	48	76	484
Singleton (A)	89	18	9	3	119
Upper Hunter Shire (A)	49	7	9	0	65
Total	3847	928	580	1180	6535

Table 19 Primary Sectors in the Creative Industries by LGA in the Hunter Region.

Source: Customised Data Report from the ABS using 2011 Census Place of Residence data across selected 6 digit ANZSCO '06 Occupations, by Age and by Sex within the 11 LGAs of the Hunter Region (2011 boundaries).

Design, constituted in this case by advertising and marketing, architecture, graphic design and fashion, is significant in terms of occupational categories, as represented by those living in the Hunter Region. There are 580 people (9%) working in the Media, 928 in the Arts (14%), 1,180 in IT (18%) and 3,847 working in Design (59%) in the Hunter Region.

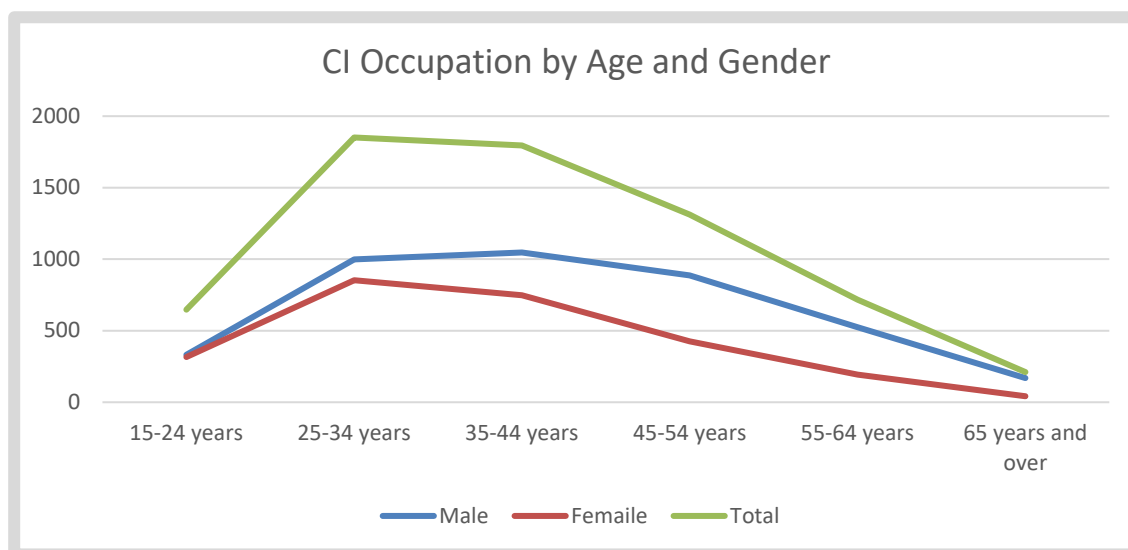
Our findings about the gender and age spread in CI in the Hunter Region do not align precisely with other studies. For example, the Ernst & Young report outlined above found that the creative industries were oriented toward youth and in some countries provided more economic opportunities for women in certain sectors compared with more traditional industries (Lhermitte et al. 2015, p. 18) although the report does not indicate whether they remain under-represented. Banks and Hesmondhalgh's 2009 study asserts that creatives 'tend to be younger than other workers, and to hold second or multiple jobs' (Banks & Hesmondhalgh 2009, p. 420). They also state that women are 'under-represented and disadvantaged in creative employment' (ibid).

CI in the HUNTER by AGE and GENDER			
Age	Male	Female	Total
15-24 years	332	316	648
25-34 years	998	853	1851
35-44 years	1047	748	1795
45-54 years	887	426	1313
55-64 years	524	193	717
65 years and over	169	42	211
Total	3957	2578	6535

Table 20 Creative Industries in the Hunter Region by Age and Gender.

Source: Customised Data Report from the ABS using 2011 Census Place of Residence data across selected 6 digit ANZSCO '06 Occupations, by Age and by Sex within the 11 LGAs of the Hunter Region (2011 boundaries).

For the Hunter Region, it can be seen in Table 16 directly above that the proportion of males in terms of occupation is higher than for females, in contrast to the Ernst & Young findings. In terms of age, most people employed in the creative industries in the Hunter Region are in the 25-34 year age band, followed closely by the 35-44 year age band, and this share is similar for both females and males. For the Hunter Region, the breakdown of age and gender is as follows:



Graph 5 Creative Industries Occupations in the Hunter by Age and Gender.

Source: Customised Data Report from the ABS using 2011 Census Place of Residence data across selected 6 digit ANZSCO '06 Occupations, by Age and by Sex within the 11 LGAs of the Hunter Region (2011 boundaries).

This graph indicates that overall the peak age period for workers in CI are between 25 to 44 years. For males the figures hold relatively steady across the 25 to 54 year age bracket while for females, there is a peak at 25 years of age with a slow decline until around 44 years old and then sharp drop off from that point onward with fewer females maintaining longer term positions in the creative industries. There are, of course, sector and LGA differences.

When females are cross-tabulated with LGA, as seen in Tables 17, 18 and 19 below, we can observe that there are 554 females occupied in Advertising and Design in the creative industries in Newcastle compared with 507 males.

BOTH GENDERS	Advertising and Design	Electronic Context	Architecture	Fashion	Visual Arts	Performing Arts	Music	Publishing	Radio	Film	TV	Total
15-24 years	256	101	63	14	67	41	34	27	21	21	3	648
25-34 years	816	397	275	11	140	25	44	65	28	19	31	1,851
35-44 years	845	309	233	43	142	33	43	72	16	18	41	1,795
45-54 years	580	255	162	26	131	15	43	56	16	0	29	1,313
55-64 years	289	103	109	7	86	9	26	64	6	6	12	717
65 years and over	84	15	34	0	27	6	16	23	0	0	6	211
Total	2,870	1,180	876	101	593	129	206	307	87	64	122	6,535

Table 21 Cross tabulation of Age Categories with CI Sector.

Source: Customised Data Report from the ABS using 2011 Census Place of Residence data across selected 6 digit ANZSCO '06 Occupations, by Age and by Sex within the 11 LGAs of the Hunter Region (2011 boundaries).

FEMALES	Advertising and Design	Electronic Context	Architecture	Fashion	Visual Arts	Performing Arts	Music	Publishing	Radio	Film	TV	Total
Cessnock (C)	82	12	13	0	27	6	0	6	6	6	0	158
Dungog (A)	4	10	0	0	0	0	0	0	0	0	0	14
Gloucester (A)	0	3	0	3	6	0	0	0	0	0	0	12
Great Lakes (A)	47	3	18	3	9	3	0	3	3	0	0	89
Lake Macquarie (C)	428	64	67	14	70	15	17	42	12	6	18	753
Maitland (C)	118	15	23	6	30	0	0	18	3	6	3	222
Muswellbrook (A)	13	3	3	0	6	3	3	9	3	0	0	43
Newcastle (C)	554	74	106	25	73	31	16	68	12	3	21	983
Port Stephens (A)	89	27	27	12	18	3	6	15	0	6	3	206
Singleton (A)	28	0	14	0	15	0	0	3	0	0	0	60
Upper Hunter Shire (A)	22	0	3	0	4	0	3	6	0	0	0	38
Total	1,385	211	274	63	258	61	45	170	39	27	45	2,578

Table 22 Occupation levels for Females where CI Sector is Cross tabulated with LGA.

Source: Customised Data Report from the ABS using 2011 Census Place of Residence data across selected 6 digit ANZSCO '06 Occupations, by Age and by Sex within the 11 LGAs of the Hunter Region (2011 boundaries).

Males	Advertising and Design	Electronic Context	Architecture	Fashion	Visual Arts	Performing Arts	Music	Publishing	Radio	Film	TV	Total
Cessnock (C)	51	33	14	5	34	3	15	6	0	0	4	165
Dungog (A)	20	11	6	0	0	0	0	0	0	0	0	37
Gloucester (A)	3	3	6	0	3	0	0	0	0	0	0	15
Great Lakes (A)	32	14	31	3	10	3	3	12	0	0	0	108
Lake Macquarie (C)	532	336	185	8	106	18	60	27	12	16	21	1,321
Maitland (C)	155	83	56	0	35	6	9	12	3	0	3	362
Muswellbrook (A)	14	3	3	0	3	3	0	0	3	0	0	29
Newcastle (C)	507	434	255	9	109	29	66	68	30	9	40	1,556
Port Stephens (A)	118	49	34	7	32	6	8	9	0	9	6	278
Singleton (A)	38	3	6	3	3	0	0	3	0	3	0	59
Upper Hunter Shire (A)	15	0	6	3	0	0	0	0	0	0	3	27
Total	1,485	969	602	38	335	68	161	137	48	37	77	3,957

Table 23 Occupation levels for Males where CI Sector is Cross tabulated with LGA.

Source: Customised Data Report from the ABS using 2011 Census Place of Residence data across selected 6 digit ANZSCO '06 Occupations, by Age and by Sex within the 11 LGAs of the Hunter Region (2011 boundaries).

From data such as this we can deduce that at certain sectoral levels and in certain LGAs the Ernst & Young assertions hold true, while for some sectors and LGAs, the trend is reversed. For example, for the Electronic sector, there are 64 females and 336 males engaged in IT in Lake Macquarie. These results differ somewhat from the findings of the studies mentioned above. Given the mix of results, and the various collection methods used to ascertain them, these figures need to be refined to gain a comprehensive and cohesive picture of what is actually going on.

Similarly, we can see in the cross-tabulated Table 21 above that certain sectors have older populations than others. For example, in the Performing Arts and Fashion sectors the major age category is 35-44 years while for Architecture the major age category is 45-54 years. However, for Advertising and Design the major category is 35-44 years, followed closely by 25-34 years (816).

5.1.5 Composite Creative Industries Stats for the Hunter Region

In 2011, The World Bank measured the self-employed in Australia, as a percentage of total numbers employed, at 11.2% (Trading Economics 2015). Self-employed workers are defined as 'those workers who, working on their own account or with one or a few partners or in cooperative, hold the type of jobs defined as a self-employment jobs (i.e. jobs where the remuneration is directly dependent upon the profits derived from the goods and services produced). Self-employed workers include three subcategories: employers, own-account workers, and members of producers' cooperatives' (ibid).

Of the 6,535 people working in the creative industries in the region in 2011, 11.2% (719) are estimated to be self-employed with most of these working in the region's urban centre. The caveat here is that many of the positions in the creative industries in certain sectors such as Film or Visual Arts are predominantly freelance, contract or sessional. To label these as employees or employers may be misleading.

What can be reasonably asserted in general from the statistics presented above is that all of the sectors belonging to the creative industries are represented in the Hunter Region. As indicated in the table below, out of the total working population of 330,837 in the Hunter Region, 6,535 people work in the creative industries, a share that is below the national average (CIIC 2015). Most of the creative industries occupations are taken up by males (3,957) in comparison with females (2,578). The creative industries contribute \$0.967billion to the GRP of the regional economy in the Hunter with a gross value add of \$0.820billion.

	All Industries	Creative Industries
Population Figures		
Total Working	330,847	6,535
Employed	293,793	5,810
Self-Employed	37,054	719
Females Working	-	2,578
Males Working	-	3,957
Economic Contribution		
Contribution to GRP	\$48.351 billion	\$0.967 billion
Contribution to GVA	\$41.124 billion	\$0.820 billion

Table 24 Composite Creative Industries Statistics for the Hunter Region.

Sources: 1) Customised Data Report from the ABS using 2011 Census Place of Residence data across selected 6 digit ANZ SCO '06 Occupations, by Age and by Sex within the 11 LGAs of the Hunter Region (2011 boundaries); 2) Remplan data,

5.1.6 Further Notes on Statistical Measure 1.

These above statistics appear *prima facie* to be close to what could be expected for the creative industries in the region. However, hidden alongside and within many of these occupational categories are other unidentified positions such as songwriter, record producer and audio engineer of which there are quite a number in the Hunter region (McIntyre 2015) with some occupations not accounted for in the 6 digit ANZSCO '06 Occupations listed above.

The following list, however, looks at the problem from the other direction, as it were. It goes to the industry and asks what occupations exist there. This list of industry occupations has been derived from extensive web searches of company, employment and organisational websites, as well as from the researchers' own knowledge as practitioners. It is noted that the following listed occupations may also constitute part of the various 'fields' of the creative industries sectors (excluding audiences as per Sawyer 2006). For each sector these include:

Publishing (includes books, magazines and the press) (27)

Creative Writer
Professional Writer
Literary Agent
Account Executive
Editorial Photographer
Copywriter
Art Editor
Commissioning Editor
Bookseller
Copy Editor
Customer Service Manager
CEO
Assistant Service Manager
Editorial Assistant
Magazine Journalist
Event Manager
Graphic Designer
Critic
Illustrator
Webmaster
Indexer
Market Research Executive
Marketing Executive
Newspaper Journalist
Sub Editor

Music (includes popular and 'serious') (29)

Record Producer
Mix Engineer
Mastering Engineer
A&R Representative
CEO
Graphic Designer

Account Executive
Tour Director
FOH Operator
Lighting Director
Video Producer
Stage Manager
Monitor Operator
Agent
Promoter
Music PR Professional
Music Publisher
Music Director
Event Manager
Musician
Songwriter
Composer
Conductor
Webmaster
Web Designer
Music Solicitor
Instrument Maker
Music Retailer
Music Retail Account Executive
Instrument Repairer
Music Journalist

Fashion (includes textiles) (53)

Buyer
Carder
Chief Innovation Officer
Retailer
Retail Assistant
Clothing Alteration Hand
Laundry Worker
Lingerie/Swimwear Designer
Milliner
Clothing Manufacturing Hand

Model
 Modelling Agent
 Clothing Packer
 Footware Designer
 Freelance Designer/Maker
 Garment Technolgist
 Hand Intarsia
 Textile Colour Technologist
 Winder
 Textile Designer
 Tufter
 Upholsterer
 Wardrobe Supervisor
 Hand Sewer
 Handcraft Tailor
 Knitting Machinist
 CEO
 Knitwear Designer
 Leather Craftworker
 Marketing Executive
 Pattern Cutter
 Pattern Grader
 Textile Analyst
 Beamer
 Blender
 Product Tester
 Production Engineer
 Quality Control Inspector
 Public Relations Officer
 Saddler
 Sale Manager
 Sale Representative
 Clothing Presser
 Collar Linker
 Cutting Room Manager
 Dressmaker
 Fashion Designer
 Dry Cleaning Worker
 Fashion Photographer
 Sewing Machinist
 Shoe Repairer
 Spinner
 Technical Textile Designer
 Weaver

Architecture (18)

Company Director
 Architect
 Draftsperson
 Office Manager
 Associate Architect
 IT Manager
 BIM Manager
 Marketing Manager
 Quantity Surveyor/Cost Manager
 Interior Designer
 Landscape Architect

Electrical Services Engineer
 Mechanical Services Engineer
 Supervising Architect
 Account Manager
 Accountant
 Business Developer,
 Construction Administrator

Advertising and Design (41)

Advertising Account Executive
 Advertising and Editorial
 Photographer
 Art Director/Creative
 CEO
 Webmaster
 Creative Director
 Advertising Copywriter
 Media Buyer
 Interior Designer
 Media Planner
 Animator
 Illustrator
 Graphic Designer
 Industrial Designer
 Project Manager
 Design Consultant
 Design R&D
 Multimedia Designer
 Web Designer
 Jewellery Designer
 Textile Designer
 Ceramic Designer
 Fashion Designer
 Furniture Designer
 Motion Designer and Editor
 Studio Manager
 Creative Director
 General Manager
 Motion Editor & Cinematographer
 Account Service Coordinator
 Account Manager
 Art Director
 Digital Designer and Developer
 Software Developer
 Website Manager
 Interior Decorator
 Exhibition and Display Designer
 TV, Film and Set Designer
 Design Manager
 Design Educator
 Digital Media Designer

Visual Arts (56)

Photographer
 Business Development Manager
 Digital Imaging Specialist
 (Picture Library)

Corporate Photographer
 Portrait Artist
 Forensic Photographer
 Painter
 Sculptor
 Gallery Owner
 Machine Print Operator
 Customer Service Manager
 Public Relations Officer
 Display Designer
 Exhibit Installer
 Furniture Designer
 Glass Blower
 Graphic Designer
 Illustrator
 Interior Designer
 Landscape Designer
 Image Sales Executive
 Minilab Operator
 Press Photographer/Photojournalist
 Art Librarian
 Photo Retail Manager
 Photo Retail Sale Assistant
 Library Assistant
 Scientific Photographer
 Library Manager
 Picture Manager
 Museum Director
 Curator
 Archivist
 Acquisitions Specialist
 Logo designer
 Multimedia Artist
 Painter
 Police Sketch Artist
 Antique appraiser
 Antiques refinisher
 Commercial artist
 Craftsperson
 Courtroom artist
 Art appraiser
 Auctioneer
 Art director
 Gallery owner
 Gallery manager
 Art historian
 Reviewer
 Teacher
 Art therapist
 Artists' agent
 Caricature artist
 Cartoonist
 Digital Imaging Lab Specialist
 Fashion Photographer

Performing Arts – Theatre (41)

Actor

Stagehand
 Producer
 Director
 Actor
 Backstage Crew
 Carpenter
 Charge artist
 Electrician
 Front of House
 Paint Crew
 Playbill writer
 Publicist
 Scenic artist
 Stage Manager
 Technical Director
 Stagehand
 Grip
 Wardrobe Supervisor
 Playwright
 Scenic designer
 Lighting designer
 Costume designer
 Sound designer
 Property master
 Production manager
 Technical Director
 Artistic director
 Managing Director
 General Manager
 Director of Production
 Costume Director
 Marketing Director
 Director of Public Relations
 Director of Audience Services
 Dramaturg
 Literary Manager
 Company manager
 House manager
 Usher
 Ticketing Agent
 Film (61)
 Art Director
 Choreographer
 Accountant
 Construction Manager
 Editor
 Location Manager
 Camera Operator
 Sound Designer
 Carpenter
 Associate Producer
 Stunt Performer
 Assistant Producer
 Casting Director
 Wardrobe Supervisor
 Chargehand Painter
 Rigger

Concept Artist
 Storyboard Artist
 Costume Assistant
 Set Decorator
 Costume Designer
 Costume Maker
 Director
 Actor
 Unit Stills Photographer
 Agent
 Director of Photography
 Editor
 Stagehand
 Executive Producer
 First Assistant Camera
 Painter
 First Assistant Director
 HoD Plasterer
 Production Runner
 Property Master
 HoD Rigger
 Line Producer
 Make-up and Hair Artist
 Hair Designer
 Marketing Executive
 Scenic Artist
 Marketing Manager
 Model Maker
 Animator
 CGI
 Painter
 Plasterer
 Screenwriter
 Producer
 Unit Manager
 Production Designer
 Script Supervisor
 Production Coordinator
 Sculptor
 Second AD
 Producer's Assistant
 Production Manager
 Unit Manager
 Public Relations Officer
 Rigger

Television (34)

Actor
 Variety Artist
 Walk-on and Supporting Artist
 Agent
 Camera Assistant (Studio and OB)
 TV Broadcast Journalist
 News Director
 Chief of Staff (TV News)
 Camera Operator
 (Portable Single Camera)

Production Manager (TV)
 Costume Designer
 Director (TV)
 Executive Producer
 Gaffer (TV)
 Lighting Director
 TV Presenter
 Accountant
 Location Manager
 Make-up and Hair Artist / Designer
 Transmission Engineer
 Marketing Executive
 Sound Supervisor
 Stunt Performer
 Marketing Manager
 Network Operations Assistant
 Public Relations Officer
 Researcher
 Script Supervisor
 Sound Assistant (TV)
 Art Director
 Boom Operator
 Camera Operator (Studio and OB)
 Sound Recordist
 Vision Mixer

Radio (17)

Station Manager
 Program Director
 Music Director
 Traffic Scheduler
 Creative Director
 Audio Engineer
 Technical Officer
 Sales Manager
 Accountant
 Sales Representative
 Audience Research Executive
 Announcer/Presenter
 Stringer
 Broadcast Journalist
 News Director/Producer
 Producer
 Radio Consultant

Electronic Games (include software development and interactive media) (18)

Games Designer
 Technical Artist (Games)
 Animator
 Assistant Producer
 Audio Engineer/Commercial
 Producer
 Creative Director (Games)
 Game Programmer
 Games Artist

Lead Artist (Games)
Level Editor
Lead Programmer (Games)
Marketing Executive
Marketing Manager
Product Manager

Project Manager/Producer (Games)
Public Relations Officer
QA Tester
Technical Artist (Games)

What is important to note here is that many of these occupational types have not been comprehensively accounted for in any statistical analysis so far. These analyses do not usually adopt a systems-based approach and therefore do not include all occupations that contribute their input to a final and creative product. In other words, they do not pursue a comprehensive ‘field’ oriented approach (Bourdieu 1993, Csikszentmihalyi 2014) or even an ‘art worlds’ approach (Becker 1982) where creative output is dependent on a network of *all* the co-operating individuals who bring it into being.

It is illuminating to take one subsector, Design, and explore how the ABS has been approaching, over time, the relevant industrial and occupational categories. The Design Institute of Australia (DIA) made a submission to the ABS in 2015 about where Design as a profession should be located in terms of ABS categories and lists. This industry, through the DIA, had expressed concern around 1996 at the way the design profession had been classified to that point by the ABS. The issues raised by these design professionals were as follows:

- Inappropriate positioning of design in statistical systems maintains government, industry and community prejudices about the skills and role of designers.
- Current positioning inappropriately reinforces the anachronistic alignment with art rather than commerce.
- Current treatment of the design professions prevents correct understanding of the range and size of design occupations in Australia.
- Current positioning prevents government planning from perceiving the economic value of this professional area and forces it into government portfolios that are unsuited to deal with it as a commercial activity aligned with trade and commerce.
- The titling of areas in which design currently occurs provides significantly misleading word associations, for example the title ‘2533 Designers & Illustrators’ under which both building and manufacturing related designers are included in addition to graphic designers.
- The lack of appropriately segmented information about the design professions at the four-digit level renders aspects of this significant sector invisible in most occupation summaries (DIA 2015).

The DIA then made submissions to the ABS committee responsible for revision of the Australian Standard Classification of Occupations (ASCO). The DIA noted that significant gains were negotiated as a result of their submission. These changes included:

- Moving design from an arts category to one associated with technical and commercial professions.
- Achieving the term design at the two- and three-digit heading level.
- Providing individual four-digit groupings for design professions associated with manufacturing, the built environment and visual communication.
- Increasing the listed disciplines from five to eight at the six-digit level.
- Significantly improving the definitions associated with each occupation in the classification.

This case illustrates the idea that the processes used by the ABS to define occupational classifications are primarily reactive not proactive, that is, the ABS is operating in an environment that is continually changing and reacts to those changes rather than anticipating or predicting them. There is thus a disparity in the ABS lists due to their inability to reflect exact current practice. At a technical level, there may also be a ‘frame of reference’ issue associated with occupational classifications, leaving some doubt about the adequacy of the questions used to collect occupational data to fully encapsulate working practices and the associated perceptions of what constitutes an ‘occupation’.

In addition, there is a wide variety of occupations within the creative industries that cross sectors. For example, whether we are talking about networked, broadcast, cinematic or virtual screen industries, there are a number of film or television directors actually working within design and advertising or embedded in other industries (McIntyre & Kerrigan 2014), yet they identify in some parts of their professional lives with the film sector.

Additionally, while work, employment and job creation in the creative industries continue to be dependent on the contextual structures within which they occur, Manuel Castells points out that the occupational structure of many societies around the globe has been transformed by new technologies. He states that ‘the processes and forms of this transformation have been the result of the interaction between technological change, the institutional environment and the evolution of relationships between capital and labour in each specific context’ (Castells 2010, p. xxiv). With these larger forces at play operating at varying scales within the system, interlinked with the increasing dominance in the economic sphere of neoliberal ‘free market’ forces, there has been a concerted move away from full-time employment toward freelancing and casualisation in creative industries’ workforces. At the same time, there is an increasingly entrepreneurial bent amongst creative workers. This situation indicates that we need to look beyond traditional models of labour market employment, that is look beyond an individual ‘who works for a public or private employer, who receives remuneration in wages or salary, and is engaged under a contract of service/employment contract’ (ABS 2015b).

Because of the dynamic environment, new creative industries’ occupations are emerging and creative industries’ professions are undergoing radical change. For example, ‘transmedia storyteller’ is an occupation the ABS has not even begun to consider, let alone classify or gather data on. As Davies and Sigthorsson pointed out in 2013, ‘the creative industries regularly generate job descriptions that previously did not exist – terms like “app developer” or “community manager” crop up suddenly and become ubiquitous. [People] will apply to jobs that don’t exist yet, in businesses yet to be established’ (2013, p. 229) and this process has evolved and developed at an alarming rate since then. To add to the complexity of these issues of the constitution of occupations within the creative industries, there is the matter of core, embedded and support services, as discussed above, to be considered.

5.2 Statistical Measure 2 – Creative Trident Methodology

To give this study a second statistical measure, the Creative Trident Methodology, outlined briefly above in the literature review, was also employed. The resultant data was drawn from both the 2011 and 2016 Censuses. A second customised table from the ABS containing the number of persons employed, the total who stated income and mean income for 35 selected industries (4-digit IND06P) and all other industries by all occupations (6-digit ANZSCO), was sought. The resultant data for this second measure was not drawn from LGAs, as for measure 1 above, but was based instead on SA4 geographical areas. This geographic level is aggregated for ASGS 106 Hunter Valley (excluding Newcastle) and 111 Newcastle and Lake Macquarie. Unlike Measure 1 it excludes the Great Lakes and Gloucester.

Selected Industries for Table 1 include:

1. 6991 Professional Photographic Services
2. 9002 Creative Artists, Musicians, Writers and Performers
3. 5511 Motion Picture and Video Production
4. 6924 Other Specialised Design Services
5. 9001 Performing Arts Operation
6. 5514 Post-production Services and Other Motion Picture and Video Activities
7. 5621 Free-to-Air Television Broadcasting
8. 6921 Architectural Services
9. 5610 Radio Broadcasting
10. 2591 Jewellery and Silverware Manufacturing
11. 5620 Television Broadcasting
12. 5510 Motion Picture and Video Activities
13. 5410 Newspaper, Periodical, Book and Directory Publishing
14. 5400 Publishing (except Internet and Music Publishing)
15. 9000 Creative and Performing Arts Activities
16. 5412 Magazine and Other Periodical Publishing
17. 6940 Advertising Services
18. 5411 Newspaper Publishing
19. 5700 Internet Publishing and Broadcasting
20. J000 Information Media and Telecommunications, nfd
21. 6010 Libraries and Archives
22. 5420 Software Publishing
23. 1612 Printing Support Services
24. 5900 Internet Service Providers, Web Search Portals and Data Processing Services
25. 5500 Motion Picture and Sound Recording Activities
26. 5413 Book Publishing
27. 8910 Museum Operation
28. 5600 Broadcasting (except Internet)
29. 5419 Other Publishing (except Software, Music and Internet)
30. 7000 Computer System Design and Related Services
31. 5622 Cable and Other Subscription Broadcasting
32. R000 Arts and Recreation Services, nfd
33. 5520 Sound Recording and Music Publishing
34. 9003 Performing Arts Venue Operation
35. 5522 Music and Other Sound Recording Activities

The second table drawn from the 2011 and 2016 census data includes the total number of persons employed who stated income and mean income for 88 selected occupations (6-digit ANZSCO) and all other occupations by industry (4-digit IND06P). As stated, the SA4

Geographic Level is aggregated for ASGS 106 Hunter Valley (excluding Newcastle) and 111 Newcastle and Lake Macquarie. It excludes the Great Lakes and Gloucester in this measure.

Selected Occupations for Table 2 include:

1. 225111 Advertising Specialist
2. 212411 Copywriter
3. 225100 Advertising and Marketing Professionals
4. 131113 Advertising Manager
5. 225311 Public Relations Professional
6. 225113 Marketing Specialist
7. 131114 Public Relations Manager
8. 232511 Interior Designer
9. 232000 Architects, Designers, Planners and Surveyors
10. 232111 Architect
11. 232112 Landscape Architect
12. 232611 Urban and Regional Planner
13. 232100 Architects and Landscape Architects
14. 233916 Naval Architect
15. 232411 Graphic Designer
16. 232311 Fashion Designer
17. 232312 Industrial Designer
18. 211311 Photographer
19. 232400 Graphic and Web Designers, and Illustrators
20. 232300 Fashion, Industrial and Jewellery Designers
21. 212112 Media Producer (Excluding Video)
22. 212312 Director (Film, Television, Radio or Stage)
23. 212000 Media Professionals
24. 599912 Production Assistant (Film, Television, Radio or Stage)
25. 212399 Film, Television, Radio and Stage Directors nec
26. 212314 Film and Video Editor
27. 212318 Video Producer
28. 212317 Technical Director
29. 212311 Art Director (Film, Television or Stage)
30. 212315 Program Director (Television or Radio)
31. 212416 Television Journalist
32. 212114 Television Presenter
33. 212300 Film, Television, Radio and Stage Directors
34. 212313 Director of Photography
35. 212113 Radio Presenter
36. 212414 Radio Journalist
37. 211213 Musician (Instrumental)
38. 211214 Singer
39. 211211 Composer
40. 211200 Music Professionals
41. 211212 Music Director
42. 211299 Music Professionals nec
43. 211000 Arts Professionals
44. 211113 Entertainer or Variety Artist
45. 211111 Actor
46. 211112 Dancer or Choreographer
47. 139911 Arts Administrator or Manager
48. 211199 Actors, Dancers and Other Entertainers nec
49. 210000 Arts and Media Professionals
50. 212111 Artistic Director
51. 212316 Stage Manager
52. 399514 Make Up Artist
53. 211100 Actors, Dancers and Other Entertainers

54. 212100 Artistic Directors, and Media Producers and Presenters
55. 212211 Author
56. 212413 Print Journalist
57. 212212 Book or Script Editor
58. 212400 Journalists and Other Writers
59. 212412 Newspaper or Periodical Editor
60. 212415 Technical Writer
61. 212499 Journalists and Other Writers nec
62. 212200 Authors, and Book and Script Editors
63. 224611 Librarian
64. 224211 Archivist
65. 224200 Archivists, Curators and Records Managers
66. 232414 Web Designer
67. 232413 Multimedia Designer
68. 261212 Web Developer
69. 261211 Multimedia Specialist
70. 261200 Multimedia Specialists and Web Developers
71. 261312 Developer Programmer
72. 261112 Systems Analyst
73. 261311 Analyst Programmer
74. 261111 ICT Business Analyst
75. 261100 ICT Business and Systems Analysts
76. 261300 Software and Applications Programmers
77. 225212 ICT Business Development Manager
78. 261399 Software and Applications Programmers nec
79. 211411 Painter (Visual Arts)
80. 232412 Illustrator
81. 211499 Visual Arts and Crafts Professionals nec
82. 211413 Sculptor
83. 211400 Visual Arts and Crafts Professionals
84. 211412 Potter or Ceramic Artist
85. 224212 Gallery or Museum Curator
86. 232313 Jewellery Designer
87. 399411 Jeweller
88. 234911 Conservator

5.2.1 Assumptions Underpinning the Trident Approach

Before proceeding to present the statistical results for Measure 2, there are a number of assumptions and definitions that underpin the Trident methodology that need to be further explored.

For Peter Higgs and Sasha Lennon (2014), the creative industries have been variously conceived. They assert that to ‘define and measure creative industries according to a fixed set of industry sectors or codes is insufficient to measure the true extent of Australia’s creative workforce’ (Higgs & Lennon 2014, p. 1). They argue that the creative industries are not discrete sectors of the economy but are instead ‘a pervasive input to many, if not all industries’ (ibid). They further suggest that the Trident methodology which they use not only quantifies employment in creative industries, but ‘also identifies the employment of creative workers (by occupation) ‘embedded’ in other so-called ‘non-creative’ industry sectors’ (ibid). For Higgs and Lennon:

The creative trident focusses on the activities that define creative production capacity in both occupations and industries. It includes three categories: (1) creative occupations within the core creative industries (what we term ‘specialists’); (2) creative occupations employed in other (non-creative) industries

(termed ‘embedded’ creatives); and (3) non-creative occupations (‘support staff’) employed in the creative industries (Higgs & Lennon 2014, p. 1).

To put this another way, if we are to measure the creative industries’ portion of the Australian workforce it is necessary ‘to include ‘specialist’ creative activity and ‘creatives’ employed in other sectors of the economy’ (Higgs & Lennon 2014, p. 4). This inclusion helps to ‘capture the full range of employment types’ (ibid). It is thus necessary to identify those specialists working within what are seen to be core creative industries, those who are embedded in other supposed non-creative industries, and those support staff directly employed in what are typically seen as the creative industries. It should be noted that these categories depend in many ways on a maintenance of above-the-line and below the line characterisations of occupational roles, one where the line is drawn by industry type, and one which Dawson and Holmes argue needs to be interrogated. As outlined above, Dawson and Holmes assert in their book *Working in the Global Film and Television Industries: Creativity, Systems, Space, Patronage* (2012), somewhat similarly to Howard Becker (1982), that ‘we need other ways to understand creativity in an industry with a complex social division of labour involving large numbers of people working cooperatively’ (2012, p. 14).

The methodology employed here is based on the NESTA approach of measuring and defining creative employment. For Higgs and Lennon, these forms of employment are centred on ‘the activities that define core creative production capacity in both occupations and industries’ (Higgs & Lennon 2014, p. 4). Using this approach gives the possibility of evaluating Australia’s occupation classifications using five criteria to establish a form of what they call ‘creative intensity’ which is then used to designate an industry as creative or not. These five criteria are:

- 1) *non-uniformity*, where the output of the occupation is not the same but results from the interplay of a number of factors;
- 2) *creative output*, where that occupational output is perceived as novel and not mechanistic;
- 3) *not mere transformation*, where the occupational role does not just transfer someone else’s creative work into another form;
- 4) *novel process*, where the occupation solves a problem or achieves a goal in novel ways; and
- 5) the occupation is *mechanisation-resistant* as it is assumed that ‘creative occupations are arguably less exposed to substitution through mechanisation’ (Higgs & Lennon 2014, p. 4).

Of course, these factors are absolutely dependent on a particular set of assumptions being drawn from the author’s own understanding of what constitutes the phenomenon of creativity itself (see Sections 2.7 and 2.11 above). Nonetheless, from this perspective those occupations ‘scoring 4 or 5 are considered “creative occupations”’ (ibid). A calculation is then made to derive the ‘share of employment that creative occupations account for in each of the standard (ANZSIC) industry classifications to generate what is then termed “creative intensity”’ (ibid). A high score gives a high intensity level and, of course, the reverse is applicable. This calculation of ‘creative intensity’ is then used to decide whether an industry is creative or not. The assertion is also made that the sectors the creative industries are usually constituted by (using a list-based approach), ‘fall into one of two sub-groups’ (Higgs & Lennon 2014, p. 5): creative services or cultural production.

Creative services enterprises and those who work within them, such as freelancers, self-employed subcontractors and so on, provide inputs deemed to be crucial to many other industries and the businesses that constitute them. These other industries range from ‘manufacturing and construction to retailing and entertainment’ (ibid). The creative services sub-group then represents, for Higgs and Lennon, what is virtually a ‘creative services economy’ where ‘creative enterprises and individuals add value to production through design, technical performance, packaging and branding’ (ibid). The sectors that are designated here as ‘creative services’ include architecture and design, advertising and marketing, and software and digital content.

Cultural production, on the other hand, according to this methodology, includes those occupations which ‘embody the role of arts and cultural assets as contributors to quality of life and community well-being and as important contributors to economic activity and economic development in their own right’ (Higgs & Lennon 2014, p. 5). The sectors which are designated as cultural production for this methodology include film, television and radio, music, visual and performing arts, and publishing.

There is also the issue of creative workers normally having a compendium of jobs in an attempt to make up a full-time wage, a situation endemic to most employment within the creative industries, as the qualitative material presented below reveals. In this regard the primary limitations of using census data to measure creative employment lies in the fact that national datasets like those derived for the 2011 census by the ABS use standardised classifications to acquire the data. As Higgs and Lennon point out, ‘the census questions, the answers given, and the processes used to encode them, also shape the data’ (2014, p. 6). For example, a person’s employment may range across a number of sectors but their census information ‘can only be encoded with one out of the approximately 600 standard industry codes that encompass all economic activity’ (ibid). Similarly, a person’s occupation may be classified according to ‘approximately 1,000 occupations of which some 90 are considered to be “creative”’ (ibid). Furthermore, as they discuss, various occupation codes are specifically described such as ‘landscape architect’ with other occupations seeming to be relatively vague and may include a mix that seem ‘relatively unrelated - for example, the ANZSCO3 code 211499 Visual Arts and Crafts Professionals n.e.c. (not elsewhere classified) includes New Media Artist, as well as Leadlighter and Textile Artist’ (ibid). Furthermore, for this methodology, ‘the term “employed” is used inclusively and synonymously with ‘work’, as many in the creative economy are self-employed or employers, rather than employees. It also includes all those employed in their primary job whether on a full-time or part-time basis’ (Higgs 2017). As a result, Higgs reminds us, ‘the analysis in this report ignores second jobs’ (Higgs 2017). This declaration is important. As stated, the Census only gathers information on the ‘main job’ performed across a certain timeframe and also does the same for the industry of employment. This is a regrettable limitation when dealing with the creative industries since employment is often cross-sectoral and multi-occupational. For example, Higgs and Lennon point out the Throsby data gathered for the Arts Council ‘indicates that some 37% of artists have only a single job, 33% have an additional arts-related job and 23% have an additional non-arts job while 8% have three jobs’ (ibid). There is generally little way of telling if the main job ‘provides the bulk of the income for an individual and if the creative component of overall income is improving or reducing’ (ibid).

Despite these caveats, Higgs and Lennon believe the Census data is currently the best we have as ‘a valuable and authoritative source of data for assessing the quantum and growth of creative employment in Australia and for making direct comparisons between states/territories, cities and regions’ (2014, p. 6).

Another important factor about the statistics emerging from the application of the Trident Methodology to small population sizes at the regional level is particularly pertinent to the 2016 data. The ABS recently changed their strategy for ensuring that the identities of those who fill out the census remain confidential where there are counts of cells with fewer than three people. As Peter Higgs has explained (Higgs 2017), where there are only one or two people in a cell it is easy to identify, for example, one radio presenter in a region. Randomisation is thus necessary. However, the change from software-based randomisation to a simplified ‘find and replace’ technique to suppress low cell counts means the aggregation totals will not be as accurate as hoped for. This situation has produced distortions in the results, especially for cities and regions with smaller workforces and lower populations than many of the capital cities. In short, the numbers become coarse approximations only, due to the necessary compromises and inconsistencies. The following statistics are therefore presented with the above set of assumptions and limitations in mind.

5.2.2 Trident Statistics for the Hunter Region

The following tables and charts are derived from the lists set out in section 5.2 above and are drawn from the ABS Census of Housing and Population 2011 and 2016. It is worth noting that the resultant statistics are divided between those derived from either place of residence (POR) or place of work (POW) population data and the final numbers for each reflect that difference.

In addition to the summary tables that precede each section, the following tables and charts indicate employment in the Hunter Region sorted into the four basic CI categories of design, the media, IT and the arts, and their subsectors of music, performing arts, visual arts, advertising and marketing, architecture, graphic design, fashion and other design, software (including games and app development), film, publishing, radio, TV and other media. They are also divided between what are called creative industries and creative occupations. Creative industries are measured by those specialists and support staff employed within what are designated as creative businesses. It is to be noted this situation does not account for embeddeds. Using the idea of creative occupations on the other hand enables us to slice the data slightly differently. The category of creative occupations are seen here as those who work as specialists in creative businesses or as embedded creatives. An alternative term could be ‘the creative workforce’. It is worth noting though that this does not account for support staff.

The summaries tables and charts provide comparative statistics for 2011 and 2016 ABS Census periods. They are all ordered according to creative industries and creative occupations as per, firstly, place of residence (POR) and then by place of work (POW). Apart for the summaries, each table has a corresponding chart to illustrate the statistical information that is in each table.

Following this process the tables and charts are ordered in the following way.

- Trident Employment Statistics by Place of Residence (POR), 2011 & 2016.
- Trident Employment Statistics by Place of Work (POW), 2011 & 2016.
- Trident Total Earnings in the Greater Hunter Valley, POR, 2011 & 2016.
- Trident Total Earnings in the Greater Hunter Valley, POW, 2011 & 2016.
- Trident Mean Weekly Income 2011
- Trident Average Annual Income by POR in the Greater Hunter Valley, 2011 & 2016.
- Trident Average Annual Income by POW in the Greater Hunter Valley, 2011 & 2016.
- Comparative Share of Workforce and Employment with Capital Cities in 2011

5.2.2.1 Trident Employment Statistics by Place of Residence (POR).

What can be seen in the table directly below, based on POR, is that the number of people employed in the creative industries is rising in the Hunter Region with nearly 9,600 people employed in 2016. The share of the total workforce also increased between 2011 and 2016 with a compound annual growth rate (CAGR as opposed to AGR) of 2.0% compared with an annual growth in the general workforce of 0.6%. While the percentage share of employment of specialist and support workers has dropped marginally, there has been substantial growth in the employment of embedded creatives, that is, those operating within other industries.

Trident Employment (POR)	Employed 2011	Employed 2016	Share of Workforce 2011	Share of Workforce 2016	Share of Creative Employment 2011	Share of Creative Employment 2016	CAGR 2011 to 2016
Specialist	2,349	2,431	0.89%	0.89%	27.05%	25.33%	0.7%
Support	2,698	2,803	1.02%	1.03%	31.07%	29.21%	0.8%
Total Creative Industries	5,050	5,239	1.92%	1.93%	58.15%	54.60%	0.7%
Embedded	3,636	4,360	1.38%	1.60%	41.87%	45.44%	3.7%
Total Trident	8,683	9,594	3.30%	3.53%	100%	100%	2.0%
Creative Occupations	5,986	6,797	2.27%	2.50%	68.93%	70.84%	2.6%
Total Workforce	262,944	271,408					0.6%

Table 25 Trident Employment in the Greater Hunter Valley, 2011 & 2016, by Place of Residence
(Source: Analysis of customised extract of ABS Census of Housing and Population).

8,683 2011 Total creative	Creative industries	Other industries	Total
Creative occupations	2,349	3,636	5,986
	<i>Specialist</i>	<i>Embedded</i>	
Other occupations	2,698	254,263	256,962
	<i>Support</i>	<i>Other</i>	
Total	5,050	257,893	262,944
			<i>Workforce</i>

Table 26 Employment by Creative and Other Sectors, Place of Residence, 2011 (Persons).
(Source: Analysis of customised extract of ABS Census of Housing and Population).

9,594 2016 Total creative	Creative industries	Other industries	Total
Creative occupations	2,431	4,360	6,797
	<i>Specialist</i>	<i>Embedded</i>	
Other occupations	2,803	261,808	264,614
	<i>Support</i>	<i>Other</i>	
Total	5,239	266,170	271,408
			<i>Workforce</i>

Table 27 Employment by Creative and Other Sectors, Place of Residence, 2016 (Persons).
(Source: Analysis of customised extract of ABS Census of Housing and Population).

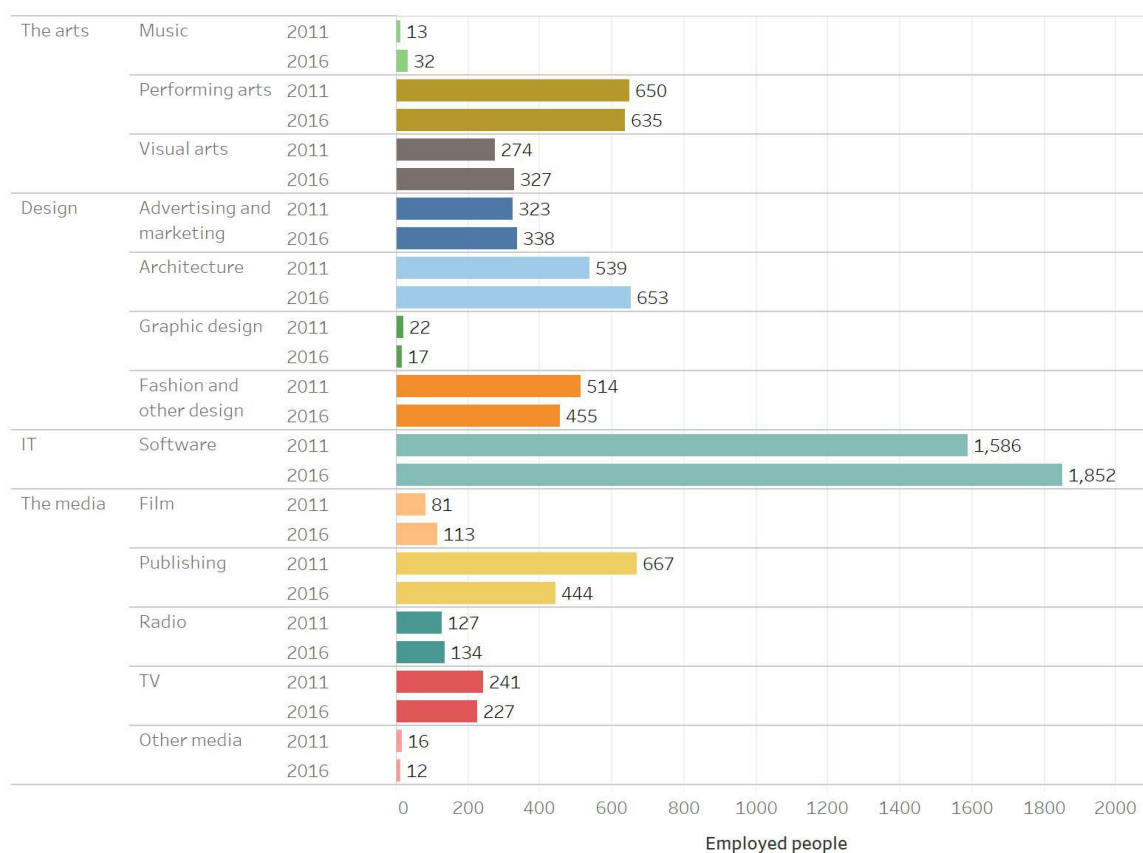
These above summaries have been drawn from the following set of tables and charts which contain detailed Trident employment statistics by, firstly, place of residence for both the 2011 and 2016 Census period. Then the Trident employment statistics by place of work are displayed in the same manner. Each of these is set against the four basic CI categories of

design, the media, IT and the arts, and their subsectors. Both sets of tables and charts are also cut according to creative industries and creative occupations as outlined above.

		Employed		Average annual growth	Share of total workforce		Share of creative industries workforce	
		2011	2016		2011	2016	2011	2016
The arts	Music	13	32	19.7%	0.0%	0.0%	0.3%	0.6%
	Performing arts	650	635	-0.5%	0.2%	0.2%	12.9%	12.1%
	Visual arts	274	327	3.6%	0.1%	0.1%	5.4%	6.2%
Design	Advertising and Marketing	323	338	0.9%	0.1%	0.1%	6.4%	6.5%
	Architecture	539	653	3.9%	0.2%	0.2%	10.7%	12.5%
	Graphic design	22	17	-5.0%	0.0%	0.0%	0.4%	0.3%
	Fashion and other Design	514	455	-2.4%	0.2%	0.2%	10.2%	8.7%
IT	Software	1,586	1,852	3.1%	0.6%	0.7%	31.4%	35.4%
The media	Film	81	113	6.9%	0.0%	0.0%	1.6%	2.2%
	Publishing	667	444	-7.8%	0.3%	0.2%	13.2%	8.5%
	Radio	127	134	1.1%	0.0%	0.0%	2.5%	2.6%
	TV	241	227	-1.2%	0.1%	0.1%	4.8%	4.3%
	Other media	16	12	-5.6%	0.0%	0.0%	0.3%	0.2%
Creative industries		5,050	5,239	0.7%	1.9%	1.9%	100.0%	100.0%
Other industries		257,893	266,170	0.6%	98.1%	98.1%		
Total industries		262,944	271,408	0.6%	100.0%	100.0%		

Table 28 Employed Persons, Creative Industries, Place of Residence, Hunter Region.

Source: Census of Population and Housing, 2011 and 2016, employed persons by place of residence, SA4 areas 106 (Hunter Valley excl. Newcastle) and 111 (Newcastle and Lake Macquarie).



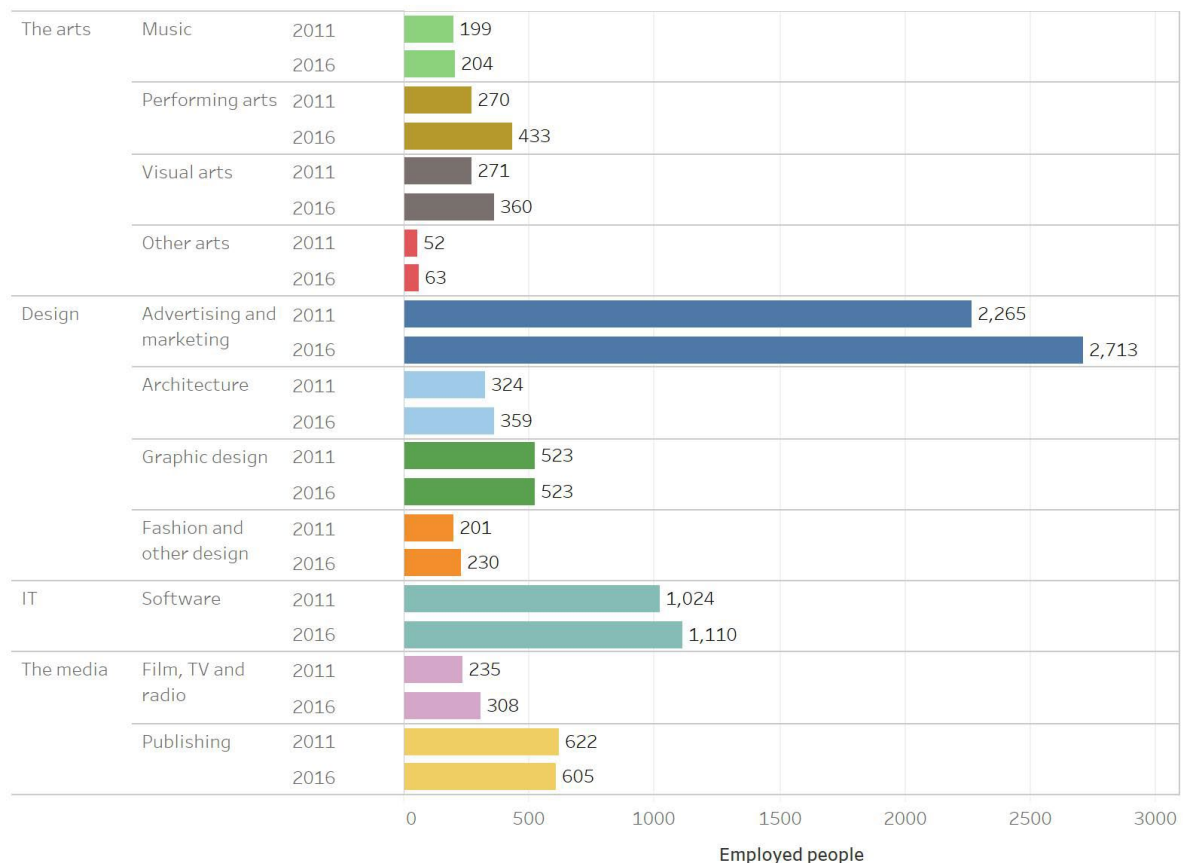
Graph 6 Employed Persons, Creative Industries, Place of Residence, Hunter Region.

Source: Census of Population and Housing, 2011 and 2016, employed persons by place of residence, SA4 areas 106 (Hunter Valley excl. Newcastle) and 111 (Newcastle and Lake Macquarie).

		Employed		Average annual growth	Share of total workforce		Share of creative industries workforce	
		2011	2016		2011	2016	2011	2016
The arts	Music	199	204	0.5%	0.1%	0.1%	3.3%	3.0%
	Performing arts	270	433	9.9%	0.1%	0.2%	4.5%	6.4%
	Visual arts	271	360	5.8%	0.1%	0.1%	4.5%	5.3%
	Other arts	52	63	3.9%	0.0%	0.0%	0.9%	0.9%
Design	Advertising and marketing	2,265	2,713	3.7%	0.9%	1.0%	37.8%	39.9%
	Architecture	324	359	2.1%	0.1%	0.1%	5.4%	5.3%
	Graphic design	523	523	0.0%	0.2%	0.2%	8.7%	7.7%
	Fashion and other design	201	230	2.7%	0.1%	0.1%	3.4%	3.4%
IT	Software	1,024	1,110	1.6%	0.4%	0.4%	17.1%	16.3%
The media	Film, TV and radio	235	308	5.6%	0.1%	0.1%	3.9%	4.5%
	Publishing	622	605	-0.6%	0.2%	0.2%	10.4%	8.9%
Creative occupations		5,986	6,797	2.6%	2.3%	2.5%	100.0%	100.0%
Other occupations		256,962	264,614	0.6%	97.7%	97.5%		
Total occupations		262,944	271,408	0.6%	100.0%	100.0%		

Table 29 Employed Persons, Creative Occupations, Place of Residence, Hunter Region.

Source: Census of Population and Housing, 2011 and 2016, employed persons by place of residence, SA4 areas 106 (Hunter Valley excl. Newcastle) and 111 (Newcastle and Lake Macquarie).



Graph 7 Employed Persons, Creative Occupations, Place of Residence, Hunter Region.

Source: Census of Population and Housing, 2011 and 2016, employed persons by place of residence, SA4 areas 106 (Hunter Valley excl. Newcastle) and 111 (Newcastle and Lake Macquarie).

5.2.2.2 Trident Employment Statistics by Place of Work (POW).

If we now base our analysis on POW data, the figures change slightly. The number of people employed in the creative industries, in this case, now sits at approximately 8,800 for 2016. The share of the total workforce also increased year on year between 2011 and 2016 with a compound annual growth rate (CAGR not AGR) of 2.8% compared with an annual growth in the general workforce of 2.0%. While the percentage share of employment of specialist and support workers has also dropped marginally, based this time on POW figures, there has been steady growth in the employment of embedded creatives, that is, those operating within sectors of other industries, as indicated by the following table:

Trident Employment (POW)	Employed 2011	Employed 2016	Share of Workforce 2011	Share of Workforce 2016	Share of Creative Employment 2011	Share of Creative Employment 2016	CAGR 2011 to 2016
Specialist	2,056	2,199	0.88%	0.86%	28.70%	24.99%	1.4%
Support	2,388	2,585	1.03%	1.01%	31.22%	29.38%	1.6%
Total Creative Industries	4,444	4,787	1.92%	1.87%	58.11%	54.41%	1.5%
Embedded	3,203	4,014	1.38%	1.56%	41.88%	45.62%	4.6%
Total Trident	7,647	8,798	3.30%	3.44%	100%	100%	2.8%
Creative Occupations	5,261	6,214	2.27%	2.43%	68.79%	70.62%	3.4%
Total Workforce	231,430	255,694					2.0%

Table 30 Trident Employment in the Greater Hunter Valley, 2011 & 2016, by Place of Work
(Source: Analysis of customised extract of ABS Census of Housing and Population).

Portions of this POW data may be represented differently as set out in the tables below.

7,647 <i>Total creative</i>	Creative industries	Other industries	Total
Creative occupations	2,056 <i>Specialist</i>	3,203 <i>Embedded</i>	5,261
Other occupations	2,388 <i>Support</i>	223,788 <i>Other</i>	226,183
Total	4,444	226,994	231,440
			<i>Workforce</i>

Table 31 Trident Employment by Creative and Other Sectors, Place of Work, 2011 (Persons).
(Source: Analysis of customised extract of ABS Census of Housing and Population).

8,798 <i>Total creative</i>	Creative industries	Other industries	Total
Creative occupations	2,199 <i>Specialist</i>	4,014 <i>Embedded</i>	6,214
Other occupations	2,585 <i>Support</i>	246,895 <i>Other</i>	249,479
Total	4,787	250,912	255,694
			<i>Workforce</i>

Table 32 Trident Employment by Creative and Other Sectors, Place of Work, 2016 (Persons).
(Source: Analysis of customised extract of ABS Census of Housing and Population).

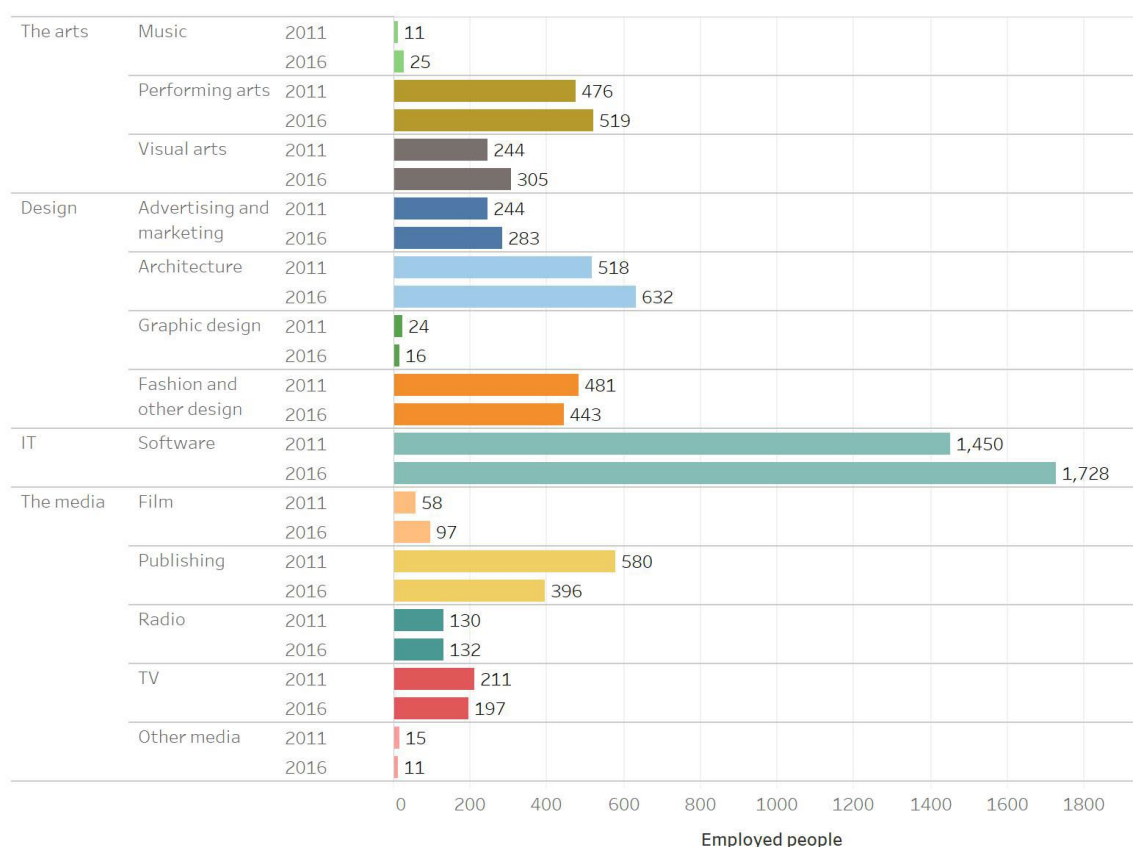
This time the tables and charts below are set out by POW with each focused alternately on creative industries and then creative occupations. In terms of employment in comparing POR and POW data, one can see that there is a slight drop in overall numbers employed in the region's creative industries workforce when POW data is used. This may result from

personnel who live in the region working elsewhere. For example, a number of people work in Sydney and commute on a daily basis into the metropolitan centre. Other creative industries practitioners are also resident in the Hunter but take on project work internationally, so their place of work is external to the Hunter Region.

		Employed		Average annual growth	Share of total workforce		Share of creative industries workforce	
		2011	2016		2011	2016	2011	2016
The arts	Music	11	25	17.8%	0.0%	0.0%	0.2%	0.5%
	Performing arts	476	519	1.7%	0.2%	0.2%	10.7%	10.8%
	Visual arts	244	305	4.6%	0.1%	0.1%	5.5%	6.4%
Design	Advertising and marketing	244	283	3.0%	0.1%	0.1%	5.5%	5.9%
	Architecture	518	632	4.1%	0.2%	0.2%	11.7%	13.2%
	Graphic design	24	16	-7.8%	0.0%	0.0%	0.5%	0.3%
	Fashion and other design	481	443	-1.6%	0.2%	0.2%	10.8%	9.3%
IT	Software	1,450	1,728	3.6%	0.6%	0.7%	32.6%	36.1%
The media	Film	58	97	10.8%	0.0%	0.0%	1.3%	2.0%
	Publishing	580	396	-7.3%	0.3%	0.2%	13.1%	8.3%
	Radio	130	132	0.3%	0.1%	0.1%	2.9%	2.8%
	TV	211	197	-1.4%	0.1%	0.1%	4.7%	4.1%
	Other media	15	11	-6.0%	0.0%	0.0%	0.3%	0.2%
Creative industries		4,444	4,787	1.5%	1.9%	1.9%	100.0%	100.0%
Other industries		226,994	250,912	2.0%	98.1%	98.1%		
Total industries		231,440	255,694	2.0%	100.0%	100.0%		

Table 33 Employed Persons, Creative Industries, Place of Work, Hunter Region.

Source: Census of Population and Housing, 2011 and 2016, employed persons by place of work, SA4 areas 106 (Hunter Valley excl. Newcastle) and 111 (Newcastle and Lake Macquarie).



Graph 8 Employed Persons, Creative Industries, Place of Work, Hunter Region.

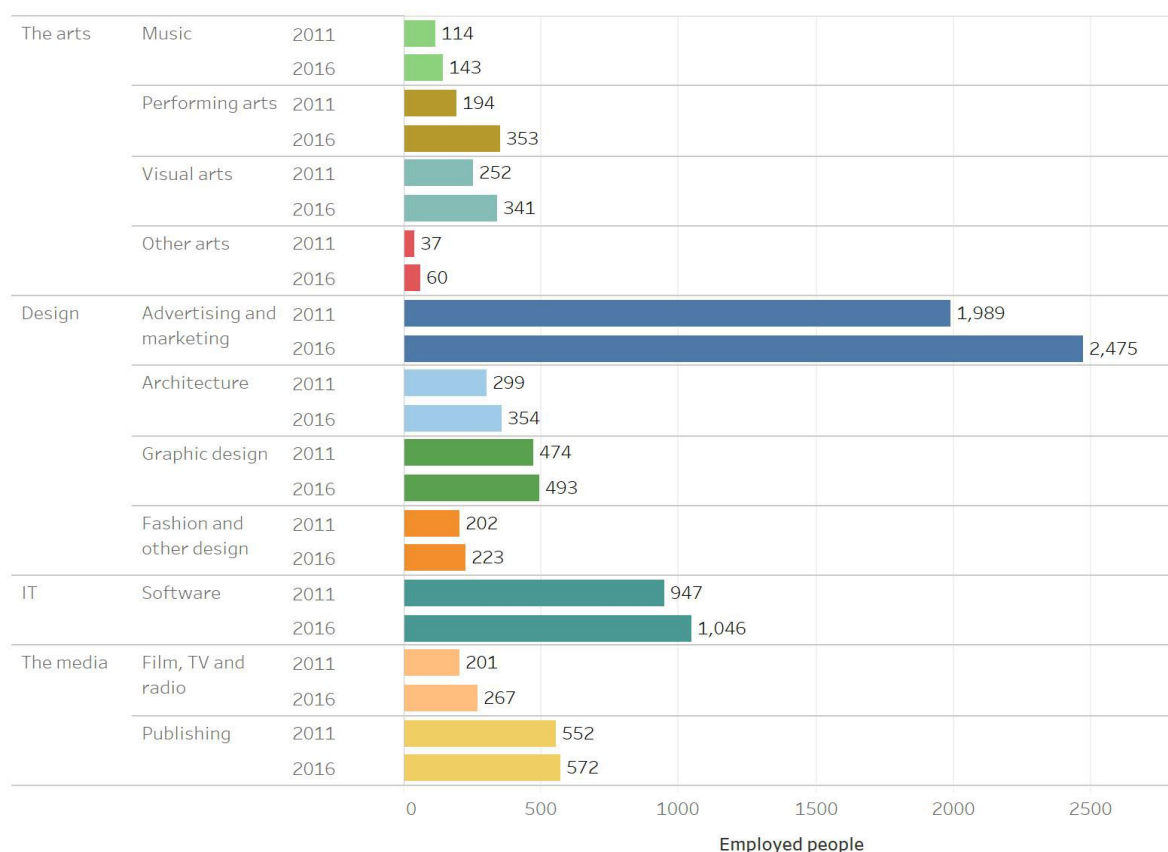
Source: Census of Population and Housing, 2011 and 2016, employed persons by place of work, SA4 areas 106 (Hunter Valley excl. Newcastle) and 111 (Newcastle and Lake Macquarie).

The POW table and chart immediately below are categorised by creative occupations, that is, those who work in what are termed creative occupations, either as specialists in creative businesses or as embedded creatives. As above, these figures do not account for support staff.

		Employed		Average annual growth	Share of total workforce		Share of creative industries workforce	
		2011	2016		2011	2016	2011	2016
The arts	Music	114	143	4.6%	0.0%	0.1%	1.8%	2.7%
	Performing arts	194	353	12.7%	0.1%	0.2%	3.1%	6.7%
	Visual arts	252	341	6.2%	0.1%	0.1%	4.1%	6.5%
	Other arts	37	60	10.2%	0.0%	0.0%	0.6%	1.1%
Design	Advertising and marketing	1,989	2,475	4.5%	0.8%	1.1%	32.0%	47.0%
	Architecture	299	354	3.4%	0.1%	0.2%	4.8%	6.7%
	Graphic design	474	493	0.8%	0.2%	0.2%	7.6%	9.4%
	Fashion and other design	202	223	2.0%	0.1%	0.1%	3.3%	4.2%
IT	Software	947	1,046	2.0%	0.4%	0.5%	15.2%	19.9%
The media	Film, TV and radio	201	267	5.8%	0.1%	0.1%	3.2%	5.1%
	Publishing	552	572	0.7%	0.2%	0.2%	8.9%	10.9%
Creative occupations		6,214	5,261	-3.3%	2.4%	2.3%	100.0%	100.0%
Other occupations		249,479	226,183	-1.9%	97.6%	97.7%		
Total occupations		255,694	231,440	-2.0%	100.0%	100.0%		

Table 34 Employed Persons, Creative Occupations, Place of Work, Hunter Region.

Source: Census of Population and Housing, 2011 and 2016, employed persons by place of work, SA4 areas 106 (Hunter Valley excl. Newcastle) and 111 (Newcastle and Lake Macquarie).



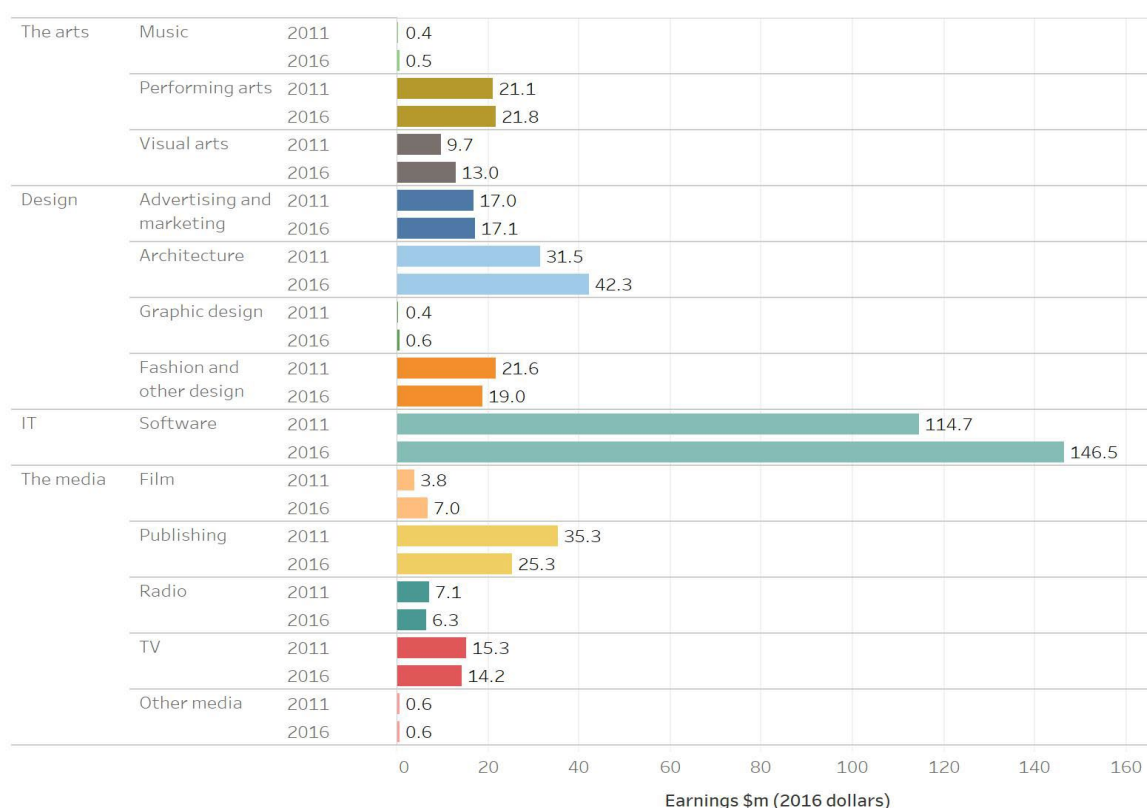
Graph 9 Employed Persons, Creative Occupations, Place of Work, Hunter Region.

Source: Census of Population and Housing, 2011 and 2016, employed persons by place of work, SA4 areas 106 (Hunter Valley excl. Newcastle) and 111 (Newcastle and Lake Macquarie).

5.2.2.3 Trident Total Earnings in the Greater Hunter Valley, POR, 2011 & 2016.

		Total earnings (\$m)		Average annual growth	Share of total workforce		Share of creative industries workforce	
		2011	2016		2011	2016	2011	2016
The arts	Music	0.4	0.5	7.3%	0.0%	0.0%	0.1%	0.2%
	Performing arts	21.1	21.8	0.6%	0.1%	0.1%	7.6%	6.9%
	Visual arts	9.7	13	6.0%	0.1%	0.1%	3.5%	4.1%
Design	Advertising and marketing	17	17.1	0.1%	0.1%	0.1%	6.1%	5.4%
	Architecture	31.5	42.3	6.1%	0.2%	0.3%	11.3%	13.3%
	Graphic design	0.4	0.6	8.4%	0.0%	0.0%	0.1%	0.2%
	Fashion & other design	21.6	19	-2.5%	0.2%	0.1%	7.7%	6.0%
IT	Software	115	147	5.0%	0.8%	0.9%	41.1%	46.1%
The media	Film	3.8	7	12.8%	0.0%	0.0%	1.4%	2.2%
	Publishing	35.3	25.3	-6.4%	0.2%	0.2%	12.6%	8.0%
	Radio	7.1	6.3	-2.3%	0.0%	0.0%	2.5%	2.0%
	TV	15.3	14.2	-1.5%	0.1%	0.1%	5.5%	4.5%
	Other media	0.6	0.6	-0.2%	0.0%	0.0%	0.2%	0.2%
Creative industries		279	318	2.6%	1.9%	2.0%	100.0%	100.0%
Other industries		14,072	15,521	2.0%	98.1%	98.0%		
Total industries		14,351	15,837	2.0%	100.0%	100.0%		

Table 35 Total Earnings, Creative Industries, Place of Residence, Hunter Region (\$ million, 2016 dollars).
Source: Census of Population and Housing, 2011 and 2016, employed persons by place of residence, SA4 areas 106 (Hunter Valley excl. Newcastle) and 111 (Newcastle and Lake Macquarie).



Graph 10 Total Earnings, Creative Industries, Place of Residence, Hunter Region (\$ million, 2016 dollars).
Source: Census of Population and Housing, 2011 and 2016, employed persons by place of residence, SA4 areas 106 (Hunter Valley excl. Newcastle) and 111 (Newcastle and Lake Macquarie).

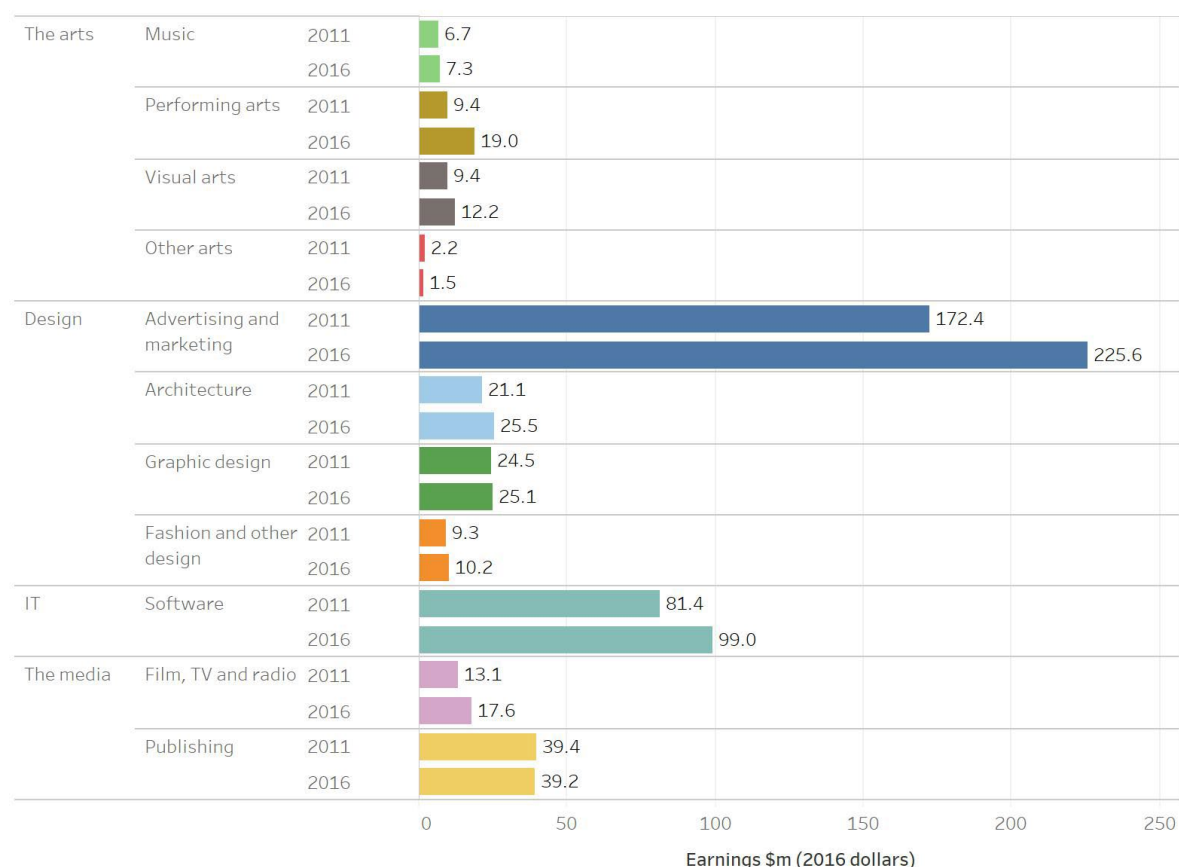
The above figures are total earnings for those specialists and support staff employed within what are designated as creative businesses. They do not account for the total earnings of

embeddeds. The figures below, on the other hand, are for creative occupations, that is, those who work in occupations as either specialists in creative businesses or as embedded creatives. These total earnings figures based on POR do not account for support staff.

		Total earnings (\$m)		Average annual growth	Share of total workforce		Share of creative industries workforce	
		2011	2016		2011	2016	2011	2016
The arts	Music	6.7	7.3	1.5%	0.0%	0.0%	1.7%	1.5%
	Performing arts	9.4	19	15.1%	0.1%	0.1%	2.4%	4.0%
	Visual arts	9.4	12.2	5.2%	0.1%	0.1%	2.4%	2.6%
	Other arts	2.2	1.5	-6.9%	0.0%	0.0%	0.6%	0.3%
Design	Advertising and marketing	172.4	225.6	5.5%	1.2%	1.4%	44.5%	47.4%
	Architecture	21.1	25.5	3.8%	0.1%	0.2%	5.4%	5.4%
	Graphic design	24.5	25.1	0.5%	0.2%	0.2%	6.3%	5.3%
	Fashion and other design	9	10	1.8%	0.1%	0.1%	2.4%	2.1%
IT	Software	81.4	99	4.0%	0.6%	0.6%	21.0%	20.8%
The media	Film, TV and radio	13.1	17.6	-0.1%	0.3%	0.2%	3.4%	3.7%
	Publishing	39.4	39.2	6.1%	0.1%	0.1%	10.2%	8.2%
Creative occupations		387	476	4.21%	4.2%	2.7%	100.0%	100.0%
Other occupations		13,963	15,362	1.9%	97.3%	97.0%		
Total occupations		14,351	15,837	2.0%	100.0%	100.0%		

Table 36 Total Earnings, Creative Occupations, Place of Residence, Hunter Region (\$ million, 2016 dollars).

Source: Census of Population and Housing, 2011 and 2016, employed persons by place of residence, SA4 areas 106 (Hunter Valley excl. Newcastle) and 111 (Newcastle and Lake Macquarie).



Graph 11 Total Earnings, Creative Occupations, Place of Residence, Hunter Region (\$ million, 2016 dollars).

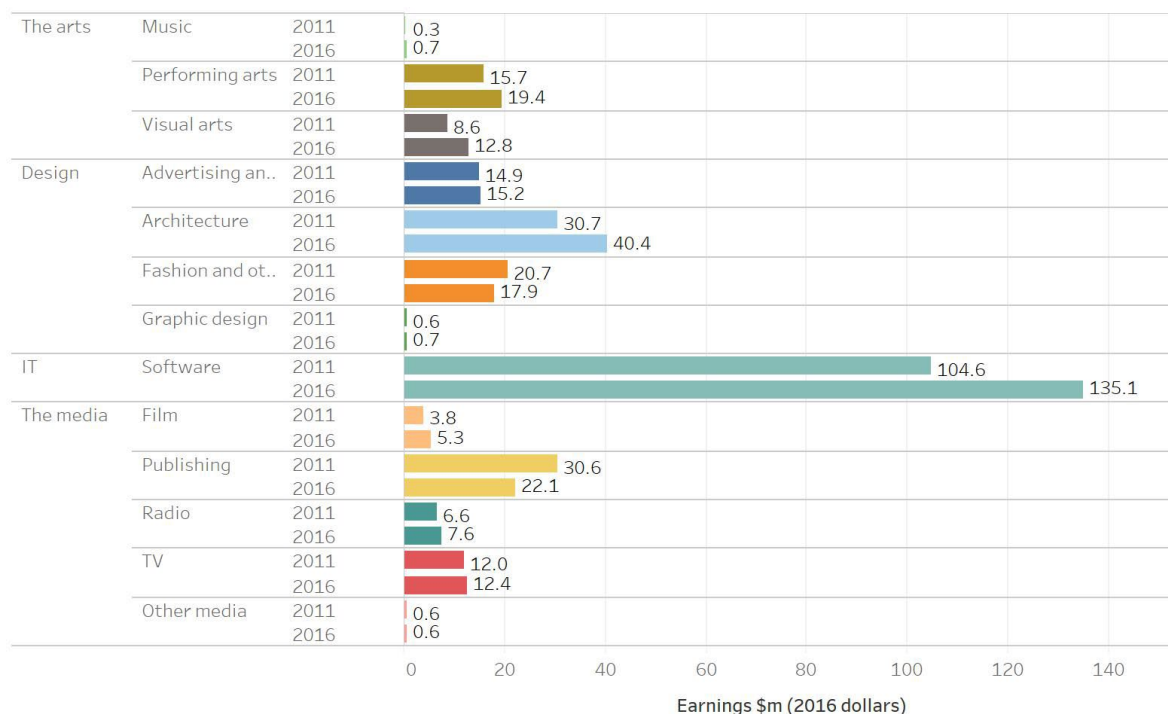
Source: Census of Population and Housing, 2011 and 2016, employed persons by place of residence, SA4 areas 106 (Hunter Valley excl. Newcastle) and 111 (Newcastle and Lake Macquarie).

5.2.2.4 Trident Total Earnings in the Greater Hunter Valley, POW, 2011 & 2016.

Examining the data using place of work (POW) figures gives, as was the case for employment above, there is a slightly diminished amount of earnings for creative industries, that is, those specialists and support staff employed within what are designated as creative businesses.

		Total earnings (\$m)		Average annual growth	Share of total workforce		Share of creative industries workforce	
		2011	2016		2011	2016	2011	2016
The arts	Music	0.3	0.7	18.5%	0.0%	0.0%	0.1%	0.2%
	Performing arts	15.7	19.4	4.3%	0.1%	0.1%	6.3%	6.7%
	Visual arts	8.6	12.8	8.3%	0.1%	0.1%	3.4%	4.4%
Design	Advertising and marketing	14.9	15.2	0.4%	0.1%	0.1%	6.0%	5.3%
	Architecture	30.7	40.4	5.6%	0.2%	0.3%	12.3%	14.0%
	Graphic design	0.6	0.7	3.1%	0.0%	0.0%	0.2%	0.2%
	Fashion and other design	20.7	17.9	-2.9%	0.2%	0.1%	8.3%	6.2%
IT	Software	105	135	5.3%	0.8%	0.9%	41.8%	46.9%
The media	Film	3.8	5.3	6.9%	0.0%	0.0%	1.5%	1.8%
	Publishing	30.6	22.1	-6.3%	0.2%	0.1%	12.2%	7.7%
	Radio	6.6	7.6	2.9%	0.1%	0.1%	2.6%	2.6%
	TV	12	12.4	0.7%	0.1%	0.1%	4.8%	4.3%
	Other media	0.6	0.6	0.0%	0.0%	0.0%	0.2%	0.2%
Creative industries		249.6	287.8	2.9%	2.0%	1.9%	100.0%	100.0%
Other industries		12,560.9	14,598.9	3.1%	98.1%	98.1%		
Total industries		12,810.5	14,886.3	3.0%	100.0%	100.0%		

Table 37 Total Earnings, Creative Industries, Place of Work, Hunter Region (\$ Million, 2016 Dollars).
Source: Census of Population and Housing, 2011 and 2016, employed persons by place of work, SA4 areas 106 (Hunter Valley excl. Newcastle) and 111 (Newcastle and Lake Macquarie).

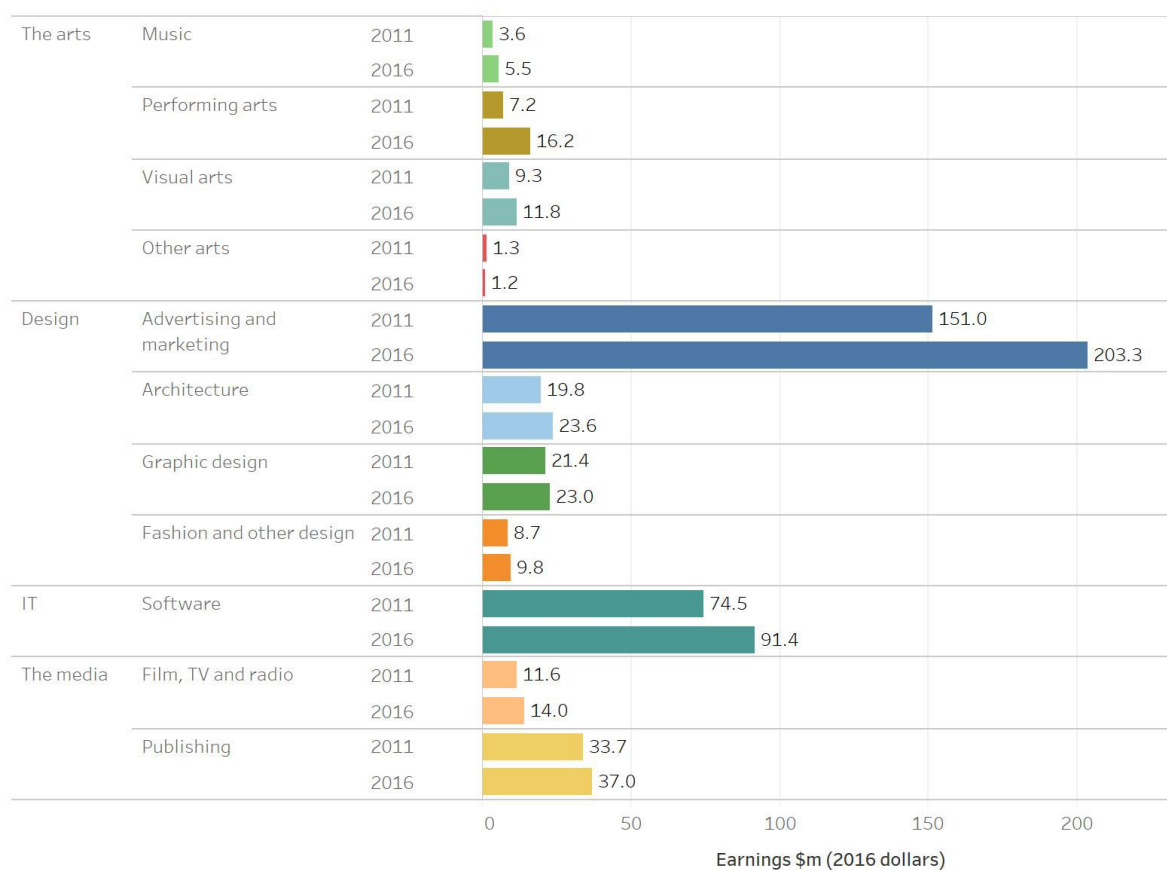


Graph 12 Total Earnings, Creative Industries, Place of Work, Hunter Region (\$ Million, 2016 Dollars).
Source: Census of Population and Housing, 2011 and 2016, employed persons by place of work, SA4 areas 106 (Hunter Valley excl. Newcastle) and 111 (Newcastle and Lake Macquarie).

The place of work (POW) figures below give a smaller amount of total earnings overall for creative occupations.

		Total earnings (\$m)		Average annual growth	Share of total workforce		Share of creative industries workforce	
		2011	2016		2011	2016	2011	2016
The arts	Music	3.6	5.5	8.8%	0.0%	0.0%	1.0%	1.3%
	Performing arts	7.2	16.2	17.6%	0.1%	0.1%	2.1%	3.7%
	Visual arts	9.3	11.8	4.9%	0.1%	0.1%	2.7%	2.7%
	Other arts	1.3	1.2	-1.6%	0.0%	0.0%	0.4%	0.3%
Design	Advertising and marketing	151.0	203.3	6.1%	1.2%	1.4%	43.9%	47.0%
	Architecture	19.8	23.6	3.6%	0.2%	0.2%	5.8%	5.5%
	Graphic design	21.4	23.0	1.5%	0.2%	0.2%	6.2%	5.3%
	Fashion and other design	8.7	9.8	2.4%	0.1%	0.1%	2.5%	2.3%
IT	Software	74.5	91.4	4.2%	0.6%	0.6%	21.7%	21.1%
The media	Film, TV and radio	11.6	14.0	3.8%	0.1%	0.1%	3.4%	3.2%
	Publishing	33.7	37.0	1.9%	0.3%	0.2%	9.8%	8.5%
Creative occupations		343.8	432.9	4.7%	2.7%	2.9%	100.0%	100.0%
Other occupations		12,466.4	14,452.6	3.0%	97.3%	97.1%		
Total occupations		12,810.5	14,886.3	3.0%	100.0%	100.0%		

Table 38 Total Earnings, Creative Occupations, Place of Work, Hunter Region (\$ Million, 2016 Dollars). Source: Census of Population and Housing, 2011 and 2016, employed persons by place of work, SA4 areas 106 (Hunter Valley excl. Newcastle) and 111 (Newcastle and Lake Macquarie).



Graph 13 Total Earnings, Creative Occupations, Place of Work, Hunter Region (\$ Million, 2016 Dollars). Source: Census of Population and Housing, 2011 and 2016, employed persons by place of work, SA4 areas 106 (Hunter Valley excl. Newcastle) and 111 (Newcastle and Lake Macquarie).

These total earnings set out above are for both creative industries and creative occupations located within each sector, that is design, the arts, the media and IT, as well as the subsectors that sit within each of these broader categories. Looking at these earning within the creative industries using a slightly different process of analysis we can see that, once again, embedded workers have increased their share of workforce earnings, that is, a marginal increase for creative occupations, but have increased even when we look at creative earnings. Share of workforce earnings for specialists has remained static but dropped once we look at share of creative earnings. Support worker share of workforce earnings and share of creative earnings have remained fundamentally the same. The annual growth rate of the set of total trident workers, that is special support and embed, has risen from 2011 to 2016 a little more markedly than for the total workforce.

Trident Earnings	2011	2016	Share of Workforce Earnings 2011	Share of Workforce Earnings 2016	Share of Creative Earnings 2011	Share of Creative Earnings 2016	CAGR 2011 to 2016
Specialist	\$92,813,812	\$121,498,468	0.8%	0.8%	27%	24%	5.5%
Support	\$136,277,492	\$193,338,340	1.2%	1.2%	39%	38%	7.2%
Total Creative Industries	\$229,091,304	\$314,836,808	1.9%	2.0%	66%	62%	6.6%
Embedded	\$120,162,744	\$194,641,616	1.0%	1.2%	34%	38%	10.1%
Total Trident	\$349,254,048	\$509,478,424	3.0%	3.2%	100%	100%	7.8%
Creative Occupations	\$212,976,556	\$316,140,084	1.8%	2.0%	61%	62%	8.2%
Total Workforce	\$11,818,150,032	\$16,074,953,024					6.3%

*Table 39 Comparison of Earnings in the Specialist, Support and Embedded CI workforce 2011 to 2016
(Source: Analysis by Peter Higgs of customised extract of ABS Census of Housing and Population).*

5.2.2.5 Trident Mean Weekly Income

In terms of mean weekly income, as can be seen immediately below, there has been an increase in income levels across the board. However, it is in the support sector where incomes have risen most, followed closely by those working as embedded personnel. As a reminder, this form of ‘embedded’ employment occurs in industries not normally designated as ‘creative’ where typical creative industry workers may gain employment. Illustrative cases might include a video maker in the service of the Police Force, a web designer working in the mining industry or a PR person working in the corporate world. As the table below indicates, this group of embedded creatives tends to have the highest level of weekly income.

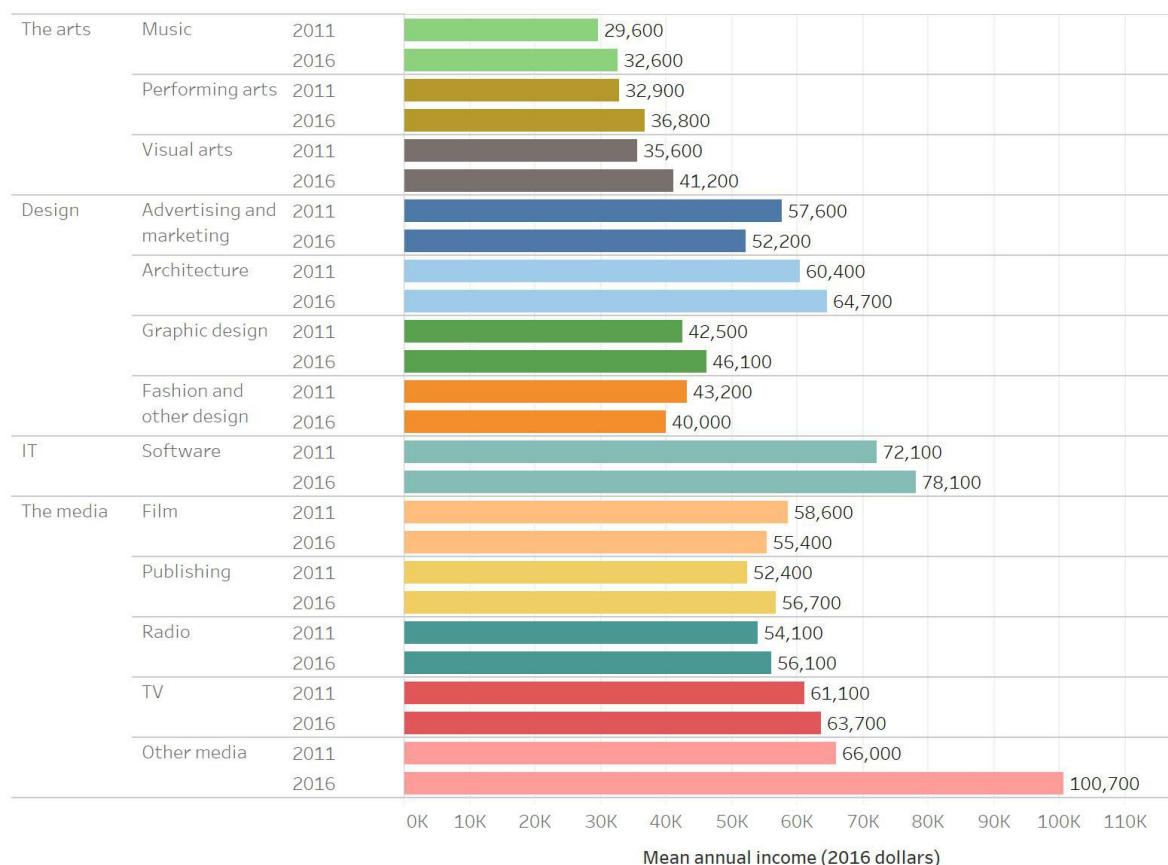
Trident Mean Weekly Income	2011	2016
Specialist	\$940.00	\$1,050.00
Support	\$1,030.00	\$1,250.00
Total Creative industries	\$990.00	\$1,170.00
Embedded	\$1,180.00	\$1,390.00
Total trident	\$1,050.00	\$1,240.00
Creative Occupations	\$1,060.00	\$1,230.00
Workforce	\$980.00	\$1,140.00

*Table 40 Comparison of Mean Weekly Income in the Specialist, Support and Embedded CI workforce 2011 to 2016
(Source: Analysis by Peter Higgs of customised extract of ABS Census of Housing and Population).*

5.2.2.6 Trident Average Annual Income by POR in the Hunter Region, 2011 & 2016.

		Average annual income		Average annual growth	Difference from total workforce		Difference from creative workforce	
		2011	2016		2011	2016	2011	2016
The arts	Music	27,400	31,600	2.9%	-49.8%	-45.9%	-50.4%	-47.8%
	Performing arts	32,500	34,500	1.2%	-40.5%	-40.9%	-41.1%	-43.0%
	Visual arts	35,600	39,800	2.3%	-34.8%	-31.8%	-35.5%	-34.2%
Design	Advertising and marketing	52,700	51,300	-0.5%	-3.5%	-12.2%	-4.5%	-15.2%
	Architecture	59,300	64,800	1.8%	8.6%	11.0%	7.4%	7.1%
	Graphic design	33,500	46,000	6.5%	-38.6%	-21.2%	-39.3%	-24.0%
	Fashion and other design	42,100	41,100	-0.5%	-22.9%	-29.6%	-23.7%	-32.1%
IT	Software	72,100	79,500	2.0%	32.1%	36.1%	30.6%	31.4%
The media	Film	51,600	59,000	2.7%	-5.5%	1.0%	-6.5%	-2.5%
	Publishing	53,000	57,600	1.7%	-2.9%	-1.4%	-4.0%	-4.8%
	Radio	56,900	49,500	-2.7%	4.2%	-15.2%	3.1%	-18.2%
	TV	59,500	63,700	1.4%	9.0%	9.1%	7.8%	5.3%
	Other media	50,900	100,700	14.6%	-6.8%	72.4%	-7.8%	66.4%
Creative industries		55,200	60,500	1.9%	1.1%	3.6%	0.0%	0.0%
Other industries		54,600	58,300	1.3%	0.0%	-0.2%		
Total industries		54,600	58,400	1.4%	0.0%	0.0%		

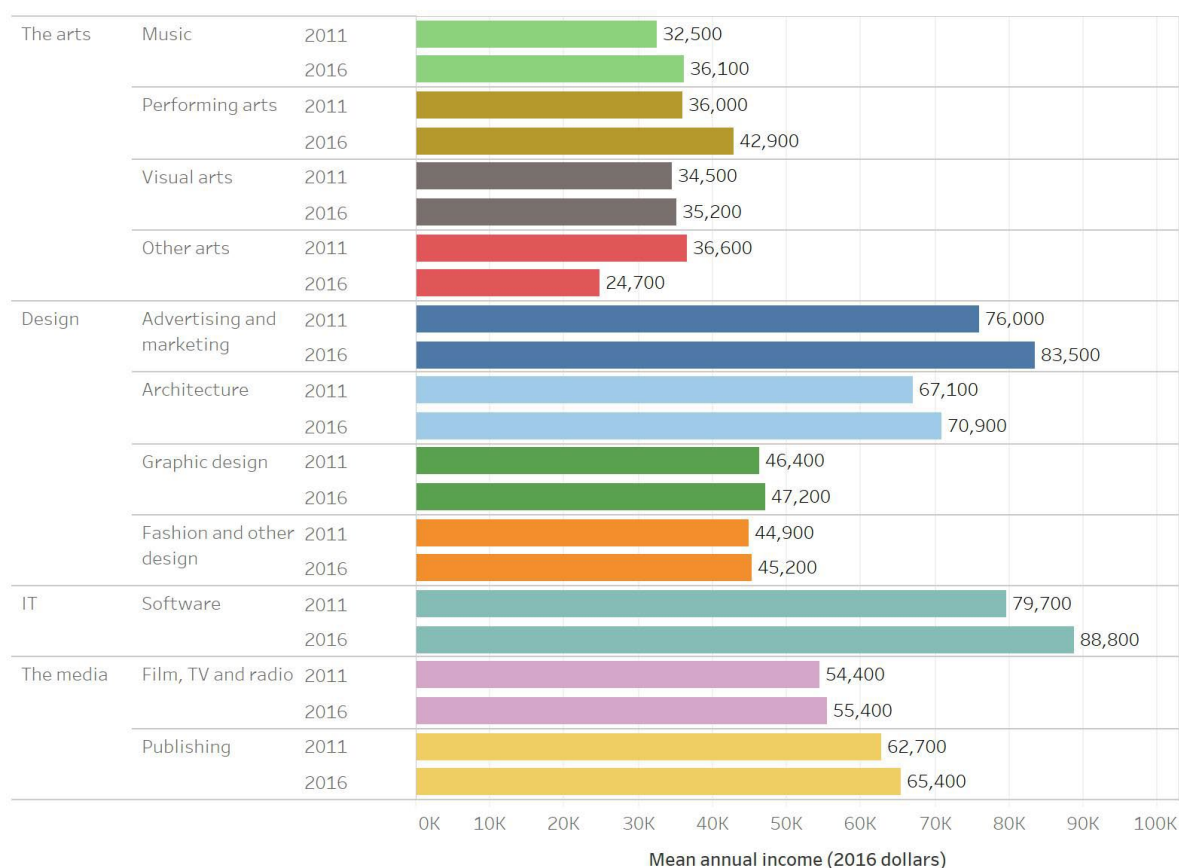
Table 41 Average Annual Income, Creative Industries, Place of Residence, Hunter Region (2016 dollars). Source: Census of Population and Housing, 2011 and 2016, employed persons by place of residence, SA4 areas 106 (Hunter Valley excl. Newcastle) and 111 (Newcastle and Lake Macquarie).



Graph 14 Average Annual Income, Creative Industries, Place of Residence, Hunter Region (2016 dollars). Source: Census of Population and Housing, 2011 and 2016, employed persons by place of residence, SA4 areas 106 (Hunter Valley excl. Newcastle) and 111 (Newcastle and Lake Macquarie).

		Average annual income		Average annual growth	Difference from total workforce		Difference from creative workforce	
		2011	2016		2011	2016	2011	2016
The arts	Music	32,500	36,100	2.1%	-40.5%	-38.2%	-49.8%	-48.4%
	Performing arts	36,000	42,900	3.6%	-34.1%	-26.5%	-44.4%	-38.6%
	Visual arts	34,500	35,200	0.4%	-36.8%	-39.7%	-46.7%	-49.6%
	Other arts	36,600	24,700	-7.6%	-33.0%	-57.7%	-43.4%	-64.7%
Design	Advertising and marketing	76,000	83,500	1.9%	39.2%	43.0%	17.5%	19.5%
	Architecture	67,100	70,900	1.1%	22.9%	21.4%	3.7%	1.4%
	Graphic design	46,400	47,200	0.3%	-15.0%	-19.2%	-28.3%	-32.5%
	Fashion and other design	44,900	45,200	0.1%	-17.8%	-22.6%	-30.6%	-35.3%
IT	Software	79,700	88,800	2.2%	46.0%	52.1%	23.2%	27.0%
The media	Film, TV and radio	54,400	55,400	0.4%	-0.4%	-5.1%	-15.9%	-20.7%
	Publishing	62,700	65,400	0.8%	14.8%	12.0%	-3.1%	-6.4%
Creative occupations		64,700	69,900	1.6%	18.5%	19.7%	0.0%	0.0%
Other occupations		54,300	58,100	1.4%	-0.5%	-0.5%		
Total occupations		54,600	58,400	1.4%	0.0%	0.0%		

*Table 42 Average Annual Income, Creative Occupations, Place of Residence, Hunter Region (2016 dollars).
Source: Census of Population and Housing, 2011 and 2016, employed persons by place of residence, SA4 areas 106 (Hunter Valley excl. Newcastle) and 111 (Newcastle and Lake Macquarie).*



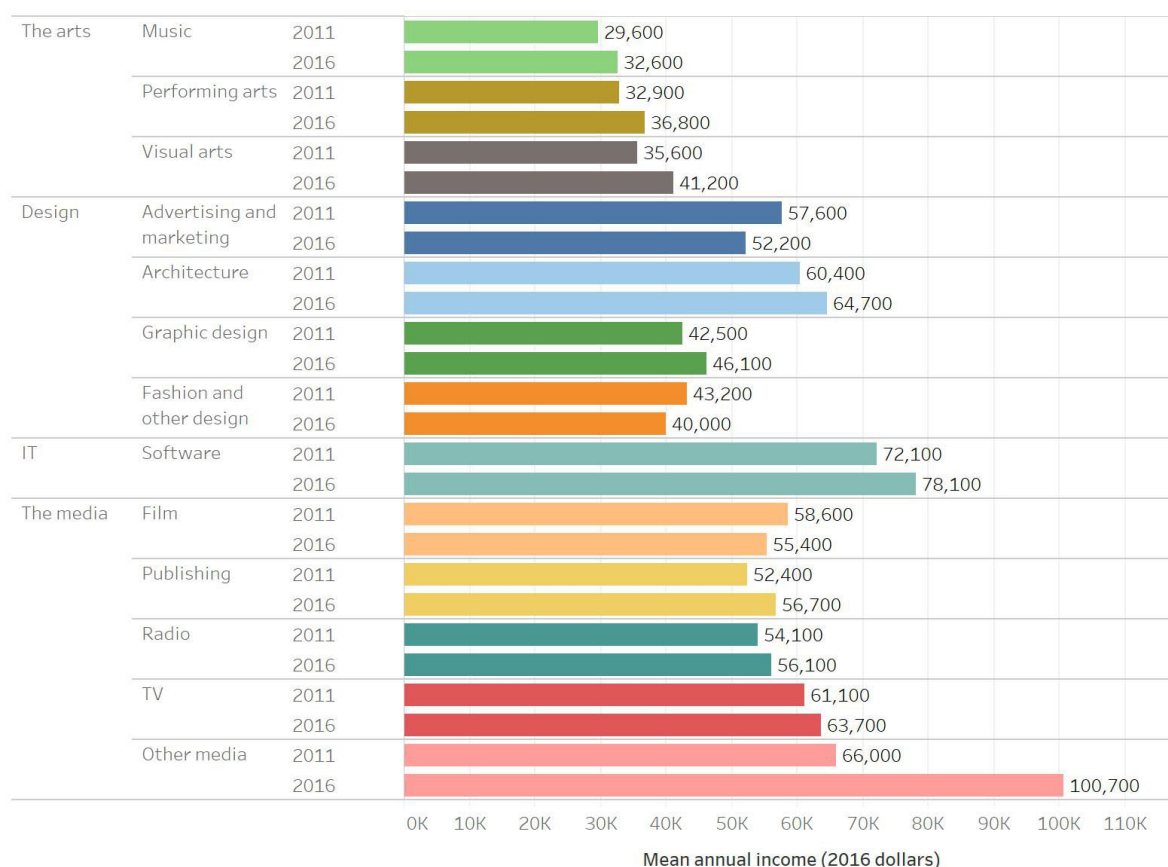
*Graph 15 Average Annual Income, Creative Occupations, Place of Residence, Hunter Region (2016 dollars).
Source: Census of Population and Housing, 2011 and 2016, employed persons by place of residence, SA4 areas 106 (Hunter Valley excl. Newcastle) and 111 (Newcastle and Lake Macquarie).*

Annual income overall has increased within the broader creative industries most often sitting just above the average annual increase for the total workforce generally.

5.2.2.7 Trident Average Annual Income by POW in the Greater Hunter Valley, 2011 & 2016.

		Average annual income		Average annual growth	Difference from total workforce		Difference from creative workforce	
		2011	2016		2011	2011	2016	2016
The arts	Music	29,600	32,600	1.9%	-46.6%	-44.0%	-47.3%	-45.9%
	Performing arts	32,900	36,800	2.3%	-40.6%	-36.8%	-41.5%	-39.0%
	Visual arts	35,600	41,200	3.0%	-35.7%	-29.2%	-36.7%	-31.7%
Design	Advertising and marketing	57,600	52,200	-1.9%	4.0%	-10.3%	2.5%	-13.4%
	Architecture	60,400	64,700	1.4%	9.0%	11.2%	7.5%	7.3%
	Graphic design	43,200	40,000	-1.5%	-22.0%	-31.3%	-23.1%	-33.7%
	Fashion and other design	42,500	46,100	1.6%	-23.3%	-20.8%	-24.4%	-23.5%
IT	Software	72,100	78,100	1.6%	30.1%	34.2%	28.3%	29.5%
The media	Film	58,600	55,400	-1.1%	5.8%	-4.8%	4.3%	-8.1%
	Publishing	52,400	56,700	1.6%	-5.4%	-2.6%	-6.8%	-6.0%
	Radio	54,100	56,100	0.7%	-2.3%	-3.6%	-3.7%	-7.0%
	TV	61,100	63,700	0.8%	10.3%	9.5%	8.7%	5.6%
	Other media	66,000	100,700	8.8%	19.1%	73.0%	17.4%	67.0%
	Creative industries	56,200	60,300	1.4%	1.4%	3.6%	0.0%	0.0%
	Other industries	55,300	58,200	1.0%	-0.2%	0.0%		
	Total industries	55,400	58,200	1.0%	0.0%	0.0%		

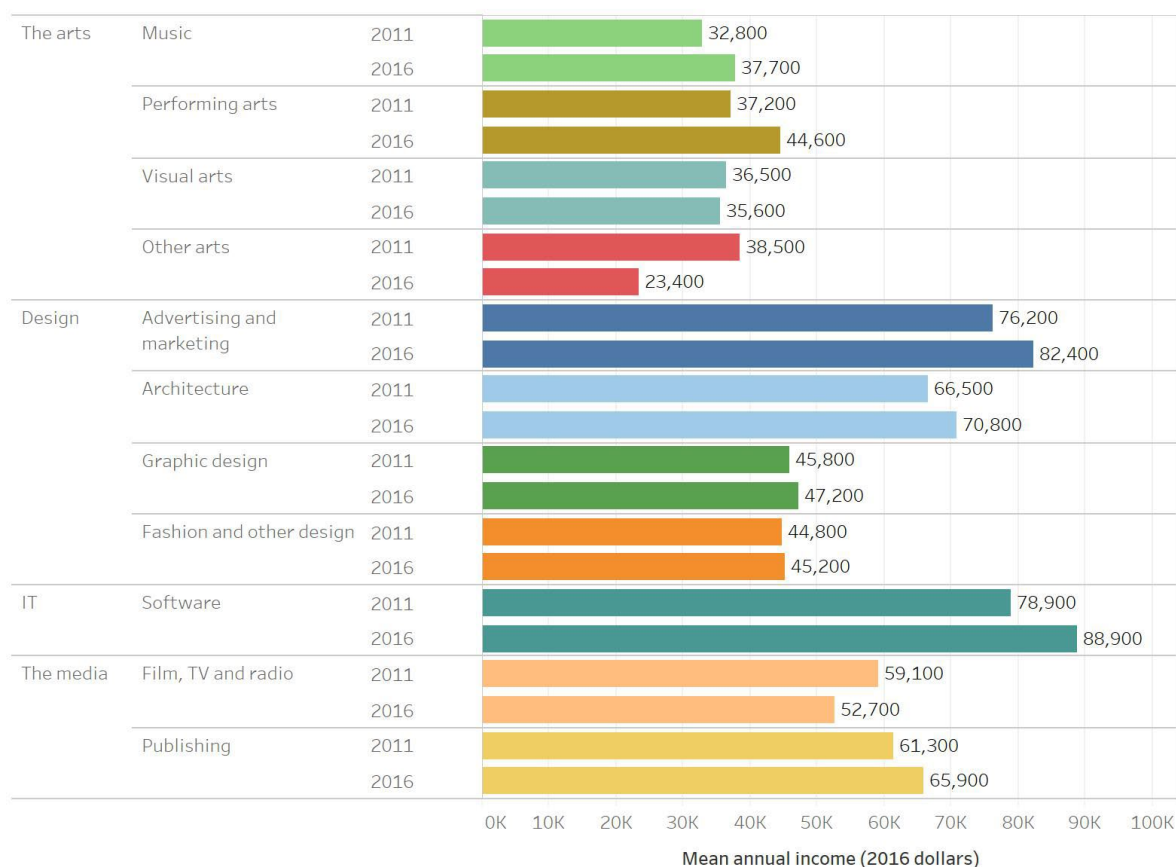
*Table 43 Average Annual Income, Creative Industries, Place of Work, Hunter Region (2016 Dollars).
Source: Census of Population and Housing, 2011 and 2016, employed persons by place of work, SA4 areas 106 (Hunter Valley excl. Newcastle) and 111 (Newcastle and Lake Macquarie).*



*Graph 16 Average Annual Income, Creative Industries, Place of Work, Hunter Region (2016 Dollars).
Source: Census of Population and Housing, 2011 and 2016, employed persons by place of work, SA4 areas 106 (Hunter Valley excl. Newcastle) and 111 (Newcastle and Lake Macquarie).*

		Average annual income		Average annual growth	Difference from total workforce		Difference from creative workforce	
		2011	2016		2011	2011	2016	2016
The arts	Music	32,800	37,700	2.8%	-40.8%	-35.2%	-49.7%	-45.9%
	Performing arts	37,200	44,600	3.7%	-32.9%	-23.4%	-42.9%	-36.0%
	Visual arts	36,500	35,600	-0.5%	-34.1%	-38.8%	-44.0%	-48.9%
	Other arts	38,500	23,400	-9.5%	-30.5%	-59.8%	-41.0%	-66.4%
Design	Advertising and marketing	76,200	82,400	1.6%	37.5%	41.6%	16.9%	18.2%
	Architecture	66,500	70,800	1.3%	20.0%	21.6%	2.0%	1.6%
	Graphic design	45,800	47,200	0.6%	-17.3%	-18.9%	-29.8%	-32.3%
	Fashion and other design	44,800	45,200	0.2%	-19.1%	-22.3%	-31.3%	-35.2%
IT	Software	78,900	88,900	2.4%	42.4%	52.7%	21.0%	27.5%
The media	Film, TV and radio	59,100	52,700	-2.3%	6.7%	-9.5%	-9.4%	-24.4%
	Publishing	61,300	65,900	1.5%	10.6%	13.2%	-6.0%	-5.5%
Creative occupations		65,200	65,200	69,700	1.3%	17.7%	19.8%	0.0%
Other occupations		55,100	57,900	1.0%	-0.5%	-0.5%		
Total occupations		55,400	58,200	1.0%	0.0%	0.0%		

*Table 44 Average Annual Income, Creative Occupations, Place of Work, Hunter Region (2016 Dollars).
Source: Census of Population and Housing, 2011 and 2016, employed persons by place of work, SA4 areas 106 (Hunter Valley excl. Newcastle) and 111 (Newcastle and Lake Macquarie).*



*Graph 17 Average Annual Income, Creative Occupations, Place of Work, Hunter Region (2016 Dollars).
Source: Census of Population and Housing, 2011 and 2016, employed persons by place of work, SA4 areas 106 (Hunter Valley excl. Newcastle) and 111 (Newcastle and Lake Macquarie).*

5.2.2.1 Comparative Share of Workforce and Employment with Capital Cities in 2011

Additionally, the creative industries constitute approximately 2.8% of the total workforce in 2011 in the Hunter Region (as defined by SA4 – the smallest geographical area that is statistically valid). The question is whether this is a high percentage or a low percentage for the region. The figure may be low in comparison with 9% in Sydney (where there is a heavy concentration of creative industries, as would be expected), but may not be low compared with Perth at 4.5% or Adelaide at 4.4%, noting that Adelaide has approximately twice as many workers and Perth has approximately four times the total workforce. With these qualifications in mind, the following tables give an indicative set of comparisons (n.b. these comparisons are for 2011 only).

Workforce 2011	Sydney	Perth	Melbourne	Brisbane	Adelaide	Newcastle
Specialist	2.5%	1.2%	2.1%	1.4%	1.2%	0.8%
Support	4.0%	1.9%	2.7%	2.3%	1.7%	1.1%
Total CI	6.4%	3.1%	4.8%	3.7%	2.9%	1.9%
Embedded	2.6%	1.4%	2.2%	1.7%	1.4%	0.8%
Total Trident	9.1%	4.5%	7.0%	5.4%	4.4%	2.8%
Creative Occupations	5.1%	2.6%	4.3%	3.1%	2.6%	1.7%
Total Workforce	100.0%	100.0%	100.0%	100.0%	100.0%	100%

*Table 45 Comparison of Share of Workforce for selected cities across Australia for 2011.
Source: Analysis by Peter Higgs of customised extract of ABS Census of Housing and Population.*

The following table allocates numbers to these percentages.

Trident Employment For 2011	Sydney	Perth	Melbourne	Brisbane	Adelaide	Newcastle
Specialist	51,111	9,927	40,753	13,658	6,598	1,893
Support	81,698	15,498	50,814	22,938	9,545	2,549
Total CI	132,809	25,425	91,567	36,596	16,143	4,442
Embedded	54,457	11,379	41,769	16,438	7,861	1,964
Total Trident	187,266	36,804	133,336	53,034	24,004	6,406
Creative Occupations	105,568	21,306	82,522	30,096	14,459	3,857
Total Workforce	2,063,246	824,401	#####	984,952	547,913	231,438

*Table 46 Comparison of Employment in the Creative Industries for selected cities across Australia for 2011.
Source: Based on an analysis by Peter Higgs of customised extract of ABS Census of Housing and Population.*

It should be noted that when making comparisons like this across a diverse set of cities operating with a wide variety of contexts, what needs to be investigated is what is normal and what is exceptional. In this case density, that is, the number of workers calculated in that occupation in a given area, becomes important to understand. Once this number is calculated the figure can then be mapped against the total workforce. The question raised is this: is a low number of fine artists in one region, for example, reflective of the norm? As a benchmark, manufacturing tends to be evenly distributed around the country, but creative industries workforces tend to be attracted to higher population areas, particularly capital cities, and are therefore clustered more densely in these areas. The further question then arises as to whether a concentration of the creative population in urban centres is a matter of economic necessity or if some other attractor is at work. All of these questions need further and more thorough investigation. However, by using the same methodology, region to region, we have a basis for comparing regions of similar

size and asking whether, for example, the Hunter Region is under-performing or over-performing in relation to cities of a similar type and context, for example Wollongong. With these figures as a basis we can also begin to ask analytically whether something such as the BHP closure has had an effect on the creative industries in the region. In this case a national study, state by state, region by region, using this methodology is called for.

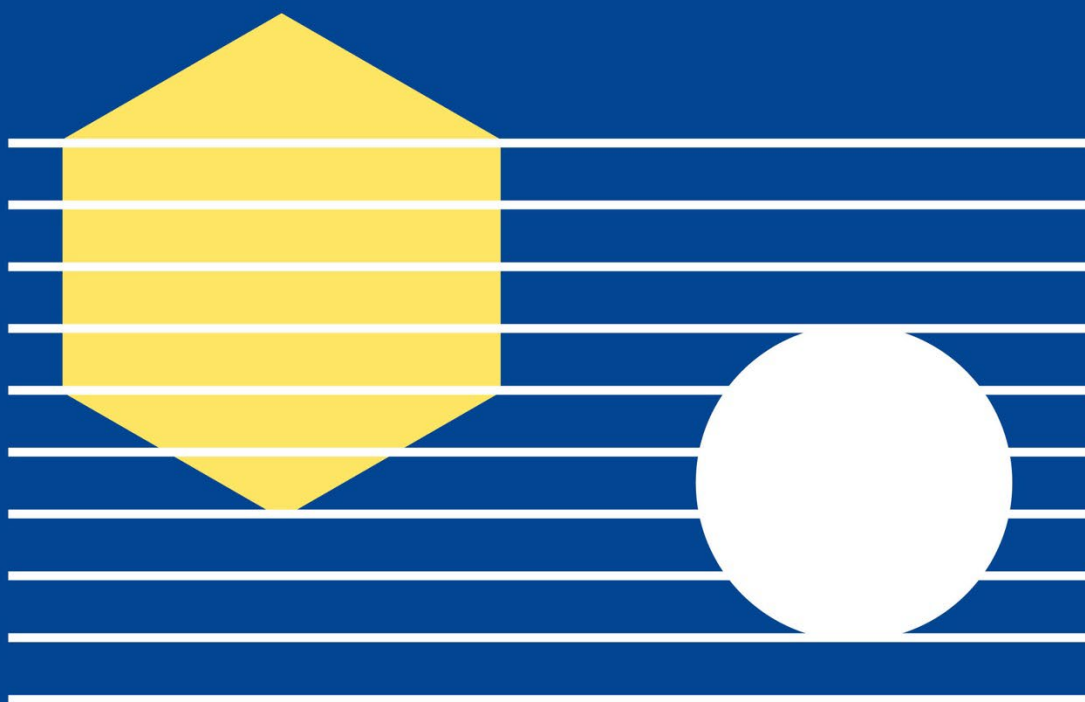
5.2.3 Further Considerations

Taking this approach one step further but staying within the above specified limits and using the assumptions outlined above, we could argue that the Creative Trident methodology is actually trying to measure in a somewhat limited way ‘the field’, a term used specifically by both Mihaly Csikszentmihalyi (1988) and Pierre Bourdieu (1993) to describe all those who form part of the social structure of creative activity in a certain domain of creative action. If we assume this is the case, what this situation then requires is one further step for analysis. There is a requirement to look at *all* those who constitute *the field* of each sector of the creative industries, rather than what occupations might or might not occur there, since it is the field that forms a crucial contribution to the emergence of creative processes, products and ideas within any entrepreneurial system. This additional perspective might reveal - in a slightly different way - who is involved and what they contribute to the emergence of creative activity in these industries. These fields - collections of agents who contribute to the emergence of objects, services and experiences typical of design, architecture, film, theatre and so on - are not the same as an industry occupation list although they do share commonalities. What is being highlighted here by making this suggestion is the idea that there is an increasing difficulty in accounting for not only changes in business operation but also employment types that have arisen as a result of the massive digital revolution sweeping the post-industrial world. In other words, the creative industries are fast moving beyond the tangible structures of production that typify traditional economies, that is, ‘firms, labour, production network, industrial districts, and markets – that is the normal stock in trade of industrial investigation’ (Hutton 2009, p. 139). Instead, what we are tending to see are ‘shifting boundaries of function, evolving technical divisions of labour, and emergent product sectors’ (ibid). This shift in thinking is bound together with conceptions of creativity which have moved, in research terms at least, away from the commonly held cultural assumptions about it. Instead, what we see now are highly confluence-based approaches (see Sections 2.7 and 2.8 above).

Given these changes, we deemed it necessary to conduct a more in-depth, qualitative investigation, including participant observation and interviews with key operatives in each CI sector, as this promised to reveal far more of the detail of what is occurring qualitatively in the creative industries than a statistical analysis can to this point. To that end, this study now reports on the ethnographies conducted into the creative industries in the Hunter Region. These include, following an adaptation of the NSW Creative Industries Taskforce sector list, music, radio, publishing, performing arts, visual arts, architecture, advertising and design, film, television and electronic games and software development. We start with the music sector.

Creativity & Cultural Production in the Hunter

An applied ethnographic study of
new entrepreneurial systems in the
creative industries.



Final Report:
Hunter Creative Industries

Music

Associate Professor Phillip McIntyre
Professor Mark Balnaves
Associate Professor Susan Kerrigan
Evelyn King
Claire Williams

The University of Newcastle | April 2018, ARC Grant LP 130100348



6. MUSIC

6.1 Introduction

This part of the report outlines the history, structure, business models, operational methods and important personnel associated with each sector. This section outlines the music industry in Australia (Cunningham & Turnbull 2014) before looking specifically at the music industry in the Hunter region. It locates the current Hunter Region music scene within Australian music history particularly in relation to the European tradition, specifically the American and British music traditions. Of note is the fact that the ongoing digital revolution continues to reshape the industry, its composition, songwriting, recording, performance and business modes. Structurally the music industry is comprised of three major and related sectors i.e. publishing, recording and live performance. There are ancillary sectors as well such as manufacturing, retail and media which are interconnected with the three major sectors. There are various business models used within these sectors. The operational methods are both formal (e.g. use of contracts, performance schedules etc.) and informal (e.g. adherence to a gift economy). Its most important personnel include songwriters, composers, musicians, managers, touring crews, venue operators, agents, promoters, producers, engineers, publishers, A&R operatives and, of course, the audience.

6.2 A Brief History of the Music Industry in Australia.

The music industry in the Hunter is a local variant of a much larger national and global one (Miller & Shahriari 2012). If you choose China's music industry as an example of a national music industry you can see that its commercial history runs for the past 900 years (Fangjun 2014). While many forms of music are embedded in the Australian musical experience, including the 65,000 year tradition seen in indigenous songlines, as well as Irish and Scottish folk songs, brass band performances, opera and musical theatre, and many other forms typical of a multicultural society, all of which are detailed at some length in *The Currency Companion to Music and Dance in Australia* (Whiteoak & Scott-Maxwell 2003), most histories of Western music, both classical and popular in particular, tend to emphasise the American/British nexus, to the exclusion of most others (see for example Frith in Martin 1983, pp. 18-48). This emphasis is understandable given the social, economic and political dominance of a major portion of the planet by both of these countries during the last century and a half (Macintyre 1999).

If we concentrate at the national level on contemporary Australian music (see Rogers 1975, Beilby & Roberts 1981, Zion 1987, 1988, Hayward 1992, Sly 1993, St. John 1994, Jenkins 1994, Leiber 1996, Mathieson 1996, Mitchell 1996, Walker 1996, Wilmoth 1993, Creswell 1993, Freud 1997, Creswell & Fabinyi 1999, Walker 2000, Cockington 2001, Whiteoak & Scott-Maxwell 2003, Homan & Mitchell 2008) we do need to keep in mind how deeply connected Australian music has been to those British and US traditions. Taking a much broader view we can also see that there is a continuum for western music specifically that has stretched beyond the development of jazz, rock and roll and EDM in the US back to Europe and Africa. In fact if one took a highly macro view, western music itself could be traced convincingly to the murky beginnings of recorded time (Menuhin & Davis 1979). It is only now that an appreciation of the long history of Australian indigenous music is beginning to be incorporated into mainstream tastes (Ellis 1985, Breen 1989, Mitchell 1996). This broad view would also need to encompass the multiple rhythmic pulses of West Africa, string, brass and pipe bands assembled around various ethnic communities, the Celtic folk song tradition, the music hall traditions of Britain, Viennese operettas and European art music. Country and western, or the more aptly titled hillbilly music, plus big band swing, the standards produced by Tin Pan Alley

and the hits from major Broadway shows have, at some stage during the twentieth century, all held a position as one of the most popular forms of music in Australia (Whiteoak & Scott-Maxwell 2003). Rock, in all its various types and forms, held sway in Australia as the most popular form in the last half of the twentieth century (Masterson & Gillard 1999) moving through phases of growth, consolidation and internationalisation (McIntyre 2004). This form has been superseded, complemented and reworked by a list of popular styles that includes R&B, rap, hip-hop, house, jungle, gabba, dub and many others, all existing under the umbrella term EDM, as well as world music and the continuing traditions mentioned prior. Each of these older and more current forms exist within the Hunter region. Its specific history has been variously documented (e.g. McIntyre 1994, Stephenson 1994, Groeneveld 1998, English 2013, 2014, McIntyre & Sheather 2013, Sheather 2016).

Just as the introduction of the technologies of recording, tape, LPs, 45s and cassettes and the domination of radio and Tin Pan Alley had significant impacts on the music industry after the peak of the industrial revolution and across the twentieth century (Fink 1996), the ongoing digital revolution in the twenty-first century, the corresponding forms of globalisation and the success of neoliberalism as a political ideology, continue to reshape the music industry, its composition, songwriting, recording, performance and business modes, globally, nationally and locally.

6.3 Structure of the Music Industry

There are a number of structural models of the music industry available (Wikstrom 2009, pp. 47-84). While some argue that there is not one music industry per se but a set of music industries (Williamson & Cloonan 2007), in general it can be claimed that there are three major sectors within the industry, i.e. publishing, recording and live performance. There are ancillary sectors as well such as manufacture, retail and media (McIntyre 2011a) which of course overlap with other industry designations. All of these sectors and their relationships can be illustrated through a generalised structures (see Figure 10).

While all of these structural components are evident globally and nationally, the Hunter region is not serviced by all of them (Groeneveld 1998). In particular, the publishing sector has had little presence in the region, with some notable exceptions, and the recording industry has never grown to the extent that it could. Inevitably the processes of digitisation and globalisation mean the region is thoroughly connected to the global musical world far more than it ever has been.

6.4 Current Business Models in the Music Sector

Despite the emphasis being placed on new business models (Strasser 2010) and the likelihood that a standard set of ways to make money (Rappa 2010) continues to operate in one form or another across the music industry:

- 1) For the live performance sector, be that classical, jazz, EDM or other popular forms, income is derived primarily from direct ticketing and merchandising sales, now mostly online, and it is usual for the performers to take the risk of success. This risk is spread across agents and

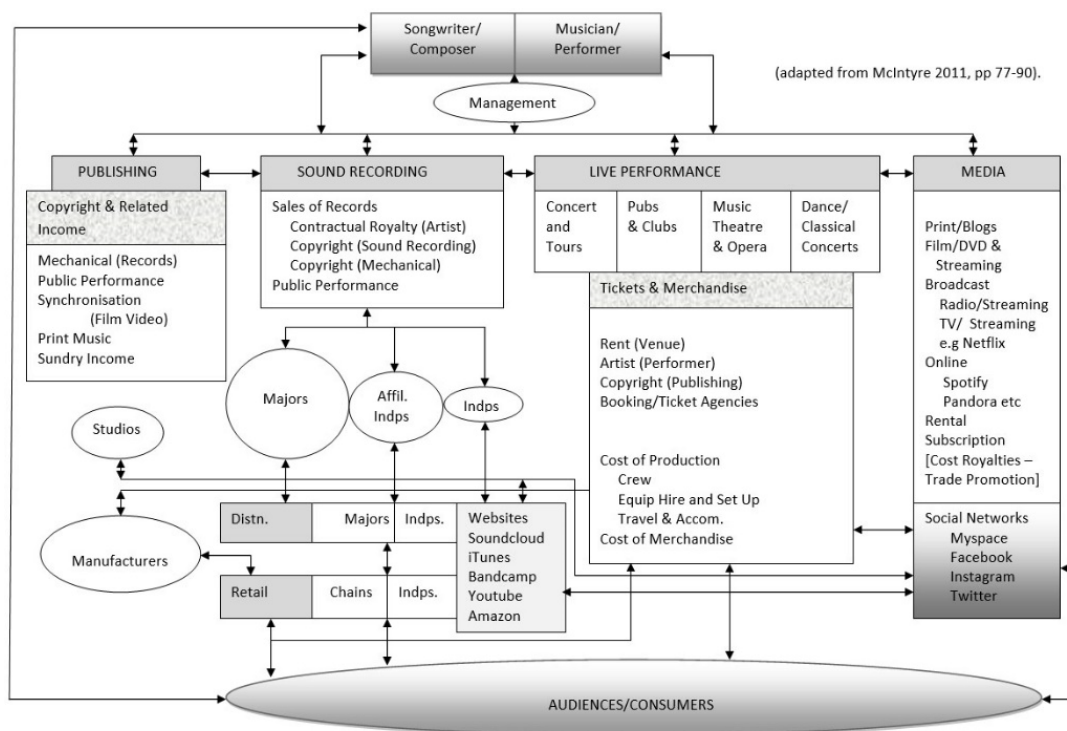


Figure 12 Music Industry Generalised Structure
(original from McIntyre 2011a p 86).

promoters who generally operate on a percentage of the derived income from these performances. Income from concert performances has progressively diminished over the last twenty years for the bulk of regional touring musicians as costs have increased and opportunities for performance have diminished.

2) The recording sector derives income from direct sale of product such as CDs and incurs costs through recording, distribution and marketing. Composers and/or performers may be given an advance to make a recording and will repay this loan before receiving any income. Alternatively, they will incur the cost themselves, lease the recording to a record company to promote and distribute or sell direct digitally. Royalties are paid to the owners of the mechanical rights of these recordings, often record companies but increasingly musicians themselves, in addition to other rights. As a result of the success of digital distribution retail income has moved from stores to web-based outlets with retail often disappearing for the value chain being replaced by sites such as Soundcloud and Bandcamp. With digital distribution occurring in the form of streaming and subscription services, the income from the mechanicals is now superseding direct sales as the dominant form of income for this sector. Despite the success of digital downloads overall income has diminished for the recording sector as a result of these supersessions.

3) The publishing sector is concerned with the copyright of musical works and lyrics as opposed to the rights derived from the mechanical recording of the compositions and songs that form the raw material of the music industry. A songwriter or composer sells or licences a song or other composition to other parties usually through a publisher. In doing so they agree to write lyrics and/or musical works in exchange for an advance (loan) from the publisher. The publisher agrees to promote and sell the composition usually in exchange for 50% of the copyright royalty income on the song or composition. This, of course, includes income from the songbooks from musical theatre

as well as all the other musical forms. Royalties are required to be paid by law on each public performance of the song or composition wherever that might occur i.e. in concert, broadcast, as part of a film soundtrack, played as a ring tone or streamed. This sector of the music industry remains successful.

4) If a musician follows the DIY route, which appears increasingly attractive to them, they will still need to understand the income derivatives of publishing, recording and live performance (see above) including show guarantees, split of door deals, playing for tips or using sites like Concert Window, Stageit, Gigeee or Twitch in order to perform in a virtual live environment. They may also organise to do private and paying live shows via Skype. All of this still depends on reputation i.e. symbolic capital which is used as a form of leverage. Whether they perform virtually or live-on-site and they are writing and performing their own songs there is income to be made through collection agencies such as APRA where the agency pays on file of returns listing each performance of those songs. The DIY artist may also need to gain extra money to finance recordings through online crowd support platform sites like Patreon and then upload recorded music for digital distribution through, if successful, Spotify or Youtube's Music Key and other sites. The DIY artist might distribute this recorded material for free but then sell, via their website and Paypal, exclusive additional material which is included on physical CDs. These could be manufactured as limited editions and also sold at live gigs. Merchandising is also a reasonable source of income in terms of the sale of hard copy goods. Other related ways to earn income that are dependent on skill levels, include producing demos for fellow artists, teaching music lessons, writing jingles, doing voiceover work, renting out equipment in downtimes, or making videos in that downtime to post to youtube and, if successful, earning returns from the number of hits. Whichever way is chosen promotion is crucial and costly in both time and money for the DIY musician.

6.5 Operational Methods in the Music Sector

Musicians, a term that encompasses all those engaged in producing logically organised sound no matter of what type or genre, legally operate as either sole traders, engage in partnerships or in some cases act as companies. Once a musician, sometimes called an artist, has developed a reputation, usually playing at house parties, smaller venues where they 'play for the door' or are incorporated into a larger musical organisation such as an orchestra, they will engage a talent or booking agent who has a list of venues that the agent exclusively books. The agent matches the performer/s, whether they are EDM, jazz, classical or rock based, to these venues for a percentage of the performance fee (usually 10 per cent). The artist often incurs all promotional costs for these concerts including printing of posters and photo shoots for press releases. The artist/s will usually hire or buy a public address system for those venues that don't have them installed. The artist/s will need to consider public liability insurance and all necessary insurance and compensation packages for the operators and, eventually if successful, a touring crew. A tour is a series of one night engagements across a given geographical territory. Tours are usually organised through a touring company for a percentage of the concert appearance fee and the touring company will negotiate with local promoters for fees, security, promotional costs etc. The touring artist may also need to engage a supporting act at each local venue who may be required to pay to be on the tour and provide additional luggers to aid the crew. At this point the touring operation may move into being described as a major live concert production and, accordingly, the artist will need to engage a larger touring crew and hire all the necessary equipment for the duration of the tour. This equipment includes an adequate PA system and

lights for all types of venues, a truck to transport it and a bus or plane to transport the band as well accommodation for all of these personnel. Legal contracts are drawn up and the operation is tightly planned and executed necessarily using written schedules such as tour sheets which detail times of performance, venue address and layout, conditions of performance and all necessary technical information to allow the concert to proceed.

Recording musicians, who may or may not also be touring performers, usually incur the full costs of their own personal equipment such as instruments and/or amplifiers. In the case of popular music they will generally buy their own recording gear or hire it. This gear is often housed in a studio, that is, a controlled audio environment which sometimes necessitates the use of an audio engineer and of course a hire fee. No matter what genre the recording artist may also feel the need to hire a producer who often works for a set fee or a percentage of the royalties or points. Other costs may include rehearsal space, freight, session musician hire, equipment rentals, meals and accommodation and arranger's fees. These costs of recording may be offset from an advance or loan from a record company. The record company advances the monies to cover recording costs and acts in the manner of a venture capitalist doing various deals dependent on the leverage an artist has. These may range from 360 degree deals, to a standard royalty deal, or a licencing deal, profit share deal, promotion and distribution deal. Alternatively an artist may bear all the costs and risks and garner 100% of whatever profit ensues. While manufacturing and distribution costs are becoming minimal with web-based delivery now the norm, promotion and marketing is still a time consuming cost which may necessitate the hire of a dedicated music promotions company. At this point the artist/s will need to interact with all broadcast, non-broadcast and narrow cast media in order to promote and thus sell the recording.

Songwriters and composers write the material that is the core artefact of the music industry. In terms of popular music in decades past, songwriting was a separate profession from that of performance. This is still the case for composition in the classical domain. However, 'songwriters of today frequently wear more than one hat, doubling as singers, musicians, record producers or even managers' (Barrat in Martin 1983, p. 59). This presents certain complexities, but for legal purposes songwriters, composers and performers are still generally treated as separate entities. As Siegel (1990), Whitsett (1997), Wilson (1999), Passman (2002) and Simpson (2006) variously explain, once a piece of music is written and exists in a material form, it is copyrighted. At this stage the songwriter/composer owns one hundred per cent of the written piece. Most often they engage a publisher, a separate business entity, to publish, promote and administer the song or composition. The royalties earned from the composition are split in two. There is a writer's share, usually fifty per cent, and a publisher's share, also usually fifty per cent. If there is more than one writer the writer's share is split between the writers according to a writer's agreement usually written. The publisher takes the publisher's share to administer and promote the song or composition. The publisher usually has the rights in the piece assigned to them, that is, the ownership of the song or composition, for a certain period or term.

This means the publisher can control the use of the song for this period and may be entitled to maintain ownership in the song for the life of the copyright. However, if a publisher does not do the best thing by the song and does not actively promote it, a reversion clause will allow the song's rights to be returned to the songwriter. With these conditions in place the publisher is then able to issue licences for others to use the song. The publisher is in essence obligated to try to get other people to do cover versions, place the songs in movies, in TV shows and any other places where income can be derived. The publisher should thus actively

sell the song for the songwriter. This is their job. They do not, and should not, just collect and administer royalty income (McIntyre 2009, p. 7).

Increasingly many of these operational functions are being taken on by working musicians themselves. Twenty-first century musicians, in all their incarnations and depending on genre, must be able to write and produce material, maintain and update musical skills, sing, buy and maintain performance and recording equipment, produce recordings, mix and master those recordings, shoot videos, hire rehearsal space, pay for transport to move gear and fellow musicians to and from venues, load in and out, negotiate performance fees, pay for promotion and website costs, regularly upload material to their websites or distribution points such as Youtube, maintain a regular blog, be active on social media, cover insurance costs, file tax returns, file APRA returns, pay agents and managers fees, as well as cover food, housing, bills and living expenses.

As well as operating in these legal and financial ways musicians of all stripes have always operated within a gift economy. What this mean effectively is that as well as being cooperative in performance many musicians need to be collegial in the way they operate with each other, supporting each other's gigs, loaning equipment to fellow performers at no expense and generally helping each other out. There are exceptions to these generalities of course but these values tend to be generally accepted. At the core of most musician's value judgements are:

The values on which successful performance depend: values concerning collaboration, the ability to play with other people; the values of trust, reliability, a certain sort of professionalism – even the most anti-professional punk band needs its members to turn up at rehearsals or gigs, to be in a fit state to take to the stage. This is the context in which skill and technique become valued not as abstract qualities but by reference to what must be done in a particular musical genre, what fellow players can take for granted ... as part of this collaborative work, musicians are expected to have a certain basic knowledge of their instrument and of technology – they need to be able to change a string, tune a drum, program a sampler (Frith 1996, p. 53).

In this process 'musicians have to make a series of decisions – should I play this note, use this take, hire this musician, change the melody here, that order of the set there, shorten my solo, change the key; and these decisions rest on a constant process of evaluation – that's the wrong chord, the wrong tempo, the wrong sound, the wrong mix – and a constant process of encouragement: that's good, leave it! Such decisions are both individual, a reflection of one's own talent (musical talent describes, among other things, the ability to make the right decisions about what's good), and social' (Frith 1996, p. 52). As all people in small business do, musicians:

Have to plan a lot of dreary details. Once they're famous or rich, or preferably both, they'll have a manager, a host of roadies, a sound tech, a lights and rigging tech and the odd spotlight operator. Until then, it's the band members who have to see to getting bookings and hiring vans, people and a tonne of equipment. They have to sort out any technical problems, have to get everything to the gig in time to set up the hardware, run sufficient sound checks to satisfy everybody, make sure the light rig is up and going, reassure the management, make sure they'll get paid the agreed amount, do the gig brilliantly, bump all the equipment out quickly – especially if there's another band on straight afterwards – then return all hired gear promptly and in good order tomorrow morning at an indecently early hour. People who [are

musicians] are not lazy. Their commitment to their music and performance skills is such that they often become their own entrepreneurs, working intensely hard in order to keep doing the job they have chosen to do (Wilson 1997, p. 57).

These musicians interact with a wide variety of important personnel who occupy the field of music.

6.6 Important Personnel in the Music Sector

Musicians are the people who perform musical instruments, including the voice. This includes not only traditional instruments but also turntables, samplers and anything that makes logically organised sound. Managers look after the business affairs of the musician usually for a commission of up to 25% of all the musician's income from all sources. Agents match venues to performers for approximately 10% of the concert fee. Promoters organise, stage and promote a touring concert performance once again for a percentage of the concert returns. A touring crew is necessary in order to stage a concert tour whether it is rock, country, classical or EDM based. The crew will consist of at least a tour manager, a front of house engineer and lighting operator, a stage manager and a monitor engineer. Venue operators operate venues at which performances take place. These can range from small hotels through to concert halls and large stadiums. In the days when songwriting, composition and performance were completely separate functions, an A&R Representative used to put performing artists together with repertoire. Now they act as a spotter of talent for the record companies and have a limited authority to sign an artist to a contract. Record producers are like directors on a film set. They have overall creative responsibility for a recording. Audio engineers have the technical responsibility to capture and manipulate sound just as a cameraperson in the film industry captures light. A publisher administers and promotes the material songwriters and composers write. Publishers have clients they service not only in the live performance sector but also the film and advertising industries. Of course, without an audience none of these personnel would continue to subsist within the music industry.

6.7 The Hunter Region Music Sector

6.7.1 Music Education in the Hunter

Music education occurs across the Hunter Region in a number of institutions and settings. As one example industry based courses are run in the Newcastle School of Music, part of the Creative Industries Faculty at TAFE. Until recently Les Hall from the Ted Mulry Gang, Mark Tinson from The Heroes and Grant Walmsley from the Screaming Jets, as important musical personnel, contributed their extensive industry expertise to the teaching of these programs. This expertise was often acquired via a deep commitment to their profession. For example, Les Hall from Maitland, guitarist and songwriter for the nationally successful touring and recording group the Ted Mulry Gang, now finds time, after his teaching functions at TAFE ceased, to write songs for, and produce, young dance artists for the European market. Grant Walmsley was a founding member of the Screaming Jets. The Screaming Jets, initially playing at such venues as Tubemakers in Mayfield before making a national name for themselves while signed to Rooart records. They had come to national attention by winning the first Triple J National Band Competition. They eventually toured Europe and the United States a number of times, where they were released on Atlantic Records, and acquired enough national chart hits to enable the compilation of a 'best of' recording *Hits and Pieces*. They are still based in Newcastle and

continued to tour nationally at least until 2012 and have reformed a number of times since. Mark Tinson also has a significant story.

As a performing musician Tinson became famous outside the Hunter as a result of his commitment to the Newcastle based band The Heroes. They were signed to Alberts Records in Sydney and their largest hit *Baby's Had A Taste* was produced by the internationally successful songwriters Vanda and Young. Since then Tinson has toured Australia many times with national and international acts including AC/DC, Ian Gillan, TMG, The Church, Jimmy Barnes and Swannee and has performed regularly on national TV shows including Countdown, Denton and the Midday Show. As a songwriter he has been signed to publishing houses such as April Music, Alberts Publishing and Rosella Music and is a long term member of both the Australasian Performing Rights Association and the Australian Songwriter's Association. His writing awards include the Music Oz Instrumental Artist of the Year, winner of the Open Ballad Category of the Trans-Tasman Songwriting Contest, the Australian Songwriters Association awards for best instrumental as well as a number of others. As a record producer he has recorded over 54 albums of music for many local and national acts and has been contracted by German record company Cultural Minority to write and record two albums for original AC/DC vocalist Dave Evans. As an audio engineer he has managed a number of studios including Reel Time Recording Studios in Darlinghurst and Studio 21 in Hamilton. He has written and recorded 7 film soundtracks including *Summer City* which featured Mel Gibson in his first movie role, as well as 6 musical theatre soundtracks and 25 commercial jingles played on radio and TV. Tinson regularly travels to New Orleans to take in the Cajun styles he is particularly fond of, working with musicians from that city and has continued to produce music for a number of artists, including demonstration recordings for Silverchair, in his Overhead studios in Cooks Hill now relocated to Kotara. His recorded collections of songs, entitled *Steeltown Cats I & II*, partially funded by ABC Publishing, showcases many of the guitarists who have found fame within the city such as Denis Butler, Steve Cowley, Bob Fletcher, Brien McVernon, Mark Hoppe, Bruce Mathiske and multi-instrumentalist Justin Ngariki. Tony Heads from Cordial Factory studios in Maitland also supplied his Hammond C3 for the recordings. Ngariki was not only a signed recording artist himself but was also a product of the Hunter TAFE music industry courses located within their Creative Industries Faculty.

The TAFE's most famous alumni include Daniel Johns, Ben Gillies and Chris Joannu from Silverchair who attended the TAFE's Ausmusic Basic Music Industries Skill course as part of the combined JSST TAFE program. In this way they completed their secondary education while recording and performing. After signing to Murrumbidgee Records, a subsidiary of Sony, they released the internationally successful album *Frogstomp* and each of their successive studio albums placed at Number 1 with three singles placed at the top of the charts. Across their career they toured internationally, broke records previously established by INXS and went on to win 21 ARIA music awards and 6 APRA awards.

Not only is the TAFE institution still involved in teaching and mentoring younger performers in the city, (although recently under threat from the NSW State Government funding cuts of 2013), its commitment to the creative industries can be seen in the recent purchase and installation in its teaching studios of an expensive SSL mixing desk, reminiscent of the technology employed by the industry in its heyday, supplied by Hunter music industry instrument retailers Musos Corner.

With the demise of the Catholic Convent system, where quite a lot of music tuition had occurred in the Valley in locations like Aberdeen, Singleton, Denman and Lochinvar, many working musicians such as Lee Rolfe, have continued with this vital task either teaching through established commercial retail premises, such as Musos Corner in Newcastle West, or through

independent private home-based lessons. This tradition of private tuition can be traced back to jazz teachers such as Don Andrews and many others. Musicians like Rolfe supplement their incomes by passing on their skills to other potential performers and the music retail outlets they sometimes work with provide facilities within their stores for these musicians to conduct their lessons. The retail outlets derive an ongoing customer base from the students and the musician/teachers derived a reliable venue and an organisation that sources students for them. There are of course other educational establishments that are linked to the region's music industry such as the Newcastle Music Academy. Rosie's School of Rock in Adamstown, run by former Screaming Jets drummer Craig Rosevear, has also garnered a number of students.

Students from across the valley also engage with the Upper Hunter Conservatorium of Music (UHCM) which teaches in studios in Singleton and Muswellbrook and teaches into twenty schools across the Upper Hunter district which include Murrurundi, Blandford, Nulkaba and Merriwa and many schools in between. This conservatorium is a 'not-for-profit, community based organisation, funded partly by the NSW Department of Education. It is governed by a Committee of Management, which meets bi-monthly, and is a member of the Association of NSW Regional Conservatoriums' (UHCM 2017, online). A significant number of students have been enrolled in single lessons, larger courses, ensemble practice and workshops. Some of these have become professional performers who have gone on to teach. The cultural service the UHCM provides these communities is invaluable.

Further down the valley at the mouth of the Hunter River, the University of Newcastle's (UON) Conservatorium, located in the cultural heart of Newcastle near the Art Gallery, Library, Innovation Hub, the University's own NewSpace building and the refurbished Civic Theatre, has for many years provided a critical adjunct to the regional music industry. Professor Frank Millward was the Head of the School of Creative and Performing Arts at the University of Newcastle for three years (2013-2016) and was responsible for what occurred at the Conservatorium. He is also a composer and multimedia artist. Prior to returning to Australia, Millward was a Professor of Music at the School of Fine Art at Kingston University in London where he created works for film, television, theatre and site specific performances. Past projects are richly diverse and include elements of musical performance and multimedia experiences. He suggests that:

No one really makes a living out of being a creative artist. There's like a pyramid with a pinpoint at the top, and on the pinpoint are the number of people who make about \$150,000 a year or more. There are a lot of people who live on thirty, fifty, sixty, seventy thousand. If they're really good and they're really commercial they'll make \$120,000. There are very few practicing creative artist who make more than \$200,000 a year ... A lot of success in the creative arts is about personality, luck, and in certain circumstances it's about skill, it's about being virtuosic, being different, having something to say. In a sense that's something that still continues to be dominant, actually having something to say, which is very difficult to get students to understand ... If you have something to say and the passion to keep saying it because it's important then you will always be successful. You will become your own industry, generate your own audience and live off the returns that such energy and relevance creates (Millward i/v, June 2016) .

Not only has the Conservatorium nurtured energetic talents, such as Gareth Hudson and Adam Miller, who all have something to say, it has provided courses for over 65 years and today teaches programs in classical, rock, jazz, pop, folk and electronic from pre-schoolers to post-graduate study.

There are many choirs in the valley such as Newcastle Gay & Lesbian Choir, Novatones, a men's harmony choir who sing unaccompanied 4-part harmony. There is also the Australian Celtic Singers and the internationally successful Waratah Girls' Choir which 'has consistently performed well in many prestigious international singing competitions' (NMD 2017, online). The Newcastle University Choir itself has a proud 40-year history and regarded highly. It performs 3 or 4 choral concerts each year, recording their music and collaborating with local choirs, bands and orchestras. But it is Echology, the University of Newcastle's chamber choir, that is a multi-award-winning ensemble that has performed (and won awards) internationally in countries such as Italy, Switzerland, China and the USA as well as interstate. It is led by Dr Philip Mathias.

Philip Matthias was born in the UK, went to college in London and trained as a high school teacher. After he completed his degree he did a year's teaching in an Australian high school and then travelled overseas where he performed as a musician. He returned to a position at the Newcastle Cathedral and later joined the Conservatorium when it was called the Faculty of Music. He entered academia through the Conservatorium and has worked in the academy for more than 25 years. He is a specialist in Australian church music and composition, especially new liturgies, and he leads the University's Chamber Choir – Echology. As a result of their competition wins internationally they 'went up a division to the champion's league' (ibid) and have released a number of successful recordings. As a working musician Philip's compositions are primarily for choir, psalms for churches, or anthems for individual performers and for film soundtracks. When reflecting on the range of 'gigs' he undertakes he acknowledges the difference elements to each working situation and what motivates him:

If I wrote a piece of music that I want to write, for me, I'll do my best to be creative and put my all into it, and my skills. And if it's not for myself but it's to give to others like for a film, I'll do it as well as the other pieces but there's a difference. I put myself into it but at the same time it's a job, it's like doing anything else, like fixing plumbing or whatever. Musicians play gigs a lot and often it is not 'what is created' but it is a process of creation. Maybe it's just a mindset around the deadline. A composer thinks 'I've got this deadline, I've got to have this product. But a great pianist plays fantastical music, they put their heart and soul into it and they'll say 'it's just a gig', which is true as well, so it's that dichotomy (Philip Matthias, i/v July 2016).

Apart from this recognition of the art/commerce dialectic commonly held by many western musicians, Dr Mathias had the opportunity to compose material for an Indigenous artist, David Leha, to perform at the UN General Assembly Hall in 2016. Dr Mathias was asked to compose the tune for a bassoon, a horn, a bass and a saxophone and because it was to be performed in this particular space, he decided to compose on a Roland keyboard. Representatives from the Roland company, headquartered in Japan, were seeing the UN performance as an important event and wanted to be part of it. Dr Mathias consequently used new software supplied by retail outlet Musos Corner, who are a Roland stockist. Musos Corner were also instrumental in securing sponsorship from Roland for this unique performance. Dr Mathias stated that:

The song is designed for speaking and not for performance. But because of David's way of singing, naturally, it's not going to fit into our 'one, two, three, four, duff, duff, duff, duff' world. His performance is naturally freer. So, I've tried to keep that freedom which means, for instance, you can't have a backing track because a backing track confines you to what *it's* doing, and I can feel there's a difference in us writing that song, because I want to do that. It's a new beast. It's a sort of mix in some way of Western and Indigenous ways of thinking about

music and I'm trying to work through it and thinking, 'what am I creating here?' To give David his culture through it, but also it's got to weave some western stuff in there as well and in a way they're both the same, those two scenarios, two songs, same singer (Philip Matthias i/v, July 2016).

Over the last few years Dr Mathias has developed a range of works with Torres Strait Islanders and Indigenous singers apart from David Leha. As a result of this work there is now talk of starting an Indigenous record label at the Conservatorium based on Dr Mathias' extensive contacts. These contacts from the field of music include Dr Karl Neuenfeldt, a former UoN anthropology lecturer and record producer now at CQU, who has been collecting, preserving and producing records of indigenous culture for some time and now shares that interest and knowledge with Dr Mathias.

6.7.2 Folk Music

While not part of the Conservatorium, Dr Peter Allsop, an anaesthetist by day, has managed to reinvigorate aspects of the folk music scene in Newcastle with his Trade Winds (TW) concerts. Peter Allsop, who has worked professionally as a folk singer in the USA, and his wife Dr Nicola Ross, bring 'folk, world, acoustic, blues and community music from professional & semi-professional artists' (TW 2017, online) to perform either at the Dungeon venue, located under the Adamstown Uniting Church, or at house concerts in the area. For example, String Theories, a Blue Mountains based trio 'exploring the world of "New Acoustic" music ... featuring steel-string guitar, mandolin, dobro, violin, viola and vocals' (TW 2017, online) appeared there in June 2017. These touring bands are often supported by local resident folk acts such as Carole Garland and Michael Fine, performing as Garland-Fine, Nicola Ross and Peter Allsop, who perform as The Doctor's Wife, and also Rob, Sarah and David Smith and Hannah Duque, who appear as The Smith Family. Trade Winds also support other local performers on these bills which may include 'a small vocal ensemble, dance group, teachers and their students, small instrumental groups or any other music group or individual, who may feel they fit into no category whatsoever' (TW 2017, online). According to their website and Facebook page, this venture operates in association with the Newcastle Hunter Valley Folk Club (NHVFC).

Starting in 1964 with a coffee house environment typical of the scene at the time, the Folk Club grew intermittently. Its venues included the Purple Parrot at the Newcastle University located at the current Tighes Hill TAFE College which was opened by successful folk entrepreneur Warren Fahey. After a number of name changes this venue fell to the City Council fire regulations in the 1980s and the performers then used home concerts for their many performances. The Folk Club returned to what was colloquially known as the Tech College until the earthquake in 1989 and then moved to a number of different venues until settling at the Wesley Fellowship House in Hamilton in April 2006. 'In August 1991 The Newcastle Folk Club Inc. became the Newcastle and Hunter Valley Folk Club Inc.' (NHVFC 2017, online), recognising the reach of its membership into the hinterland. Many local and touring acts performing at various events are supported by the club. For example, on 9 June 2017, at what is called SessionFest, located at Morisset Showground, the Mothers of Intention, 'a Celtic inspired four piece band featuring 3 part vocal harmonies, rhythm guitar, fiddle, mandolin, Irish whistles, recorders and Bodran (Irish frame drum)' (NHVFC 2017, online) appeared there playing 'a vibrant mix of Celtic and Folk inspired covers, traditional and original songs sung in exquisite three part harmony. The Mothers also play trad and original tunes, jigs and reels' (ibid). SessionFest, where camping is encouraged, is advertised on the club's website, along with a link to Google Maps, as 'a session where you create the event, the atmosphere and the

music and poetry' (NHVFC 2017, online). This community based event is part of a deep but often hidden tradition of music making in the Hunter, as Dr Helen English has discovered.

6.7.3 Brass, Pipe, Concert Bands and Orchestras

Also at the Conservatorium Dr English has documented many of the forgotten musicians of the Hunter region. She has found that the mining communities in particular 'were remarkably active, supporting brass bands and choral unions – and organising concerts and eisteddfods' (UoN 2017, online). As the Director of School and Community Engagement at the Conservatorium she is taking her insights into Hunter communities and their music making and applying them to the twenty-first century situation. Many of these communities are still active in the Hunter and are partially represented by the numerous brass bands, pipe bands, concert bands and orchestras that can be found there.

Orchestras in the Valley include Orchestra Nova (ON) which was founded in 1991 with the name of Novocastrian Arts Orchestra (ON 2017, online). It is a 50-piece symphony orchestra under the direction of Mr Robin Fischle. They work closely with Opera Hunter staging operas such as *Les Miserables* and *Carmen*. They also perform with many of the choirs in the Valley including the Newcastle University Choir, Newcastle City Choir and the Waratah Girl's Choir. Broadcasts of their concerts regularly feature on community station 2NURFM who rebroadcast the many outdoor functions they play at including the Mattara Festival and Australia Day Concerts on the Foreshore, and the very well attended 'Carols by Candlelight' extravaganzas held in both King Edward and Speers Point Parks. Their usual seasons are filled with music by composers such as Haydn, Beethoven, Schumann, Dvorak, Tchaikovsky and many others. They also occasionally tread the non-traditional path. On 19 November 2016, they performed a well-received concert at the Lake Macquarie Performing Arts Centre mixing the music of Elgar with featured original artist Amy Vee (ibid). On Saturday 5 August 2017, The Hunter Wind Ensemble performed at Christchurch Cathedral, Newcastle. This much loved venue is often used for events like this and tickets for the concert were available through trybooking.com or at the door (HWE 2017, online).

The City of Newcastle RSL Pipe Band (CNRPB) was founded in 1924 when it was using the name The Newcastle Pipe Band Association (CNRPB 2017, online). Then in 1929, the pipe band changed its name to the Newcastle City Pipe Band. They can lay claim to being the oldest pipe band in Newcastle. There have been a number of alterations to the name since then but in 1969 it settled on The City of Newcastle RSL Pipe Band. It has membership with the NSW Pipe Band Association Ltd and meets every Monday night at Kahibah Public School. In the early days the band maintained itself through public subscriptions and fees from the members. The band played regularly. It played every night except Sunday at a 'fun fair' in the city 'for an amount of two pounds two shillings per night. The Band also played in the Newcastle Suburb of Hamilton where the various shops donated contributions ranging from one shilling to four shillings per week' (ibid). The pipe band remains very popular and donates its services to local functions, often at its own expense. Paid engagements subsidise these free events as well as paying for the purchase and maintenance of the band's uniforms and equipment. In 1994 they were granted charitable status and as of 2017 they have seen 93 years of continuous service to the Hunter community (ibid).

Other large community ensembles from across the Hunter Valley are represented by bands such as Cardiff North Lakes Brass Band, City of Maitland Pipes and Drums Inc, The City Of Lake Macquarie Concert Band, Maitland City Brass Band, The Maitland City Brass Band, Muswellbrook Shire Concert Band, Scone RSL Pipes and Drums Band, Singleton Town Band,

the Port Stephens Community Band, the Toronto and Districts Brass Band, the United Mineworkers Federation of Australia Pipes and Drums Band, the Wangi Wangi RSL Pipe Band, the highly accomplished Waratah Brass Band, the world famous Marching Koalas and the Newcastle Ukulele Orchestra. Many of these bands are members of The Hunter Regional Band Association (HRBA). This association is itself a not-for-profit association that holds annual competitions for full bands, soloist and smaller ensembles. They contribute by supplying community entertainment for free for events such as 'Bands In The Park' (HRBA 2017, online). Of course, many of these players take their cornets, trumpets, clarinets and saxophones into the jazz scene operating in the Hunter.

6.7.4 The Jazz Scene

One of this scene's premier events is the Newcastle Jazz Festival which runs each year in August. According to the website of The Newcastle and Hunter Jazz Club (NHJC) the Jazz Festival, its premier event, is their main activity of the year. It has been running for the last thirty years. The festival 'is regarded as one of the best Jazz Festivals in Australia' (NHJC 2017, online) drawing players from around the country and the region.

One of these players is Peter Gray who studied at Berklee and played with the New York Music Collective. He has performed professionally and regularly since 1987 with over 250 gigs per year. He has played with many nationally recognised figures and recorded as a session musician with many of them. Other players mix work with pleasure. For example, GP Dr Ben Ewald has performed with Le Minibus, a band who specialised in a mixture of European Gypsy music, French tracks and tangos, Greek, klezmer and American jug band music. In his jazz guise Ewald plays soprano sax, alto sax and flute in the jazz trio It's Time which started as an off shoot from Le Minibus. They play swing standards, latin tunes by Jobim, modal explorations from Miles Davis, a few tunes from Theolonius Monk, a popular song or two, and calypso songs. Then there are the various trad and Dixieland bands like Eric Gibbon's New Orleans Jazz Band who play concerts hosted by the Newcastle Jazz Club & Festival. This band also earn income regularly busking at such places as the Newcastle Farmers Markets and sell their CDs to the patrons there on a Sunday morning.

As well as the many smaller ensembles playing jazz in the Hunter, the jazz club puts on shows such as that by Swing Company in March 2013. The Youtube clip of that show features Renée Bergér on vocals, John Kathner on Trumpet, Jason Nelson on Trombone, Allan Ward on Alto Sax, Neville James on Tenor sax, Warren Shaw on Baritone Sax, Peter Bottaro on Guitar, Milton Ward on Piano and Dave Jones on drums (Youtube 2017, online).

Andy Firth's Big Band also keeps the swing tradition alive in the Hunter. This band appeared at Lizotte's in Lambton on June 2017 and are advertised as the Hunter's premier Big Band. They are named after, and directed by, Andy Firth who has a long history in the industry. He has been playing from a very young age and eventually was invited, in 2008, to perform at Carnegie Hall in New York. He is an accomplished composer and arranger and received a MO Award for best live jazz performance and received an Australia Day Honours award for services to music in Australia. He has a series of reeds named after him and is a sponsored artist for Buffet Crampon clarinets, Rico Reeds, Julius Keilwerth Saxophones and Lomax Classic Mouthpieces. He has worked with national and international artists such as Buddy DeFranco, Diana Krall, Wynton Marsalis, B.B. King, Kenny Ball, Acker Bilk, Tommy Tycho, James Morrison, Don Burrows, Tommy Emmanuel, George Golla and many others of a similar stature. His big band is composed of notable local performers and featured vocalists include Julie Wilson and Francine Bell. Andy Firth also teaches privately and has 25 albums issued

under his name, many of which were recorded and engineered by Firth himself at Accessible Music Publishing Studios in Lane Cove, Sydney. The jazz scene he belongs to in the Hunter has been more recently given further impetus through the Newcastle Improvised Music Association (NIMA).

NIMA began its life through the foundational work of Capree Gaul. Gaul grew up in Maitland, NSW, and began her performance career at the Sisters of Mercy Convent in East Maitland where she learnt piano. At 16 she performed in a duo at the Coach House Restaurant in her home town. Singing with her school friend, Kym Collins, they wore batik skirts and sang Neil Young songs, playing a tambourine and singing 'lots of thirds' with songs such as *Hey, Hey, My, My* and *Needle and the Damage Done*. Gaul's musical performances continued throughout her twenties as she played in original rock bands including Amos Keeto and the Insex, Happy Dials, Lipp System, When In Rome and Beat Goes Public. She toured the country performing keyboards in rock bands with a career highlight being an appearance on the national television program *Hey Hey It's Saturday* and ABCTV program *Countdown* in Koo De Tah. Gaul played keyboard and sang harmonies as the band performed their 1986 hit *Too Young for Promises*. Gaul's current band is Trancemission and they play alternate 80s and David Bowie sets in local pubs around Newcastle.

Gaul believes these live performance experiences have contributed to her career as a social entrepreneur. She insists that she 'wouldn't be doing what I'm doing I think, if I hadn't done all the things that happened beforehand' (Gaul i/v, Sept 2015). Gaul creates opportunities for other musicians to showcase their talents in live venues. While she was formally trained as a High School Music teacher that type of employment offers her the freedom to move into short term contracts as a live music producer in Newcastle and once those opportunities have run their course she has been able to return to teaching as a means of supporting herself and her family. As a social entrepreneur she has adopted what is called a Community Business Model which requires a high personal investment of time and emotion. In this role she has set up a number of not-for-profit organisations that benefit Newcastle's musical community and contributes to Newcastle's live performance scene and as such she is an enabler of live musical performances. She uses her social networks to create opportunities for musicians and live performances which harness the collaborative nature of music and often sees many musicians gift their time, voluntarily to create opportunities for themselves and other musicians. Examples include NIMA, Newcastle Improvised Music Association and NYO, Newcastle Youth Orchestra. She has also worked as Head of Music at Hunter School of Performing Arts, and she has been a consultant for University of Newcastle, TAFE and Newcastle City Council, developing educational programs, concert series and booking musical acts for various programs and events.

Gaul understands how to harness the social networking aspect of live performance and she works closely with others to create not-for-profit organisations that connect individuals through their common interests of performing a range of new and improvised music, in particular, live jazz where NIMA has become highly important to the scene in Newcastle. She says it 'works without money, which is why it's still going strong after four years. So we don't rely on any funding' (Gaul i/v, Sept 2015). They nonetheless have two artistic directors. One of these is Adam Miller. He is a guitarist who has an international profile as an emerging guitarist who has been featured in *Guitar* magazine in America. Jeremy Borthwick, the other artistic director, has an extensive national network as well. Together they draw four or five international acts throughout the year from countries such as the Netherlands, Austria, Germany and France. NIMA attracts acts touring the east coast including national level acts from Perth or Melbourne. As a result Newcastle is now considered a regular venue for these touring acts. Audiences pay a cover charge at the door, \$15 or \$10, which gives them performances from top-tier live national and international acts. The door charge is then divided up: '80% will go straight to the

musicians, and 20% is used for our production costs, mainly flyers and posters, print media. We've got an accountant that runs all of that side of things that pays our artists electronically and that seems to work really well' (Gaul i/v, Sept 2015). The Venue is at maximum capacity with 110, which is standing room only, but the usual crowd size is 50 to 60. In 2015 NIMA had generated \$30,000 which goes towards jazz musician wages 'so that's a really big achievement' (Gaul i/v, Sept 2015).

NIMA is an incorporated Not-For-Profit Association that was established in March 2009 to address the lack of performance opportunities for contemporary jazz and improvised music artists in Newcastle. The driving goal of NIMA Inc. is philanthropic, aiming to support local musicians so that they can showcase their skills and repertoire. NIMA is also looking forward to providing earplay to less commonly accessible music genres in a space where established musicians can experiment with new musical styles. It is also NIMA's desire to support cultural revival in the city by focusing performances in the area through concert series and events and by working collaboratively with major institutions and community stakeholders. The NIMA management group continues to develop links with the community, local businesses, 1233 ABC, Dungeon Jazz, UON, TAFE and Newcastle City Council (NIMA 2014, online).

NIMA stages its performances at The Underground, a basement style venue under the Grand Hotel famous as the former home of alternative 80s act Pel Mel. In 2017 NIMA showcased artists such as Holly Clayton and Adam Miller, who both tour internationally but are based in the Hunter. They performed there on 4 April 2017 (NIMA 2017, online). The Daryl Aberhart Trio also appears there regularly, promoting their shows via Facebook and Youtube. Aberhart himself, however, is interested in a wide variety of styles of music as his Reverbnation webpage indicates (Reverbnation 2017, online). Aberhart is one of a few seasoned players who also plays sessions in the local recording studios having played on, for example, former bass player for national act The Cockroaches, Peter Mackie's self-funded recordings one of which was completed at Terry Latham's Impromptu Studios located in the inner-city Newcastle suburb of Tighes Hill.

6.7.5 Recording Studios

Hunter based studios are generally owned and operated by local record producers and audio engineers who themselves have had extensive and varied careers in the music industry.

Robbie Long, for example, is an experienced session player, multi-instrumentalist, Australian Flat Pick Guitar Champion and record producer who moved into the Newcastle region after working extensively in the Sydney metropolitan area. He owns and operates Sound Ideas which is a '32 Track Pro Tools studio based in Newcastle Australia that has been in operation since 2002' (NMD 2014, online).

Rob Taylor is now an award-winning engineer and producer who has worked at the national and international level (Taylor 2014a, online). After training and working at 2NURFM he went on to own and operate Sky High studios in Jesmond, moved to Sydney where he ran 48 Volt and has worked at Rich Studios, Alberts, and The Grove. He was the producer of the highest selling independent album in Australian history, The Whitlams' *Eternal Nightcap*, and his recorded work has been positioned four times as Triple J Album of the Week. He produced ARIA award winning albums, worked with INXS and re-mixed Madonna's *Like a Prayer* (Ian Sandercoe 2014, online). He is currently completing his PhD at the University of Newcastle

teaching into Media Production at the School of Creative Industries and also conducting workshops at 90 Degree Recordings Studio at music retail outlet Musos Corner.

Mark Tinson has operated, managed and owned a number of recording studios both in Newcastle and in Sydney. He has been a well-respected part of the recording scene in the region for many decades. He first worked at Arpiem Studios which was a collaborative effort with two of his musician colleagues, Peter de Jong and Bob Fletcher. Then along with Tony Heads, who had had some success with his own band The Velvet Underground, Tinson established the Cordial Factory studio in his home town of Maitland. Then in the early eighties he built and managed the 24 track Studio 21 in Hamilton for Peter Andersen's Rock City organisation. He was its in-house engineer and resident producer. Tinson then moved to Sydney to manage Reeltime Studios in Darlinghurst and after returning to Newcastle he set up Overhead Studios, firstly on The Hill and then in Cooks Hill, before moving his entire operation to his new digitally focused Steelville Studios in Kotara. Across his career he has recorded over 64 albums and has had a hand in many band's journeys including recording demos for Silverchair and mentoring the Screaming Jets.

Newcastle musician/composer/producer Gareth Hudson has a studio set up in the downstairs rooms of his house built into the side of a hill in Kotara. He continues to tour internationally and record with his guitar and strings quartet, Hudson Arc. He has produced albums across a wide diversity of genres for 'award-winning artists such as The Buddy Knox Blues Band, Amy Vee and Auriel Andrew. He has also recorded and written arrangements for artists including The Hilltop Hoods, The Last Kinection, Briggs and The Beards' (Hudson Arc 2014, online). He is also, according to his Facebook page (Hudson 2017, online), writing and staging another complete musical this one called *Between Worlds* featuring Marissa Sarocca. This piece of musical theatre had its first workshop performance in July of 2017 at the Australian Theatre for Young People in Sydney. Hudson created the score using Sybelius software at his Hazy Cosmic Jive Studios.

Tommirock, operating out of premises on Hunter St in Newcastle West, is run by producer Joel Black with engineer Mitta Norath, Emma Hunter and Laura Wheatley. Wheatley also takes care of website development. In an effort to diversify their income they not only offer services in music production, studio recording, mixing and mastering but also video production, professional photography, website design and artwork, CD and DVD manufacturing, songwriting, voice overs and social network marketing.

90 Degree Studio is run by Allon Silove and Andy Lindsay as part of the Musos Corner retail outlet and offers single, EP and album packages for bands and artists which include recording, mixing and engineering. They also record voice-over material for radio, TV, web and telephone-hold services as well as post production facilities for film and television work. Their gear includes a state-of-the-art control room fitted with the Yamaha Nuage system, Neumann and Yamaha monitoring and surround sound 5.1 as well as an array of microphones and plug-ins.

Sawtooth Studios in Tighes Hill is a facility that has a recording studio and rehearsal space, media production studio, video production and photographic spaces as well as green screen and animation capabilities. Their 'most unique feature is the acoustic design of the two large studio rooms: Studio two was expertly designed for a "live" sound with strategic resonance; Studio one was built to offer a truly distinctive "dead" sonic quality' (Sawtooth 2017, online). They also act as hub to 'connect you with reliable and innovative media freelancers, film makers and musicians' (ibid).

Other recording studios in the Hunter Valley include the Astara Recording Studio in Kurri Kurri, the Jamm Factory in Rutherford, Audio Recording Transportable Studios in East Maitland, Boulevard Studios in Killingworth, Montage Sight & Sound Production in Thornton, John Roy's Recording Studio in Mannering Park, Boom Audio Visual in Tingara Heights, Heavy Feet Studios in Wallsend and Avantgarde Audio Productions run from Largs in the Maitland district. Rock the Nation still operates in Mayfield.

Newcastle based record producer, Terry Latham, is a classical guitarist and lecturer at the University of Newcastle who teaches guitar and music technology at The Conservatorium (Latham i/v, Oct 2014). Latham also teaches Sound Production in the Bachelor of Communication program at UON, a course many local musicians have attended and benefitted from. His Impromptu Studio is central to the Newcastle region and it is featured in Mark Wells' recent video for *Sly* (Wells 2014, online). Impromptu, located in Tighes Hill, offers 'a wide range of current and vintage equipment [as well as] a diverse range of instruments' (Impromptu 2013, online) for musicians to use. Latham explains that he recently:

... sold my analogue 24 track [mixer] because the client base, it just wasn't being used so it was better off in someone else's building, so what I currently use now is SSL I/O for Pro Tools and Cubase. And it works on MIDI and it gives me up to 64 channels in and out of either a Mac or a PC but I'm running it mainly on a PC at the moment. And then preamps I've got Universal Audio, PreSonus, AFX, a plethora of things and yeah and then it's all controlled via a SSL Nucleus controller. So yeah it's quite good (Latham i/v, Oct 2014).

Using this digitally based equipment Latham indicates that his 'client base is diverse and ranges from Classical Ensembles, Jazz to Hard Rock [and they] offer a wide range of support services including file archiving and various recording, audio software application and music tuition' (Impromptu 2017, online). Latham, along with Grant Walmsley from the Screaming Jets, also formed One Henry Records.

One Henry Records is one of a very few record labels to have operated in the Hunter Valley. Peter Anderson's own label was another, as was Bloody Fist Records run by Mark Newlands from an office in the city in King St. Bloody Fist sold material for hardcore techno groups like Syndicate, Xylocaine and Memetic but is perhaps best known for the Nasenbluten recordings which did well in Germany. Steven Picket's case is also illustrative.

In the early part of Picket's career as a music entrepreneur he owned and operated a recording studio before moving into agency, events and design work. As Rossiter et al. assert:

While there are many factors which motivate an entrepreneur, a standard motivation for especially talented individuals within the music industry is the line between passion and tangible results. Musical entrepreneurs have separate motivation for founding a business beyond control of socioeconomic factors ... Musical entrepreneurship is a social service whose contributions change people's hearts, minds, and souls. They expound upon strategic entrepreneurship to discover new markets, new music, new inspiration, and competitive space seeking higher quality strategic actions within the entrepreneurial society. Music entrepreneurs combine their proactive behavioural resources with their capabilities to produce social capital. Friendships aid the formation of musical ventures through the concept of strategic creativity which lends itself to pursuing creativity and inspiration as well as achieving personal rewards (Rossiter, Goodrich & Shaw 2011, p. 10).

Picket was motivated at one period to operate in a fashion similar to a regional record label:

We even started up our own distribution network in Newcastle, the Newcastle Music Network where we actually had bins made, and we took them around to all the local record stores. There were about 30 of them then. And Terry, who became my business partner, and I used to get in the van one day a month and travel around all the record stores and put local product in. We invested in a number of original music acts over a ten year period, and ... we'd lost well over a million dollars over that period, that we'd invested in local musicians only to have them, like Bliss for example, I don't know if you remember them. But we got them to the stage where Polygram were ready to sign them and then the guitarist didn't want to work with the lead singer ever again Terry just came to me one day and said 'From a business point of view mate, we need to look at this' and virtually from the end of one year to the start of the next, EAO turned from being recording studio, managing original artists, and supporting original artists financially, to becoming a cover agency. And financially it was the best thing we ever did. For the soul I'm not sure. But I mean there was a lot of grief and we were worried about things. Terry and I were living on, we had the business running and we were going at, our only wage could be \$98.00 a week because at \$99.00 you had to pay tax and we couldn't afford it. So we'd get \$98.00 a week from this business which was probably, I don't know, probably six/seven/eight years old by this point, and we're on \$98.00 a week for a long time each. And he was going out and doing load ins at the Entertainment Centre or the Workers Club back in the day, and I was doing sound at the Castle. And that's how we made our money to live (Steven Pickett i/v, Oct 2015).

Despite these problems, others ventured into the realm of record labels. One Henry Records initially signed The Hauntingly Beautiful Mousemoon to their label. The popular Mousemoon eventually:

Morphed into The Lovelorn Living Party. They targeted national festivals, and operated under their own portable circus tent called the Bohemian Love Theatre, performing at Peats Ridge Festival, Melbourne Fringe Festival, cabaret shows and community events. Crucial to the group's ability to deliver such interesting projects is the communal space where they continue to meet and create (Gregory 2012, p. 7).

6.7.6 The Media

On 23 May 2013 Anthony Scully, the local ABC online reporter and former music journalist for *That's Entertainment (TE)/The Post*, reported on the destruction by fire of the Morrow Park Bowling Club. Scully wrote that 'the Morrow Park Bowling Club premises had been leased since 2005 for use as an Arts hub and many local performers and artists owe their start to the supportive atmosphere it gave' (Scully 2013, online). Erling Groenhaug, the original drummer of Mousemoon and still a central figure in this arts-based musical community with his current band The Main Guy and the Other Guys, had just released his latest independent EP with a video shot in the city. His large collection of Facebook friends were unsettled by the news that circulated in the local media.

This media has been generally supportive to musical activity in the city. Apart from occasional news stories being broadcast on NBN television, a local affiliate of the Packer based Nine Network, and Prime TV, local commercial radio plays few local recordings as part of its program material but there are a number of other outlets, such as the stories written by Jade

Lazaravic in *The Herald*, that provide promotional space. *That's Entertainment (TE)*, previously written by Stephen Bissett who moved on to become the editor of the Newcastle Weekly, was a lift-out section in the free newspaper *The Post* which has continually highlighted local acts. For example, one story on The Guppies said the band had been:

Snaring regular airplay on the national youth broadcaster with 'Never Like Mondays' and 'Bad Blood' and the likes of Birds of Tokyo, You Am I, The Rubens and Ball Park Music taking the band on the road. In a case of striking while the iron is hot, the band is about to release their self-titled EP at the Great Northern this weekend ... Front man Lachlan Morris told TE ... 'We're all still really very young, so all of this is really very exciting' (Bissett 2013, p. 26).

The national broadcaster's Triple J Unearthed project has also been important for younger Hunter musicians. SHRIMP, Vacation, Majora, Rum Jungle and Splitfeed have all had their music promoted via the Unearthed Website. As an example, so called indie pop act Belle Badi's first single *Time Machine*, which was recorded by Gareth Hudson at his Hazy Cosmic Jive Studio and was then mastered by William Bowden who had won a Grammy Award for his work on Gotye's *Somebody That I Used to Know*, was sitting at number 13 on the Unearthed Top 100 chart as of 11 April 2017 (Triple J 2017, online). Of course, this fact was cross promoted on her Facebook and Instagram pages.

Dave, another alternative act from Newcastle, heard on Triple J, is a four-piece rock band promoted through Triple J's Unearthed webpages. After winning the University of Newcastle's band competition in 2014, the band continued to work live supporting national acts like You Am I. They draw large crowds to Newcastle's primary original music venue, the Lass O'Gowrie Hotel and have released two EPs, the first in 2015 and then again in 2016. With their music on sites like Bandcamp they spent June of 2017 touring from Brisbane through to Melbourne in an effort to cross promote their latest recording (Triple J 2017a, online).

Social media has been heavily embraced by many working musicians in Newcastle. As well as the use of traditional promotional devices such as poster runs, radio interviews and press stories, increasingly Facebook, in particular, is being used by artists such as Mark Wells, Morgan Evans, Justin Ngariki and Dave Carter as their primary 'word of mouth' communication outlet. Brien McVernon posts regularly about his local gigs and when he tours the United States with his rockabilly band his fans at home are immediately aware of each and every show. In particular Bob Corbett has made extensive use of his Facebook page to promote his many gigs around the country including his recent Country Hall tour of NSW. Morgan Evans also kept his fans informed that his time in Nashville was being well spent both performing and writing. The passing of an era in Newcastle music was marked by the recent death of UJ Neill, where many on Facebook told stories and eulogised this former member of The Funbusters and country punk band The Tex Pistols.

Newcastle Live (NL), another company started by Steven Picket, claims to be 'the Hunter's premier online music, entertainment and lifestyle guide' (NL 2017, online). It delivers a comprehensive online environment where those seeking what's going on in the valley 'keep up to date with the latest local entertainment and lifestyle news, reviews, features and giveaways' (ibid). It delivers a very comprehensive gig and events guide which is updated every week and performers can submit information about their shows. Venues can register to be included. It has become an important media outlet for many regional performers and the touring acts which are promoted through the site. Picket suggests that:

The media in this town is, particularly the radio stations, once they became conglomerated into the bigger picture of the world, once that happened I was in a

situation where I was pushing local music to local radio stations and I actually had a program on New FM to start with, and NX FM ... and 2NUR before that. But it was very hard to get support from the local paper, from the local radio stations, and virtually impossible from the local TV stations. It was hard. But I guess one of the things that, as the 21st Century dawned, the digital world came into being, and it occurred to me that I might be able to create something and invest in the creation of something, that could support local music without having to rely on those big media, and become the media. And some quarter of a million dollars later Newcastle Live was born. If I was 20 now and was starting a business, my business would be based on that creativity, that heart, so I would have a studio, a digital studio so I could record and produce the music, and then there needs to be a way that that could go out to the world [which is] now social media, the internet itself. So you've got a website, created a website, having a website's critical. And then there's things like iTunes where you can put a song on iTunes and people can buy it from there, all around the world. So you just need to find a way to get it all around the world. How can you do that? If you've got somebody supporting you, you can spend hundreds or thousands of dollars on social media like Facebook and get it and actually target audiences. I don't know if you know much about Facebook but you can actually go in and target 55 to 65 year old people that live within 25 miles of Newcastle that have an interest in 1970s music. Which I've just done for a Black Feather concert which went from three tables to almost sold out. Newcastle Live did that as an experiment to see if we could do it, and we did. So I think the opportunity for musicians now ...to be able ... to have that, is enormous (Steven Pickett i/v, Oct 2015).

Further media support for local musicians comes from other unlikely online sources. Ison Live Radio (ILR) has been one of the unheralded success stories in local media. Its syndicated programs 'are heard by over three million free to air radio listeners each week covering most major western markets' (ILR 2016, online). In 2004 Newcastle band Texas Radio and the Big Beat's recording of their song *Paris Island* went to number one on the ILR Chart based on requests from the Australian Real Underground Music Show syndicated by ILR.

In addition, the University-run community station 2NURFM and the local Australian Broadcasting Corporation (ABC) radio station have both been supportive of local music. 2NURFM has maintained a local music program for some years while the 1233 ABC Music Awards, organised in conjunction with the Hunter TAFE-run Newcastle Music Week, organised by Christina Sykietis (nee Gerakiteys) and her committee, recognised the talents and successes of Newcastle musicians. One of these was the pop-rock group Supersonic. Their story is illustrative of the local/national/global nexus at work in the Hunter Valley for most musicians seeking to move beyond the local stage.

6.7.7 The Musicians

Supersonic achieved its initial distinction through acquiring the symbolic capital accreted to a number of national band competition wins. These included the Hard Rock Cafe Future Rock 2002 national band competition and the prestigious National youthweek.com 'RockIT' song competition in 2000. Again in 2002 they were awarded Group of the Year at the ABC 1233 Newcastle Music Awards. Three of their videos had been broadcast on national television program RAGE on ABC TV with the second of these three releases, *Love is Everything*, programmed between US acts Ryan Adams and Weezer. Triple J, the national ABC youth radio network, put *When You Fall* on regular rotation. Supersonic mounted tours up and down the

east coast of Australia. Supersonic's demographic in their home market included a wide range of people in the bracket from 13-40 year olds but with a centralised bell curve bounded by 16-28 year olds. It contained both males and females skewed toward females. For example at the *Waking Hour* CD launch at the Beaches Hotel in March 2003, out of 450 attendees in a 250 person capacity venue, 290 (64%) were female. These demographic figures remained reasonably consistent across all their performances. George Davias from the now defunct Sound World record retail group, which was a leading music outlet in the Hunter, stated that:

Supersonic are definitely one of our biggest selling local acts. They are always playing and promoting so they are selling a lot more than other local acts and when they do instores for us their sales are often more than current singles. Their overall sales level has increased as each CD has come out (Supersonic 2003, p. 25).

In addition, Peter de Jong, former singer with The Heroes and then Creative Director with Peach Advertising, a Newcastle based firm that manages national advertising accounts, stated that:

If companies have a new product to launch they'll test it in one of two places in Australia. Newcastle in particular, and Adelaide as well, are seen as a good test market and product release point by the advertising, manufacturing and service industries and if you watch your television on a Sunday evening, especially when the movie is on, you'll see, as an example, new ads for Telstra and other leading companies like them. Telstra's new Postshop brand kicked off here in Newcastle before it was released across the country and the reason major companies do this is that Newcastle has a broad demographic make-up of socioeconomic factors that represents Australia generally. It's a microcosm that contains good cross sections of all areas that make up the general population of the country. This makes it ideal as a test market to launch new products (Supersonic 2003, p. 25).

Supersonic had maintained its activities in this test market primarily through live performance income. All production and management costs within their purview were contributed gratis to the band in expectation of eventual success. In an early form of crowd funding they sourced finance from a large group of small local investors to enable the recording of their last album and the production of a video, the hire of Australian Music Biz (AMB) from Brisbane to promote the east-coast tour and CD release through MGM Distribution. All of this was promoted heavily on their website. After the tour and CD release Supersonic then disbanded having realised that, without the necessary financial input from the venture capitalists that are the major record companies (Haynes 2013), primarily located in Sydney, it would be difficult to expand their operations to the level they desired allowing them to maintain their musical output, and themselves, in an international 'winner takes all' market typical of a neoliberal dominated world.

In this regard the upper end of the recording industry in the form of the International Federation of Phonographic Industries (IFPI), claims success in terms of worldwide sales 'is primarily as an investor in human creativity. Record producers worldwide, independent and multi-national, invest billions of dollars in local cultures. They underpin the livelihoods of a diverse array of artists across the world' (IFPI 2003, online). Nonetheless, the IFPI goes on to state that 'only a tiny minority of these [artists] will ever prove commercially successful' (ibid). In addition, live performance income, adjusted for inflation, appears to have dropped steadily across the decades. According to the Arts Council *Don't Give up Your Day Job* survey 'in 2000-01, artists earned an average of just over AUD\$24,000 from creative and other arts-related work. The average total income, including non-arts related work [day jobs], was about \$37,000' (Australia Council 2013, online). It should be noted that these figures are gross or pre-tax with the majority

earning 'below the income earned by others in the workforce' (ibid). Mark Tinson, a producer of Supersonic's early recordings, noted that musicians, including those from his own era, have, as musical anthropologist Allan Merriam (1964) noted, a low financial status but at the same time a very high importance.

I mean if you're in a popular band, you have a level of approval I guess and you're considered to be an exciting person about town and, you know, you probably get to experience, you know, more exciting things than what other people do. 'Cause the trade off for that is, generally, you don't have as much money as everybody else has and, you know, it's easier to look at people from that era that were musicians and assess their wealth against the people that used to come in to see them. You know, the people that used to come and see us are doing much better than us, but we've contributed to the culture, you know, it's important (Tinson quoted in Sheather 2016, p. 80).

In looking at the income musicians derive, Steven Picket suggests that in terms of comparative incomes between the 1980s and now, for a four piece band:

There'd be lucky to be 10%/20% difference. It's changed very little. Strangely the soloists get a bit more. The soloists I think back then were happy with \$100/\$150. They're now around \$300/\$350 a majority of them, some of the better ones at \$400/\$450. Bands are still, we still get hotels wanting to be able to book bands for \$600 and 'We want a six piece band, \$600, supply your own PA'. [Laughing] Yeah. But still, we get requests. Now we're lucky, we're quite choosy about what we do. We have bands now going out for \$1,200. \$1,200 once upon a time would have been the very top level bands ... There's a local band called The Rumour, which has some amazing musicians including Marty Worrall who appears on The Voice as a backup singer for the Voice, not as a contestant, absolutely superb band. They're worth \$2,500/\$3,000. But you can't get that locally. You just can't. You can in functions but you can't in local gigs week to week. You just can't do it. There have been increases but it's in no way kept up with everybody else's wage increases (Steven Picket i/v, Oct 2015).

After some deliberation Supersonic's songwriters went on to diversify their creative output and financial income. Matt Plummer moved into a more lucrative career as a graphic designer at Peach and Xanders, and moved to the UK to perform as a solo artist for a number of years. He then took up professional photography when he relocated to Melbourne. He eventually returned to Newcastle and has established a successful photographic career. Mark Wells is now also well established in the field of country music. After winning the Songwriter's Prize at the Telstra Road to Tamworth at the Tamworth Country Music Festival in 2008 he was taken to the US:

... to meet and work with some of Nashville's best songwriters and US music industry heavyweights ... The lead single from his debut alt. country EP, the bluegrass infused *You're Still on My Mind* received high rotation on the Country Music Channel and reached the top 20 of the CMC Music Chart. His song *Big Skies* co-written with good friend, Morgan Evans, reached the ARIA Australian Top 50, received high rotation on commercial and country radio and helped Morgan earn a Golden Guitar nomination for Best New Talent. He has [performed] centre stage at the Sydney Entertainment Centre, and appeared on bills with the likes of Alan Jackson, Lee Kernaghan, Troy Cassar-Daley, Kasey Chambers, The McClymonts, and Adam Harvey. Mark has also been recognized for his vocal talents, and was named as Best Male Vocalist at the 1233 ABC Music Awards (Wells 2013, online).

Well's songwriting collaborator, Morgan Evans, has pushed his successes in country music even further. Evans grew up in Newcastle in NSW. He undertook work experience in his final year doing his Bachelor of Communication at UON working for Foxtel as a production assistant. This led to full time work at Foxtel and then in 2013, after releasing two hit EPs that yielded three #1 singles, Morgan was named New Oz Artist of the Year at the CMC Music Awards. This was followed by four more trophies over the next two years, including Male Oz Artist of the Year a number of times. According to his website (Evans 2017, online) he returned to Nashville to record his debut album with an all-star group of A-list musicians and Nashville based Aussie ex-pat producer Jedd Hughes. The album, released in March 2014, quickly went to #1 on the iTunes and ARIA Country Album Charts and debuted at #20 on the ARIA Mainstream Album Chart. The album garnered three #1 singles and his first APRA nominations. He was invited to return to perform at Nashville's CMA Music Festival again as well as at the legendary Grand Ole Opry. This exposure prompted William Morris Endeavor – the world's largest talent agency – to sign Morgan up for international representation. He was also signed as the face of Foxtel's Country Music Channel, which had nominated him for an ASTRA Award and a TV Week Logie Award – a first for an Australian country music star. He hosted television coverage of the CMC Rocks music festival, artist interviews and the CMC Music Awards and then was awarded the prestigious 2015 CMA Global Artist Award. Previous winners including Tommy Emmanuel, Kasey Chambers and Lee Kernaghan. Morgan has relocated to Music City (Nashville) in the USA where country music operates to its own rhythms.

Country music is - I think it's the biggest genre of music here in America. And, it's like the biggest radio format but it's also like by the far the biggest touring thing. So country music is pretty healthy in that respect just because there's so much of America to go to and there's so much country. You know it's like - yeah it just makes sense. But you can tour all year around here playing country music if you want to (Morgan Evans i/v, April 2016).

As a touring and recording artist Morgan Evans is self-employed and his support team is typical of musicians working at this level. For the recording side of his business he is contracted to Warner Bros Records. This multinational entity derives income primarily from the direct sale of product such as CDs and incurs costs through recording, distribution and marketing dependent on the deal. As a result of digital distribution, retail income has moved from stores to web-based outlets, so Evans maintains his own website <http://morganevans.com.au>. It is presumed Evans receives recoupable advances from his record company to make recordings and repays this loan before receiving income. A royalty stream must also go to the owner of the mechanical rights of the recordings, in this case Warner Bros, in addition to other rights. Streaming has meant the income from mechanicals has superseded direct sales but overall income has fallen for the recording sector. Streaming is not terribly lucrative for artists. Evan's publisher is Warner Music who operate on his behalf to promote the songs themselves and licence them to other parties. In exchange Evans writes songs and, it is surmised, gains an advance for doing so from his publisher who customarily maintains a 50% share in the royalty income. Royalties come from each public performance of the song whether that is in concert, broadcast, as part of a film soundtrack, played as a ring tone or streamed. His live performance booking agent is, as mentioned, William Morris Endeavor, and income here is generally derived from direct ticketing and merchandising sales. Risk is spread across other promoters who generally operate on a percentage of the derived income from performances. Evans is co-managed by Kerry Roberts and Rob Potts who would nominally receive 20% of all Evans' income. For Evans, the skills he developed playing and writing in Newcastle, especially his live gigs here, have been critical to his success in the USA.

I think the biggest skill that you can take from those, apart from obviously like being able to play a guitar and sing, is the ability to deal with the unknown and I think that's probably the only one that translates ... I see that a lot here in Nashville. There's sort of two ways you can come up here and it's either like through playing, touring, like crazy, like what we did in Newcastle or in Australia, or you write songs until you get a hit and then you go on the road. And it's so obvious, especially in the first year or two of people's career which way they came up and how they deal with live situations. You need to connect with 50,000 people instead of five, or 50 you know. If there's 50 people in a room you sing a song and make eye contact with every single one of them. You can actually point to every single one of them. But with 50,000 there's a certain - and not that I'm any expert at this either. I feel like I might be trying to sound like I am but I'm not - but it's a totally different experience and level of connection that you have to try to reach those people up the back ... I think the biggest thing from those bar gigs and even now it's like, there's a big sort of culture [of live performance], as well as that collaboration in song writing. I've got a bunch of mates here and when they're playing in town, they're like, 'Hey come, jump up and sing a song with us.' And I'm totally comfortable in kind of situations like that because you know I've done it a million times at Wells's gigs and Wells's done it a million times with me. We've played weddings when the PA broke down and had to jump into the crowd and sing to people, you know, it's like what's the worst that can happen, it's already happened you know (Morgan Evans i/v, April 2016).

While Evans performs his songs in venues large and small in the USA, with occasional returns to the Hunter Valley, his long term collaborator, Mark Wells, played with his own band at the Big Band Benefit Concert for the Hunter Medical Research Institute on Friday 17 May 2013 at the Hunter Theatre in Broadmeadow drawing a large and appreciative crowd. Wells' band still consists of his close friends all of whom are members of a small coterie of highly active full-time professional musicians in Newcastle; Dave Carter, Jason Bone, Bob Corbett, Justin Ngariki, Brian Daly, Robbie Long and Matt Gaudry. All of these performers continue to act as notable journeymen musicians with him. For example, Justin Ngariki has been described by his peers as:

Truly one of our most remarkable hidden treasures. He is currently signed to ABC records and is in great demand as a guitarist vocalist, drummer and songwriter. He recorded and toured internationally with former AC/DC and Rabbit vocalist Dave Evans and still gigs regularly around the country (Tinson 2012, online).

In Kurri Kurri, Kirsty Lee Akers has also successfully taken up country music. She is an ARIA Top 10 Artist and an ARIA #1 Australian Country Artist. In 2007 she won the Toyota Star Maker talent search, a win she shares with others such as Keith Urban and Lee Kernaghan. In 2008 she then won the Country Music Association of Australia Golden Guitar Award for Best New Talent. She asserts that while she is 'proud of her indigenous heritage as a woman of the Wonnarua people (Hunter Valley, Australia), she has embraced a global musical culture and now spends her time between Australia and the USA' (Akers 2018, online). She lives in Nashville for a significant part of the year especially after her album *Burn Baby Burn* generated six number one country songs. She performs internationally moving easily between appearing, for example, at the Calgary Stampede in Alberta Canada and concerts at the Groundwater Country Music Festival on the Gold Coast. Her sixth album has just been recorded at Tommirock Studios in Newcastle West. She is signed to Social Family Records which 'is distributed in Australia by EMI/Universal and internationally by The Orchard' (SFR 2018, online). They also have a 'direct-to-fan platform, the SFR Store, fully accredited by ARIA, and

report sales daily for chart inclusion' (ibid). Akers has self-produced this latest album, *Under My Skin*.

A lot of women might doubt themselves and normally it's more of man's world in the recording studio, but I myself have been doing this my whole life ... I released my first album 11 years ago, so I think I know what I'm doing by now, so I'm just glad I had the courage to step into the producer's seat ... It was a lot harder when I first started out because I was naïve and young and didn't know the ways of the world and just took what was given to me. As you get older you can figure it out for yourself and I'm lucky that I'm finally surrounded by amazing people and most of them are men and they take direction great from a woman (Leeson 2018, online).

Tim McPhee is a musician and composer as well as being a designer and a fashion and music retailer. He has performed with the bands Firekites and The Instant as well as composing music for the TV series *Barinia*. For McPhee social media has changed promotion. At the time of the Firekites first album:

The only way of promoting shows ... was with press ads in Drum Media, and wall posters but for the new show [five years on], well, we did no wall posters, no pole posters or café posters, it was all on social media. And having knowledge of that for any artist I think, particularly in music, is really important now. So skill sets have kind of widened. So now, everyone is expected to have a really strong level of promotion and sufficiency in those mediums (McPhee i/v, Sept 2015).

For his most recent productions McPhee records ideas and musical pieces onto his iPhone with many of these fragments ending up as complete pieces on albums:

We ended up duplicating the channels, because when you record on your iPhone it's in mono, so I just doubled the channels, and EQ'd each channel differently, and then we added bass and it was done. We did try and re-record that but it just didn't have the same sparkle or magic at all ... The original phone recording is actually what's on the album. The iPhone is really important for capturing ideas quickly when you're on the fly, or on the go but you do need quite a lot of gear. I need a lot of instruments and thankfully I've been able to build a really beautiful home studio over the year. But you don't actually need heaps of gear to be able to record with now, which would be more than adequate to record. You've got two stereo channels in and a field mic for recording. You could do soundtrack work on that. With ProTools and interfaces and computers now, you're able to work in studio environments that would have cost hundreds of thousands of dollars only a decade ago ... Globally, within the music industry, a lot has changed over the last three years, last 18 months, last year in particular, with things like Spotify and file-sharing and file-streaming. That's definitely influenced the way we're considering our next step forward, in terms of releasing music (McPhee i/v, Sept 2015).

While electronic dance music (EDM) is generally disparaged from within the regional rock community, it is nonetheless, a form of music making that like all other forms manipulates logically organised sound. On this basis DJs, turntablist and sampling producers can easily be classified as musicians. Noting that Leiber and Stoller had made the claim that, 'we didn't write songs; we wrote records' (Palmer 1996, p. 35), it is also asserted that the 'action and interaction of technology with popular music has changed its expression, form, reproduction, promotion and even its creation' (Durant 1990, p. 176). The 'techniques of collage, involving recyclings, parodies and pastiches' exemplified by many EDM producers, points to the fact that 'the process of musical performance has

become so complex through its links with technology that it can no longer be mastered simply by a musician, let alone be set down in musical notation by a composer as it used to be' (Wicke 1990, p. 15-16). These ideas can be applied to the work of regional EDM producers like DJ Sasch who 'remixes and creates electronic and dance music and plays them live at gigs (house parties, private parties)' (Triple J 2017b, online). He has been involved in making music for over a decade and is attempting to move his musicianship to the next level by approaching 'record labels and regular gigs at nightclubs in the city of Newcastle' (Triple J 2017b, online). Jacob Grant, who works under the name Just A Gent, was a winner of Triple J's Listen Out competition in 2017 and is also an electronic producer and DJ. He appeared for Triple J at the Atari Stage in Centennial Park in Sydney on 27 September 2016 (ibid) and his last tour took him to Coffs Harbour, Perth, Miranda, Canberra, Brisbane, Sydney, Newcastle, Christchurch (NZ), Melbourne, Adelaide, Hobart and, finally, Proud Mary's at Erina on the Central Coast (Just a Gent 2017, online). His music is readily available from his website, on Soundcloud and he posts regularly on Instagram and Facebook.

Each of these performers, and the many others mentioned above and listed on the Newcastle Music Directory website (NMD 2017, online), have contributed significantly to the recording and live performance sectors of the music industry in the Hunter.

6.7.8 Live Performance Venues

As Jane Groeneveld had noted in reference to the AUSMUSIC *Staying Alive Report*, the live performance sector fulfils a number of key roles in the popular music industry including; acting as a major employer for the industry in regional centres, providing the foundation for research and development for the industry by primarily acting as a training ground, exemplified by Morgan Evans case above, as well as being a promotional tool for those artists who have recorded, and as a source of income to allow those sole traders and partnerships typical of the regional music industry to develop and hone their performance, songwriting and business skills (Groeneveld 1998, p. 21). Furthermore, A/Prof Shane Homan, formerly of the University of Newcastle and now at Monash in Melbourne, argues that 'live performance remains a primal popular music experience, which intensifies global debates about stagecraft, individual virtuosity, favourite live performers and sites' (2003, p. 9).

While the number of popular music performance sites in the Hunter Valley has decreased significantly since the seventies and eighties (Sheather 2016, pp. 194-197) quite a number of venues still cater to the local popular music industry. Andrew Goodwin wrote on his blog post:

Until recently I was responsible for running an online gig guide for Newcastle, NSW, Australia. Over the four years that the gig guide operated I published over 60,000 events. Collating and mapping the events was a painstaking task that took many hours each week. Each of the events in the database is accompanied by a latitude and longitude, allowing the events to be located on a map. The animation [on the blog] shows a visualisation of some of the events. The video covers events from July 2009 to December 2009. Orange flashes show areas of live music activity. Major venues are labelled. Each frame in the video covers one hour of real time. View the video in fullscreen [on Vimeo] to make the venue labels readable. This animation uses less than 10% of the gig archive database. The full dataset extends from Gosford in the South, to Taree in the North, and West to Merriwa in the Upper Hunter Valley. Gigs were recorded for a period of 4 years

from October 2006 to December 2010. The full archive of past events can be viewed at the NewcastleMusic.com Gig Archive (Goodwin 2017, online).

Taking a further snapshot across one week in March 2017 we can see that at this time there were at least 102 live venues operating weekly across the Hunter region employing musicians primarily on a Friday, Saturday and Sunday night with an occasional Monday, Tuesday and Thursday gig being offered. There are 46 venues in the Newcastle LGA, 22 in Lake Macquarie LGA, 16 in Maitland LGA, 5 in the Cessnock/Singleton LGA, 7 in Port Stephens LGA, 4 in the Great Lakes and 2 in the Upper Hunter. Of this total, 63 are hotels and 26 are clubs with the remainder being assorted bars and other venues, all of which employ performers on a contract basis from agencies or directly engaged through the musician's own efforts. Most of the musicians employed perform in bands (81 quartets or trios) with 15 of the total employed being in duos. There were 6 DJs operating in this period. These figures do not include any festivals such as Groovin' the Moo, one-off international touring concerts such as occur at Hope Estate in the Hunter Valley wine region, or the numerous weddings that take place in the valley especially during the later peak spring season. Many of these weddings are catered to by DJs such as Mobydisc and Mobile Millenium. Some of the clubs mentioned don't specify who performs, such as Muswellbrook Workers Club whose website attests to the idea that 'it is home to the best live entertainment in the Upper Hunter. Great local bands mix it with many of the top musicians on the east coast of Australia which makes for a great night out ... Sensational solo artists and dazzling duets play live in the club while the best big bands blast it out' (MWC 2017, online). Many venues in the hinterland, such as the Murrurundi Bowling Club, occasionally have intermittent functions where live bands perform such as local fund raising nights or the occasional wedding where DJs primarily supply the music. In Maitland the Grand Junction Hotel, now known fondly as The Junkyard, maintains a strong band roster and has become the venue of choice for many musicians operating in the valley. The musicians who play here include The Lairs, Bluestone Junction, Baghead, LD Express, Magpie Diaries, Frankenbok, Zombonimo, Alby Pool, Muzzy Pep, The Autumn Hearts, Fish Fry and Pow Wow. Zoe K launched her album there on the night of 7 April 2017.

In the Newcastle hub there are a number of venues that cater to musicians who perform largely self-written music or are slightly out of the mainstream. While these venues are limited they are important. These included, until recently, The Great Northern which brought many independent musicians from the capital cities to Newcastle, and also Lizotte's, located in the suburb of Lambton. Along with giving a platform to nationally recognised musicians from the Oz/pub rock period, Lizzotte's stages shows by many roots music performers from the US and supports local CD releases such as those recently organised by Mark Wells. Touring artists like Colin Hay, Jeff Lang and Steve Earle perform there. Other venues include the Cambridge which continues to host a number of young local acts and national touring groups such as Altai, Dune Rats, The Hard Aches, British India, Remi x Sampa the Great, Lisa Mitchell and Dustin Tebbutt, Dave, Split Feed, Touche Amore, San Cisco, Pete Murray, Frenzal Rhomb, Grinspoon and Velvet Elevator.

The Lass O'Gowrie, located near the new Transport Interchange in the western part of Newcastle, supports a diverse array of local independent artists who play for a percentage of the bar takings. If they draw a large crowd, as The Hauntingly Beautiful Mousemoon did, they do well, after they deduct promotional, rehearsal, travel and instrument maintenances costs. These musicians and bands include Dave, Split Feed, Faster Than Light, Octavian, Bin Juice, CREO, Alex Martin, Suburban Haze, Wilson and the Castaways, Dyer Maker, Peasant Moon, Vacation, Treehouse Children, Rave Tapes, Gooch Palms, Arcades + Lions, Polar Chills, Rum Jungle, The Main Guy and the Other Guys and many others. It's noteworthy that their

appearances in venues such as this need to be limited so as to maintain their long-term appeal to the dedicated audiences that attend their shows.

As a venue The Unorthodox Church of Groove, now renamed The Black Malabar and located in Newcastle West, takes a slightly different approach. It has found a niche for itself within the world music and roots genres. American blues master Kirk Fletcher was hired to perform on 17 June 2017 and this show was promoted by Sydney based firm, Gerrard Allman Events. The Bandaluzia Flamenco troupe with special guest dancers Rosalie Cocchiaro and Cahchy Penalver, performed there on 11 June. This performance was booked through www.trybooking.com and was sold out. Miriam Lieberman from Sydney launched her fifth CD Full Circle there on 1 July and performed on her kora (21 string African harp) and guitar, along with the cello, violin and harmonies of Kate Adams and Lara Goodridge.

The Stag and Hunter Hotel, located out of the city centre on Maitland Rd in Mayfield, caters to a more traditionally oriented roots, blues and rock scene with bands such as Den Hanrahan & The Rum Runners, Pop Standen & the Prince of Promises, Alby Pool & The No City Limits Band, Magpie Diaries, The Merewether Fats Blues Jam, Lyle Dennis Express, Leadfinger and The Delta Lions, The Autumn Hearts, The Marquis, Lenny Tranter and the Bagism Revaluation all appearing recently. Likewise, the Wickham Park Hotel, also on Maitland Rd but closer to the city centre, has become a haven for many musicians in the city with acts such as The Porkers, Kenny Jewell, Spy V Spy, Voodoo Express, Grant Walmsley's Freebird, Datura 4, The Hurricanes, Driver 8, King Shakey, Hey Poncho, The Lamplighters, John Larder and Crawfish Stew all playing there during the early part of 2017.

The Northern Star and Station Hotels in Hamilton as well as the Kent, The Delany and Queens Wharf Brewery have all supported cover bands at various times and are serviced by venue consultants like the Eastern Acoustic Organisation (EAO). While the Honeysuckle Hotel largely depends on duos and solitary performers, on the afternoon of 11 June 2017 they catered to a full band, The Whispering Jack Show, featuring long time regional performer and promoter Mike Vee. The band was attended by a requisite crew driving a full PA rig with lights supplied by Value Audio who has been operating in Newcastle since 1978. The hire company's pantechnicon was parked outside reminiscent of scenes typical of the 1980s (Sheather 2016). Further along the redeveloped harbour foreshore could be heard, at Queens Wharf Brewery, the sounds of DV8, the band most people in the 80s thought to have the potential to be very successful nationally (Sheather 2016). On the back of their recorded hit *Dry Your Eyes* they had drawn thousands to their gigs. At the same time that evening a young busker was located in the main pedestrian thoroughfare on the Foreshore earning applause and change.

Located in Islington the Small Ballroom 'under ages' event on 4 June 2017, Vibes for Tribes, featured all young regional bands such as Stanger Than Friends, Smacked Youth, Cherry Stain, Fungus, Looseleaf IV and Sienna Lace. Catering to an older crowd the Central Bar in King St in Newcastle plays regular house music, hosts irregular hip-hop dance nights and occasionally features performers such as Alex Lloyd as well as the Tempresses of Tease Burlesque Revue. The Coal and Cedar bar in Hunter St, modelled on a thirties Chicago speakeasy, features blues music on Wednesday evenings. There is also the very popular University venue, The Bar On The Hill, where Marcus Wright from Big Apachee Promotions and present licensee of the Wickham Park Hotel, learnt his profession. However, the many venues that serviced live performances in the recent past in Newcastle are currently closed and the buildings are being demolished or re-purposed. These include, amongst others, the Ambassador Night Club, The Air Force Club, the Palais and the Empire Hotel. The notorious Star Hotel, scene of a highly publicised riot in 1976 (Sheather 2016) and launching pad for The Heroes career, has had a makeover and still supports some live music, but as of 13 June 2013, the derelict shell of the

once highly popular Jolly Roger nightclub was included by the former Lord Mayor of Newcastle, Jeff McCloy, in a list of places 'we weren't so proud to drive friends past'. He went on to say that:

All cities go through periods of rebirth. And for Newcastle, it's now our turn for change! I am thrilled to see progress at all of these sites. A development application has been lodged for the former Star Hotel for adaptive reuse of the existing buildings. The plan is for a series of low level apartments and terraces – development sorely needed in that part of the city. Just up the road, demolition work is due to start this week at the former Jolly Roger/Hunter Village site. The Joint Regional Planning Panel has approved 17 levels of residential apartment but just clearing the site will be a marked improvement. The benefit of a clear site can be seen where the former Empire Hotel stood. This derelict site was purchased and cleared by the NSW Government (McCloy 2013, p. 11).

Many of these sites in and around the city centre have become exemplars of the changes the city has gone through in the past four decades. With the rise of two major malls in the suburbs that resulted in the emptying out of the main retail area in Hunter St, the closure of the BHP steel mill and the re-development afforded by the destruction wrought by the earthquake (Sandner 2010), the change from working class occupations to middle class employment at the University and John Hunter hospital, the increase of throughput from the coalmines in the Hunter Valley with Newcastle now operating as the world's biggest coal exporting port and the development of the restaurant scene in Beaumont St and Darby St, the character of the city has been changing.

The iconic Newcastle Workers Club, which hosted Crowded House on the night before the earthquake in 1987 caused it to collapse, leading to a number of deaths, has failed to regain its level of popularity and was bought up by the Panthers group of clubs from Sydney. It now hosts occasionally successful concerts from national touring bands such as You Am I and Parkway Drive as well as international artists like Andrew Strong and the Commitments from the UK and Anderlin from the USA. The Wiggles, an internationally famous children's band, have been highly successful at this venue.

Further down King St is the King St Hotel, formerly The Castle. Once a late night home for rock bands, this nightclub, situated across the street from an all-night MacDonalds fast food outlet, promotes 'the finest DJs from across Australia [and its] cutting edge sound and lighting' (King St 2013) making this venue extremely popular with the University and tradesperson oriented demographic. As an example of the entertainment, on the weekend of 7-9 June 2013 it hosted appearances by out of town EDM proponents Propaganda, Our House and Sampology. On the night of 7 June there were queues of attendees lined up around the corner and down the next block waiting to gain entrance into the venue. The venue's website noted that 'along with all Newcastle nightclubs, King Street Hotel has a 1.30 am curfew and 3.30 am closing time' (King St 2013, online).

Finnegans, a former Irish pub on the corner of Darby St and King St in Newcastle, features Tuesday through to Saturday three rooms of entertainment relying primarily on Electronic Dance Music (EDM) using DJs based out of Sydney to entertain its patrons. These performers include DJ Brooke Evers, DJ Tig, DJ duo Indigo Starlight, EDM producer and DJ Kidd Kaos, DJ Ricky Bonomini, hip-hop DJ Benny B and Josh Blair. Entry to this venue is free until midnight when a ten dollar charge applies. Posted outside the venue is the house policy on the responsible service of alcohol and the responsible conduct of gaming. They also have an ID Scanning policy. Like all the venues in the city, they comply with the 1.30 am lock-outs combined with a 3.30 am closing time which have been in operation since 2008.

One security guard, interviewed for a study undertaken by researchers Tomsen, Homan and Russo (2003), asserted that ‘people pulling guns, knives, stabbing - all these things are out there and they do happen and you can’t sweep them under. In my twenty years I have probably seen all of it. Every year it evolves into something more sinister now with needles, bloody syringes’ (2003, p. 95). Tomsen et al. suggest that ‘serious conflict and violence at licensed venues is not yet uncommon in the local region’ (2003, p. 2). These circumstances resulted in a news story in the national newspaper *The Australian* reporting that:

Researchers from the University of Newcastle and the NSW Bureau of Crime Statistics and Research [asserted] a 1 am lock-out combined with a 3 am closing time at 14 licensed premises from March 2008 reduced the number of assaults in the area by almost 200 in the following 18 months The Newcastle restrictions were instituted by the former Liquor Administration Board after a public disturbance complaint was lodged by NSW police against hotels with high levels of assaults. They were bitterly opposed by hoteliers, who now say the measures have caused insolvencies and harmed Newcastle's night life. ‘No one thought the measures would be so devastating to business,’ says Newcastle publican Rolly de With, who is president of the local chapter of the Australian Hotels Association (Dusevic 2010, online).

The researchers went on to claim that the curfew approach was ‘unique internationally’ which provided the possibility for policy implementation around the world. ‘The trend internationally has been to longer trading hours. This study presents a bold challenge to that trend’ (Dusevic 2010, online). These Lock Out Laws were then replicated in Sydney in 2014 also having a detrimental effect on the night time economy there in an attempt to reduce alcohol-fueled violence as they had done in Newcastle.

These are not the only restrictions venues have faced in the Hunter. Newcastle based music entrepreneur, Steven Pickett, stated that:

The lock-out laws in my opinion did nothing but decimate the Newcastle social scene. What was 30,000 people went down to 3,000 people that had to be shared among what venues there were ... I’m passionate about giving local musicians somewhere to show their wares but it’s being strangled. And it’s being strangled by so many things that we’ve all documented and now it’s still happening in the year 2015, and it really needs to change. So the legal framework at the moment is absolutely against anything live in Newcastle and it needs to change, and in the last three weeks, two instances, the CBD and the Terrace, are prime instances ... they’ve been holding music there [at the CBD], live and DJ and recorded music, for at least 30 years that I know of and probably longer. Sometime in the late 1990s they built a block of apartments at the back. The other day a person in that block of apartments made a complaint and said that their mental health was being affected by the volume of music, and so the CBD Hotel is not allowed to have music or patrons in their courtyard after 10:00 pm. Now to give you an idea of the framework, the legal framework Newcastle City Council started to receive a lot of noise complaints and I have only learnt this recently from an acoustician, a professional, a person who goes and measures sound for a living. He said to me that Newcastle City Council has the strictest noise conditions in the State, if not Australia, and they came about because their mission was not to manage the noise complaints more efficiently but to eliminate the noise complaints, so that if someone complained about the noise they needed a mechanism where they could shut the pub down. That was easier. And that’s what’s happened ... There needs

to be two things: number one, entertainment precincts that are protected from that type of thing, and secondly, a first occupancy rule I believe should be brought into New South Wales where if you've moved next door to a pub that has live music you know that you can't do anything about that. Move somewhere else ... cities that have experienced the decline and then gone 'Well uh oh we've done something wrong here' have reinvigorated, and they're Melbourne and Brisbane with Fortitude Valley, they've actually got three entertainment precincts that have protected venues (Steven Pickett, i/v Oct 2015).

While night time venues struggle with these issues, intermittent day time festivals have also become increasingly popular. As one example the Fat As Butter Festival 'has attracted international and Australian acts to Newcastle each spring since it began in 2008' (Tarala 2013, p. 3). Furthermore:

A crowd of more than 11,000 flocked to last year's event to see a host of acts including Grinspoon, 360 and Good Charlotte. Newcastle City Council's economic development and tourism services manager Jan Ross said an application had been made by Mothership Music (the Fat As Butter promoter) to create a temporary camping precinct for 1500 festival-goers at Stockton's Ballast Ground from 18-20 October ... Ms Ross said the application for the 750-site camping area was under review, including reports on security, transport, police surveillance, first aid, noise management and environmental impact and safety. She said the Fat As Butter camp was expected to bring between [AUD]\$120,000 and \$145,000 in business to the Stockton community and could provide low cost camping-style accommodation close to the city for future events (Tarala 2013, p. 3).

For the established music industry in Newcastle these one-off events tend to contribute little long term income to the industry itself since local acts, if they are added to the bill, are paid little in comparison to the out-of-town headline acts and production is often sourced from Sydney suppliers rather than local firms such as Scion Audio or AI Audio & Lighting. What they do contribute for local musicians are opportunities to study how professionals in other areas conduct their business and they thus present possibilities of action to them, as has occurred throughout Newcastle music industry's history (McIntyre & Sheather 2013).

In addition one of the cities other long term promoters, Peter Anderson of Rock City Event Marketing (REM), now a diversified promoter and event organiser rarely dealing with local music, laments the loss of a business driver in that area typified by policy frameworks like the Australian radio quota system. During 30 years of existence, REM brought artists such as The Beach Boys, Bob Dylan, Cold Chisel, Crowded House, The Cure, Faith No More, Garth Brooks, INXS, Oasis, Reba McIntyre, The Seekers, Soundgarden, Split Enz, Sting, The Supremes, Paul Kelly and Pink (REM 2013, online) to city venues and went on to compete with concerts staged in the Hunter Valley wine region. For example, having just completed their 'purpose built 19,000 capacity outdoor amphitheatre at our Hunter Valley Winery' (Hope Estate 2013, online), this winery bought Fleetwood Mac to their venue on November 2013 having staged other concerts by artists such as Carole King and Leonard Cohen. Bruce Springsteen bought his E Street Band from the USA to perform there on 18 February 2017. Needless to say these shows draw large crowds and their discretionary entertainment income from across the valley, from within the city of Newcastle, and elsewhere.

6.7.9 Manufacture, Repair and Retail

Starting off in Speers Point, Hunter Valley Violins (HVV) is an instrument repair business who services the Hunter Region. It is now located on Hunter St in Newcastle. David Robertson, the luthier who owns and manages this business, has accrued fifteen years of experience building and repairing violins, violas and cellos. He is regarded as a master craftsman who sells not only his own instruments built on the premises but strings and instruments suitable for students, fine violins and cellos from makers such as Gliga, Enrico, KG, Jean-Baptist Collin-Mezzin, Herman Dolling JR, H. Dennis and many others, as well as some remarkable antique instruments available for inspection on request (HVV 2017, online). His counterpart in the popular music world is Len Biglin who operates an instrument repair business in Charlestown. As well as fixing guitars and amps, and occasionally making them, he plays guitar and blues harp with Big Daddy's Cajun Blues Party. He also played with the Mutineers, Voodoo Daddy, the Polecats and Serious Business as well as sitting in on many occasions with long time Newcastle blues aficionados, The Witchdoctors (Biglin 2017, online).

Centauri Audio, located in Newcastle, provides 'support services to musicians and the associated music industry.' This business is based in Waratah and customers come from the city and the valley and right across the north-west of NSW. They:

Provide service, repairs and modifications to professional music production equipment, such as guitar, bass & keyboard amplifiers (valve amps a specialty), speakers (including recones), mixers, effects units, power amplifiers, PA systems and lighting systems (including dimmers, desks & moving lights). We can also design and manufacture custom speaker systems (high-efficiency PA types a specialty) to meet specific targets, utilising quality components from various manufacturers. [They] are currently authorised repairers for Yamaha Pro Audio, VOX, Fender amplification, SWR, LightEmotion, American DJ, Wharfedale Pro Audio, dB Technologies, HK Audio, Digitech, David Eden, Peak, Markbass, Hiwatt, Laney, with more pending (Centauri Audio 2017, online).

Similar to Value Audio, Scion Audio operates as a music industry hire company. Starting in the mid-1970s, for many years it was the PA supplier of choice for the huge number of bands playing during the 1975-1987 period (Sheather 2016). While Value Audio still concentrates on working with bands, Scion is primarily an events company supplying not only public address systems and lighting rigs of all sizes and types, and the crews to run them, but also theme lighting, draping, event equipment and staging. They hire this equipment out for everything from home parties through to very large corporate events (Scion 2017, online).

One of the major musical institutions in the Hunter is Musos Corner, a music retail outlet run by Sandra Lindsay and her team that now has an extensive online presence nationally. Beginning in 1967 this company has supplied equipment to amateur and professional alike. It employs a large roster of music professionals as sales consultants and advisors as well as a digital sales team catering to their national and international customer base. Their in-house studio, training facility and hi-tech showroom are industry standard nationally. Their website is state-of-the-art and highly active where pages such as Musos TV demonstrate all of the activities they are involved in, from teaching bass, drums, banjo, ukulele, piano and guitar through to clips on the Newkulele Festival they sponsor, through to a virtual walk through tour of the outlet (Musos Corner 2017, online). They also run ancillary businesses such as the Drum Shop, Foley's Pianos and 90 Degree Studio. Their nearest competitor in the Valley is Music Headquarters in New Lambton which also operates in the musical instrument sales, teaching, recording and rehearsal studio space. Other rehearsal rooms can be found at venues such as Sawtooth Studios in Tighes Hill which also doubles as a purpose built recording studio. This studio has been designed to also shoot photography and film videos (Sawtooth 2017, online).

With the demise in the physical sale of CDs, the Valley's major family-owned recorded music retail outlet Sound World has closed, as has Beaumont St Beat and now the Sanity chain store in Market Square, leaving the JB Hifi chain in the suburban malls the only outlet for hardcopy recordings. Second-hand vinyl and CD can be purchased at Snafu Records and Rices Bookstore both in Hunter Street. The situation for record retail is a simple reflection of the globalised and digitised world they now occupy. Most consumers of music in the Valley are now very familiar with downloads from websites such as iTunes but are also cognisant of downloading material, for example, by accessing YouTube clips and converting these to MP3 files via freely available converters such as Video2MP3. As a recent insertion in a discussion paper for the Australian Law Reform Commission noted, as was cited above, 'worthy individuals and citizens ... are knowingly, ignorantly or indifferently finding themselves in breach of international and national copyright law. And they intend to keep on doing exactly as before' (ALRC 2013, p. 46) necessitating a rethink of all related business models. Given these circumstances Steven Picket thinks:

Publishing is where all the money is. And I think if you can get a song and get it out there and someone else records it or it gets put on a compilation CD that's where the money is. If I was 20 now I'd be pushing people into the world of song writing, and I'd be working on social media ... my business would be based around publishing and social media. I would start a completely different business model now, and I think actually musicians have more power now because they can, realistically, can buy what I spent my life building, \$120,000.00, that could equip you with four studios nowadays basically. You can buy great equipment, you can record with the ability to edit and enhance it digitally, and then you've got the internet to take it worldwide (Steven Picket i/v, Oct 2015).

6.8 Conclusion

Social media has made a significant difference to the way musicians now publicise themselves and promote their work in the Hunter, with commercial digital sites proving to be a boon to regional promotional opportunities. Despite these changes, formal and informal music education remains a vital part of the various support mechanisms available to the personnel working within the music sector of the creative industries in the Hunter Valley. This includes the delivery of a variety of tertiary courses staffed by former industry professionals who mentor younger performers as they earn an income. Community based folk music clubs and venues carry the torch for a more idealistic time while the many brass, pipe and concert bands and orchestras operating in the valley also provide opportunities for on-the-job training, as it were, in ensemble skills. The jazz scene has depended on these players bringing their skills to the wide array of jazz performances and styles present in the valley. Many of the virtuosos also go on to find what limited work there is as session players in the local recording studios. These have had to diversify their operations with many now not only providing recording services but also moving into video production, drone services, professional photography, website design and artwork, CD and DVD manufacturing, songwriting, voice overs and social network marketing. The locally focused media has been generally supportive although the larger networked organisations have done little to support regional musicians.

These musicians still struggle to earn income commensurate with the rest of the population with live performance remaining a principle source of income. Nonetheless, there are still a considerable number of musicians performing in the valley with many younger performers from the rock and EDM genres taking advantage of online promotional opportunities such as SoundCloud and Instagram. Facebook is ubiquitous for all genres including for the many

community based groups. While opportunities in the live realm are extensive, they have certainly diminished for popular musicians from their heyday in the eighties. The Lock-out laws and very tight noise restrictions for live venues in Newcastle, in particular, have stifled much of this activity in this regional capital. The hire companies that depend on these performances have managed to remain in business while instrument manufacturers and repair businesses remain at the boutique level. Instrument retail businesses that depend on both amateur and professional musicians in the region for their income have also diversified and taken advantage of the opportunities online retail has provided to move on to the national stage. The music sector overall has had to deal with digitisation, in particular, as this bellwether sector continues to change and adapt to these circumstances.

The changes wrought by the use of digital technologies have had an effect at the local and global level. The diminishing of income for international recording artists as a result of downloads, both legal and illegal, has meant these acts are chasing what they believe is a more lucrative return from the live sector and are increasingly capitalising on markets traditionally serviced by local industries. Given the small recording fraternity and the limited set of studios operating in Newcastle, and overall income derived from recording diminishing globally, most local musicians' income is tied to the regional live circuit, but gig fees have not risen commensurate with other professions' wages and fess. The loss of performance venues in the city as a result of urban redevelopment and the security issues which resulted in a night time curfew in the city, coupled with the rise of the festival touring circuit, has meant the opportunities for the local music industry continue to shrink. This has resulted in musicians in Newcastle having to diversify the array of services they offer while also coping with a loss of income from their traditional sources. Promoters and agents have had to diversify their business activities since the lucrative period of the eighties when structural features such as the national radio quota and appearances on nationally broadcast television programs provided central business drivers. Many of the key musicians from that period have found careers in education and now provide mentoring frameworks for younger performers that complement the ongoing gift economy of this regional centre.

In terms of continuities, the field of contestation and cooperation revealed in the Newcastle music industry can be best understood as a scalable interactive system not a collection of isolated parts. This field continues to be a dynamic network of interlocking choice-making agents who produce and circulate musical goods, ideas and knowledges across a wide variety of genres and styles. These domains of knowledge still present possibilities of action to each agent in the field, be they musician, producer, DJ, venue proprietor, booking agent, promoter, media operative, policymaker or educator, and each brings something unique to this shared environment. They collaborate, compete, mentor and support each other through both a gift and financial economy trading various levels of the social, cultural, symbolic and financial capital necessary to operate inside this field. This basic framework has not changed. There is a need to examine more fully the relationship between the structural imperatives for economic competition and a musician's professional disposition toward cooperation. The question of whether a *laissez-faire* neoliberal international market with its emphasis on a winner-takes-all approach (Thussu 2000) is the best environment to operate in for local musicians who premise their creative interaction both on and off stage on collaboration, is a necessary one to ask.

Creativity & Cultural Production in the Hunter

An applied ethnographic study of
new entrepreneurial systems in the
creative industries.



Final Report:
Hunter Creative Industries

Radio

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7. RADIO

7.1 Introduction

Radio is another important and mature sector within the creative industries' sphere in the Hunter. It has a long and deep history within the region.

7.2 A Brief History of the Radio Industry in Australia

The ongoing history of radio in Australia (Holloway 1975, Potts 1989, Tebbutt 1989, Lane 1994, Walkington 2000, Criticos 2016) can be divided into a set of distinct but overlapping eras.

Firstly, radio developed as a 'new technology and means of two-way communication, in the 1920s' (Miller in Cunningham & Turner 1993, p. 41). After the early experimental years, listeners could purchase what was called a sealed set which meant they could only listen to the station permanently fixed on the dial of their particular radio set. This method of controlling radio broadcasts and income proved unworkable as listeners 'simply opened the sets up and adjusted them to the stations they wanted' (Walkington 2000). The Post Master General's office, the entity in charge of licencing radio, then divided broadcasting stations into those which were financed by listener's licence fees ('A' Class stations) and those that were financed by advertising ('B' Class stations) and abolished the use of sealed sets (Holloway 1975, p. 13). After some stations got into financial difficulties due to high set up costs, the Federal Government established a Royal Commission and promptly nationalised the 'A' class stations. The Australian Broadcasting Company (ABC) was formed and entered into a contract with the government to supply programs for a national broadcasting service. As the Class 'A' licences expired the ABC took them over. It was difficult for the Company to keep all Australians happy given the vast distances and scattered population, so the government again stepped in and announced it would take over broadcasting and established a broadcasting service similar to the BBC in Great Britain. The Australian Broadcasting Commission Act was passed in 1932 and the government took responsibility for providing a national service 'and ensuring that both the national and the commercial stations operated in the public interest' (Holloway 1975, p. 15). The Australian Federation of Commercial Broadcasting Stations was formed at the time the ABC was formed to protect the interests of the 'B' Class stations.

Secondly, radio came of age as a 'broadcast medium, in the 1930s' (ibid). The structural history outlined briefly above then set the scene for what has become known as radio's Golden Age (Lane 1994). The medium was the primary one in the country and its success saw, in its latter period, the 'emergence of a diverse production sector and debates over Australian content and wartime censorship in the 1940s' (Miller in Cunningham & Turner 1993, p. 41).

Thirdly, television was introduced in 1956 in Australia which heralded marked changes in radio audience listening habits. When the major advertisers transferred their money to television, doomsayers predicted the death of radio, outmoded by the new medium. The large-scale show business aspects of radio in the 1940s and early 1950s were certainly no longer viable; commercial radio instead fashioned a new identity for itself (Potts 1989, p. 168) which marked the second coming of radio – the age of specialisation (Keith 1990, p. 163). The niche that radio saw for itself was linked, at this point, to the fortunes of popular music and the adoption of formats such as Top Forty AM radio borrowed from the US.

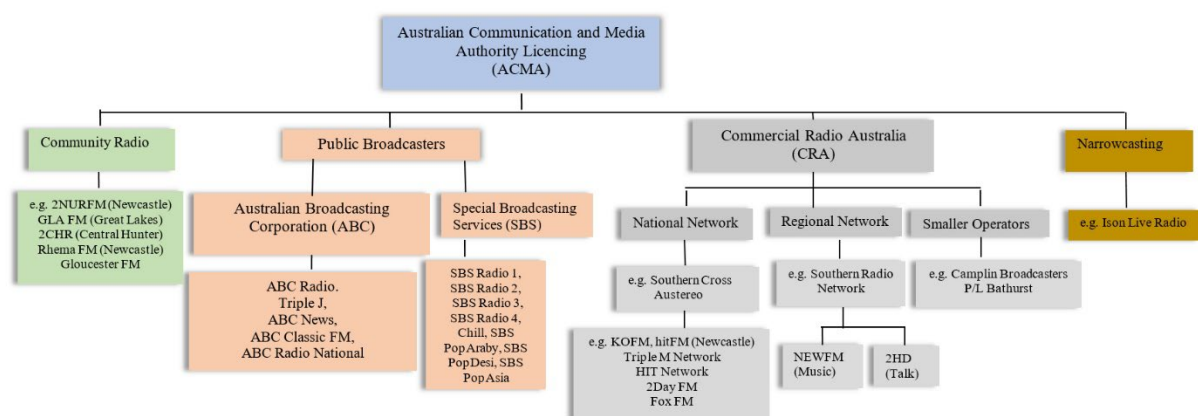
Fourthly, the 1970s saw the continuation of what become a fairly rigid approach to formatting, the advent of JJ on the ABC and the inception of public or community radio which itself was coupled with the introduction of FM (Letch 1997). The early seventies also saw the rise of media mercenaries such as Rod Muir, who had an immense effect on commercial radio. From

1974 onward, the Australian content quota ensured a vibrant music industry which depended on radio for promotion while radio conversely depended on it for content (Marlow 1995). By the time the 1990s came around radio was involved in the emergence, proliferation and consolidation of national commercial and government radio networks, an increase in talk radio, followed by further niche broadcasting and then the arrival of narrowcasting. As Steve Ahern asserts, ‘the convergence of radio receiver technology, the further specialisation of niche formats, increased competition from other media and changing consumer habits’ (2006, p. 14) can be seen in the still birth of digital radio (DCA 2017a, online) and the advent of internet radio and podcasting.

Finally, competition from streaming services continues to challenge ‘radio to keep adapting and reinventing itself to remain relevant to its audience into the future. The past 100 years of radio history indicate that the radio industry is capable of meeting that challenge’ (Ahern 2006, p. 14). Despite all the increased competition and technological change, radio remains ‘the world’s most ubiquitous medium, certainly the one with the widest reach and greatest penetration’ (Pease & Hendy quoted in Hendy 2000, p. 2).

7.3 Structure of the Radio Industry in Australia

Radio in Australia operates across three, or now possibly four, sectors. This diversity is tied to radio’s early history as outlined above. As a result, radio in Australia is in a unique structural position. It has a commercial (free-enterprise) sector and a national or government funded system centred on the ABC. These two systems developed and now operate side by side. The former was based on the American model and the latter on the BBC model used in Great Britain (Webb 1981, p. 159). Community radio, as a unique and third radio sector, came much later with the introduction of FM in the 1970s. Added to these are now the nascent independent internet-based radio services that rely on streaming, podcasting and other digitally related operations. The Department of Communications and the Arts has regulatory oversight of the radio industry (DCA 2017, online) and administers key legislation like the Broadcasting Services Act 1992 (BSA) and the Radio Communications Act 1992 (Radcoms Act) (CRA, 2006, online). While the Australian Communications and Media Authority (ACMA) is the regulatory organisation that oversees the ownership and control rules for broadcasting services, ‘most aspects of program content are governed by codes of practice developed by industry groups representing the various broadcasting sectors’ (ACMA 2006, online). Commercial radio is represented by Commercial Radio Australia (CRA), community radio is represented by the Community Broadcasters Association of Australia (CBAA) while independent and or net based operators are partially represented by the Independent Australian Radio Broadcasters Association (IARBA). The ABC is responsible to Parliament through the ABC Charter.



7.4 Business Models

Various business models operate across the radio industry.

1) Commercial radio depends for its income on aggregating an audience around its content and on-selling this audience to its advertisers. Ratings services (Neilson 2005) are employed to determine the size of the audience share the station aggregates in its particular region. 'Under their licence conditions, commercial radio stations are entitled to charge fees for broadcasting advertisers' commercials. Advertising revenue keeps the station on air, which keeps listeners tuning in, who keep attracting advertisers, who keep paying the dollars, which keeps the station operating' (CRA 2002, online). Expenditures include infrastructure costs, licences (ACMA, APRA), wages, operating costs and studio production costs for commercials, unless these are sourced from national agencies.

2) Government radio is funded through Parliament and this source of monies is augmented through sales of merchandise both online and at ABC stores throughout the country. The ABC's 'revenue can be classified into two broad groups: Government appropriations (amounts legislated through the annual Appropriation Bills Nos 1 and 2 for the use of the ABC); and revenue from independent sources (principally, the sale of goods and services)' (APH 2017, online). Its remit 'under the ABC Charter found in section 6 of the Australian Broadcasting Corporation Act 1983' (APH 2017, online) is the requirement to 'provide innovative and comprehensive broadcasting services of a high standard as part of the Australian broadcasting system consisting of national, commercial and community sectors and to transmit news, current affairs and entertainment programs outside Australia' (APH 2017, online).

The ABC delivers radio broadcasting services over four national radio networks: Radio National, ABC Classic FM, Triple J and ABC NewsRadio; local radio through nine metropolitan radio stations in capital cities and Newcastle, and 51 regional radio stations throughout Australia; three Internet music based services; and Radio Australia, an international service broadcast by shortwave, online, satellite and local rebroadcasts to the Asia-Pacific region in five local languages Indonesian, Tok Pisin (Pidgin), Chinese, Vietnamese and Khmer (Cambodian) as well as English. Aside from news and current affairs, English lessons, sport and music from Australia, Radio Australia's programs cover the events and issues of the region with a particular emphasis on health, the environment, science and technology, agriculture and education (ibid).

The ABC is required as the major national public broadcaster, to contribute to and reflect Australia's national identity (APH 2017, online). This is why it is funded.

3) The community sector (CBAA 2006) is dependent for income from sponsorship and whatever grants are available to it. This sector tends to run on a shoestring using volunteers wherever it can and avoids some cost by pooling resources. For example, CRN is the national Community Radio (Satellite) Network. This use of the network is a way for community stations who generally have limited financial resources, to share programs or short interviews/segments with each other allowing access to news and specialist programs from a weekly schedule for rebroadcast on the stations' local frequencies.

Many stations also tune in for special broadcasts of national festivals, sporting and political events, documentaries and community service announcements.

Stations pay a flat quarterly fee (based on their income) and can then pick and choose as much or as little of the programs/content on offer as is suitable for their listeners. The Digital Delivery Network (DDN) now accessed by many stations, means that most ComRadSat programs/content can be automatically recorded, for later broadcast at a time suitable to the station (CBAA 2006, online).

4) Independent radio is the sector where a diverse set of business models operate, and more innovative entrepreneurial approaches tend to occur. For example, Ison Live Radio (see: <http://www.isonliveradio.com/about.html>) syndicates weekly programs bought up by terrestrial stations around the globe. These are produced in a variety of formats with 'over a million free to air radio listeners each week' (Ison i/v, May 2015). ILR also produces non-stop music programming, 24 hours a day every week, in nine differing formats which are delivered through the Internet or via satellite. Ison claims that 'although web casting is a somewhat minor concern with us, we also have a substantial share in online radio in Australia with our daily web casts reporting listeners from one end of the country to the other' (ibid). Income is primarily derived from the sale of syndicated programs and the more traditional sale of aggregated audiences to advertisers.

7.5 Operational Methods

Most stations in Australia including the ABC, are now part of a network of multiple stations managed, organised, financed and programmed from a centrally run administrative centre (Criticos 2016). While the proprietors of the commercial networks may be larger national and international companies the network structures and their operational methods have remained reasonably consistent over the last three decades. The size of stations in these networks may vary. 'Generally, a metropolitan radio station employs more staff than a provincial or regional station. Sometimes, in smaller stations, team members may have responsibilities for more than one department. For example, in some stations the on-air announcer may also be the program director' (CRA 2017, online). However, each of these stations, be they in the commercial, community or government sectors, have a similar set of positions within them which consists of administration, programming (including news) and production, traffic and scheduling as well as various technical roles and functions. For the commercial sector these positions also cover sales and audience research.

The administration sector of a station includes the general manager, often a company secretary and their combined staffs. The general manager and their staff are involved in 'hiring and firing personnel, issuing paychecks, overseeing that the station meets ACMA guidelines, undertaking accounting and book-keeping, purchasing office supplies, stationary and equipment and organising correspondence and generally ensuring that the station operates in a businesslike way' (CRA 2017, online). The station management and administration area of a radio station's activities falls under the direction of the station manager who has overall responsibility for the running of the station. 'The administrative support staff, including the accountant and accounts personnel, reception and personal assistants to the different managers and teams, perform tasks [as they do in most businesses] and are integral to the station's success. The size of the administrative team largely depends on the size of the station' (CRA 2002, online).

The sales section of the station generally has a sales director and a team of salespeople whose job it is to produce the station's revenue. In essence, the sales team sells the accumulated audience acquired by the programs provided in the program department. The ads they sell are sold on the basis of airtime cost which is related to daypart and ratings/share. Most often the account executives deal with what are known as local accounts where advertising is sold to

local businesses in the station's service area. Advertising is also handled by local and national representatives and agencies. National accounts are dealt with when advertising is sold to big companies purchasing media across the continent. These accounts can have a dedicated national account executive but are more usually handled by the sales director who will most often deal directly with an advertising agency, as most national businesses would find it cost inefficient to deal with all radio stations, or networks across country. These accounts can also go through a media representative as well. The advertising agencies the sales director deals with are the middle or intermediary tier in the sales process. The client works with the agencies to tailor the ads for business and place them in the appropriate stations. Account executives often have mixed feelings about agencies. Larger agencies tend to be good clients for stations as they place regular and bulk advertising, so sales directors are keen on them. However, the agencies can drive hard bargains in terms of rates as they usually know the industry well. This relationship also diminishes the prospects available at a local level for the account executive. Sales people most often work on a retainer which is usually a minimal payment to maintain their personal financial base and this is supplemented by a commission which is normally based on 10% or 15% of written sales. The commission acts as a major motivator for the sales executives. They operate on a budget which is usually set by the sales director and is based on a projection of wages, overheads and running costs etc. of the station. The station's revenue, and thus ability to continue operating, is critically dependent on the sales executives meeting these budgets.

The sales team works closely with the creative director and copywriter, often the same person, who receives a creative brief from an account executive or sales executive. 'The brief contains information received from the client about the marketing, advertising and campaign objectives of the product. The copywriter works under time restrictions, client requirements, deadlines and, sometimes, government regulations. He or she aims to write exciting and fresh radio commercials that observe a clients' advertising objectives and appeal to listeners' (CRA 2002, online). Once the creative director has a script to work with, he passes these requirements on to production. 'In compiling the programme or commercial, producers utilise the station's resources and sometimes call in outside sources if needed such as a voice over professional. A producer will use audio and technical equipment to do their job. A producer might also: use music, accessed from a station's music library; historical tapes from news archives; original and pre-recorded sound effects; and voice talent. The search for voice talent often sees a station's staff limbering up their vocal chords for this job!' (CRA 2002, online). The sales team is also supported by traffic and promotions plus marketing and research.

A radio station's traffic department oversees the smooth scheduling of commercials into the station's programming format' (CRA 2017, online). The promotions section of the radio station 'is responsible for the station being visible in the market place. All the promotional ideas they come up with and then consequently execute, must be compatible with the image of the station. These include everything from stickers to TV and billboard ads etc. as well as ensuring that the announcers are visible in the community the station is broadcasting to (CRA 2017, online).

The programming section (Romaro & Wheatley 1992) has a responsibility 'to put together a coherent and profitable program schedule. They make all program choices and decide on scheduling and all on-air matters that are crucial in acquiring an audience. In doing so they monitor the format and style of the station. Programming is overseen by a program director (PD) and they hold a critical position within the station. The whole economic and psychological direction of the radio station is in the program director's hands. They must not only be seen to have flair, but also must be rational, analytical and verbal. They are required to have a 'feel' for radio and they generally sleep, eat, breath and talk radio. They must keep their ear to the ground,

listening not only to their own station but the competition as well. They need to develop excellent antennae for the nuances of programming and understand the economics and budget of their department' (CRA 2017, online). The music director (MD) works closely with the program director and they are the link between the music industry, the suppliers of content, and the radio industry. MDs listen to and decide which new music will be placed in high rotation, or not. They supply the scheduling information for the order of air plays for each piece of music and decide when that music has become tired and needs to be retired. Apart from auditioning new music, their day to day tasks include maintaining the CD library, ensuring that accurate details of all the music played on the station, including that used in commercials and promos, are kept and forwarded to APRA once a month. They maintain the playlist using critical software such as Selector. They do all the music research which involves finding out audience preferences and they undertake tracking, that is, measuring the number and type of listeners each station in the market has (Byrne i/v June 1999). The on-air announcers, who may be disk jockeys or news journalists, are the celebrity voices that the station uses to ensure the program material is linked together and presented cohesively.

Radio listeners tune-in to hear music, news, announcers and journalists ... as the voice of the station announcers are responsible for developing a close relationship with listeners (CRA 2017, online). Meanwhile journalists working under the auspices of a news director will compile and report the news on the radio and will deliver that news on-air via news bulletins. The closer the relationship announcers and journalists build with listeners, the higher the loyalty and the longer the audience listens to the commercial radio station. Announcers and journalists do more than just turn up at the station and talk to their listeners to achieve listener loyalty and long listening times. They work closely with the programme director to develop the types of programmes that their listeners want to hear. The success of this team effort is measured by independent radio audience surveys. The results of these surveys assist presenters and programme directors to evaluate their performance (CRA 2002, online).

All these positions are supported by the technical department who are responsible for the quality of the audio and audio broadcast equipment. They oversee all technical operations and maintain and repair all the technical equipment.

It can be seen then that 'putting radio to air is primarily a team effort where a dedicated and professional radio team such as that outlined below. This effort undertaken through the team hierarchical positions requires a great deal of planning and co-ordination with each department playing a vital and specialised role' (CRA 2002, online) within not only the station itself but also within the larger structural framework of the radio industry.

7.6 Important Personnel

'The job of Station Manager requires a mix of skills including commercial acumen, creativity and the ability to lead and direct a team. The manager's responsibilities include handling the daily problems of station operations in consultation with the Program Director, Sales Manager and Chief Engineer. The Station Manager oversees the general policies of the station and supervises the implementation of these policies often set by the network head. The manager usually handles the station's relations with the Australian Broadcasting Authority (ABA) and other government bodies. The manager also usually participates in community activities on behalf of the station' (CRA 2002, online). Within a radio station there are many people who support and assist the Manager and each individual department. The Sales Director and the

team of salespeople have the job of producing the station's revenue. The sales executives are charged with maintaining existing sales levels and generating new accounts. As well as servicing existing accounts they will research new angles and put together advertising packages for clients. In doing this they are supported by and work with the Creative Director in matching clients' desires to actual ads that will work on radio. The Creative Director is responsible for coming up with concepts and copy for the ads as well as executing the production of the ads ready to go to air. The Traffic Scheduler schedules the timing of ads and spots to go to air and coordinates all of this with programming and sales. Program Directors (PD) oversee the on-air sound, employ and fire air staff, conduct air checks to improve on air staff performance, they schedule shifts, promotions and production and adhere to all licence requirements. They check all logs before distribution to on-air staff, co-ordinate all station research and review all new music setting up regular music meetings. They are generally required to attend at least one sales meeting per month and are the liaison figure between sales and programming. They oversee all production of commercials and promotions and consequently must understand all sections of station e.g. scheduling/traffic, promotions, library, production and so on. The PD works closely with the Music Director (MD) and the MDs main function is to select the music that is appropriate for the format of the station. On-air Announcers or Disk Jockeys are the voice of the station representing and embodying the station itself. They present and link together the program material compiled by the rest of the team. The news team working under News Director compile and report the news and these Broadcast Journalists are subject to the same programming requirements as the on-air announcers. This situation arises as the PD program director is also responsible for who reads the news, how it's delivered and how it sounds, all of which are aspects of programming. The PD is not responsible for news content however. This is the News Director's direct responsibility. The Technical department has responsibility for the maintenance of the audio broadcast equipment.

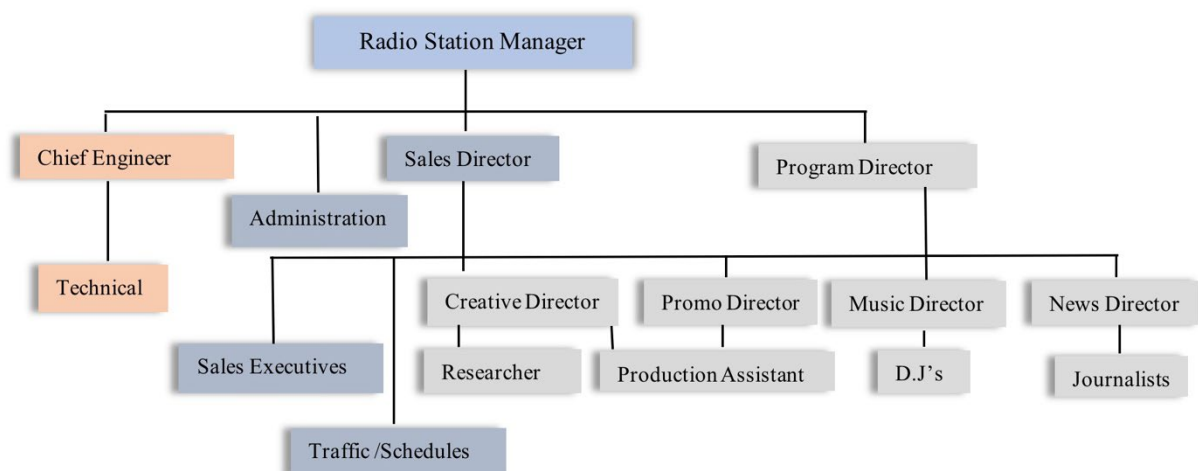


Figure 14 Radio Generalised Personnel

7.7 The Hunter Region Radio Sector

7.7.1 Introduction

Radio, according to the Commercial Radio Australia (CRA) website, is 'constantly reinventing itself broadcasting in both analogue and digital' (CRA 2017c, online). The CRA asserts that '27% or 3.6 million people listen to DAB+ digital radio in the 5 capital cities' (ibid). In addition, commercial radio alone reaches 'over 18 million listeners each week with an estimated 50 million radios in Australia – average of 5 devices per household, which means more radios than people' (ibid). It is mobile and portable, and it is claimed to be 'the original interactive media

– live on-air, via sms, email, online opportunities to interact and express a view’ (ibid). Importantly radio is ‘reliable when access to other media breaks down. For example, when natural disasters strike, it is on-air when mobile phone networks go down’ (ibid). As a medium it is seen to be ‘live and local, reflecting the community of listeners’ and generally is seen to be deeply connected, with some dispute (Criticos 2016), ‘with local issues/events/figures’ (CRA 2017c, online). Despite the apparent boosterism, all these notions have been evident in the promotion of radio in the Hunter. Despite some inroads from the digital world, broadcast AM/FM is still a popular medium.

The Infinite Dial Australia study shows that radio continues to be the key driver of audio consumption in Australia. The study, sponsored by Commercial Radio Australia, Southern Cross Austereo and Triton Digital was undertaken in the first quarter of 2017 and provides new insights into what Australians are consuming online. The methodology for the study was based on the longest running survey of digital media consumer behaviour conducted in the USA, Infinite Dial. The study has been conducted in the USA since 1998 and is highly regarded globally. Key findings from the study include [the fact that] radio is the leading audio platform consumed by Australians with 85% of people having listened to an AM/FM or DAB+ station in an average week, compared to Spotify 21%, Podcasting 10%, Pandora 8%, Apple Music 6%, Google Play All Access 2% (CRA 2017d, online).

In the first radio ratings survey conducted by GFK for 2017 for the lower Hunter, the major radio market in the Hunter Valley, out of the four main commercial stations KOFM remained at #1 with 14.3%, with its fellow networked station Hit 106.9 achieving 13.1%. The SRN network stations 2HD & New FM both came in below 9%. Interestingly, 1233 ABC gained 11.6% and Triple J sat at 11.4%. The total share of stations surveyed, commercial and the ABC, for the first period in 2017 was 75.5% and it was surmised that ‘some share has been lost to ‘other AM/FM’ - 2NUR, out of area commercial stations and the like’ (MediaSpy 2017, online). Total share to all ABC stations, that is 2RN, ABCNews, 1233ABC and Triple J, stood at 29.8% while the total commercial stations share, which includes KOFM, Hit FM, 2HD and NEWFM, stood at 45.7%. Community stations in the valley are generally not surveyed.

7.7.2 Community Radio

Community broadcasting began in the early seventies when there was a perceived set of listener dissatisfactions with the range of then existing media services. At this time the FM broadcasting band had become available for use and many people wanted more access to, and be able to participate in, major institutions such as the media. ‘Australia was one of the first countries to legislate for a public broadcasting sector i.e. independent, non-government, non-commercial broadcasting’ (Letch 1997, online).

At this time, according to John Tebbut, the Alternative Radio Association (ARA) was formed by politically active students who were joined in this enterprise by other progressive groups. However, the group most recognised as the catalyst for the introduction of community radio was the Music Broadcasting Societies (MBS) and the university bureaucrats often associated with them. The MBS attended a Conference on Public Broadcasting in July of 1974 by the Department of the Media, but the ARA was not invited but insisted on attending. Immediately after the conference the Public Broadcasting Association of Australia was established. Many believed that what was needed was an alternative vision of what Australian society could be, but the Department of the Media understood the call for access to public radio as a desire for

inclusion with educational bodies, disadvantaged minorities, various individuals, as well as the musically deprived, along with the ARA, all involved (Tebbutt 1989, pp. 128-129).

The first broadcasts initiated from outside either the core commercial or government sectors came from, according to Tebbutt, two pirate radio stations. These were 3DR (Draft Resisters) and 3PR (Peoples Radio) which operated from University campuses in Melbourne. They were short-lived affairs with the police smashing the equipment of the former and the latter being electronically jammed. It's generally accepted, however, that 'Adelaide University station 5UV was the first public broadcaster, commencing in 1972 on a restricted and experimental basis' (Letch 1997, online). Since then many community stations have come and gone.

One of those that has had longevity is 2GLA FM from the Great Lakes LGA. It broadcasts on 101.5FM and is located in Tuncurry. Its website can be found at <http://www.greatlakesfm.org.au> and it accesses the Community Radio Network (CRN).

The CBAA's Community Radio Network (CRN), allows community radio stations to share some of the sector's best news, talk, music and entertainment programs – 24 hours a day, 7 days a week. The CRN gives access to over 100 talk and music programs, and distributes several flagship community radio programs, including National Radio News, The Wire and Good Morning Country, as well as: special broadcasts covering major cultural and festival events; informative talks programs; specialist music programs; and topical short inserts. Stations that subscribe to the service can choose exactly what they'd like to use and when, augmenting their own local content with specific programs of national relevance, whether it's full programs or short inserts within existing programming, or as a fall-back or overnight sustaining service. The CRN service offers stable, cost-effective, broadcast quality audio, accessible via either the Digital Delivery Network (DDN) or live satellite audio feed. All programs on the CRN can be broadcast live or recorded and re-broadcast later (CBAA 2017a, online).

As the Community Broadcasting Association of Australia's (CBAA) website states 'Great Lakes FM broadcasts a mix of Adult Contemporary music and news on satellite relay from 2UE' (CBAA 2017, online). Other community radio stations in the Valley include 2CHR, Gloucester FM and Rhema FM as well as 2NURFM. Central Hunter Community Radio (2CHR) broadcasts on 96.5 FM and:

Is the community voice of the Central Lower Hunter Valley in NSW, Australia. Serving the two cities of Cessnock and Maitland and their surrounding districts, 2CHR is run by volunteers and is an incorporated non-profit organisation. Formed in 2000 by the joining of aspirant stations from Cessnock and Maitland, the station features many popular styles of music, plus interviews, news, weather and sports - all with a focus on local interest - and, of course, community announcements (NMD 2017, online).

Gloucester Broadcasters Association Inc. was formed in 2005 and after taking three years to acquire a temporary community broadcasting licence (TCBL) the station has 'been broadcasting on 104.1FM since 1 June 2009' (Gloucester FM 2017, online). Their transmitter is on loan and like many small community stations they are staffed by volunteers only and are 'funded by sponsorship advertising from mainly local businesses, memberships and donations' (ibid). The station's goal 'is to provide Gloucester with local news, information and entertainment [and focus on] 'events and issues that concern Gloucester' (ibid). Rhema FM Newcastle, a Christian community station with its studios located in Newcastle West, 'has been established for over 30 years and has been on air full-time for over 15' (Rhema FM 2017,

online). Meanwhile 2NURFM at the University of Newcastle began broadcasting in March of 1978. Wayne Stamm was the station manager there from 2005 until 2018.

Stamm began his career in radio in the late seventies starting out in Cairns, then at various stations where he ‘moved up and down the east coast’ (Stamm i/v, April 2016). Among other country towns, he worked in Townsville, then Foster at Great Lakes FM and then moved to Melbourne to work briefly at 3KZ. He then moved to NEWFM doing news and most recently has spent about 13 years at 2NUR FM.

Everything that I’ve picked up about the industry is by working in the industry. I was lucky enough to start in those days where, you know, you could run off and work at a commercial station in the bush somewhere, and learn how to apply your trade there, making a thousand mistakes on air and not having anybody worry about it too much, and you know once you perfected that they gave you an opportunity to move on. I’ve been lucky in that I’ve been reasonably good at what I’ve been able to do. So, finding a job and progressing through the industry hasn’t been particularly difficult ... There’s some good formal training that’s available and we’re seeing a lot more people come out of communication courses now. There are some terrific programs where there is a little bit more formal training that’s been applied and more of those people are getting into the industry now. They never have before. For those places that are lucky enough to have a radio station like this attached to their Uni or college I think that makes a huge difference about the quality of people that we get (Stamm i/v, April 2016).

When he was starting out it wasn’t unusual to have an announcing team, scheduling and traffic people and ‘you would have a copywriter who would write the commercials for you. You’d have a program director, and a music director and your news team and the sales team’ (ibid). Having worked in news, in sales, on air and now in management, Stamm has a reasonably good set of skills and experiences to draw on and consequently has a good overview of what it takes to make a radio station work. He also has an opinion about the collaborative nature of the whole industry.

It’s still sectionalised which I think is really interesting. There’s still a number of divisions within the industry itself ... you see that between Commercial Radio Australia and the Community Broadcasting, Association. I don’t think you see that quite as much overseas, which is one of the reasons I like going to the NAB conference each year because, you know, radio is radio in the US (Stamm i/v April 2016).

Given the nature of radio as a creative medium ‘there has to be an awful lot of collaboration’ (ibid) but Stamm has seen a recent shift in the way many departments collaborate with sales using on air staff in pitches to clients and on air staff, who saw what went to air with minimum commercial content as the most important thing, now more willing to accommodate the sales teams requests.

We’re seeing a lot more of that than we’ve ever seen before. And also that cooperation between the different levels, the sales and promotions and the on air team about you know what happens on air ... I think that that collaboration becomes even better in that everybody has a common goal and the common goal is to produce a good sound for the radio station because if you produce a good sound for the radio station then you can sell sponsorship for it which means that we all exist (Stamm i/v April 2016).

Apart from the internal aspects of the station needing to be collaborative, the context in which this occurs is also important. There are some similarities but also radical differences between the commercial and community sectors. He suggests that the community radio is supposed to give on-air access to the community. They are limited to five minutes per hour of sponsorship which is meant 'to be able to keep a station's head above water and I think in most cases that works quite well' (ibid). He believes commercial radio has more freedom to play what they like on air and they 'of course are in it for the money. They've got shareholders and what they're supposed to be doing is make money for their shareholders. They can run unlimited commercials if they want to' (ibid). Stamm states that many are limited to 18 minutes per hour but most run approximately 14 minutes per hour as 'that seems to be the threshold of pain I guess that they've discovered is best for their listeners' (ibid).

While the commercials' business model is totally reliant on advertising, many community stations that are affiliated with a University have their funds underwritten by the University, in addition to sponsorship monies. Many like 2NURFM have now had to ensure they pay for themselves either through sponsorship or fundraising events. But competition is not just coming in terms of sponsorship dollars or for listeners from the local community. The whole radio world has been opened up by digitisation with stations, because of the regulatory framework, not finding it feasible to move some of their activity online. Stamm asserts that 'we're doing it differently now but we're still here' (ibid). There was a belief that streaming services such as Pandora and Spotify would have a large impact but Stamm having just returned from NAB in the United States, feels:

[It's getting] bigger and bigger all the time and especially now over the last four or five years, trying to keep up with the change in the industry and to stay ahead of the change that we're seeing in society has been a big driving force for most radio stations, and again that's one of the reasons that I go to conferences on a regular basis and talk to people all the time. I'm just back from NAB in the States. I only got back in the country a couple of days ago and that's the biggest one in the world and you've got 100,000 people from the industry who get together to take a fairly in-depth look at what's happening and there's a lot of discussion about it and there's just the contacts that you get from those people and the things that you learn from them is incredible (Stamm i/v April 2016).

His visit to NAB indicated that there is evidence to suggest that Pandora and Spotify 'have well and truly peaked' (ibid).

In the US there are still 91% of people listening to their radio and if you're looking at media usage, television is the highest at 92%. Radio runs second at 91% and then after that you've got things like text and social networks, smart phones, tablets, streaming video and streaming audio. The things that we're seeing a bigger growth in at the moment are things like podcasting (Stamm i/v April 2016).

For Stamm 'that's one of those things that really has started to pick up in the last few years. There are a lot more people podcasting now than ever had before' (ibid). He asserts that over the twelve months of 2015-16 in the United States 'the number of people who listen to podcasts has gone from 21-28% and that's one of the biggest jumps'. While Smart TVs have made similar gains, the smart phone is 'still growing but nowhere near as much. It's up only by about 3%. The things that have been surprising though are brand platforms like Instagram' which has grown by about 3-4%. Stamm also asserts that in the US there is also a considerable amount of home stations streaming where, for example, a Winamp plugin is used to play music from someone's playlist, another plugin like Edcast is used to stream it, and this is routed through a server such as Icecast.

We thought that was going to have a huge impact on what we were doing but what's happened is that we've changed the way that we do radio so that now it's become much more of an interactive medium than it ever was before. We've still got the same number of people who are listening. People aren't listening any less to radio. They do listen a bit differently in that most listening these days seems to happen in vehicles. Home and work you know - around about a quarter, but for vehicles - at least 50% of people are listening in their cars. Streaming online, I think from memory, was down to around about 30% or thereabouts. So again, you've still got that thing where there's still a lot of people listening. The gen Ys and the millennials are the ones that are dropping off things like Pandora and Spotify and are going somewhere else. We're just doing it differently. The interaction is a lot different than it ever was. Things for us like Facebook and Twitter and Instagram to a certain extent are ways that we now communicate with the audience. So, we never did that before. It's a lot different than it ever has been. It's like, oh you know, once upon a time I guess if you were entering a competition for a radio station you would write, or you'd ring. Well now you write, you ring or you're on the web and there's about even support for all those things. So, it is a changing world, but I think the industry is changing with it (Stamm i/v April 2016).

The station Stamm manages has moved into the social media sphere but has also moved toward the podcasting realm.

What we're doing now is we're posting interviews that we do but we've not gone into podcasting in terms of specific programs. But it is certainly something that we are looking at very seriously now because we think again there's a market for it and a lot of interest for it. It allows you to do a lot more from a podcast point of view than you can do on air. It gives you the opportunity to expand interviews. Podcasting allows you to do a lot more and certainly given what's happening overseas and in this country with the style of podcasting that's going on and growth in it, it's really interesting. You know we made a 'toe in the water' attempt at it I guess ten years ago and then it fell by the wayside and then in the last two years it's come back even stronger. But we certainly see it as being a nice addition to what we're doing and an opportunity to do some other things (Stamm i/v April 2016).

But audience growth has not expanded in a commensurate way in terms of numbers. As Stamm says 'the amount of money that we're paying for our online stream per listener is significantly higher than we're paying for our terrestrial signal. And whilst it's a nice idea to think that that's going to allow you to have expansion, you can probably count them in tens or 20s'. These figures come from hits and email counts from listeners overseas, but they appear to be primarily former Novocastrians 'who listen to us more than it is other people. So, they're looking for a hit from something at home, and this is you know a great way for them to get some local news' (ibid). While the digitally linked online network that is the internet is not as important as presumed, networked terrestrial radio remains significant. It is the structural pattern that has seen most growth in the radio sector but there is also talk of hybrid radio superseding the push for digital audio broadcasting across the networks (Stamm i/v April 2016).

Hybrid radio is radio that would work on your smart phone so that you would get the metadata which will give you the album cover notes, an opportunity to download the song, and maybe even give you concert information if there was a concert by the artist coming up in your area with a link to the ticket holders. So

that would come up as part of your data feed, whereas the FM signal would come through the FM chip in the smart phone. Now that's another story about the number of those that have been activated but that was the way hybrid radio was set up and just yesterday or the day before Joan Warner from Commercial Radio Australia here in Australia has been talking about the launch of LG's DAB plus hybrid phone which will do the same thing. So, the idea is that you take the signal from the DAB chip. That doesn't count towards the data on your phone, but you've got all the album information as part of the radio. Now there've been a couple of other iterations of that. There are a couple of car ones that do the same. The idea then is that once you get out of the range of the signal, then it would then go to the online stream. So for example, if you were listening to 2NUR and you got down the coast and the signal started to fade out, it would swap to the stream and you can go from there or you could change stations if you like (Stamm i/v April 2016).

In this case hybrid radio may be one of the ways to overcome one of the major problems of digital radio.

The problem with digital radio is, right now it's restricted very much to the capital cities where they're talking about maybe launching it. I think Darwin and Hobart in the next couple of years with possibly Newcastle included in that but there are no firm plans at this point in time. The biggest drama of course is that digital, unlike FM, doesn't fade. Digital stops. So, you've got to get the infill right and that's the problem with infill transmitters. Where do you locate them? How much is that going to cost? And then there is a substantial cost for community broadcasters in particular to be able to be part of the digital (Stamm i/v April 2016).

The transfer across to mobile phones kind of solves the problem of getting people to buy a new set and Stamm believes the FM chips in smartphones should be activated and if this is the case 'hybrid radio is the right way to go' (ibid). He suggests that FM is not 'going to be turned off for a long time' adding that there is a proviso in that the government and ACMA have both indicated that 'the uptake has got to be over 50% or 90% and I think the coverage has got to be over 90% and then they would talk about turning off FM and you're never going to get that' especially in places like 'Alice Springs or Dunedoo or any of those places'. He concludes that the 'the chances of that happening in yours or my time is pretty small. So, my thought is FM is here for a very long time and it's not going to go anywhere. It's really quite stable. Digital though is a better technology but, you know, rolling it out and making it work is a bit difficult' (Stamm i/v April 2016).

In summary Stamm concludes that 'radio is reasonably healthy' (ibid). He suggests that the best thing is to be 'a big part of your local community. I've always thought that that was incredibly important. But that's not to say that online we're not seeing some great things happening. You know there's some wonderful talent who are producing some terrific things online as well. So, I guess you know you lose one you pick it up in other ways. I think we're in reasonable shape.

If you look at the reason why people listen to radio in the first place, first and foremost might be because they're hearing a song that they really want to hear. Radio being company is in the top four or five (from memory) of things that people listen to the radio for. It's because they like it. It's something that they know, and they love and understand and has always been a part of their lives. For some people it's habit. And news, you know, and that big one is as I said, 'It keeps me company'. And then what's going on locally and behind that as well. So, you

know they're the top six or seven reasons why people listen (Stamm i/v April 2016).

7.7.3 The ABC

The Australian Broadcasting Corporation (ABC) is a federal agency which works within the legislative framework of the ABC Act 1983. The Act established the ABC and its Charter is contained in that Act. This sets out the functions and responsibilities of the ABC. These functions are:

- (a) to provide within Australia innovative and comprehensive broadcasting services of a high standard as part of the Australian broadcasting system consisting of national, commercial and community sectors and, without limiting the generality of the foregoing, to provide:
 - (i) broadcasting programs that contribute to a sense of national identity and inform and entertain, and reflect the cultural diversity of, the Australian community; and
 - (ii) broadcasting programs of an educational nature;
- (b) to transmit to countries outside Australia broadcasting programs of news, current affairs, entertainment and cultural enrichment that will:
 - (i) encourage awareness of Australia and an international understanding of Australian attitudes on world affairs; and
 - (ii) enable Australian citizens living or travelling outside Australia to obtain information about Australian affairs and Australian attitudes on world affairs; and to provide digital media services; and
- (c) to encourage and promote the musical, dramatic and other performing arts in Australia (ABC 2017, online).

Within this framework ABC radio, until recently, consisted of a number of relatively independent networks. For example, Triple J was the self-proclaimed youth network of the ABC, broadcasting to places such as Broken Hill, Dubbo, Grafton, Taree, Wollongong, Cairns, Rockhampton, Ballarat, Bendigo, Alice Springs, Kalgoorlie, Wagga Wagga, Mildura and Warrnambool and of course right across the Hunter Region (ABC 2006, online) where it has a sizable portion of listeners. Richard Kingsmill, a long-standing PD at Triple J until recently, stated in regard to their playlists that:

We certainly listen to our audience. I do as much field work as I can by going to record stores but not as much as I'd like. Once every couple of weeks I'll visit stores and see what's moving and what's not. We use the overseas press as a guide, but we need to stay ahead because we have that reputation. Consequently, the charts are not that critical to what we do. If there's a vibe on the band, some grass roots activity, people are talking then, this is a really important thing. Gut feeling is also something I use a lot and that comes from years of listening. You develop an instinct for what will work. Not that I'm always right. But it's these last two that we tend to do most (Kingsmill, i/v July 2004).

Kingsmill's habitus (Bourdieu 1993), his predisposition to make certain decisions, born of long years of engaging with both music and radio, is similar in many ways to that of Meagan Loader's whose appointment to the PD's position in 2010 replaced Kingsmill. Loader's new

job was announced by the Station Manager, Chris Scaddan. Her work history included a role as Station Director at FBI FM, a community-based station said to be more 'alternative' than Triple J at the time, and her stints as drive and evenings producer at Triple J itself. She had also worked on the Noise and LOUD media arts festivals which gave her a deep knowledge of how to develop content and also helped her to gain an understanding of the media world she worked in. Meagan Loader has since moved on to be the Content Director for Triple J's newer digital networks, that is, Double J and Triple J Unearthed where many young Hunter musicians have achieved success.

Along with Triple J, Classic FM was networked on the ABC right around the country in all major metropolitan and regional centres. News Radio, now renamed ABC News, was the Australian Broadcasting Corporation's national radio network providing continuous news and information 24 hours a day. It could be heard in all Australia's capital cities plus Newcastle, the Gold Coast, and Gosford as well as narrowcast on the Internet. Radio National, which has over 60 distinct programs each week broadcasting to a significant number of centres right around the country, is different from any other radio station in Australia. It broadcasts programs that explore ideas in science and programs on the latest in arts and books from around the world, as well as programs about the mind and human behaviour. 'There's also music, comedy, book readings, radio dramas and poetry. Programs about science, health, the arts, religion, social history and current affairs are backed by first class research and presented some of Australia's leading broadcasters including Norman Swan, Peter Barclay, Robyn Williams, Ramona Koval, Phillip Adams, Fran Kelly, Rachael Kohn, Alan Saunders, Julie Copeland, Andrew Ford and Lucky Oceans' (ABC 2006, online). Some of these presenters have since passed away or moved on. Radio Australia, broadcasting internationally into Asia, has been reduced to an online presence. On the other hand, ABC Local Radio has mutated into ABC Regional. In 2006 ABC Radio represented a wide array of regional and metropolitan centres which were recognised as having a 'distinctive mix of news, views, current affairs, talkback, entertainment, sport, music, and rural issues' (Radio Info, 2012).

In 2014, the Corporation created two new divisions: Digital Network, to drive new digital capabilities; and ABC Regional, to ensure the needs of audiences in rural and regional Australia were being met. ABC Regional officially launched in July 2015. New investment in digital platforms including apps, the ABC Radio Player and better streaming facilities have enabled the ABC to meet audience expectation in the digital age (ABC 2017a, online).

Content available as podcasts and iView first-release productions has now become an important point of audience contact for the ABC. Following a restructure, ABC Radio has integrated its digital and broadcast platforms more fully and has taken on an audience-centric rather than a platform-centric approach. The digital reach of the ABC includes the ability for audiences to listen live or go to the station website of ABC Radio Sydney, ABC NEWS, RN, ABC Grandstand, triple j, triple j Unearthed, Double J, ABC Classic FM, ABC Classic 2, ABC Jazz, ABC Country, ABC Extra, Radio Australia and Radio Australia Multi-language (ABC 2017b, online). Each of these broadcast and narrowcast stations can be accessed locally, national and internationally. This situation means that ABC radio employees now need to be multi-skilled.

To demonstrate, Phil Ashley-Brown has a story typical of many ABC Radio employees. Ashley-Brown completed the Communication program at the University of Newcastle. In his final year his major project was focused on Revhead culture in Newcastle. This five-minute package was bought by Triple J and Radio National. He was then unemployed and began work as a volunteer for a local MP and eventually worked as a speechwriter for three years. This

involved not only constituent work but also media work. 'Radio was the one thing that had always interested me. I was inspired by what you could do with radio, with the intimacy of radio, with the scope, where you can go' (Ashley-Brown i/v September 2015). He applied for 10 different positions and in his 'holidays I'd go and do work experience in different ABC stations around the country' (ibid) until he was successful. Phil Ashley-Brown, according to his current Linked In professional profile, is now 'the ABC's Manager of Broadcast Content Quality ... He works with teams on the ground in a newly created national role for the ABC's Regional Division ... Phil Ashley-Brown was the station manager for 1233 ABC Newcastle from January 2008 through to July 2015 (Ashley Brown 2017). His main focus in the institution has been on radio journalism and his personal skill set includes interviewing, editing and writing which merged into multi-track editing and mixing. As well as maintaining these fundamental skills, he claims that 'over and above that, everyone here has to be able to take a photo, everyone here has to be able to shoot some basic video, we have to know how to post onto Facebook, we have to know how to be strategic with social media, so we're all across that at varying levels' (Ashley-Brown i/v September 2015). He also points out that 'in this workplace some people are great at one thing and others are great at another. So we work together to maximise the use of those skills. But personally, my skill level has increased over time and evolves constantly' (ibid). He has applied these skills in various projects. *River Stories* is one:

River Stories is a story about the Hunter River starting from the beginning of the river in the Barrington Tops all the way down to Newcastle Harbour. And this is a story that started when I first joined the ABC in Muswellbrook. I got this idea about the river. I wanted to do something on the river. And as someone who'd grown up in Muswellbrook, I'd experienced the river in floods, I'd seen fires rage around the river, I'd met farmers who'd worked on the river, and so I came up with this idea of doing a radio series. So, in 2001 I did a bunch of stories that ran from the beginning of the river all the way down, and I recorded those over a couple of years, and they went to air in 2003. And they were hugely popular because they connected people to the river, which is the lifeblood of the Hunter Valley. And then 10 years later I wanted to go back and see what had happened, how had the river changed, how had the people changed, what were the economic changes and the social changes in the community? And so, I went back, but this time I went back with a film crew, and we filmed the river, and we did a real focus on the river from, not just a radio point of view, but from a multimedia point of view, which culminated in an exhibition in the Maitland Regional Art Gallery. So, it was a much different approach. And I think the changes in the river are also reflected in the changes in the approach we had. So, we were not just a radio station anymore, we were a multimedia centre with so many different ways of telling the same story (Ashley-Brown i/v September 2015).

These radical changes in the modes of delivery the ABC now embraces are still, however, coupled with what can be seen as one of the ABC's more traditionally important functions:

During emergencies, stations like this are the hub of the community, and we work really hard to make sure that what we're doing here reflects truly what's going on. And we use every single element of the radio station and of the people who work here. We use our multimedia capabilities, we get out and we take photos, we make sure that the audience is involved. And interestingly, we use the skills of the people here, but the skills of our audience are really where the power is. So, our power isn't here, it's out in the community, it's people ringing in, it's people sending texts in, information (Ashley-Brown i/v September 2015).

These adhocracies, a term coined by Andrew Zollie and Ann Marie Healy in their book *Resilience* (2012), that emerge and are facilitated by ABC radio during times of emergency are, in the digital age, well suited to ‘fast moving, fluid circumstances where you don’t know what you’ll need next. If it were a musical genre adhocracy would be jazz’ (Zollie & Healey p. 349). These adhocracies, employed by the ABC in the middle of emergency situations, are reliant on the regional community and they have allowed ‘successful improvisational approaches to emerge’ (ibid, p. 351) which are more about coordination than they are about command and control (ibid).

Those people have more information than any of the emergency services or any of what we have here. They’re the people standing on the ground. So, it’s almost like we’ve got 100,000 people out there reporting in to the station and giving us information. And I can tell you that we’ve had reports from police and the SES saying that they get information from us, because the information is being provided by the community really. We are first and foremost a service of the community, but we are the community as well. We really are part of the community and reflect the community back to itself. So there’s a real strong connection there that I don’t think any other organisation is able to have as closely as we have (Ashley-Brown i/v September 2015).

Not only is the ABC focused on engaging with the community during emergencies but also more broadly during all times of the year. It is also required by its Charter to encourage creativity and innovation. As Phil Ashley-Brown indicates ‘the ABC’s focus is to be innovative and to really be at the forefront of digital storytelling, and storytelling of any type. And that is something that has been driven very, very hard within this organisation’ (ibid). The ABC, largely represented in the Hunter Region by ABC 1233, has not only been at the forefront of using social media, but their staff must also ‘think creatively as much as we can about how to connect with our audience’ (ibid). Ashley Brown points out that, with taxpayers funding this service ‘we want to make sure that service gets out to as many people as possible. Whether they’re in Newcastle or in Lake Macquarie, or whether they’re in the Hunter Valley or even overseas, we want to try and broaden out that appeal as much as we can’ (ibid).

Part of that is being innovative in the stories we tell, in the way we tell them, and in the sort of content we do as well. So creative approaches like the *Story Box* that Aaron Kearney does on a morning every day, or *Treasure Hunter* that we do on a Saturday morning, or the use of our social media pages or our Facebook or whatever it is, it’s all trying to do the one thing, and that is getting our content out as far as we can, and also maximising the other elements of the ABC’s offer. So, while we’re trying to get content out to a big local audience we’re also trying to do the same at a national level. We’re trying to get stories into the seven o’clock TV news in Sydney and right across New South Wales or even nationally, as well as radio content out onto the news current affairs programs. It’s about getting our stories out into all the digital spheres the ABC has (Ashley-Brown i/v September 2015).

ABC Open has been a major part of this story of innovation. Anthony Scully, who was a journalist with the Fairfax print newspaper The Newcastle Herald, was the region’s ABC Open Producer until 2017 when ABC Open became defunct and Scully moved into the News room as a feature journalist. According to Scully (i/v March 2016) his job at ABC Open entailed community engagement, as well as curating content on the ABC Open website while moderating community-made content and writing and blogging about it. While he operated out of the radio premises in Newcastle West, his multimedia remit meant he was ‘also promoting

via social media, doing stories and pitching video content made in the community to our video EP (Executive Producer). We've got slots, dedicated slots, on ABC News 24 and we've had partnerships within the ABC with other programs' (ibid). For Scully:

A big part of the role as a producer is to go and find organisations to partner with in the community. We do exhibitions working with the University, TAFE and community and filmmaking groups and writing groups and photography clubs and we get involved in all those external things (Scully i/v March 2016).

Scully realises the connection between the ABC's traditional functions and the way multimedia is now incorporated into those functions.

The ABC's always engaged with the community whether it's you know 'call us up and tell us what you think' on the radio program but you know from day one it was, the audience is more sophisticated than that, they can tell a story in more sophisticated ways. By 2010 people had already, for years, been writing blogs or uploading photos to Flickr or videos to YouTube and so [ABC Open] was a conscious way for the ABC to acknowledge that change in the community. For a relatively small investment, of, you know, a producer's wages around the country and building infrastructure in the ABC for a dedicated community space for community-made stories, you know, it's been good value for money and it's also found us new audience members (Scully i/v March 2016).

With ABC Open operating for a number of years, the platform had a significant number of contributions accessible by digitally connected community producers and audiences. Scully suggests:

There are something like 80,000, we call them 80,000, stories. A lot of them would be photos but then there would also be other mediums as well. I tried to work out how many video stories have come out of the Hunter region and it would be in the hundreds. Some of those are two-minute stories and some are four-minute stories ... We're always looking to get into areas where we know that we've never been before, or it would be nice to get more listeners for the ABC. So we look at Port Stephens and Maitland and South Lake Macquarie and West Lake Macquarie and in the Upper Hunter with the areas where we don't always get to with our outside broadcasts (Scully i/v March 2016).

Not that places like the Upper Hunter don't have their full share of storytellers working for the ABC. One of these is the nationally iconic Philip Adams. Adams owns an agricultural property in the Upper Hunter and takes advantage of the ABC Upper Hunter radio studio, doing his long running *Late Night Live* radio series for Radio National from there on many occasions. Adams, however, hasn't always told stories for the ABC. He began his creative career in advertising, where he found himself:

In the company of people like Bruce Petty, Fred Schepisi who would go on to become a significant film maker, Peter Carey, et al. There was a lot of us. We didn't know each other necessarily at the time, and nor had we confessed our creative ambitions to each other, but advertising gave us a home long before the government got interested in setting up funding bodies. So that's how I started (Adams i/v April 2016).

Adams was self-educated with an insatiable curiosity. As a young journalist he wrote for the Eltham magazine and the *Communist Weekly*, under a pseudonym, where he reviewed films

before becoming a fill-in critic for *The Bulletin*. He also covered for many journalists in Melbourne. As Adams describes it:

At the age of 15 or 16 I'm starting to review everything from plays to concerts, not that I was competent to do so but no one seemed to notice. So that was my first, if you like, professional engagement, once again under the guise of anonymity but in that case using other people's by-lines. So that's pretty much what happened. I then got into 'The Bulletin' under my own name when Donald Horne took over as editor (Adams i/v April 2016).

Later Bruce Petty, who had worked on *The New Yorker*, 'decided I was faintly prodigious and got me into *The Australian* which was then a shiny bright new newspaper, and still vaguely progressive. And he got me a job as a television critic, and I took over from Andrew Denton's dad, Kit Denton' (ibid). He was given full column at *The Australian* before joining the *Nation Review* and then moved between both Fairfax and News Corp as a writer for some time. As well as working in advertising it was then that he made his first feature film for \$6,000 (ibid). He, along with his partner Brian Robinson, won a number of film awards 'and at that point became absolutely determined that we should have a film industry' (ibid). Along with his friend Barry Jones he convinced Prime Minister John Gorton to fund this venture.

Adams went on to be not only an advertising executive and journalist but also a film producer, author and radio broadcaster. He is now known as a social commentator and public intellectual and sits on many prestigious not-for-profit boards, predominantly in the cultural sphere. He has been awarded a number of honorary doctorates as well as an AO and a number of other prestigious honours. The National Trust cites him as a National Living Treasure.

I was juggling an awful lot of stuff, and it seemed I was working 24/7, as they say now, juggling business career, journalism, film, etc. etc. But at that stage of my life I seemed to have boundless energy, so it wasn't much of an issue ... I was writing two columns a week, and these were not the 1,000 worders or the 600 worders you get these days, we're talking thousands of worders. But I did that through the simple process of dictation; for about 40 years I never physically wrote a word, I simply dictated vast, on everything, everything from film scripts to newspaper columns to correspondence to shopping lists (Adams i/v April 2016).

In this process Philip Adams not only produced *The Adventures of Bazza Mackenzie* but also *We of the Never Never* and *Don's Party*, among many other iconic Australian films. He was also instrumental in setting up the Australian Film Commission. He has authored over 20 books and still writes a column for *The Australian* newspaper. He began his radio career on commercial station 2UE working the late shift there in the 80s and 90s. 'The great thing about late night is they didn't give a f--k what I did. So, there I am on 2UE interviewing Manning Clark, for Christ sake; they'd never heard of him, but it seemed to rate okay, so they let me alone' (ibid). He then moved to ABC Radio taking over the *Late Night Live* program which was centred on Radio National but also broadcast on Radio Australia. It now goes global via the Internet. This globally oriented program is put together at least once per week in the Upper Hunter.

Despite being a Luddite, and that's tactical as much as anything, in that I refuse to be multi skilled, I just wander in and sit down at this dazzling array of screens and knobs but have others do it. I'd suddenly discovered that the new technologies were quite advantageous and miraculously for quite a long time we were the biggest podcast program in the country (Adams i/v April 2016).

This move into the digital realm has been very successful for Adams. He suggests that this success, where he now attracts not only a sizable international audience but many other authors and public intellectuals from around the world who clamour to be part of his radio program, is attributable to one important factor.

I've always taken the view, whether you're making a film or writing a column, that in a sense this is cultural specificity. Being local is probably the best way to have a hope of being international. The great cinema isn't the cinema of genre that tries very much to be mid-Atlantic or mid-Pacific; it's in every country. It's when you do a f--king good Italian film or French film, Russian, that you've got a hope of universality. You don't get it out of any other sort of route (Adams i/v April 2016).

Not only is he locally and globally focused, that is looking for the universal in very specific localities, he is also, as Stuart Hall has described it, a person who is locally rooted but at the same time is also a world citizen. Hall contends that 'at one and the same time people feel part of the world and part of their villages. They have neighbourhood identities and they are citizens of the world' (quoted in Garafalo 1993, p. 25). Adams also realises how important his team is to him and at the same time understands the difficulties his style of locally rooted but globally oriented broadcasting presents to them.

Look, I, at *Late Night Live*, sing the praises of the team every Thursday night, and I do it from the bottom of my heart. But the fact is I've had dozens and dozens and dozens of producers ... On the record, I have to say, that a great deal of their efforts are wasted; they slave over a brief, they'll produce masses of research material which I very rarely read, they'll give me a long list of questions which I very, very rarely use because I prefer to go into the thing almost blissfully ignorant, because I don't have interviews, I have conversations, and so it's a different approach to the material. And of course, the jokes about Gladdy's and Poddy's aren't entirely jokes; they're quite serious. The Gladdy is quite a serious point that to me the trick has always been to imagine that there's just one person listening (Adams i/v April 2016).

This traditional way of engaging with the radio listener has not gone out of vogue as yet on the commercial stations and most definitely not at the ABC. It is one of radio's enduring attractions. However, for Adams and many others at the ABC, the financial remuneration is the least of radio's attractions:

The ABC doesn't pay anything, but of course it's a job for which there's a queue around the block. It's regarded, widely regarded. I remember, yeah, quite a few people have said 'this is the best job in media; who else can sit and talk to anyone pretty much around the world, on any topic?' There is no other job like that. And there's always three or four hard working people who will track these characters down, get them in the studio, and off we go. So I am inordinately fortunate to have it. But what the ABC does, or what it did, it does it less and less now because it's so f--king broke, is it compensates me in other ways. For example, they upgraded the studio in Muswellbrook for me, so I can do the program at least once a week in the bush, which helps me enormously, because as you may know, I live an awful long way from Sydney (Adams i/v April 2016).

Adams knows he is not the only person of stature, from what is now called the creative industries, to reside in or come from the Upper Hunter. His proximity not only to Muswellbrook but also Scone gives him a unique perspective. Murrurundi in the Upper Hunter is a case in

point. ‘And there, in itself, is this little festering hot spot of all sorts of very eccentric creative people living in a town which is almost ruined by poverty, and which is now being recycled as a cheap and interesting place to live by artists’ (Adams i/v April 2016). This is a situation which is indicative in a number of ways of the effect neoliberalism, as the currently dominant political ideology, has had on many regional communities. In relation to this it needs to be noted that there is also a strong association of this political ideology with that of the creative industries, as Terry Flew (2012) explains. The argument is put that the introduction of policies aimed at supporting these creative industries is a ‘reflex adaptation of cultural policy to better serve dominant corporate cultural interests’ (Flew 2012, p. 182). In a manner reminiscent of Raymond Williams and his understanding of patronage (1981, pp. 41-42), Adams adopts a pragmatic approach to this issue.

Well, I find the notion of industry and art slightly tense, but it was ever thus. Look at the lives of the good and the great over the millennia; they’ve always needed a wealthy patron to write out the cheques, whether they’re Imhotep building a pyramid or Michelangelo painting a ceiling. Art or painting, has for centuries of course, been a commercial practice. It’s not just contemporary artists ramping up the price at Sotheby’s or Christies though, by getting their wives to bid; it’s a business, and all forms of art, it seems, are now businesses. So, I suppose creative industries is okay; it’s as accurate a term as any. But it is a bit devoid of sentiment (Adams i/v April 2016).

With writers like Ellen Dissanayke (1995, p. 41) posing a similar view, Adams went on to say that:

I am totally bewildered by the new technologies and the disruptors and all the rest of it that’s happening. But on the other hand, as I pointed out the other day on some public occasion, we’re still doing exactly the same things as we did 3,000 years ago; we’re painting our faces, walking onto wooden platforms and doing something called acting. We’re still blowing and tooting and plucking at musical instruments, as we’ve done for thousands of years, we’re still doing all the ancient things. We’re still stringing words together, making pots. So there’s a paradox; the new technologies come rushing forward, and yet if anything, well, every reaction has an equal reaction, and the equal reaction is to preserve continuity and the old. I suppose they’ll both coexist like the double helix circling around each other (Adams i/v April 2016).

One of those continuities, at least from the twentieth century onward, is the imperative for commercial radio to make money.

7.7.4 Commercial Radio

According to the Commercial Radio Australia (CRA) website (CRA 2017b, online), commercial radio broadcasting, primarily from Newcastle and Lake Macquarie, reaches the lower part of the Hunter Valley with a broadcast area bounded in an arc which runs from Swansea in the south to Morisset, Cessnock and Singleton in the west, and to Dungog, Bulahdelah and the Myall Lakes in the north.

The ACMA-registered station 2KKO operates as KOFM broadcasting on 102.9 MHz and operates out of Charlestown in the Lake Macquarie LGA. It has a targeted demographic profile of 30 to 54 year-olds. It runs an ‘Adult Variety’ format and its broadcast area covers Newcastle, Lake Macquarie and the Hunter Valley. Its website URL is www.kofm.com.au.

Its sister station was operating as NXFM but is now called HITFM. It broadcasts on 106.9 MHz and is co-located with KOFM in the same building in Charlestown. It is a 'Hot Adult Contemporary' format station and is aimed at 18 to 39 year-olds with www.nxfm.com.au as its website URL. These formats obviously are directed at very specific forms of music indicating a symbiotic relationship between radio and the music industry. As Mike Byrne, former program director at NX and KO asserted:

Music is art and it is commerce and when the music industry treats itself like a business they sell more records. When what we are able to play intersects with what the music industry delivers to us, both industries benefit. When the music delivered by the popular music industry gets too arty or too unusual, as it does periodically, and moves away from the mainstream, the less we are able to play it and consequently the less the music industry sells. When the popular music industry, as a whole, delivers what mainstream radio can deliver to its audience and, make no mistake it's a large audience which is quite discerning in what it will and will not listen to, both the radio and music industries benefit (Mike Byrne i/v, 2003).

Both of the stations that Mike Byrne worked at, NXFM and KOFM, now belong to the Southern Cross Austereo (SCA) network. This network 'has the largest regional commercial radio footprint in Australia with stations in all States separated into two targeted brands' (SCA 2017, online). These brands include the HIT network and the Triple M network but SCA also owns the Fox, 2Day and SeaFM brands. The SCA Hit Network, of which HIT FM is of course part of, has 'over 3.5 million metro listeners tuning in each week and over 1.1 million users online. It also rates number 1 for women in the 18 to 39 year-old demographic' (SCA 2017, online). Out of all the commercial stations in Australia, SCA operates the most digital radio spectrum with stations such as Buddha Radio, Easy Radio, Old Skool Radio and Kinderling Kids Radio all available to the Hunter audience via various station websites and assorted apps. It should also be noted that the SCA group of companies, which was formed in 2011 by the merger of the Southern Cross Media Group and the Austereo Group, is also involved in regional free-to-air TV networks as well as online, mobile and various one-off events giving it a large media footprint in the area.

2HD and NEWFM, on the other hand, are part of the Super Radio Network (SRN). As Harry Criticos writes:

The SRN is a subsidiary of the privately-owned company BOL, which owns forty radio stations comprising of twenty-one AM, fifteen FM and four digital stations (DAB+). Thirty-three stations are spread across Northern NSW with three stations located in South East Queensland. The SRN is the largest regional network in NSW with two formats operating throughout its network of stations: Music (Contemporary Hit Radio / Adult Oriented Radio) on FM and DAB+ (digital radio) and talk/music (Adult Oriented Radio) on AM. Apart from the five SRN regional stations that broadcast locally from 5.30am/6am to 6pm, SRN stations receive networked programmes from 9am till 5.30am the following day. The responsibility of supplying and distributing networked programmes to the SRN is divided between three SRN stations located in NSW. As such, there is no central control point within the SRN network structure for the distribution of AM programme content when compared to the SRN FM network (2016, pp. 115-16).

The SRN constitutes its network, as Criticos points out, with a number of stations that can be categorised in the following way:

- Stand-alone – A station that broadcasts locally from 5.30am/6am to 6pm followed by networked programme.
- Nodes – Stations that receive networked programme from the hub. Nodes can also include stand-alone and hub stations as all the AM stations receive three hours of network programme between 9am and Midday Monday to Friday; and
- Hub – A station that is the distribution point for networked programme to SRN stations (Criticos 2016, p116).

As both a standalone and a node station in this network, 2HD operates from premises in Hexham in the Newcastle LGA and is broadcast on 1143 kHz & 97.5 MHz with a 'News, Talk and Sport' format. It has a demographic of 35+ and www.2hd.com.au is its website URL. NEWFM operates from the same building. It broadcasts on 105.3 MHz and runs an Adult Contemporary format aimed at a demographic of 30 to 44 year-olds (CRA 2017a, online).

John McGahan, former station manager at 2KO and more recently station manager at 2NURFM described Newcastle radio audiences in 2003, at a guest lecture at the University of Newcastle, in the following ways. For 2HD these audiences were typified by a '40+ blue collar bloke who enjoys 2-3 schooners after work at the pub or club. He has a punt at the weekend, loves the Knights and lives in Mayfield, Islington and Windale. He has a car that is a minimum age of five years. He lives on "struggle street" but gets by' (McGahan 2003). For 2KO, their audiences were best envisaged as:

White collar workers, female aged 30-49. They drive a Commodore which is usually 12 months to two years old. They have 2.1 kids and live in Maryland, Belmont, or McCaffrey's Drive along Silver Ridge. They can be seen taking their kids to the football, basketball and so on. They dine out at least once a week on fast food or Chinese. They are labelled by the industry as "grocery buyers" (McGahan 2003).

NEW FM on the other hand:

Aims at the 13-34 demographic and is skewed to males. They are employed blue collar workers who spend money on cars and entertainment. They have little loyalty and go with the flow so are hard to keep as listeners. They prefer to live west of Gordon Ave and like noise and to stay out late. They have no opportunity to save money and have a girlfriend, but they like to hang around with the guys. They've been a bit disgruntled over the last three or four years (McGahan, 2003).

This discontentment may have come about at that time as NEW FM reworked its format after the Bill Caralis organisation (now SRN, their present owner), attempted to program in a similar fashion to its successful radio stations further up the coast. For McGahan NXFM was aimed at:

Females whose average age is 26. They like dance music and they can be described as "cute". They like to be in the know in terms of gossip and radio provides this for them. They are involved in the community and they like to be first with the latest. They are outgoing and usually work in an office environment. The right man will come along but they're still waiting. They are thinking about travelling or have travelled. They are into fashion. Their primary interest is their car which is a purple, or some fashion colour, Fiesta (McGahan 2003).

The ABC's audience, by which McGahan means 1233's audience, is 'conservative. They don't listen to commercial radio and they also don't listen for a great length of time' (ibid). He did not describe either Triple, Radio National's or News Radio audiences. Nor did he describe the audience for Pandora or Spotify as these had not become operative at this stage. There are, however, other stations in the Hunter.

As CRA describes it, to the northwest of Newcastle, 'Singleton, Muswellbrook and Scone make up the region commonly referred to as the Upper Hunter, which is approximately 130 km from Newcastle and 285 km from Sydney. All three centres are close to the Hunter River with the New England Highway, which links Sydney and Brisbane, running through the heart of each town' (CRA 2017b, online). This area is serviced by two commercial stations; 981 2NM broadcasts on 981 kHz and targets a 40+ demographic with an 'Adult Contemporary' format while Power FM broadcasts targets 18 to 35 year-olds with a tried and tested 'Contemporary Hit Radio' format. Both are located in the same building in Muswellbrook and are also part of the Grant Broadcasters network. Grant Broadcasters are the second largest radio network in Australia, behind SCA and ahead of SRN. They are still a family owned business which has adapted and progressed since starting in Dubbo in 1942. They now own a network that includes stations in the Northern Territory, Queensland, South Australia, Tasmania, Victoria and, of course, the Upper Hunter in New South Wales.

7.7.5 The Independent Sector

Radio, as a cultural form and economic concern, has continued to be resilient and adaptable. After its development in the early twentieth century, it has acted as a precursor to many of the newer forms of media that occur within the current set of creative industries. Not only has it adopted these newer forms and incorporated them into what it does, just as it had borrowed heavily from other cultural forms itself and aggregated these into what was then a novel type of content delivery that itself gave rise to other forms such as television and streaming, but these newer forms have made revenue by also aggregating audiences around consolidated content and on-selling these to advertisers and other businesses, just as Facebook does now.

This willingness to try new things is a hallmark of radio's continuing survival across all its sectors. It also has room for small independents. For example, 'Bay FM is a Port Stephens FM radio station, broadcasting on 88.0, specifically serving the Tomaree and Tilligerry Peninsulas, just north of Newcastle. Local family owned and operated, our studios and main transmitters are located in Nelson Bay, the Heart of Port Stephens' (Bay FM 2017, online). The station can be accessed through a number of apps including Listen Live or Tune In Radio from Google Play or the Apple App Store.

One major example of the creative and innovative approach taken by those involved in the independent radio sector is that of Ison Live Radio (now Australian Broadcast Media) which has operated out of Newcastle, NSW for some time. Its major creative operative is Sean Ison.

Ison began his career 25 years ago developing his initial cultural capital in the field of radio as a 'cart boy' working at various stations in the production side of commercial radio. He then moved to on-air positions on community radio and from there moved to narrowcast broadcasting in the process developing the habitus, the set of naturalised predispositions to action that are informed by a long-term way of being in the world, typical of a radio operative. He has also been immersed formally in the domain or knowledge system of radio as he has a BA (Com. Stud.) from the University of Newcastle where in 2004 he completed a media production major. He can demonstrate his symbolic capital by pointing to the title he now holds as the President of The Independent Australian Radio Broadcasters Association and has built a

small media business that concentrates on successfully syndicating programming internationally, delivering content in narrowcast formats. He has also been developing streaming services. As an active decision-making agent within the business he is nominally the product manager for Australian Broadcasting Media, originally Ison Live Radio. Along with Israeli investors, members of the field in Csikszentmihalyi's terms, he owns half of that company. For ILR he oversees the music coming in from all online sources and the music going out. These songs also constitute a significant portion of the domain of radio and the musicians who send them to him also constitute a part of the field Ison deals with. In terms of the products and programs the company creates, both of which are part of the field of works, Ison asserts that 'every product that's created has to be saleable, it has to have a dollar value attached to it. It has to be something we can either fly with advertising or something we can sell as a package to other radio stations or TV stations' (Ison i/v May 2015). It is worthwhile noting here that when Ison refers to 'we' he is indicating the partners he is working with rather than a set of employees as this business is not structured in the traditional way. It has no traditional employees. In outlining ILR's operational methods Ison claims that:

[ILR] produces weekly radio programs for radio stations all around the world. In a range of formats our shows are heard by over a million free-to-air radio listeners each week. We also produce direct-to-radio programming from our studios 24 hours a day, 7 days a week. This is non-stop music programming in nine different formats, delivered via the Internet or via satellite straight through the mixing desks of Australian radio stations hooked up to our own ILR Media Server (ILR 2016, online).

Unlike the four free-to-air commercial radio stations in the region, all emanating from two larger radio networks, SRN and Southern Cross Austereo, ILR has thus used the affordances the internet provides to its own advantage. This wasn't always the case. Ison admits that initially 'I had no real use for the internet, no experience of it until I went back to university, and it opened up a whole world for me. And I was able to contact a lot of people and to make friends' (Ison i/v May 2015). In developing this social capital, so important in operating freely in the field, Ison admits these social networks were heavily leveraged. Word of mouth proved to be the initial means of establishing success as far as the syndicated programs for ILR were concerned. The programs needed content, domain material, and they needed buyers, further members of the field, to buy the programs. As Ison explains 'our products, the actual specific shows, carried word of mouth with other stations. We also were working with a lot of musicians for the music to come in from the musicians, and a lot of them actually put us on to stations, believe it or not, which was pretty good' (Ison i/v May 2015). Then in an able demonstration of the gift economy at work, Ison:

Set up an industry website called ausradiosearch.com and offered all kinds of free services and content as a package [subscribers] could sign up to for free. This attracted a lot of Australian and overseas traffic from radio stations (about 800 visitors a day at its peak). We then hitched onto this and offered them shows (Ison i/v May 2015).

It was this free service, a gift to the community as it were, that demonstrated the value of reciprocity and which enabled the initial international contacts to be made. ILR was eventually delivering programs via the internet to stations across Asia, Oceania, Europe and North and South America. Most of these were concentrated in Europe and North America. Additionally, as Ison indicates, 'although web casting is a somewhat minor concern with us, we also have a substantial share in online radio in Australia with our daily web casts reporting listeners from one end of the country to the other' (ILR 2016, online). Furthermore, in a display of orthodox

entrepreneurial behaviour, focused on the use of financial capital, Ison diversified his interests by establishing Australian Broadcasting Media (ABM) along with a business partner:

We went and got investors from Israel to set it up and we bought a stack of stations, they're all country music stations, they go down the Hume Highway, and there's a bunch of them go in towards the Riverina. That's basically where they're running. There's about 40 of them, I think. They're all what you call narrow casts; they're low power FM, although we don't run them quite at low power. But if you chain it together you end up with one big sort of radio station, and we bought those in 2005, sorry, 2008 we bought those and set them up (Ison i/v May 2015).

In this case, the business models Ison operates with are consistent with the notion of amplified hybridisation (Lhermitte et. al. 2015, p. 89) as mentioned above. As he indicates, he now runs a more traditional radio model along with his internet-based delivery each feeding into the other.

Our business is sort of two tiered now; we're still doing syndicated programming but we're also now able to put the same resources that we had coming into this syndicated side of things into actual radio stations of our own, and we play quite a lot of syndicated shows as well, we have a lot of syndicated shows coming in now. The way those [stations] are set up they go into independent mode where it's all computerised. They basically play, do their own thing at certain times of the day, because I decided it wasn't worth networking automation basically through the satellite link, it wasn't worth paying for it. And then at particular times we have a nationally syndicated morning show. That goes out, that's all in real time on that. I do an overnight show which is voice tracked most of the time, because I'm not usually creeping around at midnight anymore. And what else do we do? We have, oh, there's a drive time program. So, there's certain times of the day it's the same program going throughout the whole thing, covering the whole region, and then other times they're doing their own little thing, playing local advertising and stuff like that (Ison i/v May 2015).

In operating within the social, technological, economic and political contexts of the field of radio Ison also has to operate within a legal one. The main form of content he aggregates is music from the field of works, the accumulated cultural work completed up to this time in a particular field. This is for both his syndicated program and his narrowcast formats. As such there is a legal requirement for these content providers, the musicians from the field who originate the content, to be remunerated. This is not done directly as ILR does not pay musicians for their content but is required to pay fees to the Australasian Performing Rights Association (APRA) incorporating the Phonographic Performance Company of Australia (PPCA), which remits the fees it collects to songwriters nationally. Significantly, APRA also has a remit to do the same with its partner organisations internationally via the Berne Convention. Ison states that his company ABM negotiated an arrangement with APRA. However, 'I mean of old we didn't worry about this, but we had to, especially once we started getting terrestrial radio stations, so we negotiated a special arrangement with them' (Ison i/v May 2015). Once he moved into streaming, a certain complexity moved into these practices. Given that 'measures of risk-taking behaviour have been found to correlate significantly with entrepreneurial orientation (Caird 1993)' (Mazzarol 2011, p. 49), and the fact that entrepreneurs like Ison tend to reinterpret situations of potential loss into situations of potential gain, we can claim here that there were commensurate forms of risk to be negotiated. As Ison explains 'we started a thing called Radio Sydney which is 250-odd streams of internet radio, and we had to negotiate a

special arrangement for that as well. I mean we've got a lawyer and we do play it close to the wind sometimes and interpret the law our way' (Ison i/v May 2015).

Ison observes that 'the whole industry legally is in a state of flux' (Ison i/v May 2015). Along with changing technology the recent simulcasting court case tested the waters of what could be possible. As the Australian Copyright Council reported in 2015, Commercial Radio Australia (CRA) was unsuccessful in its Full Federal Court appeal. CRA had argued that an internet simulcast could not be seen as a broadcast, but they were unsuccessful and the judgement against them was upheld by the Federal Court. What was important about this decision was that radio broadcasters could no longer use their existing licence with the PPCA to stream sound recordings over the internet. The Full Federal Court of Australia had previously concluded that:

Online streams (simulcasts) of radio programs were not 'broadcasts'[1]. This was later affirmed by the High Court of Australia which rejected an application from the CRA to appeal. The decision meant that rather than having one PPCA licence covering both radio and internet broadcast, radio stations are obliged to have a second, separate PPCA licence to broadcast their programming online (ACC 2016, online).

For Ison there were 'several concepts that were simply outdated that just didn't really apply' (Ison i/v May 2015). He and his legal team, also seen here as players in the field of radio, argued in their negotiations with APRA that 'the wording of the legislation didn't cover what was being said, or it may have covered it, but it didn't cover it accurately' (Ison i/v May 2015). In those negotiations, ABM and APRA came to an arrangement that appears to have suited both parties:

They're quite good, I will say, they're not quite the bogeyman I used to think they were. They're quite reasonable about negotiating things. But I mean fortunately APRA's open enough for example, for people like us to come along and say, 'Well, we want to do this. What will this cost? And what about 20% of this', and that sort of thing. And that's a situation that should exist, rather than arguing in the copyright tribunal, which is where it was going to end up, but I think we avoided that (Ison i/v May 2015).

Ison is continually scanning the horizon for further business opportunities. He knows that 'you have these different models overseas; I think we just need to catch up' (Ison i/v May 2015). He also realises this presents not only opportunities but also threats but ones he is willing to confront. For him it's a hostile situation because the technology is in flux and organisations like APRA, underpinned by copyright law, are asserting that current laws still apply. Noting the speed of change, Ison argues that these laws don't really apply. 'No one's actually clarified and sat down and defined [them], and I mean it's not just legally, the nature of things is changing' (Ison i/v May 2015). For him:

One of our major things that we get listeners from is podcasts, and the whole idea of on-demand entertainment where people, same as with television or whatever, people can choose what they want to hear when they want to hear it. That in itself is changing, yet APRA has a ... podcasts are still a grey area. APRA says most podcasts are illegal, that everybody's doing the wrong thing because they're breaching the mechanical copyright of the musicians or whatnot. Others say that's not the case, so ultimately this will sort itself out when the technology gets to a stable point where it's not progressing (Ison i/v May 2015).

While this may be a hopeful scenario, given the emphasis being placed on the ongoing nature of creative destruction and digital disruption where these are now seen as the new norm. One newer station that is hoping to disrupt the local scene is the recently inaugurated new2UW. This

is a locally owned digital station that intends to broadcast as much local content as possible. It purposefully follows a traditional format of 'news, music and talkback together with hits from the 1960s, '70s and '80s' (Everett 2018, online). They intend to replicate the experience of listening to an old time AM station with local personalities populating each shift. Mark Tinson and Steven Pickett, both from the music industry (see music section above), take the drive shift while breakfast:

Will be hosted by airwaves stalwart and station operator David Sayers while PR and events expert Tracy McKelligott tackles the morning shift from 9am, with academic Dr Harry Criticos working behind the scenes ... 'We've basically just been waiting for the technology to catch up', Sayers said. Up to 60 per cent of people listen to radio on their mobile phones. Listeners can tune in through the app, on the web at new2uw.com or via digital radios (Everett 2018, online).

7.8 Conclusion

From much of the above we can see that systems, whether they are called innovation ecosystems or creative systems in action, are central to the creation of novelty and value in the sort of changing marketplaces that typify the creative industries. Radio, as a cultural form and as an economic concern, has continued to be resilient and adaptable inside this system. It is an important and mature sector within the creative industries sphere in the Hunter. It has a long and deep history within the region. It is populated by networked commercial businesses, government funded stations with a strong online presence, a well-established community sector and a set of independent operators working outside the prior categories. Despite some inroads from the digital world, broadcast AM/FM is still a popular medium. This form of radio is still the leading audio platform with 85% of people listening to this medium in comparison with 'Spotify 21%, Podcasting 10%, Pandora 8%, Apple Music 6%, Google Play All Access 2%' (CRA 2017d, online).

For the commercial sector the major radio stations broadcast from the Newcastle and Lake Macquarie LGAs primarily reaching the lower part of the Hunter Valley from Swansea in the south to Singleton in the west, and to Bulahdelah and the Myall Lakes in the north. This area is serviced by two major networks, that is the Super Radio Network (SRN) and Southern Cross Austereo (SCA). In the Upper Hunter this area is serviced by Grant Broadcasters who are the second largest radio network in Australia, behind SCA and ahead of SRN.

The Australian Broadcasting Corporation (ABC) has a strong presence in the region. Content available as podcasts and iView first-release productions has now become an important point of audience contact for the ABC. The digital reach of the ABC includes the ability of regional audiences to listen live or go to the station website of not only 1233 ABC but also ABC NEWS, RN, ABC Grandstand, triple j, triple j Unearthed, Double J, ABC Classic FM, ABC Classic 2, ABC Jazz, ABC Country, ABC Extra, Radio Australia and Radio Australia Multi-language. Each of these broadcast and narrowcast stations can be accessed locally, national and internationally.

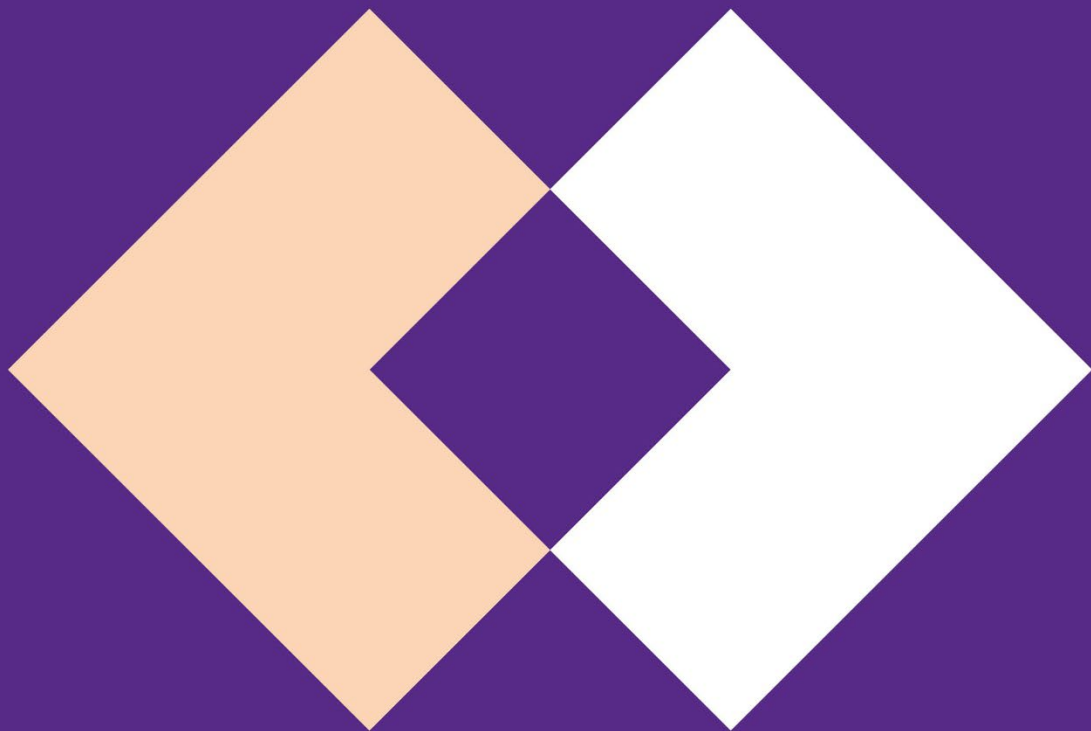
The Community broadcasting sector is serviced Great Lakes FM in Forster with other community radio stations in the Hunter Valley including 2CHR, Gloucester FM and Rhema FM as well as the oldest community station in the region, 2NURFM, located at the University of Newcastle. Central Hunter Community Radio (2CHR) serves the communities of Cessnock and Maitland and their surrounding districts. Most of these stations are run by volunteers and are mainly non-profit organisations.

One major example of the creative and innovative approach taken by those involved in the independent radio sector is that of Ison Live Radio (ILR now Australian Broadcast Media) which has operated out of Newcastle, NSW for some time. ILR produces weekly radio programs for radio stations all around the world in a range of formats. It is heard by over a million free-to-air radio listeners every week and produces direct-to-radio programming from their studios across the clock every day. It is delivered via the Internet or via satellite and operates from its own media server. One of the newest digital stations in this sector is the new2UW, a locally owned digital station. It purposefully follows a traditional format of news, music and talkback and intends to replicate the experience of listening to an old time AM station with local personalities populating each shift. They realise that up to 60 per cent of people are listening on mobile phones. They can tune in via an app or on the web or via digital radio.

Needless to say there are a number of dedicated yet idiosyncratic characters populating this entire sector of the creative industries. They are connected locally, nationally and globally.

Creativity & Cultural Production in the Hunter

An applied ethnographic study of
new entrepreneurial systems in the
creative industries.



Final Report:
Hunter Creative Industries

Publishing

Associate Professor Phillip McIntyre
Professor Mark Balnaves
Associate Professor Susan Kerrigan
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8. PUBLISHING

8.1 Introduction

The publishing sector in the Hunter Region is diverse and well established with a long history in the valley. Books, newspapers magazines and newer forms of publishing such as zines and blogs are all well represented in the region. While some of the more traditional forms of publishing are showing a tendency to struggle in the face of the digital changes that are sweeping the globe, there are still plenty of opportunities in the region for entrepreneurial publishers. The telling of stories that resonate with their audience is an age-old attractor and is deeply embedded in our social and cultural world.

8.2 A Brief History of Publishing in Australia

Publishing, as it is currently understood, begins after the invention of paper and the copying services that existed in Greece, Rome and China, in 1440-50 with the invention of Gutenberg's printing press (EB 1994, p. 415-16). This was followed by the consequent spread of printing and literacy. The first true newspaper began in Antwerp in Belgium in 1605 but publishing became a substantial industry in the 19th century with the introduction of inexpensive paper, steam power and typesetting (ibid). From the very first incursion of Europeans into Australia publishing has been a part of the cultural milieu since that colonial era.

One of the early convicts in Australia, George Howe, who was born in the West Indies, came with a good education and skills in printing and he was immediately put to work printing government documents. He printed the very first book to be made in Australia, *New South Wales General Standing Orders*, which was a very dry compendium of 'Government and General Orders issued between 1791 and 1802' (SLNSW 2017, online). He also set about, with permission, publishing Australia's first newspaper which was *The Sydney Gazette and New South Wales Advertiser*. It came out on 5 March 1803 and was printed weekly.

[It] held four portfolio pages of official material, with a small number of private notices. Early editions comprised shipping news, auction results, crime reports and agricultural notices, poems, literature and religious advice. *The Sydney Gazette* remained the only newspaper in Sydney until the appearance of explorer William Wentworth's *The Australian* in 1824 (SLNSW 2017, online).

From that period onward Australian literature, newspapers and magazines told the many stories of this country. Bookshops and publishing houses came and went in all the major towns, and eventually cities, giving rise to an industry that supported authors, printers, compositors, editors, journalists, newspaper editors, publishers and proprietors who themselves established printing presses and plants. This industry stood alongside a culture of reading soirees, poetry recitals and public lectures which were eventually supported and encouraged by various lending libraries, literary societies, Schools of Art and Mechanics Institutes. Theatrical plays and musicals found further life after the stage performance through the printing of their scripts and manuscripts. As far as newspapers were concerned in the early stages of the twentieth century, the daily paper was the most important of the mass media. As noted by Tiffen (2014) 'before the arrival of radio and television, the newspaper enjoyed the same kind of social monopoly as the railroad did before the coming of the automobile and the airplane ... it dominated the sphere of information as the train dominated transportation (Smith 1980, p.318)' (in Cunningham and Turnbull 2014, p. 87).

Australia's publishing roots are directly linked to the origins of British publishing. In the early 1800s the practice was to export raw material consisting of stories and

other texts to Britain to be converted into book form. The end product was then shipped back to Australia to satisfy the prodigious appetites of Australian readers (Munro and Sheahan-Bright, 2006). With the eventual arrival of printing presses in Australia, the fledgling industry began to make an impact. However, publications were predominantly restricted to newspapers and various types of journals. At the time of Federation, Australian writers were producing a prolific amount of material, but the bulk of the printing was still being completed in Britain, which was aware that Australia was a significant market for its industry. It was not until the period between World War 1 and World War 2 that the Australian book trade started to acquire an identity of its own (Borchardt and Kirsop, 1988) (Tian 2008, p. 15).

In 1948 the Australian Book Publishers Association was established 'from a merger between the NSW and Victorian Publishers Associations, and with a modest membership of 20' (APA 2017, online). This association grew in due course 'to be the biggest representative body of its kind' (ibid) and amended its title in 1996 'to embrace a growing digital culture' (ibid). It is still 'to this day open to any person or company engaged in a publishing activity in Australia' (APA 2017, online).

In the 1950s and 60s to say that newspapers were 'the most important of the mass media would no longer have been a very sensible proposition, given the greatly varying roles played by movies, radio and the infant television industry' (Tiffen in Cunningham and Turnbull 2014, p. 87). Publishing houses like Allen & Unwin became the mainstay of book publishing in Australia when it began publishing in the 1970s 'as part of the UK company George Allen & Unwin Ltd established in 1914. In July 1990, following the sale of the UK company, Allen & Unwin's Australian directors effected a management buy-out and the company became fully independent, owning the Allen & Unwin imprint throughout the world' (A&U 2017, online). They remain Australia's leading independent publisher and were voted 'Publisher of the Year' in 2016 which was the thirteenth time they had been given this award.

Throughout the 60s, 70s and 80s the newspaper and magazine industry was dominated by Fairfax and News Corp with titles like *The Australian Women's Weekly* maintaining their culturally iconic status. Angus & Robertson and Dymocks also continued their long run as mainstream booksellers. In the 1990s one of the main drivers of the continuing development 'of the Australian book industry were the 1991 changes to the Copyright Act which enshrined the parallel import restrictions' (Coronel 2017, online).

By creating a solid, protected market for local editions of overseas-originated books, a 'portfolio' model for publishing companies became the norm. Both locally owned independent publishers such as Allen & Unwin, Text, Scribe, Black Inc., Hardie Grant and many others, and the local branches of the big international publishers – Penguin, Random House, HarperCollins, Pan MacMillan, Hachette and Simon & Schuster – developed businesses that combined 'buy-ins' of overseas-originated titles alongside their publication of local books. And as these companies grew, they were better equipped to participate in international rights markets at events such as the Frankfurt, London and Bologna Book Fairs and to sell rights to Australian books to many other territories and languages (Coronel 2017, online).

The negative aspect of this story is that the larger companies became 'reliant on sales of overseas-derived titles for up to 55% of their revenue' (Coronel 2017, online). With a growing proportion of readers buying online and offshore this business model was destined to become self-defeating. During the 90s and 2000s 'independent bookshops maintained a substantial

market share; chain stores served the mass-market well; and the massive discounting wars that distorted the UK and US book trades and moved much of bookselling there into supermarkets and discount mass retailers were largely averted' (ibid). Then a downturn occurred which was stimulated by the ease of online shopping, the introduction of eBooks and the Australian dollar reaching parity with the US. Since Amazon entered the book market in 2007 the bricks and mortar retail stores began to disappear at an alarming rate. Apple has also successfully integrated books into its iTunes catalogue. As Tim Coronel explains 'eBooks are currently about 10% of publishers' revenue, but in the US eBooks now make up a quarter of mainstream publishers' revenues and there are many titles, especially in genre and popular fiction, that are eBook-dominant or eBook-only' (2017, online).

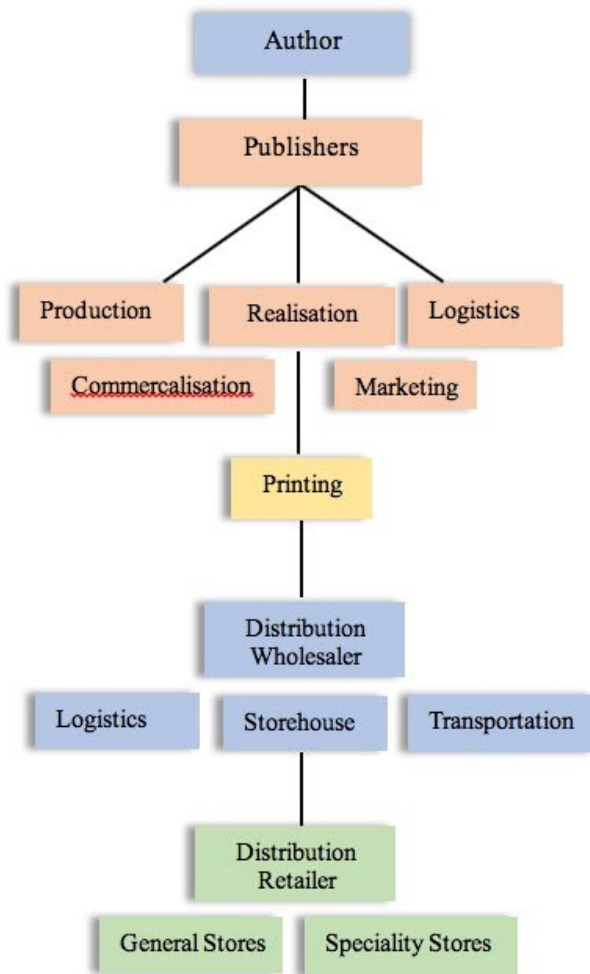
A similar situation has occurred for newspapers and magazines as zines and e-zines and so called 'independent' publishers began online news services often using traditional or legacy media as their primary news source. 'At the beginning of the twenty-first century, by all the most tangible measures, newspapers are in relative, and increasingly absolute, decline' (Tiffen in Cunningham and Turnbull 2014, p. 87). Blogging as a form of writing eventuating in commercial ventures have proliferated and primary news sources have, for many readers, become social media sites such as Facebook, Twitter and Reddit. Nationally focused news outlets have also had to compete with mastheads whose main news service is located elsewhere on the planet. For example, *The New York Times* and *The Guardian* both deliver Australian editions online now competing directly with News Corp and Fairfax media mastheads.

It can be seen then that, 'the technological capacity of the digitised world has provided a series of affordances that have enabled the advent of newer processes of creating material in a written form and getting it to an audience. In the face of these changes the old gatekeepers have had to relinquish many of the vestiges of their own power' (Matulionyte, Paton, McIntyre & Gleadhill 2017, p. 2).

8.3 Structure of the Publishing Industry

The publishing industry can be divided into sectors that produce periodicals or non-periodicals. Non-periodical publishing includes the one-off printing and sale of such things as books and reports while periodicals include magazines and newspapers which appear at regular intervals. While these have all been paper-based at one time, increasingly there are now a number of digitally based publishing and self-publishing options that have threatened to disrupt the structure of this industry.

Traditional Value Chain



New Players in Digital Publishing



Figure 15 Traditional and Digital Publishing Structure
(Original in Fernández- Pacheco: online)

8.4 Business Models

As Albert Greco, Jim Milliot and Robert Wharton indicate, in the third edition of their monograph *The Book Publishing Industry* (2014), book publishing generally derives income from direct sales and residual licencing deals. Publishers usually keep a sales force to sell bulk purchases directly to retailers. The retailer will generally take 55% of the listed retail price while the publisher collects 17.5%. The author is due 10% dependent on the deal brokered between them and the publishing house. Costs of production, distribution and promotion usually account for the other 17.5%. Publishers may now also operate as distributors selling directly to individual customers/readers competing in this case with Amazon, Book Depository and so on. It's worth noting that as a distributor and retailer Amazon usually takes 30-60% of the list price for each book it sells. Licencing deals and returning fees for the use of eBooks are also made directly with institutions such as Universities. The eBook market usually operates on a pay-per-use basis and with online delivery there is now also the potential for an ad revenue stream for publishing houses who operate these services.

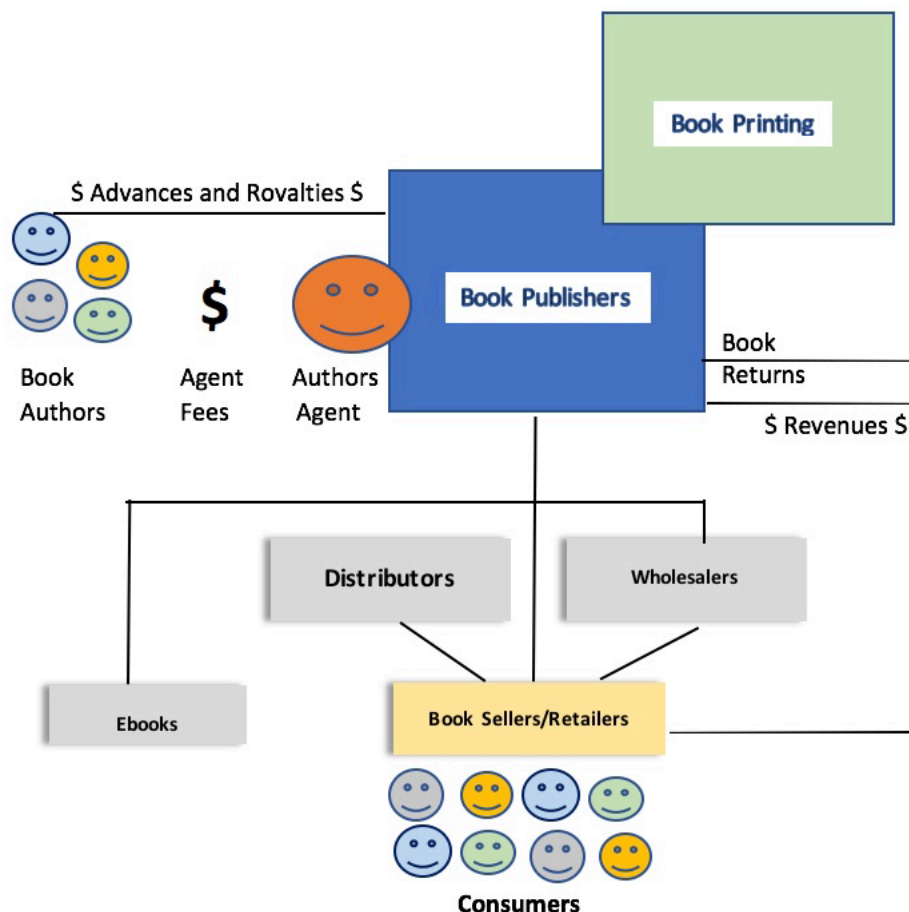


Figure 16 Traditional Publishing Revenue Structure
(original from Publishing Revenue Structure: Online)

Magazines have traditionally relied on either direct sales or subscriptions, and advertising revenue which is itself based on circulation figures. Circulation, subscription, print advertising and now online advertising revenues remain core to this sector but staging events to promote and sell product is also becoming an income generator as well as being push factors which

generate further advertising. Circulation figures are based on direct and potential sales while print advertising is based on the sale of ¼ page ads etc.

For free circulated magazines, ads and subscriptions are the primary revenue stream. For paid publications, of course, there is also off the rack sales, but this is considerably less for most publications unless the magazine has an extremely large circulation and an excellent sale through ratio (the actual percentage of magazines sold, out of the total amount distributed, per issue per retail location). Another revenue base that both types of magazines can capitalize on ... is merchandising. With the advent of commerce ready websites, it's easier now than ever before to sell merchandise related to a magazine's brand. It is also possible to garner a significant consumer base, not only predicated upon the magazine's core demographic but also via social media sites with very little to no investment. If a well thought out marketing plan is properly planned and executed, the merchandising realm can certainly be much more lucrative than the aforementioned options (Lindsey 2017, online).

In addition, magazines and newspapers may increasingly be brand oriented rather than operating as a single product for sale. In this case its income is not just through advertising sales or subscription but also through content licensing, custom publishing, in-house video promotion and sales, conducting industry seminars, sales of subscriber lists, and appearances at trade shows. Primarily, as one comment noted on Lindsay's Quora site 'the value is in the content and the reader relationship to the brand' (2017, online). Another suggested that a reasonable strategy for certain magazines is franchising where 'magazines can enter new geographic territories and sell the rights to publish the magazine to someone who believes he/she can make a profit from the advertising revenues in a given district' (Lindsey 2017, online).

The business model for newspapers is almost identical to magazines. However, as of 2015 global newspaper circulation revenues for the first time became greater than advertising revenues. According to the annual World Press Trends survey undertaken by the World Association of Newspapers and News Publishers (WAN-IFRA), 'the basic assumption of the news business model - the subsidy that advertisers have long provided to news content - is gone' (Kilman 2015 online). This situation was noted by Larry Kilman, the Secretary General of WAN-IFRA, at the 67th World Newspaper Congress, 22nd World Editors Forum and 25th World Advertising Forum held in Washington, DC. In this case it can be claimed that audiences, instead of advertisers, have become newspaper publishers' largest source of income. With newspapers estimated to generate US\$179 billion in circulation and advertising revenue in 2014 this was 'larger than the book publishing, music or film industries. 92 billion came from print and digital circulation, while 87 billion came from advertising, the survey said' (Kilman 2015, online).

Both magazines and newspapers now have an imperative to operate with an online presence. This may require the maintenance of a dedicated website that is itself increasingly structured to be mobile phone friendly. Many online magazines depend on both subscriptions and advertising and will often give away, as loss leaders, certain stories or sections of the magazine to gain more subscribers. There is also, increasingly, a lengthy time lag between building an audience via sites such as Reddit and other forms of social media, attracting both subscribers and advertisers, and the ability to monetise this audience. Making money from the online magazines or news-sites requires patience and a source of finance willing to wait for returns. As a part of this process the magazine or news website will need to be smartphone accessible requiring the

reader to purchase an application that then provides another revenue stream for these types of publications.

8.5 Operational Methods

Publishing houses, as Greco et al. (2014, p. 6) spell out, traditionally perform a set of discrete but connected functions when producing books. The first of these is *content acquisition*. The publisher acquires a manuscript from an author. In acquiring a manuscript, the editor evaluates the literary skills of the author, the content of the book and whether this will fit with consumer demand across a projected 12 to 18-month period. Once a book is commissioned it proceeds to *content development*. The manuscript is developed and enhanced via the editorial process. The third stage is where the book cover and the look of various pages are *designed*. The next stage is where *the production cycle* takes place. In managing this cycle, the publishing firm goes about creating cost analysis documents and production cycle estimates which involves ‘a financial operation working within the production capabilities of either the lithographic printer or the people putting together the book (Greco et al. 2014, p. 5). As the book swings into *production* there are *prepress and then printing* and paper binding or the preparation of an e-book to be undertaken. The book is then *finalised* as a hard copy, an electronic one or both. Once the book exists in a material form the job of *marketing* takes over. The suggested retail price will be determined and a campaign to market and promote the book will be organised and implemented. *Selling the book* across various channels of distribution becomes the function of the publisher’s sales team who are aware of the multiple channels and the multiple challenges and opportunities each creates. Once sales are made the copies need to go to whoever has ordered or purchased them. This is the responsibility of *fulfilment* who are involved in ‘managing the warehouse and distribution of books into channels of distribution; supervising all book returns; How many copies will be returned? How do we handle a rush, an unexpected demand for a new title? (ibid). The last operational function involves *customer service*. Since good customer relations are imperative, customer service has the responsibility of ‘handling all inquiries and orders from customers before, during, and in the after-sale period for new titles as well as for all backlist titles’ (Greco et al. 2014, p. 6). The publishing house has other revenue streams other than sales of the book and these are largely associated with rights. The publishing house has the function of ‘supervising all sub rights, foreign rights, foreign sales licencing activities, special sales etc.’ (ibid). They employ ‘an accounting process that requires a rigid application of the contracts language since this is a revenue stream for many well-established authors’ (Greco et al. 2014, p. 6).

The magazine and newspaper publishing sectors operate in very similar ways. Both must go through comparable procedures on a regular, that is daily, weekly or monthly basis. They must firstly ensure that they have content, which can be sourced from freelance writers, staff journalists, contributing editors, columnist or feature writers. All these writing activities are overseen by an editor and copy editing may be sourced in house or outsourced to freelancers. The writing team will most often, especially for magazines, work in tandem with a design team, generally consisting of a creative director, an art director and a photo editor, who works with a number of freelance or contract photographers. This team’s major task is to oversee and construct the look of the magazine. At the same time the newspaper or magazine publisher needs to ensure that they have a sales team that will reliably and regularly engage enough advertisers and subscribers to cover the cost of producing the publication including the wages of everybody involved. All these operations are necessary whether one is producing a hard copy

for sale or an online entity for digital distribution. Where these differ is at the point of going to press, that is, printing hard copies or producing the right file types for uploading. If printing hard copies then, apart from design, significant costs include typesetting and paper stock, printing and binding fees and distribution costs. If creating an online magazine Flipping Book Publisher, for example, is considered one of the best software packages to access to allow the build of the online magazine. Once made the file will be uploaded to a website and located on a server. Then promotion of the edition begins using as much access to social media as possible.

Blogging is another matter. Once compelling content is developed and regularly, not intermittently, posted, then the blogger must involve themselves in SEO optimisation and use social media such as Twitter, Facebook and Snapchat, or Pinterest and so on, to help drive audiences to the site. It is a highly active process. Once there is an established audience, money can be made from advertising, sponsorship (depending on the content), creating an e-store to sell affiliated merchandise or by using Paypal as a site for readers to make donations to the writer.

8.6 Important Personnel

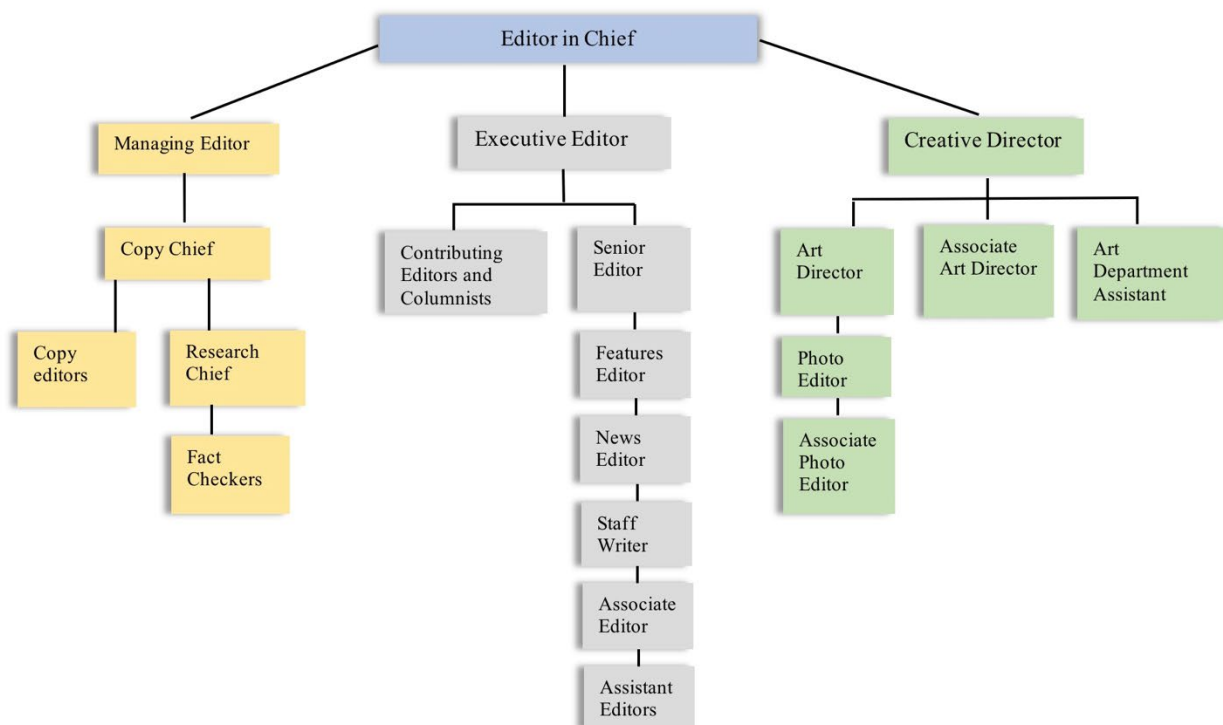


*Figure 17 Publishing Personnel Generic Structure
(Original from Querimit: online Editorial Department Consumer Magazine)*

Writers are, of course, very important people in the publishing sector. They may come as freelancers who work to a brief or on spec for magazines, or as a staff writer who operates as a news journalist, a feature writer, a columnist, or they may be an author or blogger. Some writers may perform many or all of these functions. Their roles vary according to the title and position and who they write for, but the main task is to produce engaging content. Authors, in particular, are also required to undertake a wide variety of promotional activities. For book authors a writer's agent is increasingly important. Agents will place authors with publishing houses usually through a commissioning editor. The publisher generally owns and/or operates the publishing house and they employ editors in the book trade to ensure the book is market ready.

For newspapers and magazines, editors are responsible for the overall output. They ensure the written material is newsworthy and ready to be read once it is printed or uploaded. In this case the art director, designer and creative director, who may be one and the same, work closely with the editor to ensure the output is appealing. The photo editor is responsible for sourcing suitable images from stock companies or by employing appropriate freelance photographers. Typesetters and printers are necessary in the physical production phase of publishing as are distributors. In the case of digital sales, online distribution platforms are necessary to get the output to market. Marketers work in tandem with the sales team. Salespeople are needed to ensure all copies are supported by advertisers for magazines and newspapers; and for book publishing they are required to make sure the book is sold to its audience via retailers who are increasingly located online. The sales team may also be assigned to sell to institutional buyers such as universities and libraries.

8.7 The Hunter Region Publishing Sector

8.7.1 Books

Philip Adams, as well as being a public intellectual heavily involved in the radio and film industries, is also an author of note. He has written and published approximately twenty books. He lives in the Upper Hunter along with his partner Patrice Newell with whom he has co-authored books with. Newell is also an author herself and a former journalist who now concentrates on promoting and growing olives. As Adams remarks:

Of course the Hunter is a strange place. As you would know, it must be something in the water apart from coal dust, because ... tonight I'm launching a book at Gleebooks for Ian Lowe, and it's his update on *The Lucky Country*. Donald Horne was the most famous son in Muswellbrook. Patrick White, next door to my farm on Belltrees. [Henry] Havelock Ellis, people don't realise, who came up with the Narcissus complex which Freud knocked off, he taught in a school not far from where I live. There's Barbara Baynton who was regarded in her time as one of the great writers, you know, HG Wells comparing her to Tolstoy, lived in Murrurundi (Adams i/v April 2016).

Baynton (1857-1929) was born in Scone in the Upper Hunter and when her parents moved to Murrurundi she began her early education at home. She went on to write short stories for *The Bulletin* and eventually had her collection *Bush Studies* published by the London publishers Duckworth & Co in 1902. Through intelligence and good fortune, she became an astute business woman investing 'in the Law Book Co. of Australasia Ltd of which she later became chairman of directors' (ADB 2017, online). Her first and only novel *Human Toll* was published in London in 1907. Her collected works, edited by Sally Krimmer and Alan Lawson, include *Bush Studies*, *Human Toll*, other stories, verse, essays and letters, and are held in the Auchmuty Library at the University of Newcastle.

There have been quite a number of other famous authors originating from the Hunter. One of these is Marion Halligan. She was born in Newcastle and is published by Allen & Unwin and University of Queensland Press. She now resides in Canberra. Before taking up a writing career she was a school teacher and journalist, but it was her novel set in Newcastle, *Lover's Knots: A Hundred-Year Novel*, which put her on the literary map. With it she won the Age Book of the Year prize and the Nata Kibble Literary Award and it was shortlisted for the NBC Banjo Awards. Halligan has now 'published some twenty books (including a children's book, *The*

Midwife's Daughters) and has written short stories, articles, book reviews and essays for various publications' (A&U 2017, online). According to her UQP authors' page:

Her seven novels, *Self Possession*, *Spidercup*, *Lover's Knots*, *Wishbone*, *The Golden Dress*, *The Fog Garden* and *The Point*, have between them been nominated for most major literary prizes. *Lover's Knots* won the Age Book of the Year Award and *The Golden Dress* was shortlisted for this award and for the Miles Franklin Award. Marion has also published four collections of short stories, a picture book for children, and three nonfiction books. More than sixty of her short stories have been published in journals and magazines and her work has been widely anthologised. Marion won the Geraldine Pascal Prize for critical writing and was chair of the Literature Board of the Australia Council from 1992-1995 (UQP 2017, online).

One of the current crop of successful popular authors who still resides in the Hunter Region is Barry Maitland. Maitland grew up near Glasgow in Scotland and, as his website indicates (Maitland 2017, online), was inspired to appreciate literature by an English teacher. He studied Architecture at Cambridge University, and after practicing as an architect commenced study again focused this time at urban design. He attended the University of Sheffield, where he also taught. He was then offered, in 1984, the position of Head of School in Architecture at the University of Newcastle. He took up this position and turned to writing after the Newcastle earthquake in 1987 ruined his house and his wife was almost killed. As he says,

It was a dramatic and chaotic time, and as a reaction to what was going on around us I began to think about the plot of a murder mystery, *The Marx Sisters*. This was published in 1994 and became the first of a series of twelve Brock and Kolla novels published over the next 20 years, together with one stand-alone mystery thriller *Bright Air*, set in Australia (Maitland 2017, online).

He retired from the University of Newcastle to write full time and has lived off his writing ever since. His publishers include Penguin and Allen & Unwin.

Jaye Ford is another successful writer from the Hunter to have moved between professions. She is a 'bestselling author of five thrillers and two women's fiction novels' (Ford 2017, online). Ford came from the northern beaches of Sydney, moved to Bathurst where she obtained a Communication Degree from the Mitchell College of Advanced Education - now Charles Sturt University. She started her career as a cadet journalist in radio, before moving to both print and television journalism. She was 'the first woman to host a live national sport show on Australian TV, fronting Sport Report on SBS. Later, she fronted Prime TV news in Newcastle' (Ford 2017, online). With twelve years of journalism experience she left the news media and began her own public relations consultancy. She wrote unpublished fiction between jobs and ten years later, after raising a family, 'her first book, *Beyond Fear*, was published by Random House Australia. It was the highest selling debut crime novel in Australia in 2011, won two Davitt Awards for Australian women crime writers (Best Debut, Readers' Choice) and was shortlisted for Best Adult Crime' (ibid). Since then she has been writing fiction full time. Apart from her thrillers, Ford also writes women's fiction under the *nom de plume* Janette Paul. 'Her first novel under that name, *Just Breathe*, was released in 2013 after her second thriller (*Scared Yet?*) and became a bestselling digital title' (ibid). Her next book, as Janette Paul, is a romance entitled *Amber and Alice*.

Jaye is a regular guest at libraries and author events to discuss her books and career. Jaye also hosts library events, interviewing other authors and chairing

panel discussions. Other appearances have included participation in author panels and teaching workshops at writers' festivals and writers' conferences, including the Sydney Writers Festival, Byron Bay Writers Festival, Newcastle Writers Festival, the Romance Writers of Australia annual conference and Sisters in Crime events (Ford 2017, online).

Ford has been interviewed for Better Reading, intouch Magazine, the Newcastle Herald and Australian Women Writers. She has been involved in the Australian Writers Centre podcasts, had stories about her discussed on pop.edit.lit, engaged in Q&A session on Blog Talk Radio and is active on social media, does guest blogs for various online bloggers, as well as maintaining her own author's website. Ford was also instrumental in setting up and running the ongoing writer's support network Partners in Words which meets regularly in the Hunter at venues such as the Prince of Wales Hotel in Merewether where members regularly have guests from the publishing industry speak with them over dinner.

Other support networks for authors in the valley include organisations such as the Hunter Writer's Centre. This Centre 'is a not-for-profit, incorporated organisation devoted to engaging, employing and educating aspiring and established writers in the Hunter region' (HWC 2017, online). The Hunter Writers Centre:

- Nurtures, supports and celebrates literary culture
- Assists writers from beginners to established professionals
- Employs literary and related artists
- Provides access to professional development through workshops, writing groups and seminars
- Provides publishing opportunities to members including Read, Write, Love, and live reading events
- Offers resources for aspiring and experienced writers
- Administers the prestigious Newcastle Poetry Prize, the Newcastle Short Story Award and the Grieve Writing Competition
- Establishes strategic partnerships with cultural and community organisations, businesses and groups in the Hunter region (HWC 2017, online).

This wide variety of activities is focused on promoting and encouraging local writers. Promoting her book through local media such as the *Newcastle Weekly*, Port Stephens-based crime thriller writer Audrey Pflugrath, whose nom-de-plume is Audrey J. Cole, published her first novel, *The Recipient*, in 2017. This book is 'available from Harry Hartog Booksellers at Westfield Kotara, McDonalds Booksellers and Stationers in Maitland, Homebody Gift Shop in Nelson Bay, Terrace Mowers at Raymond Terrace and online' (Hennen 2017, p. 36). As well as her own Audrey J. Cole website, Pflugrath writes a regular blog called *Aspire*, which contains a wealth of advice for aspiring independent writers. She conducts interviews with successful writers as well as writing book reviews. She posts pieces on, for example, how to hit the New York Times and USA Today Bestseller Lists as well as how to do the same on Amazon. She writes:

Amazon will probably be where you make the majority of your sales, especially if you're an indie author. According to an Author Earnings report from 2016, Amazon was responsible for nearly half of all print book sales in the United States. If that percentage of sales continues to increase, Amazon will not only be dominating the eBook market, but the print book market as well (Pflugrath 2017, online).

While Cole is not one of them, many of the Hunter's authors have also been staff or alumni of the University of Newcastle. They have produced not only many works of fiction but also nonfiction. The University's Creative Writing program has been very encouraging of local authors. The program draws on nationally renowned writers such as Helen Garner who wrote *Joe Cinque's Consolation: A True Story of Death, Grief and the Law* while mentoring young writers in her classes at the University and living at Sedgenhoe in the city. The program is currently staffed by Associate Professor Kim Cheng, Dr Keri Glastonbury and Dr David Musgrave, all of whom are themselves published poets and authors. For example, A/Prof 'Kim Cheng's book of personal essays, *Between Stations*, was nominated for the Western Australian Premier's Award for Nonfiction in 2009. He has just completed a novel on the life of a Tang Dynasty poet' (UoN 2017, online). Dr Glastonbury is not only an accomplished writer herself but also mentors authors such as 'Michael Sala, whose PhD manuscript, *The Last Thread*, was the Pacific Region winner in the 2013 Commonwealth Book Prize and won the UTS Glenda Adams Award for New Writing at the 2013 NSW Premier's Literary Awards' (ibid). In 2013, after two University of Newcastle creative writing graduate research students were short-listed in the Premier's Literary Awards, Susan Wyndham, the literary editor at the *Sydney Morning Herald*, wrote in her Undercover column, 'They must be doing something right in Newcastle' (UoN 2017b, online).

The *Sydney Morning Herald* has had a history of supporting Novocastrian writers mostly through its Books and Arts section. One of these writers is Keith Russell, currently part of the Communication program at UON. Helen Frizell, the book reviewer at the SMH in the 1980s, devoted a full page to Russell's work and his devotion to the ideals of William Blake. Russell, in the late seventies / early eighties was publishing poems through his own Moon Ark Books publishing house. Frizell described his 'production of *The Tree of Flowers*. Keith Russell published only 100 copies. The book was his vision. He wrote the poetry, typeset, designed, illustrated and printed the work ... the book was printed with simple equipment – paper and ink and stencils' (Frizell 1980, p. 13). The notable Norman Talbot, active as an A/Prof in English at the time, also claimed that Riverton Press, a local publishing entity, 'would never have got off the ground but for Keith Russell' (ibid).

In 1996, Lisbet de Castro Lopo set up 'an independent boutique press to publish local writers of merit' (Catchfire Press 2017, online). Catchfire Press continues in this purpose and its past is as varied as the names it has operated under. De Castro Lopo was supported in setting up the press by Don Cohen, Lucy Dougan, Norman Talbot and Ron Vickress. This group ensured that the Coal River Press, as it was then known, met in August 1997 and began to cooperate with the Newcastle Community Arts Centre. It published the Newcastle Poetry Prize anthology. After this relationship proved impractical the press changed names to Leading Light Press and began looking for manuscripts from local authors. The committee decided to 'publish a series of occasional writings under the title *Seamark*. The first of these appeared in June 1998' (ibid). Then the name Catchfire Press was adopted. Their first significant publication under this last name was a collection of short stories called *Is That Love? The Goblin Child*, a novel, was published in 1999, with its preliminary finance supplied by de Castro Lopo herself. This initial 'gift, along with money from sales, fund-raising activities, membership fees and submission fees, has sustained the press' (ibid) to this day. This press is located in Newcastle and they continue to 'publish writers from the Hunter area, in books wholly designed and illustrated here, and we have deliberately set a slow pace to maintain standards in book design and editing, as well as literary quality, comparable with anywhere in Australia' (ibid). There have been titles published. These include, *Beneath the Valley* by Justice Michael Kirby, Jim Comerford, Zeny Giles, Jan Dean, Jack Delaney et al. which was published in 2005. *People of the Valley* was

published in 2013 and includes short stories from Sharon Munro, Gail Hennessy, Jan Dean, Greg Ray, Jean Kent, Patrick Cullen and Zeny Giles. *Watermark* was published in 2016 and 'was launched at the New Lambton Community Centre on September 13th by Scott Bevan' (ibid) from ABC 1233 local radio. There were approximately 200 people in attendance. There have been many other publications which can be seen on the Catchfire Press website. The authors who publish with this press 'are paid royalties at Australia-wide rates; and to seek wider distribution and sales for them, we now have an Australasia-wide distributor' (ibid). As their website indicates 'as a non-profit, community-based press, all our executive are volunteers from our membership. This includes committee, publishing and editorial staff. However, our covers are chosen by competition between senior design students at the University of Newcastle and paid for as part of the prize' (Catchfire Press 2017, online).

As well as all the poetry, journal articles and conference papers being produced at the University, there are a multitude of books written by the academics working at the University as part of their core research activities. These include, among many others, John Maynard's *Fight for Liberty and Freedom: The Origins of Australian Aboriginal Activism* (2007), Philip Dwyer's *Napoleon: The Path to Power, 1769-1799* published by Bloomsbury in London in 2007, Victoria Haskins' book *Matrons and Maids: Regulating Indian Domestic Service in Tucson, 1914-1934*, and the edited collection *Radical Newcastle* published by Newsouth Press and put together by James Bennett, Nancy Cushing and Erik Eklund. This book is a distant cousin to earlier collections like *Novocastrian Tales* edited by Paul Walsh and published and printed in Newcastle in 1997 by Elephant Press, a small imprint founded by Annis Harvey and others in the suburb of New Lambton. The book is a collection of short stories and poetry by Hunter based and affiliated writers and luminaries such as Marion Halligan, Philip Adams, Moya Farrell, John Bell, Nick Enright, the Biggins Family, Les Murray, Norman Talbot, John Doyle, Bruce Wilson, Barry Maitland, John O'Donoghue, John Ramsland, Betty Capper, David Rowe, Madeleine Randall, Mikey Robins, Donna Meehan and Cardiff's wild film-making son, Yahoo Serious.

As well as these texts there have been books such as Ruth Cotton's *Hidden Hamilton*, Howard Bridgman and Nancy Cushing's *Smoky City: A History of Air Pollution in Newcastle, NSW* and Gaye Sheather's *Rock This City: Live Music in Newcastle, 1970s and 1980s*, which have done well for small local publisher Hunter Press. This press is run by Mark MacLean and Christine Bruderlin. Bruderlin has degrees in visual art, is a professional designer and is 'also a printmaker and illustrator who has been acquired by the National Gallery of Australia and the Museums and Art Gallery of the Northern Territory' (Bruderlin MacLean 2017, online). This pair also run a publishing service called Bruderlin MacLean which provides the necessary service for anyone to create books and published materials. Their 'clients include publishers, government departments, businesses, educational and medical organisations, and individuals; their projects range from academic and interpretive publications to theses and short print run self-published books' (Bruderlin MacLean 2017, online).

As well as being a publisher, Mark MacLean is also a writer, an editor and a high school teacher. He is the former owner and founder, along with Christine Bruderlin, of McLean Books in Hamilton, NSW. MacLean was born in Cumbria in the UK and began an apprenticeship as an electrician in a shipyard. While on a one year, round-the-world working holiday he met his future partner in Alice Springs. He lived in Central Australia learning to write. He found a job working in the publishing department of the Institute for Aboriginal Development which is an Aboriginal-controlled adult education college in Alice Springs. He worked with linguists and editors of Indigenous languages and in the process learned to write and edit. Bruderlin was working as a production manager at an Indigenous publishing house and she and MacLean then

travelled together to the UK. She came back to Australia and MacLean followed her and migrated to Australia. They moved to Newcastle, starting MacLean's Book store. This is where they learned about book publishing, promotion, distribution, retail and the audiences for books. There was some rigorous competition in the city for these newly established book retailers. As MacLean explains, 'at the time there was, I think, three - Angus & Robertson's, a Collins and Dymocks, as well as all the independents such as Pepperina. I think there were about nine bookshops, nine places selling new books at the time. And we thought "this is a big deal", but we decided to do it. We just decided, we put the life savings on the line and said, "we'll do it"' (MacLean i/v April 2016). They rented premises in Beaumont Street in Hamilton, with the intent of having a five-year limit on their tenure. 'I did not see my life as being in retail ... we did the five hardest years of any business I suppose, complete idiots, and then sold it as a really great going concern' (ibid).

But it was incredibly rewarding and for me it was an incredibly important learning experience because now, if I meet anybody in publishing I say, 'Don't try and publish another book until you've tried to sell one'. You've got on the one hand publishing, which is a kind of weird hybrid of massive business and cottage industry. And at the time you had this kind of massive book audience and everything met through the prism of the bookshop. I've never been so focussed on so many different things. On any day, when you think you're widely read you'd think 'I can handle a bookshop' and then you go and actually what you find is that you'd have a narrow vertical interest and what you're dealing with is everybody's narrow vertical interests that spreads out (MacLean i/v April 2016).

They sold the business and set up Hunter Press. The press is a small online publishing house which publishes books and stories with 'relevance and connection to the Newcastle and Hunter region of New South Wales, Australia' (Hunter Press 2017, online). It sells both hard copy books and e-books via its website and offers editing and self-publishing services for a fee. MacLean realises they need to diversify in order to gain a comfortable income:

I think it's very difficult to work just as an editor and for Christine just to work as a designer, but we have a range of skills. And a lot of those skills we learnt when we had a bookshop. We can immediately give publishers feedback if they've got this idea, because to them every book is their baby and their authors are really enthused about it, and sometimes we can just look at it and just say 'Well you did know that there was a book on this last year did you?' and they don't know that, or you just say 'Look nobody's going to buy that at that price point' or 'Why have you got this on the cover?' The bookshop was fantastic for that. It was a brilliant education (MacLean i/v April 2016).

The Hunter Press has taken up quite a lot of both Bruderlin's and MacLean's time. Working on Howard Bridgman and Nancy Cushing's book, *Smoky City*, necessitated a risk on the print run but they relied on their author's promotional abilities. As MacLean explains 'Howard's an amazing self-promoter in that sense. He will go to Rotary with 20 copies and sell 20 copies. He's just amazing that way. So eventually it'll sell out' (MacLean i/v April 2016). As well as this promotion there are several behind the scenes activities that must take place to keep the sales rolling. MacLean explains that 'Christine just spent this entire weekend getting the reflow version for a fixed format version of the *Smoky City* eBook, and these things just consume every minute of your life if you let them' (ibid). As well as the mundane but highly necessary work that goes into ensuring books are available in all formats, the Hunter Press goes beyond being simply a commercial proposition and has built a cultural aspect to it.

Ruth Cotton's *Hidden Hamilton* book was just extraordinarily successful. We completely underestimated how many we should have printed. We had phone calls and phone calls. Ruth had a blog and then a Facebook page. Chris and I did a Writer's Centre workshop and Ruth came up afterwards and said, 'Look I've got this blog' and we said 'Yeah, we've been following it. It looks interesting'. And we had a conversation about how we might turn it into a book, and it was quite a learning curve for all of us. With *Hidden Hamilton* we had to really rewrite the blog posts. Then there was the feedback to the blog that we had to somehow incorporate. It was an interesting example of how rather than a book coming out and having a social media aspect, this was social media that then became a published artefact that was quite different to the original social media thing (MacLean i/v April 2016).

MacLean's own writing has also done well for the Hunter Press.

I don't know what it was about *Year Down the Drain* that clicked with so many people, but I originally printed 100 copies thinking I would sell 60 or 70, and within two weeks we'd reprinted another 100, and then another 200, then 500. It just kept going. It was just one of those things that I completely was, to this day I don't know what it was that connected with people, but the initial impetus was definitely aided by this parallel blog (MacLean i/v April 2016).

MacLean learnt quickly about the value of networks. As Davies and Sigthorsson note in their book *Introducing the Creative Industries: From Theory to Practice* (2013), 'it's important not just to network but network strategically – creating maintaining and extending a network of contacts to maximise the opportunities to work' (Randle and Culkin 2009, p. 111; 2013, p. 109). MacLean also realised what was required in leveraging those networks. He asserts that 'the kind of things that you need to do to get a good launch group or getting book groups going, it's a really, really tough process' (MacLean i/v April 2016). As far as developing existing networks MacLean suggests there is lot more involved than initially contacting friends. Moving that networking process online was imperative. They were one of the first to build and use a website and they became part of a buying group in order to then sell books online. He indicates that 'we actually had a newsletter, and these days the bookshop has a Facebook presence I think, they've got a Twitter account and everything. These things are absolutely essential' (ibid). In comparison to their time in Alice Springs where launches 'had been done by posting invitations out and putting an advert in the Centralian Advocate', in Newcastle 'it was all Twitter, Facebook, Instagram, and it was a completely different crowd. We looked at that and said "Wow". It was a real lights-on moment when you realise that this is how modern connections are made' (MacLean i/v April 2016).

In terms of future orientation Bruderlin and MacLean have decided to maintain their local focus. As MacLean notes 'we're not called the Hunter Press for nothing' (ibid). He explains that they have opportunities to sell internationally:

We've published *Five Boxes* in the UK and we have an E-Book version that's been bought in a number of countries [but] we don't consider ourselves to be anything other than a local publisher. I do see immense opportunities in the way that software and hardware and networks are all colliding at the moment. I wouldn't say coming together, colliding. There are some fantastic opportunities and people are doing some amazing things, but I think we're also in a period of transition where we are slightly bewildered by the possibilities of what could be as against what is (MacLean i/v April 2016).

What he suggests is essential to keep in mind, is to not let go of the core skills.

In the creative industries there are still things that need to be done, and because we've got more people able to do more things it doesn't mean that things are being done better ... The users can now pick their own font, they can pick their own background colour, and it's presented to us as some kind of freedom. I really don't think that's the case. I think it's actually making it more difficult to communicate and articulate messages ... because of the proliferation of devices ... lots of things are possible and everyone's trying to think what could be possible, but just think about what is (MacLean i/v April 2016).

8.7.2 Newspapers

The Hunter Region is not only served by the national or state based metropolitan newspapers, such as News Corporation's mastheads, *The Australian* and the *Daily Telegraph*, and Fairfax Media's *Sydney Morning Herald*, but it has had, and continues to have, access to a variety of locally oriented newspapers. According to newspapers.com.au (2017) these newspapers include:

- The *Muswellbrook Chronicle* which services Muswellbrook, Denman and Aberdeen;
- *The Advertiser* which services Cessnock, Kurri, Weston, Branxton and Pokolbin;
- The *Singleton Argus* which services Singleton, Branxton and Greta;
- *The Maitland Mercury* which services Maitland, Gresford, Rutherford, Paterson, Lochinvar, Kurri Kurri, Greta, Greenhills, Branxton, Morpeth and Beresfield;
- The *Hunter Valley Town & Country Leader* which services Maitland, Cessnock, Muswellbrook, Scone, Singleton, Dungog and Gloucester;
- The *Lower Hunter Star* which services Maitland, Raymond Terrace, Kurri Kurri and Beresfield and its stablemate the *Newcastle and Lake Macquarie Star* services Newcastle, Broadmeadow and Lake Macquarie;
- The *Great Lakes Advocate* which services Tuncurry, Forster, Pacific Palms and Nahiack;
- The *Port Stephens Examiner* which services Port Stephens, Raymond Terrace, Nelson Bay, Salamander Bay and Shoal Bay;
- *Bay News Of The Area* (NOTA) is a 'widely read, independent weekly community newspaper with a free distribution of 7,000 copies to multiple locations' (Newspapers.com.au, 2017). It services Nelson Bay, Salamander Bay, Shoal Bay, Anna Bay, Fingal Bay, Taylors Beach, Corlette, Bobs Farm, Soldiers Point and the Port Stephens region. Its sister masthead includes the *Medowie News Of The Area* (NOTA) which has free distribution of 2,000 copies to multiple locations including Medowie, Salt Ash, Williamtown, Campvale and Ferndale, as well as the *Myall Coast News* which is distributed free to Tea Gardens, Hawks Nest, Bulahdelah, Karuah, Stroud, North Arm Cove, Carrington, Bundabah, Nerong, Bombah Point and Pindimar;
- The *Newcastle Post - Newcastle Edition* which services Broadmeadow, Wickham, Carrington, Mayfield, Shortland, Merrylands, Waratah, Newcastle, Hamilton, Merewether, Jesmond, Wallsend, Lambton, New Lambton, Adamstown, Kotara and Elmore Vale;

- The *Newcastle Post - Hunter Edition* which services Maitland, Tenambit, Morpeth, Bolwarra, Lorn, Rutherford, Telarah, Largs, Metford, Thornton, Woodberry, Tarro, Beresfield, Ashton Field, Gilleston Heights, Heddon Greta, Kurri Kurri, Stanford Merthyr, Pelaw Main, Greenhills and East Maitland; and
- The *Newcastle Herald* which services a broad area of the Region including Newcastle, Taree, Wyong, Gosford, Port Stephens, Raymond Terrace, Tuncurry-Forster, Maitland, Cessnock, The Entrance, Kurri Kurri, Salamander Bay and Nelson Bay (Newspapers.com.au, 2017).

Post Newspapers is an independent company which publishes the *Newcastle Post*, *Hunter Post*, *Lake Macquarie Post* and the *Property Hunter* magazine. They also publish the long running *That's Entertainment* insert that supports and promotes the local entertainment industry (Issuu 2017, online). There is also *The Leader*, run out of National Park Street in Hamilton which, according to Trove (2017, online), has been published under various titles since 1993 and via Facebook at least until 2016 (Trove 2017, online). As well as being available for purchase from local newsagencies, News Corporation's *The Australian* and the *Daily Telegraph* are distributed free daily to local hotels and motels as well as being made available for free at each MacDonald's hamburger franchise giving these papers a very wide circulation. *The Newcastle Herald*, on the other hand, has very deep connections to the region:

The Newcastle Herald had its origins in two early newspapers, *The Newcastle Chronicle and Hunter River District News* and *The Miners Advocate and Northumberland Recorder*. Established in 1858, the *Chronicle* began as a weekly journal carrying mining, shipping, court and some small items of local news. It cost just sixpence. In the years that followed it took on more of the appearance of a newspaper, became a bi-weekly and then tri-weekly, and by 1876 its last edition was priced at twopence. In 1873 in Nelson Street, Plattsburg (now part of Wallsend), *The Miners Advocate and Northumberland Recorder* was first published. Under the guidance of founder John Miller Sweet, the paper flourished and by 1876 it was a tri-weekly selling for threepence with a circulation of 4000 copies a week. John Sweet's father-in-law, James Fletcher, believed the region was ready for a bigger newspaper published daily and persuaded his son-in-law to expand. *The Advocate* moved to Bolton Street, Newcastle, and on April 3, 1876, the first copies of *The Newcastle Morning Herald and Miners Advocate* hit the streets. The first *Herald and Advocate* masthead was ornate and carried a sketch of a colliery pit-top, including poppet head and chimney. Such ornate mastheads stayed with *The Herald* for 104 years, the last major change being on October 6, 1980, when a more modern and simple masthead was introduced, dropping the 'Morning' and 'Miners Advocate' from the title. This was the masthead that appeared until 1998 when, in July, the newspaper became 'the compact with impact' after going tabloid in size. The move to tabloid was seen as an immediate success (The Herald 2017, online).

The Herald is known as the largest media organisation in the valley and the only Hunter-based paper to serve the entire Hunter and Central Coast regions. It is published six days a week and covers 'local, state, national and world news, sport, finance and business' (The Herald 2017, online). It tries to engage its readership with 'authoritative news, information and analysis about their community, their society, their country and their world' (ibid). The Herald Classifieds 'are the only classifieds published six days a week across the region' (ibid). It is published by Newcastle Newspapers who, as well as publishing *The Newcastle Herald*, also publish *The Newcastle and Lake Macquarie Star*, the *Port Stephens Examiner*, the *Lakes Mail* and the *Myall*

Coast Nota' (ibid). They also produce what they call 'a replica digital edition of the *Newcastle Herald*, Monday to Saturday' (ibid).

Journalists working at all these newspapers have helped create the news where their methods have been identified by Janet Fulton as part of a system at work (Fulton 2008, 2009, 2011, 2011a & 2013). Currently, journalists in smaller newsrooms 'are expected to take photos, sub-edit and maintain a website as well as engage in the 'traditional' practices of journalism – interviewing, gathering data and writing' (Fulton 2011, p. 113). In larger newsrooms, even though certain distinctions between jobs may still exist and while these may still 'have photographers and dedicated design staff, multi-skilling means journalists are expected to produce stories, and continually update them, for the online edition of the publication as well as the print version and also provide information for other news platforms' (ibid). With these exigencies at play many journalists increasingly rely on previously published works. In her studies Fulton noted that certain journalist 'had copies of the Sydney Morning Herald and the Newcastle Herald available on the communal desk as well as all back copies of their own publication. Journalists in this newsroom regularly referred to previous editions of their paper to clarify facts and provide background for current stories. [One journalist] had newspapers stacked on each desk, current newspapers on the main desk as well as a television tuned into the news' (Fulton 2011, p. 137). For editors, and some journalists, who are now also required to do page layout, the arrival of 'electronic pagination programs such as Quark has meant more control over the finished product' (Fulton 2011, p. 126). Nonetheless, with the increase in multi-skilling expected of many journalists one editor noted that this situation 'has meant that a journalist's "actual writing time becomes less and less and less. So, to be a great journalist becomes harder and harder and harder"' (ibid).

Rosemarie Milsom has been one of these journalists. Her story is illustrative of the disruptive changes that have beset the newspaper sector of the publishing industry and how a writer like her has been required to change her approach to her calling. She is an award-winning journalist, a festival director and now a radio presenter. As one media release described it:

I [Rosemarie Milsom] was born in Bosnia in a town north-west of Sarajevo. My father's family are Bosnian and my mother is Australian. I came to Australia when I was three months old and grew up in Sydney. My family moved to Newcastle when I was 17 and I completed my schooling, university studies and journalism cadetship here before returning to Sydney in 2000 to work at *The Sun-Herald*. Family brought me back to Newcastle six years ago. I have been a feature writer at *The Newcastle Herald* for the past three years. I was attracted to journalism from the age of 15. I have always enjoyed writing and meeting people: journalism also struck me as an avenue for helping people and exploring important issues (UON, 2015).

Milsom, who is married to fellow journalist Ben Drzyzga, became the Founding Director of the Newcastle Writers Festival and until late 2015 she combined this role with that of senior feature writer at *The Newcastle Herald*. Milsom has been a journalist for 21 years, mostly with Fairfax Media. She has been a section editor at *The Sun-Herald* and features editor at *Sunday Life* magazine. Her work has also been published in *Vogue*, *Medical Observer* and Qantas' in-flight magazine. She has been a finalist in the United Nations Association of Australia's Peace Media Awards and the Kennedy Awards for Excellence in NSW Journalism. In 2014 she received the MEAA's NSW Regional Feature Award for her profile of golfer Jack Newton. When she was named Journalist of the Year at the 45th annual Northern NSW Media Awards the judges said:

Rosemarie Milsom's feature piece stood out in a category boasting a number of strong entries. At its core it is an old-fashioned love story, but it is so much more than that. Rosemarie spent 80 hours with a family of African refugees reunited after years of being forced to live apart because of political unrest and violence in their native Congo. What results is a beautifully-written, poignant and informative piece of writing, with Simone De Peak's powerful photography proving the perfect accompaniment (The Herald 2012, online).

Milsom remembers that journalists 'usually came straight from school, so they started at around 18, and they did a three-year cadetship all on the job, no academic study behind them' (Milsom i/v Sept 2015). Milsom eventually, after a few unsuccessful starts, came into the occupation with an Arts degree. She had 'embraced English, essay writing, which was all done by hand initially because I didn't have a computer and the internet wasn't, when I first started Uni, wasn't around. So, it was laborious handwriting. But there's just something about writing that just comes naturally to me' (ibid). She remembers that:

We had a cadet coordinator, and she was a senior sub-editor, had been chief of staff, very respected journalist, and Linda took all of us under her wing, and there were about six or seven cadets at the time which is unheard of now, and said, 'Bring me your work before you actually file it to the sub's desk and I will look over it for you and help'. And it was, I can't actually remember how I learnt to write a news story, because I obviously started off in news, not feature writing, but I must have just picked up with her guidance, because no one else instructed me, there was no formal instruction; it was kind of thrown in the deep end. I learnt very quickly about prioritising information, so unlike the luxury of an essay where you have a few thousand words, you have to condense everything down into quite stripped back facts and a few quotes (Milsom i/v Sept 2015).

Milsom quite liked 'the cut and thrust of news, the adrenalin I quite liked, and every day was different, there was variety' (ibid). At one point one of the feature writers went on maternity leave for six months and the editor made the decision to rotate news journalist through the features position. Milsom indicates that 'they weren't going to fill it full-time, and you'd have to do a four to six-week stint, and I was first cab off the rank' (ibid). After much resistance and argument, she succumbed to her editor's demands.

I got over there, and it was almost like the years at Uni and the skills I'd learnt on the job in news melded, so I had more time, I could expand on thoughts, I could talk to different people which in a sense with a university essay you're looking at different sources, I could research. I mean with news, research is pretty much non-existent, if you're on a job that happened that day it's quickly get out there, read the media release or quickly glance at some facts, but there's not that luxury of going into a subject necessarily very deeply. If you're going to investigations, yes of course, you can often spend weeks or months on a story, but I don't know, I really liked it. I really liked it, and I never went back. That was it, I never went back to news after all that time. I must have done two or three years in news reporting, so I've been a journalist for 20 years, and then it's been features ever since (Milsom i/v Sept 2015).

With this sort of experience behind her Milsom has seen many of the dramatic changes that have affected newspapers around the world.

We had computers when I started journalism, but it was a bizarre system; we didn't have the internet, there was one computer in the library that I think they connected somehow and you could go and log on, and it was just this one computer that could get internet access. So that was '95 when I started And I remember we ran a feature, I didn't write it, about the worldwide web and how it was growing, and now it's overwhelming, the change that has happened in that 20 years. And if you'd shown me in 1995 a crystal ball that would show me that on your phone you'd be able to access every news organisation in the world with a touch of your phone, I would have thought it was some kind of science fiction fantasy. So yes, it has been overwhelming, and what's happened is there's been this fast-paced revolution in terms of information and how people access it, which is compounded and puts stress on newspapers because by the very nature of the printing, the 24-hour cycle of a newspaper is slower and clunkier. So, media outlets have obviously got websites, and there's information on the websites, and it's all now about SEO and clickbait and all those sorts of clichés that don't sit next to the printed-out newspaper, but we're in a really dramatic transition (Milsom i/v Sept 2015).

Milson expects newspapers to disappear in the West. Many are closing all the time in the USA and the UK but not so in China or India where a rapidly growing middle class and their increasingly literate populations are demanding the written word. For Milsom many of the smaller papers in the Hunter Region will go, especially with the moves from Fairfax to roll out its national plan where 'they're shutting some papers in Western Australia and I think that's inevitable in New South Wales' (Milsom i/v Sept 2015). With these structural changes occurring rapidly 'the pressure on me as a journalist is that we're being told about, "Social media, Twitter, dah, dah, dah, you've got to be engaged, you've got to be connected, and we're going to train you how to use video, and we want you to record your interviews, etc."' (Milsom i/v Sept 2015). For her, as a very successful feature writer, these are difficult propositions from when she is engaged in an hour-long feature interview, 'I don't want to be distracted by having to worry about is that working, can we check. The intimacy of a feature interview, I think often means that you can't have that intrusive aspect that people want to sit down with you one-on-one and have a detailed conversation without a camera in their face, even if it is just a little iPhone' (ibid). She also realises that 'we often don't have the resources or the free staff for someone extra to come with me ... We don't have the equipment, we don't have the resources, the numbers of people to be able to enable that' (ibid). Furthermore, she argues that 'I don't think in Australia we've really worked out, they have in the UK and in America, ... how to transfer features over to the online digital format, how to capitalise, how to value-add to a feature because it's time consuming' (ibid). Milsom is wise enough to admit that the digital environment has not only constrained the way she approaches her work, but it has also, at exactly the same time, enabled a faster and possibly more convenient approach to the methods she uses as a journalist.

Look research, I mean gosh, I don't go and meet anybody without Googling them beforehand, in the very least. I mean we're lucky, where Fairfax has got a digital library which is incredible, and we have, like every main newspaper in Australia, all the content at our fingertips for the last 15 years or so. So, you just type in a key word and you tick which paper you want it from, *The Australian*, the *Daily Telegraph*, the *Illawarra Mercury* and it will bring you up every story. I use that far more than I use Google because there are a lot of stories that were written more than 10 years ago that have not ever been placed up on the web, so that is an

invaluable resource. Actually, if Fairfax was smart they'd pay for, they would have a membership and you could access it as a punter to do research and make money, and it's an amazing resource. It's called FDC, Fairfax Digital Collections. I'm on FDC constantly, and I glean so much more information from FDC than I would by just Googling someone. And in terms of research it's been pivotal. In terms of changing the way I write it hasn't at all, because as I said, features have been operating as it always has in a sense, and they'll throw up my story online and throw a few pictures in it. It won't look that great actually, and I think it's quite hard to read a 2,000-word feature in the way it's structured online, but as yet there's been no major changes to how I approach, how I write. And even hyperlinks, I mean we could be using hyperlinks a lot more in my stories, but that requires work. That requires, if it's a story based on an historical event, we can refer to records, but it requires someone to do that. And I'm under the pump as it is (Milsom i/v Sept 2015).

At the same time as Milsom was coming to the end of her working life as a journalist in newspapers, but not as a writer, she also took on the task of organising and running the Newcastle Writers Festival. She wasn't 'the first person to wonder why Newcastle didn't have its own writer's festival' (NWF 2017, online) but in her inimitable style she went ahead and did something about it. Milsom was also 'lucky enough that supporters jumped on board, including the University of Newcastle, Hunter Writers Centre, Newcastle Now and Newcastle City Council' (ibid). Milsom declared that she wanted to 'create an eclectic, welcoming festival that celebrates words and ideas, as well as the depth of local writing talent' (ibid).

The inaugural Newcastle Writers Festival was held in 2013 and was a resounding success. More than 70 writers participated in 38 sessions – half of which were free. In 2014, the festival was enhanced by the addition of a popular children's program. More than 100 writers participated in the extended festival and more than 6500 people attended the event, from pre-schoolers to adults. The 2015, 2016 and 2017 festivals were bigger and better still (NWF 2017, online).

The success of the Newcastle Writers Festival has been due in part to the networks Milsom has cultivated because of her work in journalism. She edited a book review section while she was at the *Sun Herald* but goes further in saying that 'books provide newspapers with an incredible amount of content' (Milsom i/v Sept 2015). She reminds us that she had been working for an editor who was 'very literary, and she said to me, "Are you on all the mailing lists for all the publishers?" and I said, "No." She replied that "You have to get on the mailing list, so you get forward lists of books that are coming out."' (ibid). Milsom also made contacts 'in Sydney in the publishing industry that are still in those jobs and have become friends of mine' (ibid). She declares that 'one of my good friends is a publisher and I have good friends in marketing and PR and publishing, and I know lots of writers'. But for her, there has always been tussle in her mind to move her writing work as a journalist toward becoming a more literary writer.

The struggle I've had is that one of 'who do I think I am?' This is a journalist, this is a cultural element ... I think that transition from being a journalist, we don't call ourselves 'writers', you don't; we see it as a trade, and I've been grappling with that cultural shift, and I did a writing course in Sydney last year and Catherine Hayman who took the course, a very respected writer said to me, 'Will you just get over this? Just let it go. You know how to write. You're just shifting direction. Just get over this stuff. You're just as entitled to write a book as anybody. Because you're a journalist doesn't mean you can't write a book', because then I was

grappling with fiction versus non-fiction, and look, it's ridiculous, just up in my own head (Milsom i/v Sept 2015).

So Milsom has decided to let go of this cultural baggage but also realises the value of patronage or of being self-supporting. Her attitude to all her diverse activity is to see it all as storytelling including her Directorship of the Writers Festival.

The narrative threads of that program are like the narrative threads of a feature. But I love the engagement with people; that will still happen. I think that I will never just become a full-time writer; I can't imagine being able to afford to do that, I just can't financially do that with young children. So, I will always be doing some kind of journalism, freelancing, and the festival, but I will always I think, unless I win the lottery. If I won the lottery tomorrow I would become a full-time writer and I would then put some of that money towards paying someone to direct the festival. [laughs] But no, I can't see myself as being able to afford to be just a full-time solitary writer, so I think I'll always keep engagement up (Milsom i/v Sept 2015).

After she took a redundancy package from *The Newcastle Herald* she kept up her activity with the Writers Festival but also took up an offer to work on ABC 1233 radio where for a year and a half she had 'a regular segment with Paul Bevan on Drive each Wednesday and fill[ed] in as a presenter when needed' (Linked In 2017, online). Not working at the Herald has allowed her to focus her considerable energies at writing but also recognise the difficulties many former reporters face in making the transition required after an industry like journalism collapses.

I mean 'Good Weekend' always traditionally had a good base of staff reporters, six to eight, and then they culled them all, and now they don't have any. So it exists mainly on freelance copy, and I think you can tell the depth. Staff reporting is a luxury, but what it enables you to do is invest in really, really good writing that a freelancer won't be able to pull off because they're not going to spend three weeks on a story and get paid 65 cents a word. It's just not worth their while. As I keep saying to my husband, absolute worst-case scenario [laughs] I'll do some casual high school teaching, because I'm a teacher, I'm a qualified teacher. Not that I put that down, I mean I think teachers are wonderful and my best friend's a teacher and she's saying, 'We'll give you work'. But look, it'd be lovely to think you could sustain yourself, if I could go off now and spend a year or two writing this book and not have to do anything else. But that's just not possible, I don't think. But maybe if I get the first book out of the way there might be scope for the second, or I don't know. I don't even know if I'm going to get the book off the ground [laughs]; ... I think the sadness for me is leaving newspapers as such, because I love newspapers, but that's tinged with so much nostalgia that I'm also a realist, and so the days when I'm feeling this pang I picture the new model and I think, 'Yes', like I don't see myself there. So I see myself here, but here is gone in the next few weeks, so that makes it easier to move on (Milsom i/v Sept 2015).

Milsom's story is illustrative of the way newspapers in the Hunter Region have had to traverse the disruptive activity that the newer online environment has wrought. It is also illustrative of the shift from full time ongoing employment to a more freelance oriented and heavily capsulised workforce. As Banks and Hesmondhalgh indicated in 2009, as outlined above, creative work is increasingly irregular, contracts are short-term with little job protection, career prospects have become uncertain, and earnings are minimal and often unequally distributed.

It's little wonder then that when a new newspaper comes along local journalists have rushed to join it.

Elwyn Lang was the editor of the *Mudgee Guardian* and started *The Weekly* in Mudgee in 2005 which he and his son then sold to Rural Press before starting up a tourist magazine called *Discover Central NSW*, which was sold in 2016. He has now started another local paper in the Hunter, the *Newcastle Sunday*, which operates counter-intuitively to the digitised formats that have proliferated recently. Aspects of his business model are aimed at ensuring newsagencies benefit from stocking the new paper. As Darrell Croker suggests, Lang 'is applying old-fashioned news sense to disrupt the digital disruption of print media' (Croker 2017, online). Newsagents 'receive a dollar on every sale from the \$3 cover price' (ibid) and the paper is also stocked in Coles, service stations and other regular news outlets giving it a wide circulation. As Lang states, 'we have about 200 distribution points but that's growing. We've been really well received. Many newsagents had posters out in advance of the first edition and they are reporting that sales have been excellent, so they will continue to push it' (ibid).

The *Newcastle Sunday* does have an online presence, which forms part of a subscription package. 'If we break a story midweek we'll post it online', Lang says. But his focus is quality print. "If we do this well enough, people will go out and find it and buy it. It's only \$3 and it's going to be a super good read." And the traditional selling points are all there ... 'Starting a newspaper is a bit of a rarity in today's media climate but I'm very positive. It's a new take on local newspapers. It is local. It's all about Newcastle, the Hunter, Port Stephens and down to the Central Coast. We have a great team of journalists, photographers, salespeople and production team' (Croker 2017, online).

With 95% of the paper consisting of local content it has a print run of '30,000 and the first two editions were 112 pages' (ibid). Word of mouth, as well as a TV and radio campaign, was significant in ensuring the launch of the paper was promoted well. Advertising support was forthcoming from national retailers, entertainment venues, councils and real estate and Lang had hired a 30-strong team, and these included former staff writers from *The Newcastle Herald* such as long-term Newcastle journalist, Alysson Watson, as well as younger journalists such as Claudia Long. Unfortunately, this independent publication 'closed after three months and eleven editions' (Samios 2017, online) with Elwyn Lang citing a 'lack of paper sales, due somewhat to the difficulties with distribution ... and the lack of profitability' (Lang quoted in Samios 2017, online).

With the longstanding *Newcastle Herald* facing competition at the local level from papers such as *Newcastle Sunday*, they are also being squeezed from the other direction as competition arrives from within the global arena. Successful foreign mastheads have now made significant inroads into Australian markets and these include the Hunter Region. As one example, *The Guardian Australian Edition*, since launching in 2013, 'reached a record peak of 2.1m Australians and ranked as the 6th most popular online news brand' (The Guardian 2017, online). It is staffed by a number of former Fairfax and News Corp journalists including its new editor Lenore Taylor.

The Guardian Australia has reported a \$7.5 million loss for 2013-14, despite experiencing strong growth in readership since its launch in May 2013. According to The Australian Financial Review, a special purpose financial statement for Guardian News and Media Australia, showed that while sales revenue rose to \$3.79 million from only \$400,000 the previous year, the website's borrowings grew to \$15.46 million, almost double that of the previous year. The Guardian has

made heavy investments in its Australian edition, which has seen it climb to the seventh spot in the most recent Nielsen online readership figures, at just under two million unique viewers a month. The Guardian News and Media has also touted the importance of the Guardian Australia in building the company's international brand, which recently overtook The New York Times in comScore's ratings for international desktop readership – slotting it at second among all English-language news sites, after the Mail Online. The AFR's report quoted Guardian Australia managing director Ian McClelland as saying that the company is operating like a start-up with a three to five-year business plan (NewsMediaWorks 2017, online).

This online Australian edition is accessed in the Hunter Region via desktop and smartphone apps, and its stories are recirculated via Facebook and Twitter to readers who see themselves as globally oriented but locally located.

8.7.3 Magazines

There are several magazines operating out of the Hunter region. These currently include the *Newcastle Weekly*, *Façon Australia*, *Hunter Lifestyle* and several others.

The *Newcastle Weekly* is published by New State Media Newcastle Pty Ltd, a company run from Canberra that is also currently involved with the *Canberra Weekly* and the *Illawarra Daily* (ausbiz 2017, online). Nick Samaras is the publisher who founded Newstate Media in 2009 and launched the *Newcastle Weekly* in May 2015 (Newcastle Weekly 2017, online). The magazine operates out of Charlestown. Lavinia Hutchison is the General Manager; the editor is Georgia Osland and the magazine's staff photographer is Peter Stoop. The *Newcastle Weekly* is free to its readers, deriving its income from advertising, and covers 'local news and current issues, politics and sport, food and entertainment, fashion and beauty, home and lifestyle, as well as real estate, motoring, boating, and trades & services' (ibid). It is published once a week on Thursdays and is available from at least 850 locations in 'Newcastle, Lake Macquarie, Maitland, Cessnock and Port Stephens. Over 43,130 copies of Newcastle Weekly are distributed each week from shopping centres, supermarkets, cafés, real estate agencies, fitness centres and retailers' (ibid).

Façon Australia is an ambitious and high-quality luxury fashion magazine published out of Greenaway St, Wickham, an inner-city suburb of Newcastle. Its founder is Lara Lupish [also see section 12.6.4 of this report]. She is the magazine's editor-in-chief and its creative director and she took extensive international experience and applied it to magazine publishing launching *Façon* on December 13 in 2015. It is a locally produced fashion magazine that features 'Hunter-based models wearing the brands of local designers and established national designers, as well as global fashion juggernauts including Versace, Ferragamo, Armani, Burberry and Escada' (Green 2015, online).

While continuing her work in the Sydney styling scene, she developed a personal styling clientele in the Hunter before staging two fashion runways in Newcastle last year. The second event was held at Newcastle Museum, with 300 guests and almost 100 'exits', or fashion 'looks', on the runway. 'That was massive, it was like a Myer or David Jones show', she said. The genesis for *Façon* and the 2016 New Fashion Festival Newcastle came after Lupish and three other businesses - Matt Briggs Photography, Models & Actors Talent Management and Chic Artistry - moved into a refurbished factory space in Wickham in May. Lupish and

Briggs were helping Models & Actors Talent Management style and photograph model cards for the agency's clients to take to auditions and castings when she saw more potential. 'I said to Matt, well, we're shooting this, we should start building some content around it, I am styling it, let's start an Instagram page', she recalls of the *Façon* brand. Working on a few issues of Hunter Lifestyle magazine, she noticed a gap for more fashion coverage at a regional level. Well placed to harness her celebrity stylist contacts with luxury brands in Australia and abroad, she already had brands like Carla Zampatti and Alex Perry couriering their clothes to her door for fashion shoots (Green 2017, online).

Façon has been 'on sale in newsagents in major cities on the east coast of Australia' (ibid) but all issues are available online. Hunter designers, such as Jean Bas, High Tea with Mrs Woo and Abicus, have been highlighted in the magazine alongside national and global brands. The magazine featured local models. Lupish is not only the creative director but is heavily involved in design, sales and distribution and she hopes to 'consolidate the city's fashion credentials ... because Sydneysiders and others are moving here, I feel this region is really heading towards being a city and I want to help this part [the fashion industry] grow into something taken seriously' (Green 2017, online). As has been written about in the press 'Lupish's mission has also been made easier by an economic development grant she received from Newcastle City Council' (ibid).

Editor-in-chief Lara Lupish unveiled *Façon* Book Two, the Influencers Issue, in September 2016 to a well-dressed crowd of more than 100 people at Custom Eyecare on Darby Street in Newcastle. With all the elements needed to kick-start a party, the night was a huge success and the perfect way to reveal the cover and to release the book ahead of its national roll out the following day. In attendance included the Lord Mayor of Newcastle, Nuatali Nelmes, *Façon* cover girl - Gemma Sanderson, NXFM radio presenter Sophie Tiller, NBN news anchor, Natasha Beyersdorf, high profile business owners, creatives and supporters/friends of *Façon*. Music was provided by indie rock band, dave the band, canapés by Sprout and wine by Yellowglen Peacock Lane (*Façon* 2017, online).

The *Façon* company had 1220 followers on Facebook, as of 15 April 2017, and over 7000 on Instagram, as of 15 April 2017. The magazine emerged from the popularity of the company's posts:

We started an Instagram page and started shooting material for the Instagram page and I guess from there we spruiked the magazine because I thought that we should turn it into a hard copy ... The reason I made the first one so glossy and drippy was I wanted it to sit on the stands next to Vogue which it did. We're also distributed in Hong Kong, Dubai, Malaysia and Singapore. I'm very lucky that I've got a really good distributor. He was the Circulation Manager for ACP for 30 years and he just happened to take my call. I'm sure he rues the day! He's connected, and he knows. The print run is small. We printed 5000. It's not a lot but it's enough. It's very expensive to print. I've got a publishing company here – Imprint (Lupish i/v Oct 2016).

As noted, Lupish had been working briefly for *Hunter Lifestyle* magazine. *Hunter Lifestyle* magazine was first published in 2003 and its latest edition, there are six every year, came out on 11 July 2017. It is published as both a glossy hard copy print version and online at <https://hunterlifestyle.com.au>. The magazine was started by Phil and Marilyn Collins. They moved to Morisset in the Hunter Region from Sydney in August 1980. Four years later they

started a local newspaper because there was no newspaper on the western side of Lake Macquarie at that time and they ran that for ten years. Marilyn Collins worked as a newspaper journalist but says she has no formal qualifications in journalism:

No! [laughs] I learnt the hard way. When we started our newspaper, I was a trained legal secretary and my husband had the philosophy - he was always selling things - he said to me if you can write a good letter, you can write a good editorial. Lucky I could, I suppose! (Marilyn and Phil Collins i/v Nov 2015).

Phil Collins has a background in marketing and promotion and had started the Newcastle Home Show. He ran that and five other home shows around regional NSW for twenty years and eventually sold that business in 2012. As PJ Promotions he also did the marketing and promotions for a number of shopping centres in the region. For the Collins' the magazine was inspired by *High Life Magazine* which Phil had seen in Bowral. He asserted that 'this area needs a high-profile presence like this magazine. I think we'll start one' (Marilyn and Phil Collins i/v Nov 2015). The first edition was March/April 2003. Marilyn is Co-editor and Editorial Editor of *Hunter Lifestyle* magazine which means that she is responsible for planning and sourcing the editorial content of the magazine. For the first five years or so, she wrote all the articles but as the magazine grew this was not possible and now she uses freelance writers. Marilyn still writes most of the house stories, however, and takes the photographs for those stories as well. Phil's role is in advertising and marketing, including selling the advertising, getting the copy and getting the approvals. The magazine is designed to appeal to both men and women. It has a print run of approximately 5000 and while the first edition was 80 pages, it is now 180 pages. In terms of distribution:

It goes into more than 300 newsagents state-wide including farmers out at Dubbo and the remoter country areas. We sell very well, of course, here in the Hunter, and also the Mountains area, North Sydney and the Eastern Suburbs and we have a subscription base of 1000 that goes right round Australia - South Australia and Norfolk Island, all different places (Marilyn and Phil Collins i/v Nov 2015).

Their readership has changed over the life of the magazine. Marilyn says that their readers were initially 'baby boomers but now we have 30-year olds buying the magazine because they are all renovating houses and they want to get ideas from the up-market houses we feature. We have widened our demographic' (ibid).

In terms of production they primarily use freelancers. These include a graphic designer for the advertising, a graphic designer who works with Marilyn on the layout, and three freelance writers, one based in Gresford writing rural stories including stories about horses and cattle-breeding and two based in Newcastle writing the arts and human-interest stories. Marilyn agrees that 'it's very hard for magazines at the present moment. We're all having a bit of a downtime at the moment' (Marilyn and Phil Collins i/v Nov 2015). They have cut costs by closing their office and running the business from their home in Clarence Town. The magazine is described on its website as 'an exceptional promotional vehicle for leading Hunter-based businesses and regional tourism'. Marilyn gives an additional dimension: 'I'm a story-teller and a history-recorder ... I'm recording what happens here in the Hunter' (ibid). They also have a Facebook page with 1274 likes. They assert that regarding their 'journey with the magazine and the people we meet in those industries, whether it be stage or art or authors, we are incredibly lucky to have the people that we have living in this region who are so talented. It's incredible' (ibid).

Marilyn and Phil Collins also have a commitment to promoting and supporting creative talent, including mentoring and financial support for those arts they have a keen interest in. Phil has

had a long-standing involvement in music. In his early years he played in a band and for many years he has supported a group of local singers. These include Daniel Stoddard, Rob McDougall and Stevie Hudson, and Phil has produced a number of shows, called UltraSwing Lounge, for them at the Civic Theatre in Newcastle as well as helping them with touring. Both Marilyn and Phil have an interest in visual arts and theatre and they are proud to say, 'we are showcasing these people in the magazine' (ibid).

Steve Dunkley, a musician himself who also occasionally writes for *Hunter Lifestyle* magazine, was the publisher and creative director for *Social Life Magazine* (Issuu 2015, online) which ran for 19 issues across 2011 to 2013. It was published exclusively online through the Issuu website. The magazine ran a variety of stories on matters pertinent to the local region such as holidaying in Bali, a story on the Hunter Women's Network, Grant Walmsley's new band Freebird, how to engage social media and many others. It was supported by a variety of advertisers which included Bar Petite, the Clarendon Hotel, Villa Clone and Wylde Lawyers. Events such as the Harvest Markets held at Maitland Showgrounds took full page ads. Dunkley's team included Steve James, the General Manager also responsible for Sales and Marketing while Elle Sheedy was the Content Manager. Other contributors included Cat Cossetini, Rachel Beardsley and David Muir. Dunkley was not only the publisher of *Social Life Magazine* but is also still a designer, photographer and illustrator as well as being a long-term musician within the valley having played in bands such as the notorious Funbusters and Men Without Shame. He currently performs with The Steves.

The music scene in the Hunter has also been well catered to by the publishing sector of the creative industries. For example, Sydney based *On the Street* music magazine had a Newcastle page and local correspondent in Julie Williams prior to her moving to the news desk at NEW FM when this FM radio station was first established. Locally based *Concrete Press* followed and was edited by Mark Hughes for a number of years. It was initially run from a house in Kahibah before moving to a set of co-located rehearsal spaces and music business offices that existed in the former NXFM building on Hunter St in Newcastle. This music magazine was succeeded by *U-Turn* run by Catherine Hart and her team from the Black Box space in Newcastle West. Under her editorship *U-Turn* was run efficiently and appeared regularly but ran into cash flow problems when a number of her high profile out-of-town advertisers began to pay irregularly. *Reverb Street Press* started as a hard copy print edition run in the manner of its predecessors *Concrete Press* and *U-Turn* but soon became an exclusively online only proposition. Its owner is still music enthusiast Kevin Bull and one of its long-term contributors has been Nick Milligan who studied Communication at UON. *Reverb Online* still features music news, reviews, interviews, giveaways and a comprehensive gig guide on its website and now also runs what it calls *Reverb Radio*. *Reverb Radio* has taken the *Reverb* archives and converted these to radio 'shows'. As Kevin Bull indicates 'After stumbling upon Radionomy, I thought it would be nice to put my favourite songs online as a perpetually streaming "radio station"' (Reverb 2017, online) which he did. It now runs daily streaming 'copies of many of the phone interviews Reverb did while we were in print and having this "radio station" gives me the opportunity to make these available' (ibid).

8.7.4 Zines and Blogs

The Follower 'newspaper' which ran briefly during 2015 was largely the brain child of Zackari Watt, a long-term catalyst inside the performing arts scene in Newcastle. He first came to attention via the band The Hauntingly Beautiful Mousemoon who attracted a large following to venues such as the Lass O'Gowrie Hotel in Wickham and were eventually signed to One

Henry Records, a venture of Grant Walmsley, from the highly successful Screaming Jets, and Terry Latham, the owner of Impromptu Studios in Tighes Hill. *The Follower* operated out of Wolfe Street in Newcastle in premises sourced from the Renew Newcastle program. It claimed to be Newcastle's only 'Arts independent newspaper and events guide' (Facebook 2017a, online) and it contained 'giveaways, mind-blowing events and the things you need to know!' (ibid). This venture had 'a circulation of over 50,000 copies' (ibid) as it was distributed within *The Leader* newspaper run out of National Park Street in Hamilton.

Along with Marigold Pazar and Zana Kobayashi, Zackari Watt is also a Director of The Follower Studios which is 'a multi-faceted "creative industries" focused studio HQ with a strong focus on performing & visual arts' (Renew 2017, online). This venture is in many ways an extension of the Morrow Park Arts Hub and it has a 'history in events production, visual arts, music, theatre & much, much other juicy creative endeavour both in Newcastle and at a national level' (ibid). The studio has approximately 20 regular users of the collective space. This space contains 'a fully functional film & photography studio, a well-stocked & fully functional costume room – with sewing & costume making facilities, a combined production (for film & photography) & musical composition suite, an actor's workshop space, creative meeting/brainstorming space & one large, sunny work room with 3 x large communal desks' (ibid).

Newcastle Mirage is another self-published zine that has been running pieces on music, art and culture in Newcastle. It has done this regularly since 2013. It is produced out of Sawtooth Studios and Burst Media Studios in Tighes Hill and is run by Managing Director Kian West. Its Creative Director is Ryan Williams and its Copy Editor is Alyssa Gill. The contributing writers and artists include, at least for Issue 49 June 2017, Kian West, Ryan Williams, Michelle Kot, Amy Lovatt, Brook Tunbridge, Chris Dunn, Spencer Scott, Amy Theodore and Bronte Goddensmith. The cover story for Issue 49 was about James Drinkwater, a local artist who 'is constantly in and out of the country, firstly to Berlin, then as result of winning the Brett Whitely Travelling Art Scholarship in 2014, Cite Des Arts in Paris, followed by a further three months travelling from Ireland to the Balkans' (NM 2017, p. 26). Photography for this 6-page spread was undertaken by Alex McIntyre, a professional who had worked as a musician with Supersonic before relocating to perform solo in the UK. He then studied photography at RMIT in Melbourne and began working there professionally. He has since set up his business in Newcastle and his office is co-located with the Foong sisters, in their High Tea with Mrs Woo fashion warehouse in Mayfield.

Other stories in this issue of *Newcastle Mirage* included a story on Newcastle Coffee Snobs, another on the artists who exhibited as part of the Phantom Exhibition at the Newcastle Art Gallery, an interview with folk and blues musician Nicholas Connors, a conversation with the Hunter Young Professional's Treasurer Alex Hardy, an interview with Peter Gardiner the winner of the 2016 Kilgour national art prize, another interview with local band Arcades and Lions, and a story about 'cool people doing cool things in Newie – Brayden from HQ Skate' (NM 2017, pp. 22-25). This zine is peppered with ads from Oasis Social Media, the Stag and Hunter Hotel, Pekarna Adamstown Bakery, the Foghorn Brewhouse, The Cambridge and The Edwards Shop, a supplier of music, art, culture and books, run by former Silverchair bassist Chris Joannou.

Blogging is also a vital part of the publishing scene in the Hunter. There are many examples which include, amongst others, Coal River Working Party, Newcastle Appearances, Hidden Hamilton, Icyclenewcastle, East End Footprints, Novacastria, Pink Patent Mary Janes, Showbag, The View From King Street, This Untidy, Smoky City, West End Adventures, Found

In Newcastle, Little Eco Footprints, The New Industrial, Little House in a Tsunami, Newcastle Now & Then and Swamp Life. A few cases will serve to illustrate the various activities and styles of these writers.

HUNTERhunter, for example, was started by 'Fiona and Alissa a couple of frustrated Novocastrians who were sick of Googling and trawling the internet trying to discover where to go, what to do and what was new in the Newcastle and Hunter region' (HUNTERhunter 2017, online). Their site was built by Headjam, a Newcastle based design house, and this blog has active Facebook, Twitter and Instagram accounts. They blog weekly and claim to reveal 'hidden treasures and secret gems, keeping up-to-date with all that's new and what's going on around Newcastle and the Hunter Valley' (ibid).

All the Streets in Newcastle is a blog using a Wordpress site run by 'Tania and I've set up this page for Rose, a ninety-three year old lady who lives in Newcastle. Rose is in the process of walking down all the streets in Newcastle, one by one, and writing about what she sees' (ATSIN 2017, online). Rose take notes by hand of the streets she has traversed. She passes these on to Tania who transcribes them and posts them to this site. As Tania explains on the blog 'Because I have set up a few blogs I was asked if I was interested in setting up one for Rose, to which I tentatively said yes, even though I don't live in Newcastle anymore. After receiving the first letter in the post (and first folder of photos, via Dropbox via Wanda's daughter Erica) I knew I was part of an interesting project' (ibid).

Siobhan Curran set up *The Novocastrian Files* a few months after moving to Newcastle. She had first visited in 1998 and became a big fan of 'Australia's most underrated city' (Lonely Planet), so much so our family moved here from Sydney in 2010' (NF 2013, online). Curran began blogging partly as a way to find out 'more about some of the interesting and talented locals I was discovering and secondly as a means of identifying where the good coffee / lunch / dinner spots are via their recommendations' (ibid). She 'continues to use whatever spare time I have shining a spotlight on just some of the crazy good this part of the world contains, particularly things to do with creative types'(ibid). Her posts are published every week and she is also using Facebook, Twitter, Instagram and Pinterest.

ABC Open has also encouraged the Hunter Region's writers. Judy Wells from Swansea, former President of the Hunter Society of Business Communicators and a lecturer at the University of Newcastle in the Bachelor of Communication program, has since retired but keeps her writing muscles flexed by authoring a number of posts. These include titles such as 'Bras Burned in Arcadia Vale' and 'Her Life's Work'. 'If You Go any Further, You're Coming Back' deals with her then new life in Canada. It helps pinpoint in many ways the feelings that lead many of the Hunter's creative industries practitioners to return home to the Hunter region:

After the first set of seasons we begin to feel at home. We glimpse the spirit of the place, see the people as they see themselves. We make friends, start school and work and begin to shape a new future for ourselves. Gradually, one set of yearnings is replaced by newer, fresher stimulants. We stop comparing and the new becomes familiar, natural. But never far from the surface, something explodes from memory and our imaginations cascade down the pathways of loss: to the voices of loved ones, the smell of the sea, the flutter of gum leaves in sunlight, the feel of hot, wet sand. We juggle the new and the old in unsteady tension with memories and feelings that will last for the rest of our lives (Wells 2014, online).

As makeup artist, Jes O'Brien, who has worked successfully in Europe with people such as Kate Moss, explained when she was interviewed on *The Novocastrian Files* blog, she is Novocastrian 'Born & Bred. Wandered away for my early to mid-twenties only to inevitably return – as do most' (NF 2017, online). Dr Judy Wells herself eventually returned to the Hunter from her lengthy sojourn in Canada and took a position in the Communication program at the University of Newcastle where she went on to mentor many future creative industries practitioners.

8.8 Conclusion

The publishing sector of the creative industries in the Hunter Region is in a healthy cultural state despite, and possibly because of, the disruptions the digital revolution has wrought. The region is well serviced for its size with non-periodical publishing which includes the one-off printing and sale of such things as books and reports while periodicals such as magazines and newspapers appear at regular intervals. While many of these have all been paper-based, increasingly there are now a number of digitally based publishing and self-publishing options that have, to an extent, disrupted the structure of this industry. In terms of freely circulated publications, ads and subscriptions were the primary revenue stream. With the advent of online publications, acquiring an ongoing and significant consumer base via digital hits has become important. In this case social media sites, with very little to no investment, have become critical.

The region has had several local and regional mastheads as well as the national newspapers. All of them compete with international mastheads that operate online, some with Australian editions. Journalists have survived the transition to digital by moving across and between other creative industries' sectors. This also seems to be a trait of those engaged in the magazine business who are all generally skilled in multiple professional roles. Writers, of course, remain important in the publishing sector. With the demise of newspapers in particular they have taken on freelance work, working to a brief or on spec for various outlets. There are still a limited number of staff writers operating as news journalists, feature writers or columnists. Authors, and now bloggers, are ever present with some writers, of necessity, performing both functions. Their roles may vary but the prime function is to produce engaging content. Authors also undertake a wide variety of promotional activities.

Magazines have been produced here for some time with a number competing successfully in the region with an overt intertwining of content and producers which is typical of this sector. Books have also been part of the cultural scene in the valley for many years with many exceptional authors living in the region. There have been a few notable publishing houses operating in the region with the number of booksellers diminishing as bloggers increase their dynamic activities.

Creativity & Cultural Production in the Hunter

An applied ethnographic study of
new entrepreneurial systems in the
creative industries.



Final Report:
Hunter Creative Industries

Advertising and Design

Associate Professor Phillip McIntyre
Professor Mark Balnaves
Associate Professor Susan Kerrigan
Evelyn King
Claire Williams

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9. ADVERTISING AND DESIGN

9.1 Introduction

Advertising and Marketing represents a very significant creative industries sector in the Hunter Region. It includes the work of advertising agencies, that of design agencies and the increasing variety of work PR agencies undertake in marketing and strategic communication. As well as the people who work in-house, these agencies are all crucial employers of various freelance video makers and their crews, photographers and graphics designers as well as jingle writers and web designers. Many of these freelancers work in collaborative workspaces and the level of their education and training is quite high for such a young creative industries sector.

9.2 A Brief History of Advertising and Design in Australia

Advertising and marketing, as John Sinclair writes, ‘historically is the force that sustains all commercial media’ (in Cunningham & Turnbull 2014, p. 209). It has been in existence for some time. Until the end of the nineteenth century, household goods were usually delivered or bought in bulk but soon after ‘the production of packaged and branded household goods became widespread in all industrialised countries’ (ibid, p. 211). Many of the best-known brands in Australia such as Rosella, Arnotts and Fosters were established at this time. There had been advertising of these brands and many others in newspapers for some time, which is why commercial artists were important during this period (Young 2015, pp. 219-34), but ‘from this time on, however, manufacturers in industrial capitalist societies built up national sales organisations, using advertising in conjunction with other marketing strategies in packaging and distribution’ (ibid, pp. 211-12).

The development of the golden age of radio in the thirties in Australia was important as the big advertising companies such as George Patterson Pty Ltd who handled the large soap companies like Colgate Palmolive and the Lever Brothers, began to exert a tremendous influence on programming through their purchase of large amounts of air time. Shows they supported included *Dad and Dave*, the *Lux Radio Hour*, *Australia’s Amateur Hour*, *The Quiz Kids* and of course *Pick-A-Box*. Performers like Jack Davey and Bob Dyer were used to promote the sponsor’s products whether it was biscuits, toothpaste or cars (Baird 1992, p. 8). ‘The production of such programmes in conjunction with the revenue derived from traditional forms of advertising served to strengthen the advertising industry and reinforce the media’s dependence on it’ (Crawford 2008, online). In this way, advertising became critical to the way radio developed. The arrival of television as the prime mass medium after the Second World War reinforced this trend. As Sinclair asserts:

The international manufacturing-marketing-media complex we know today did not really emerge until after World War II, as US corporations seized opportunities to invest overseas in industrial development and to exploit the relative affluence that accompanied it. Among these corporations were the new US television networks and the advertising agencies of Madison Avenue (in Cunningham & Turnbull 2014, pp. 212).

While Australian agencies took on the gendered characteristics of Madison Avenue, women were not entirely locked out of the advertising world, as Jackie Dickinson reveals in her book *Australian Women in Advertising in the Twentieth Century* (2016). Dickinson presents evidence which suggests that ‘from the end of the nineteenth century, increasing numbers of educated,

middle class Australian women sought paid work. Advertising provided an acceptable route for many of these women to enter the workforce' (2016, p. 11). Advertising and marketing, not surprisingly, began 'to become established as an integral part of the new age of corporate capitalism' (ibid). Public relations, as an entity devoted to marketing those corporations, and other entities, also comes into existence at this point.

As Sheehan (2014, pp. 20-46) and Zawawi (2009, pp. 26-46) variously argue, PR's history in Australia is complex. Knights suggest that 'strategic planning in PR has developed out of the advertising industry. As a form of communication, advertising has been operating at a sophisticated level for more than a century' (Knights 2001, p. 5). PR's recent history, as Knight further explains, can be traced to the 1960s 'when advertising had become a multi-million dollar global industry' (2001, p. 5) and public relations established for itself a place in relation to this industry. This relationship is important to understand since:

Although it was much younger, and had smaller budgets to play with and was perhaps a little harder to define, it was growing at a fast rate and, at least on the agency side, it tended to model itself on its older advertising sister, with, for example, 'account directors' and 'account reviews' and 'pitches' for new business. It was therefore probably inevitable that by the 1990s PR agencies would start to follow ad agencies [in the way they operated] (Knights 2001, p. 5).

Not only was PR important to the marketing and advertising arena at all levels but the advertising world increasingly incorporated the design world into its orbit as well.

While Alan Young's article in the *Journal of Design History*, entitled 'Commercial Art to Graphic Design: The Rise and Decline of Commercial Art in Australia' (2015), indicates the symbiotic relationship design has long had with the advertising world, the history of design in Australia can be traced back to the 1880s, according to Michael Bogle's book *Design in Australia: 1880-1970* (1998). Tony Fry's influential *Design History Australia* (1988) also gives an overview of the increasing influence of design in both the world it operates in but also in increasingly drawing in a broad array of professions into that sphere. There has been an expansionary and at times all-encompassing approach to what constitutes the realm of design¹. For example, on the Design Institute of Australia's website there is a link to a *History of Design in Australia: 1789-2002* which starts with a Wedgwood medallion being fired from Botany Bay clay in 1789 and in 1820 'Webster and Temple, two convicts, make a set of chairs for Governor Macquarie' (DIA 2017, online). In the twenty first century, design has become an integral element of product development. The reason for this is two-fold. First, appreciation has grown of the value of aesthetics to the saleability of consumer goods (Apple being an example). In addition, there is a growing understanding that functionality can be enhanced when product design is given priority (Naiman 2017, online).

The Design Institute of Australia (DIA), which began as the Society of Designers for Industry in 1947, has members from 'a broad gamut of disciplines in both established and emerging fields of design. They include (but are not limited to) spatial designers, communications designers, industrial designers, design educators, systems designers and design managers' (DIA 2017, online). There are those working in digital media, exhibition and display, systems and service design, industrial, jewellery, fashion, textile, furniture, interior, architecture and set

¹ As an example see Michael Smythe's *New Zealand by Design: A History of New Zealand Product Design* (2011). A review of this book contends that 'Smythe begins by provocatively re-inscribing 'Maori art' as 'Maori design' (though neither term was relevant in pre-colonial New Zealand)' (Hochscher 2014, p. 188).

design and many other forms recognised by the DIA. Some of these forms of design have been instrumental in the more recent popularity of ‘bespoke’, hand crafted products where many consumers have tired of the uniformity and short life-span of many mass-produced goods. However, it is graphic design that has most often been associated with advertising. The Australian Graphic Design Association was founded in 1988 and is now ‘a lead member of the International Council of Graphic Design Organisations, forming a global network of 187 member associations in 56 countries and consultative status with UNESCO, UNIDO, ISO and WIPO’ (AGDA 2017, online).

9.3 Structure of Advertising and Design Industry

Agencies in this sector have been split into two basic categories. Advertising agencies include full-service, boutique, digital, in-house or media specialist agencies while promotion agencies include direct marketing, sales promotion, event planning, public relations and design agencies (Mills 2017, online) many of which have been combined into what are called full-service agencies:

Full-service agencies provide clients with all the services they need for the entire advertising function. This includes planning, creating, producing, and placing the ads, as well as research before the campaign and evaluation after it to assess the campaign’s effectiveness. Full-service agencies have expanded in recent years through consolidation—larger agencies buy them when they want to provide a one-stop shop for their global clients. In the process, the types of services that agencies provide has expanded to include PR, design, and event planning (Saylor 2017, online).

Some agencies focus on one aspect of the creative process such as creative production work or media buying. They refer to themselves as ‘specialised agencies’ (Saylor 2017, online). For example, some companies will specialise in media planning and buying. Some interactive agencies, gaming agencies and search agencies may partner with other agencies ‘to provide services for the full campaign as determined by the client or the lead agency’ (ibid). However, some companies prefer to retain control over advertising and ‘may set up in-house agencies within the corporation. An advertising director typically runs the in-house agency; she chooses which services to buy and which to perform internally’ (ibid).

This in-house agency may keep ‘creative services in house, create advertisements itself, and then purchase media-buying services from the outside. The inside agency may buy services from a specialised service agency or buy services à la carte from a full-service agency’ (ibid). In-house agencies are generally cost-effective and ‘give the company greater control over the entire process. In addition, internal employees may have a deeper understanding of the company and its customers than would an outside agency. Insiders can also coordinate the promotion better with the firm’s overall marketing program and other functions, such as ensuring that enough products are made and delivered in advance of a promotion.

In addition to the types of agencies, there is also the role that the agency plays in the client’s business. The most common and secure relationship is the agency of record, or lead agency. As clients may work with many different agencies for their various needs, the agency of record is the lead

agency partner and usually has the majority of the client's business (Saylor 2017, online).

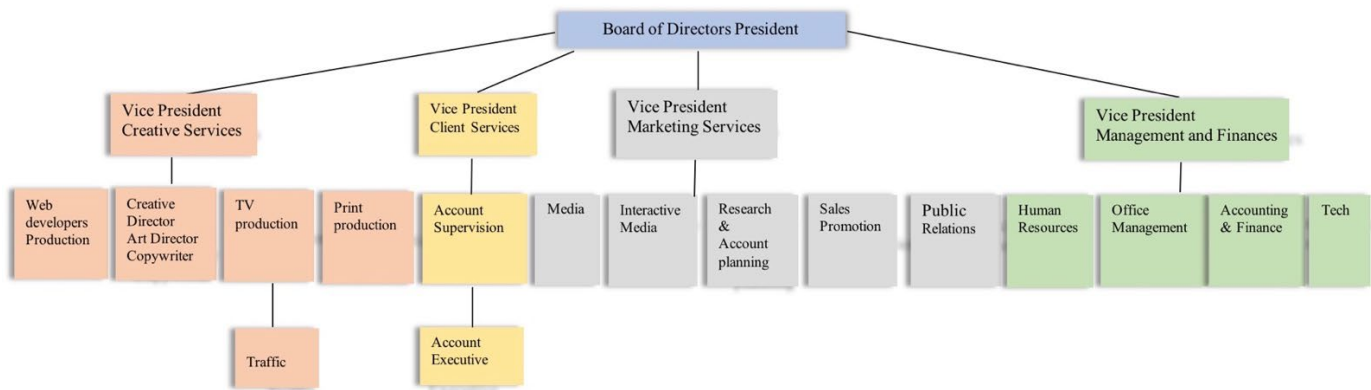


Figure 18 Design Typical Full-Service Agency Organisation
(Original in Saylor 2017, online).

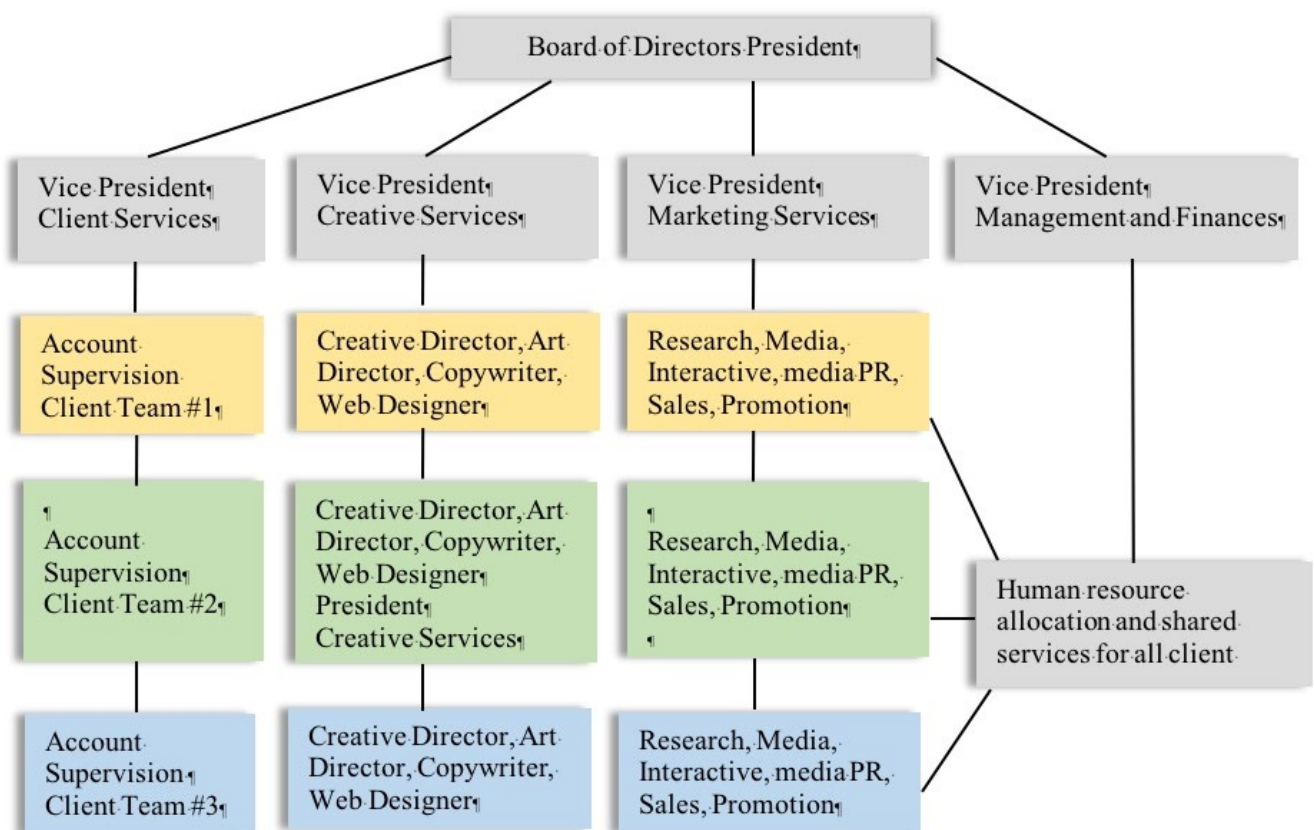


Figure 19 Design Agencies Generic Teams Specialists
(Original in Saylor 2017, online).

9.4 Business Models

In the advertising and design world, revenue may be generated from a number of sources. For example, commissions may be earned dependent on the media form targeted. A commission of 15% is usually charged for what is displayed on broadcast media. This fee is similar for outdoor

media such as signage. Commissions on digital media are often negotiable. There will also be mark-up charges placed against production costs and any fixed costs such as wages are calculated here as well. Work may be outsourced, for example, to specialist design houses or video companies, and the contracts drawn up to govern the arrangement will specify objectives along with the negotiated fee. Nearly all projects are calculated on an hourly rate or else a fixed price will be agreed to be paid on completion of the project. A typical revenue stream flows in the following way: the media bills the agency for the cost of a spot, and the agency then bills the client. This bill includes the cost of the spot, plus the commission which covers production costs, agency's copywriting, art direction, and account service charges. The percentage of profit necessary for the agency to stay afloat is added on here.

9.5 Operational Methods

Traditionally an advertising or design agency will work to a brief. This will generally include information on the product or service required, the competition, the proposed target market, what consumer need or problem is being addressed, what the consumer thinks of the brand, the one thing they need to believe about this product, what can be done to make them believe this, and some idea of the tone of the communication to be used. Much of this information may be garnered through what is now called the design thinking process. Traditionally, design has most often occurred late in the production process, when the need has been to promote or package finished goods or services for sale, for example through advertising. However, in order to both facilitate the brief and/or aid in product development, design thinking has been developed and applied in many situations in the workplace. The five stages of design thinking were originally proposed by the Hasso-Plattner Institute of Design at Stanford, known informally as d.school. These stages include empathising with the user, defining the problem, ideating or generating ideas, prototyping and testing. Design thinking is increasingly seen as a useful strategy where innovation is being called for, but once the brief is agreed on the agency will operationalise that brief by bringing into being a novel campaign, product or service.

9.6 Important Personnel

An advertising agency may employ a creative director, account executive, copywriter, media buyer and traffic controller as well as a graphic designer, PR specialist, brand manager, social strategist, developer, UX designer and any number of freelancers. Design agencies may employ graphic designers, for example, to fulfil work contracted from advertising agencies but many also employ film makers, web designers, photographers, illustrators, interior designers, filmmakers, set decorators and stylists. Many of these operatives, if they are not employed directly, will work on contract or freelance themselves. Often designers, and of course many others, may be employed as embedded creatives, for example in the public relations area of a government department or the social media unit of a large corporation.

Inside advertising agencies there are certain staff functions that will not, typically, be outsourced. These include Account Managers who work closely with clients to ensure the brand is served well, to identify and ensure a focus on the target audience, to help position the client competitively and to develop the most appropriate complete promotion plan. In terms of market research, account planners work with clients 'to obtain or conduct research that will help clients understand their markets and audiences' (Saylor 2017, online). Art Directors or Copywriters engage with clients 'to develop the concepts and messages that will catch consumers' interest and attention' (ibid). The creative department will generate the ideas, images and words of the

message being enacted. The agency will also typically employ a media buyer to ‘evaluate the multitude of options available for ad placement—now greatly expanded by the Internet. They decide how best to allocate the client’s budget to use the best media to most effectively reach the target audience’ (ibid).

A number of other specialised companies service the advertising world. These include art studios and various design firms who may be involved in such things as designing ‘logos, stationery, business cards, and packaging design for products’. Film and video companies may be contracted to produce vision and sound for all screen-based media, photographers are in demand for stills that are to be used in print, pamphlets and/or on web-based platforms, while web designers or specialised media strategists may be contracted for their experience with internet-based media. Printing firms are still contracted ‘to produce printed material for a variety of media channels’ (ibid). Promotion agencies may also work within specialised sectors such as the music industry, while other public relations agencies will assist in marketing strategies, event planning and overall strategic communication. Various research companies have sprung up to service the advertising and design sector.

9.7 The Hunter Region Advertising and Design Sector

9.7.1 Introduction

‘The advertising industry is complex, and many different types of skills are required to create a successful ad campaign. Career possibilities abound for people who are artistic, good at writing, analytical and creative’ (Saylor 2017, online). There are, as seen from directly above, a wide variety of employment possibilities within the advertising and design sector and most are well represented in the Hunter. Many of these people develop their skills through a program of study, for example at University or TAFE or at a private college. Some, however, are self-taught or learn ‘on the job’. Digital skills are fundamentally important for many working in this sector but traditional hand skills continue to be important, especially with the current vogue for bespoke/craft styling. Advertising and design agencies offer services across the range of ‘real world’ and digital economy applications and while they are physically located in the Hunter Region, a number work nationally. Design agencies and PR companies are linked to them.

9.7.2 Advertising Agencies

A number of very successful creative individuals from across the country began their careers in advertising agencies. Philip Adams, a film maker, author, radio presenter, public intellectual and long-term resident of the Upper Hunter, began his creative career in this sector of the creative industries. He found himself:

In the company of people like Bruce Petty, Fred Schepisi who would go on to become a significant film maker, Peter Carey, *et al.* There were a lot of us. We didn’t know each other necessarily at the time, nor had we confessed our creative ambitions to each other, but advertising gave us a home long before the government got interested in setting up funding bodies. So that’s how I started (Adams i/v April 2016).

As well as this familiar story from the Upper Hunter, the unique demographic profile of Newcastle has traditionally been important to the advertising sector of the city. Peter de Jong, a former musician and songwriter who recorded with Alberts Music, was a Creative Director

with Peach Advertising, a large Newcastle-based company which handled national accounts for companies such as Telstra, Coca Cola and Australia Post. De Jong explains:

If companies have a new product to launch they'll test it in one of two places in Australia. Those places are Newcastle and Adelaide. Newcastle, and Adelaide as well, is seen as a good test market and product release point by the advertising, manufacturing and service industries and if you watch your television on a Sunday evening, especially when the movie is on, you'll see, as an example, new ads for Telstra and other leading companies like them. Telstra's new Postshop brand kicked off here in Newcastle before it was released across the country and the reason major companies do this is that Newcastle has a broad demographic make-up of socioeconomic factors that represents Australia generally. It is a microcosm that contains good cross sections of all areas that make up the general population of the country. This makes it ideal as a test market to launch new products (De Jong in Supersonic 2003, p. 17).

Peach Advertising, the company which de Jong worked for, ran many successful campaigns. As part of the STW group, it was one of Newcastle's longer-established advertising agencies, providing work for a diverse set of 'creatives'. It was, therefore a target for takeover, and recently merged with its major competitor in the city, Enigma. In 2011 Enigma's Founder, CEO and Managing Director, Lisa Sutton Gardner, stated:

For the last two decades Enigma and Peach have spearheaded Newcastle's ability to compete with Sydney and Melbourne in the advertising, marketing and communication sectors. We're now harnessing that energy in a combined entity that will enhance our ability to compete with multinational companies around Australia (Campaign Brief, 2011).

This merger helped create the largest agencies in Newcastle and allows Enigma 'to expand its capabilities in digital media and government social marketing' (Campaign Brief, 2011).

Clients of these firms have included Roy Morgan Research, the NSW Minerals Council, Klosters Motors, Countrylink, the RSPCA and Charles Sturt University. Enigma now positions itself as delivering branding, strategy, media, PR, digital, design and production services for its clients. The company's projects provide a set of platforms for the 'creatives' involved. For example, after working closely with McDonald Jones Homes, the firm undertook extensive film and photography shoots to create an advertising campaign that ran in the Sydney metropolitan area as well as the south and north coast markets in NSW. These 'creatives' include a number of professionals who have worked across a number of sectors within the creative industries. A few of them are former musicians, such as those whom de Jong mentioned above, but they also include Matt Plummer and Brian Daly.

Matt Plummer worked as a musician for ten years with Supersonic (see Section 6.7.7) before moving to the United Kingdom where he took up design work in London and Leeds. There he 'created art for brands like 3 Mobile, And1, You Are Here Records and Royal Parks' (Plummer 2017, online). He eventually returned to Newcastle and secured a position as Art Director with Enigma with clients such as the NSW Government, CountryLink and Volkswagen. His client list soon expanded to include NIB, RED Energy, Mojo Homes, and the McDonald Jones Group (ibid). Brian Daly, on the other hand, describes himself as a composer, director, writer, creative director and musician who works across a number of agencies such as Enigma, Kent Woodcock, Sticky and Eluminate, making ads, videos and jingles for clients (Daly 2017, online).

A number of these 'creatives' involved in the type of work Plummer and Daly do, move between firms. Out of the Square Media (OOTS), for example, benefits from the expertise of a number of former Peach and Enigma employees. Jamie Lewis (also see film sector) is a case in point.

Lewis is a graduate of the University of Newcastle's Bachelor of Arts (Communication Studies) program. During his studies he was a member of Footlice Theatre Company, and he began work at the Media Communications Unit in Newcastle. In 1996 he started in advertising in a junior role as a copywriter/production assistant with a local company where he learned the process of producing tightly scripted and shot commercials from idea to execution. After spending nine years with Enigma, in 2012 Lewis moved to OOTS, as his Linked In site declares (Lewis 2017, online). He is OOTS' Creative Director.

In Newcastle, we often have many hats and I do a lot of copywriting and I direct commercials, corporate videos and different forms of content as well as presenting to clients. That is kind of my role in a nutshell as a creative director, but as a creative practitioner I just call myself a writer and director and I just love creating, fantasy stories in terms of anything that has a twist on reality I love, so I take something that is quite normal and like to put a spin on it in some way (Lewis i/v May 2015).

Lewis has treated his time in the advertising world as a learning experience, especially in regard to collaboration:

I was a terrible one at this, I had always thought it's my idea, I have to make it and the collaborative, to me, was quite wrong in that it was really just having people to help fulfil your vision. Which isn't collaboration it's ... 'I've got this bloody big idea and you will do this, this and this'. Then, working with Ian Hamilton (Limelight Creative Media) was the first time that I have probably met someone where collaboration was very intense but I saw the benefit of that, in a much better way. And I think too in the earlier advertising days where I worked, a lot of it was people defending their ideas rather than people working collaboratively (Lewis i/v May 2015).

OOTS was founded by Martin Adnum, a former cameraperson from NBN Television and has grown from its television and video production background into a full-service agency (OOTS 2017, online). Adnum himself specialises in account management, concept development, creative direction, copywriting, social media and video and audio production (ibid). Adnum and his team at OOTS recently distinguished themselves with the *Feel Inspired* promotional campaign for Newcastle which was taken up by local television station NBN, a 9 Network affiliate. The OOTS website specifies that they offer media placement and buying services, audio and video production, copywriting, graphic design, photography, app development, web design, event management and brand strategy (ibid), indicating the merging of advertising, design and PR functions.

While firms such as John Church, StickyAds, The Village of Useful, MAD Media Group, Artbeat and Level 7 construct complex digital environments for their clients, the use of highly interactive social media is not overt in their own digital environments. In this case it appears that the 'desire for intimacy' with the public, as Weinman (2013) argues, is something that is deployed by advertising businesses in current marketing but it is not something that advertising agencies expect to do themselves as part of their own businesses. The larger agencies also

employ key big data and other tools to enhance their client experience and aid in targeting certain audiences.

9.7.3 Design Agencies

As indicated above, the advertising and design sectors of the creative industries in the Hunter often overlap, feeding off and informing each other. In addition, the digital environment has become increasingly important in the range of services these sectors offer. The design sector itself now offers clients a variety of services which include, amongst many others, web design, social media design, search engine optimisation (SEO) and associated techniques. Competition, while always fierce, has increased. For example, the recent entry of Fairfax Marketing into the local business mix offers business clients an integrated and sophisticated model of support, measurement and feedback on their use of social media within the engagement and marketing mix. The Fairfax presence appears to be influencing small business to enter the digital marketing world in a new way. Agencies such as Graphika, Redback Solutions, Nodding Dog Design, Suckerpunch Design and Glue Digital have taken these ideas on board and like their advertising agency cousins, outsource many services locally and, at times, internationally.

An example of these agencies is Headjam which does much of the same but has eschewed the nomenclature of ‘design’ and instead describes itself as a ‘creative agency.’ They offer services and expertise in advertising campaigns, advertising photography, branding, graphic design, marketing, print media, project management, video production and what they describe as web+digital. For Headjam:

Web and digital covers everything that happens via the internet, and the wide range of computer-based technology that we use in everyday life. Headjam has expertise in a wide range of web and digital based disciplines including website design and development, through to app creation for mobile phones and tablets. We have the ability to build a complete online business for you, and specialise in the latest in web design approaches: responsive design. Responsive web and digital solutions can be used across all types of devices, from mobile phones to tablets, laptops and desktop computers. Our web and digital skillset has been built up through experience in many contexts, creating small business websites through to massive online learning environments. Headjam have the ability to tackle the most complicated web and digital challenges for your organisation (Headjam 2017, online).

Headjam are digitally connected via sites such as Facebook, Twitter, Instagram, Google+, LinkedIn, Vimeo, YouTube, Pinterest and The Loop and they have a blog which they use for ‘spreading the word’. Principal, Managing Director and founder of the company, Luke Kellett, ‘graduated with Distinction from Account Management from the Communications Council’s own AdSchool’ (Headjam 2017, online).

He worked in London creating media for music labels Atlantic, Sony Music and Universal and his photography has attracted to Headjam a portfolio that includes Boy and Bear, Hiatus Kaiyote and The Waifs, and won him prizes at the Melbourne Design Awards and the Woodford Folk Festival. Thousands of his ethnographic photographs of the bohemian community in Melbourne were recently purchased to form part of the permanent collection of the Victorian State Library (Headjam 2017, online).

Kellett's specialism includes producing 'audiovisual content for broadcast and web-based contexts' (ibid) and he is now responsible for 'accounts from the first client meeting and oversees the execution of strategy for creative and branding across digital and traditional media platforms, and manages all IP for the agency' (ibid). Sarah Cook is also a principal of the firm. After learning as much as she could in Melbourne and Sydney, she 'came home to Newcastle in 2011 take the reins of Headjam's design team' (Headjam 2017, online). She has a Diploma of Graphic Design and a Certificate III in Fine Arts, both from Hunter TAFE. She is an advocate of the latest design methods and 'her designs utilise the techniques of graphic design to permit form and function to meet in a sophisticated aesthetic response to the challenge at hand' (ibid). Mike Preston is a principal of the firm as well. He is highly experienced, having spent at least thirty years in advertising:

Directing the launch of major brands such as Optus and Hahn in the Australian marketplace. Career highlights include two of Australia's longest running campaigns, one for Johnson & Johnson and the other for Colgate. He worked with a long list of renowned agencies including JWT, Publicis, McCann Erickson, FCB, George Patterson and Clemenger BBDO (Headjam 2017, online).

Preston has also collaborated with NSW Health, the Government Census, the RTA and EPA (ibid).

These principals work with a team of in-house staff which includes a studio manager, account managers, a senior designer, an art director, senior digital developers, and a designer and illustrator. Helen Simmons is their Broadcast Designer. She is a motion graphics expert who specialises in editing, 2D and 3D animation, motion tracking, compositing, and stop motion (ibid). She began her career in Melbourne after graduating from Victoria University:

Wanting to learn more from the university of life and with the world at her feet, she flew to London to begin her new adventure. Landing junior roles with Gorgeous Enterprises and Annex Films, Helen rapidly grew her skillset and she quickly fulfilled a lifelong ambition of owning her own production studio. Helen founded The Visual Collective, where she worked with brands both locally and internationally, providing video editing and animation services to clients such as King's College London, Nescafe and Barclays Bank (Headjam 2017, online).

The team at Headjam depends on a variety of freelancers. These include photographers Alex McIntyre and James Geer, illustrator Keo Match, broadcast designer Josh Bruce, cinematographer Pete McMurray, account planner and researcher Dr Benjamin Matthews, and service designer Doug Helman, while public relations is handled by Meg Purser from Purser PR, Headjam's 'PR agency of choice' (ibid).

9.7.4 Marketing and Public Relations Agencies

Dotted throughout the Hunter Valley are a number of working public relations professionals. Some work for agencies, some run their own agencies, some work within the corporate world or public service and some freelance within specific sectors of the creative industries. Purser Corporate Communication (PCC), for example, has been at work in public relations in the region since 1984. Meg Purser, a graduate of the Communication program at the University of Newcastle, is its Managing Director. PCC are, according to their website (PCC 2017, online), a traditional public relations agency which advises businesses on their communication strategy looking closely at their messaging, community engagement, corporate positioning and methods

of handling issues and crises. As well as this higher level strategic work they also engage clients interested in their publication development and production management for reports, magazines, newsletters and brochures. On behalf of various clients, they undertake project and event management, and social media campaign content and positioning; they help write speeches, scripts and content for digital platforms; and they organise promotional materials and presentations. They also deal with media and public affairs, acting as consultants who ‘maintain contacts in regional, metropolitan and trade media’ (ibid). PCC also delivers media training offering assistance with editorial and advertorials, media liaison, opinion pieces, submissions and briefing papers as well as providing detailed situation analysis for their various clients. PCC includes in its team Melinda Smith, a former News Presenter and journalist at NBN Television. Smith also worked as a broadcaster on commercial and ABC radio networks before moving into corporate affairs and the management of strategic community welfare partnerships (PCC 2017, online).

Heidi Pollard, who grew up in Toronto, is also a graduate of the Communication program at the University of Newcastle. She holds a Masters in Professional Communication from the University of Southern Queensland. Pollard is now the CEO of UQ Power but her first job was at the John Hunter Hospital as a Public Relations Manager.

My very first day I had a car accident on the way to work. So, I actually arrived via an ambulance to the Emergency Department. I had to ring my brand new boss and say, ‘I’m going to be a little bit late, and I’m going to be coming via Emergency’. Maybe it was first day nerves, but I actually remember saying about three months into the job that I’d learnt more in the three months than I felt I’d learnt in three years of the degree. And it wasn’t until I was probably in my career about three years [when] I was managing strategies and actually doing campaigns and I started going ‘Oh, now my university knowledge is coming to help me’. And I would go and get old textbooks and things out, and actually draw on it then. But in the first probably three to six months of my career, it was more just learning office politics – how to work with an executive, how to deal with the media when you get 15 calls within 10 minutes from different media outlets and you’re like, I wasn’t really prepared for this. I used to take a whole day to write a media release. And now I have to punch something in 10 seconds, and get it approved by an executive and minister, and get it out to the media (Pollard i/v May 2016).

The tasks she and her team were given were varied and at times hard to pinpoint.

I used to say all the time to my team that we had a sign above our door that said ‘dump your shit here’. Because in PR, it seems like anything that doesn’t fit in an organisation neatly, into Finance, Accounts, HR, they go ‘give it to the PR people, they will sort something out’. So, I learnt really quickly just how to be ambidextrous, and deal with lots of different things, from bikies turning up with guns strapped to their ankles that want to donate to children, to you know, media, to a policeman getting shot in the back and you know, helicopters landing and massive coverage. So you just kind of learnt to roll with it (Pollard i/v May 2016).

After accumulating a wide variety of experiences such as these, Pollard moved to Hunter TAFE where she became the Manager, Marketing Public Affairs. Next she moved to WorkCover NSW as the Director of Communications. It was her CEO at John Hunter Hospital who offered her wise counsel. Pollard found that her leadership skills developed because people above her supported her ideas:

I was really fortunate when I was at John Hunter in that first position that our executive, the CEO there was brilliant. A really good leader, and he taught me very early on what a good leader does. And he really supported and empowered me. So, even things like we had three fatalities that came about for people who had had open heart surgery, and I was still pretty new in the manager role. And we'd been doing a values program with staff about what's important, and one of those things was honesty, and patient care. So, I felt the need that we should go public, and actually talk about we've got an issue we're investigating. The surgeons wanted to keep it quiet and manage it in-house. So, I ran a press conference with Channel 9, Channel 7, Channel 10, The Australian [newspaper], all of those people where I'd never done anything like that in my life. But it actually ended up being in our favour, 'cos they appreciated that we were on the front foot about it. So I was really lucky to have someone like him in the beginning. And I used to get quite overwhelmed because of the amount of detail and the volume that you deal with, in PR. And he used to always come in at night and just say 'eat it like an elephant, one chunk at a time' (Pollard i/v May 2016).

At the end of her WorkCover NSW job, Pollard took six months' leave to change her career direction.

I went to the States and studied to be a business coach. So, went to Texas and did this course in a compressed way. It was a three-year course and I did it in six months. Because what I found more and more, it felt a bit like Groundhog Day in that in Comms, you can often see the same themes every year, and seasonal things, and I started going 'I could do that with my eyes shut – what do I really love about what I do?' And what I loved was developing people. And I found that I'd had staff that had worked for me at John Hunter who'd followed me to TAFE, who'd followed me to WorkCover. So, people would keep going 'I want to work with you!' So, I said 'There's something in that, you know?' I actually love the human side of what we do, connecting people, developing. So, I did the coaching course, and then in my last year at WorkCover I negotiated to be able to work a four-day week. I actually worked compressed hours, so I worked five days in four. And then would have the fifth day off every week to actually start coaching. And so, I did that *pro bono* for a year - for free, just to kind of get my coaching hours up, and get practised at it. So, Leading Value is essentially a leadership kind of coaching company (Pollard i/v May 2016).

Leading Value is a company owned by Pollard that has given way to UQ Power. Pollard is also Director of First Firm, a property investment business, and she is Chair of the Professional Communicators Network, based in Newcastle, which she founded. She is Chief Leading Lady of the Leading Ladies International, a networking organisation that runs global programs for women. She was a member of the Hunter Medical Research Institute Foundation and is currently Chair of the Bachelor of Communication Advisory Board, at the University of Newcastle. In essence Pollard is now an entrepreneur and her talents include being an international company culture coach, a property investor, motivational speaker, philanthropist, humanist author and leadership advocate. Her principal position is currently Chief Empowerment Officer of UQ Power. This firm is aimed at future-proofing businesses, empowering people and leveraging business leadership. UQ Power runs a number of business services for business leaders, HR professionals and event planners. Pollard has learnt to value her time and delegate where necessary and uses a number of virtual services that help her stay on top of her commitments. One of these is a Virtual Assistant, Claire, who is paid \$65 an hour

to manage Heidi's diary and help with highly technical tasks. Claire lives in Queensland and they have met only once in seven years:

But some of the stuff that she does for me would take me three hours, and takes her 10 minutes, you know. 'Cos like I said I'm not great at the detail. But I now also have a subscription to a service in the US called Fancy Hands. And it's about \$6-8 per task US, so still really cheap for us, and a task is sort of 20 minutes' allotment. So, I'm going to Vegas next week for a conference that I'm speaking at, and so I wanted to check out what are the co-working spaces that are over there. So I just shoot a task on my Fancy Hands page, and say can someone do some research for me. And within 10 minutes, I get back an email with all the different services there are and companies, here's their contact details, opening hours, all of that. 'Cos if I go onto the internet, I go down the rabbit hole and I won't come out for three hours, you know. I am easily distracted by bright, shiny objects. So for me it's all about controlling that (Pollard i/v May 2016).

Paula Jones, on the other hand, is a determined specialist. She has thirty years' experience in the music industry and is now the Director of JonesPR. She runs her business out of her offices in Merewether. She began her career in retail 'followed by six years in publicity/promotions and marketing with various record companies' (Jones 2017, online). Jones first worked in the music industry as NSW Print Media and Regional Promotions Coordinator for Polygram Records where she managed 'publicity and promotions for all artists and label projects signed to the Phonogram label relating to key press, radio and TV within NSW as directed by the Promotions Manager' (ibid). She took that experience and moved through the ranks of Polygram Records and on to Larrikin Entertainment before moving to Sony Music Entertainment where she was the Queensland Promotions Manager. She quickly moved to their subsidiary Murmur Music to become the National Promotions Manager. She secured Midnight Oil and Silverchair as major clients and set up JonesPR in 1998. This company undertakes 'major publicity campaigns for clients with new release albums and tours within the Australian music industry' (ibid). Her present list of clients includes Midnight Oil, Peter Garrett, Paul Kelly, John Butler Trio, Kate Miller-Heidke, Kim Churchill, Karnivool and the Heavenly Sounds tours (ibid). She was the head Event Publicist for the Homebake Festival for eleven years and did much the same for the Groovin The Moo Festivals across a six-year period. She has mentored others through her teaching in the Music Business course at Hunter TAFE, been a regular participant in panel discussions for the industry, and since 2001 has worked *pro bono* for Music NT as part of their Bush Bands Business project. 'Held just outside of Alice Springs, it assists indigenous bands living in remote communities throughout the NT with 3 intensive days of workshops culminating in the Bush Bands Bash concert' (ibid).

9.7.5 Freelancers and Designer Makers

Design is an increasingly wide and inclusive field. It encompasses graphic design, industrial design and architecture as well as fashion design in all its manifestations. In addition, consultancies for interior design, furniture design, illustration, and textile design have proliferated. For example, Tina Elliott owns and operates The House of Elliott, a retail outlet in Perkins St, Newcastle which sells homewares, furniture and accessories. Tina is a sole trader and has four casual staff. She offers a design consultancy and home staging service. The 'short consulting' process involves a visit to a person's home for two hours to advise them on how they can change their home while 'staging' a home involves preparing it for sale. Elliott has opinions about attitudes to design in the city.

Newcastle is growing. Design is emerging here. People are becoming aware of the benefits of it but they don't want to particularly pay for it and unfortunately because the television is full of design shows, everybody thinks they can do it but they don't teach you any of the design rules ... there are certain rules of design which nobody knows unless you get taught them so they don't see the value in it (Elliott i/v May 2016).

Elliott's approach to her work is premised on simplicity. She has eschewed material rewards for lifestyle, saying:

I've had my own business since I was 18 and I'm now 50. I'm sort of at the end of working for myself and working for a very long time so I don't chase business, I wait for people to come to me. There's no arrogance in this. And the question is, 'Can I do it? Can I fit it in? Do I want to do it?' so it's not all about money. It's about creating a lifestyle that suits me and allows me to look after my children, keeping it contained, whereas if I was 20 years younger and had more time I could do so much more with my business. I choose not to (Elliott i/v May 2016).

While not keen on using social media such as Facebook to promote her business, Elliott has developed a social media strategy, reluctantly employing someone to manage this:

I was hoping that I could get away with not going into the whole social media market but at the moment I'm having to give in and I'm doing the website and Instagram because people don't need it but they expect it and this is the thing I struggle with. I'm extremely private and for me I am all about creativity and the general market now, they expect a piece of you. They have this need and hunger for information so they have to know who you are and you have to give it to them. So that's where I am at the moment. Which is really difficult for me because I am really private (Elliott i/v May 2016).

Many designers, like Elliott, focus on selling the products they design and make. These 'designer-makers' also include Jo O'Toole and Jono Everett who design and make furniture, Sophia Emmett and Ange Hailey who design and produce jewellery, Graham Wilson who develops and produces various forms of merchandise, and Liz Anelli who is an illustrator.

Trevor Dickinson (also see Fashion Sector) uses the company name, 'Trevor Dickinson and Jo Steel'. Their work is branded as 'Newcastle Productions'.

I draw cities and make prints of that work - tea towels, cards, the product that I sell in shops with my drawings. I kind of exploit the drawings as much as possible. And I do mural work as well which is done directly from those drawings of the cities. Also I'm a textile designer and I do work in the textile industry, T-shirt designing, specialising in childrenswear (Dickinson i/v Feb 2015).

Dickinson's business model is an example of vertical integration as he manufactures, distributes and promotes his work as well as designing it. He says:

I do find now that a lot of my time is spent manufacturing: packing cards, printing tea towels, packing stuff, going to the post office. To maintain a living as an artist who manufactures, I have less and less time for creativity. It's just me to do the work ... All of that time-consuming stuff can be drudgery. I do like the fact that after all these years of people commissioning me, I'm the boss. Everything is my decision. It's like I've got this pretend company. Well, it's a real company but it

feels like an art project. The packaging, promotions, everything is completely for me. The whole thing is overarching, this sort of brand (Dickinson i/v Feb 2015).

Dickinson has been commissioned by Newcastle Council to design and paint murals, first the Newcastle Beach Tunnel and since then others, including a tunnel leading to Merewether Beach which he whimsically re-named 'The Merewether Aquarium'. He has also painted photo walls at Newcastle Museum which are very popular. One is labelled 'The Best Looking Couple in Newcastle' and people stand underneath the sign with their partner and pose for a picture. He also designed a series of portable vinyl photo walls for the Grooving The Moo music festival.

Dickinson asserts that 'social media is a huge thing for what I do and I use it as much as possible' (ibid). His Facebook posts created significant interest in the Aquarium mural and over a period of weeks the 'Likes' on his page almost doubled as people started sharing pictures which encouraged others to visit the site and do the same.

There is, however, the issue of copyright. Dickinson is philosophical about the pragmatics here realising there are some benefits to this situation: 'Even my pictures I put online and I never put watermarks on them or anything like that. I kind of like them being shared. Nowadays you can't fight it. It's a way of getting work out there and shared' (ibid). Dickinson has taken up a Renew Newcastle studio space where he is co-located with others including designer and illustrator Liz Anelli.

Anelli reveals that before she took on the Renew Newcastle space, she was working in a tiny second bedroom with no room for the large-scale drawings she was working on. She was going 'stir crazy'. In addition, she says:

I love the idea of bringing an empty space to life and also of sharing creativity (even if it's just the occasional stop for a cup of tea) with fellow professionals. It's great to be part of an organisation that is patiently building such a strong arts network in Newcastle (Renew 2015, online).

A children's book illustrator who combines traditional techniques and new technology in her creative process, Anelli was born in the UK and graduated with a degree in graphic design from Leicester Polytechnic in 1986. She worked in London at the Natural History Museum and for the Radio Times as a freelance illustrator and as a University teacher. She came to Newcastle in 2012 and in that year re-joined the Society of Children's Book Writers and Illustrators, attended their Sydney conference, and was picked up by leading children's book publisher Walker Books. Anelli works with schools and libraries as well as corporate clients. Her studio space through Renew Newcastle is, for her, helpful for collaboration, events and shared learning. Anelli says, 'I make illustrations – mostly for books, websites and newspapers – using a mixture of drawing, paint, printmaking, collage and computer 'colouring in' (Anelli i/v May 2015).

While Anelli is acclaimed, winning numerous awards for her work, book illustration by itself does not provide her with a living wage. She receives approximately one dollar per book and a book will sell 6,000 copies at best. She also does paid workshops and lectures at schools, illustrations and animation work for websites, and develops screen-based apps for organisations such as the Child Protection Agency and Education Services Australia. She also undertakes speed drawing engagements for corporate events. Anelli has received an Australian Society of Authors (ASA) grant of \$10,000 for research and travel associated with her work for a book on Lake Eyre, and for a large map of Newcastle Port which she designed for the exterior of the Maritime Centre. For this last work she received support from Newcastle Council, Hunter

Development Corporation, Port Corp, Port Waratah Coal Services, Orica and Newcastle Now Business Improvement Association. She actively seeks specific grants and sponsorship:

If I have a commission for a book or something like that, that's straightforward: there's a standard fee that you know you are going to get and there's not much bargaining power on that. But for things like the Port Map project, I went out and got my own funding. So I knew that there was a Council grant for community assistance projects. And then I went to see Phil Ashley-Brown who runs the ABC radio and sat down and had a chat with him, and said 'Who should I go to and tap for money?' and he gave me a list of names. And some of them had official application systems that you could go through and others I just wrote to them and said 'I'm doing this project, it'd be really good for your company, please give me so much amount of money'. And actually, when you ask, a lot of the time they've got money sitting there, and they like community projects (Anelli i/v May 2015).

Anelli feels that networking is essential, both on-line and face-to-face. She suggests that connecting is easier in Australia because the industry is smaller:

I used to belong to the Society of Authors in England. But meetings there were either enormous, so there'd be 150 people there and you wouldn't be able to get to talk to anyone who you thought might be a good person to connect with, or, you know, just like tiny. Whereas I go to the Society of Children's Book Writers and Illustrators meetings down in Sydney and I'm sitting in the room with probably the key 15 publishers, authors, illustrators in eastern Australia. Because there aren't many of them ... So it's really easy to make friends and connections in the book industry here (Anelli i/v May 2015).

Given the ubiquity of digital technology, for Anelli living in a regional city is not an impediment to career success:

I would never say I am a Newcastle artist. I would have never said I am a Leicestershire artist. I am an artist who happens to live in Newcastle. Because it doesn't matter where you live now, absolutely doesn't matter at all. Most websites don't even have a 'uk' or an 'au' at the end of them. My website just says '.com' at the end ... It's not relevant where you live because you can easily communicate and send images all over the world, via Dropbox or email or something like that (Anelli i/v May 2015).

For Anelli social media is also a way of connecting with peers and her market. She believes:

It is important to build up your media profile and become a desirable speaker at festivals and Book Week events ... It's important to have a strong social media profile, be seen at industry events, write a blog that doesn't just advertise your own work but celebrates the world of children's books, writing, drawing and creativity (Anelli i/v May 2015).

Graham Wilson is another local designer who has diverse skills and sources of income. He initially undertook a Certificate in Art at TAFE in Armidale and Newcastle and then completed a Bachelor of Visual Arts at The University of Newcastle. He began teaching art at Ron Hartree's school and went on to teach Design at Hunter TAFE for almost 20 years. He worked at the University of Newcastle as a demonstrator in print making and at Newcastle Art School (TAFE) teaching art classes including drawing. This work enabled him to continue his practice. His business, The Carved Greenman, offers stone carving and graphic design. From 2012 until

its closure in 2017 he had a retail outlet and small workshop demonstration area along with other creatives at the Renew Newcastle site 'The Emporium' in Newcastle where he sold T shirts, mugs, prints, posters, cards and small sculptures which he designed and made. In 2017 he relocated to a new collaborative workspace, the Creator Incubator in suburban Hamilton North. His skills are diverse:

I think it would be best described by an individual who came into the shop a few months ago, who said, 'So who did the wood carvings?' I said, 'Well, I did those'. He said, 'Well, who did the t-shirts?' I said, 'Oh, I did those as well'. He said: 'Well who did the graphics?' 'Well, I did them too.' 'Who does the stone carving?' 'That was me, too.' He said: 'You're really hard to pigeonhole'. (Wilson i/v June 2015).

Wilson is also an award-winning actor and has qualifications in film-making, having completed a Certificate 3 in Screen Studies, and a teaching qualification – a Certificate 4 in Training and Assessment. He has expertise and professional experience in visual arts (as a painter and printmaker), graphic design, interior design, set design and stonemasonry. In 2009, Wilson was invited to a stone carving festival in Trondheim, in Norway. The organisers found him by Googling 'stone carver, stone mason' and his website came up. Wilson says he is only the second stonemason in the world to have a website (ibid). Through those he met in Trondheim, he was invited to go to the York Minster stone carving festival in the UK the following year. He was then asked to return to Trondheim for the European stone carving festival, which he won with a carving of Odin the Norse god with a blackbird on either side, Huginn and Muninn, forming part of his helmet. He was invited by Nidaros Cathedral in Trondheim to work there for three months in their cathedral workshop, where there was not only stone masonry but also carpentry, a blacksmith's forge, a stained-glass section and a mould-making section where they mould all of the carvings:

And it's all traditional. You have big powered saws for cutting stone but everything else is done by hand – there's no sort of compressed air tools or anything like that so you feel like you're carrying on a noble medieval tradition ... The cathedral there is 900 years old and I got to work on a part that's going to go back into the cathedral (Wilson i/v June 2015).

Wilson also has expertise and professional experience as a painter and printmaker, interior designer, and set designer. When he was teaching Graphic Design at Hunter TAFE Wilson earned a reasonable income but since leaving there he works in a private school a few hours a week and has a modest income only from the shop and commissions. The precarity of his business means that his wife's full-time income is very important to the family. As Wilson asserts 'she makes a living and I augment that living' (ibid). He suggests:

The income can be very low. But just when I'm thinking 'This is hopeless, why am I here, I'm not making money' – then I'll have a good week and sales go up or I'll get a commission, or something like that. So, you know, it's sometimes one step forward, two steps back, but sometimes it's three steps forward, every now and then, so I manage to keep my head above water (Wilson i/v June 2015).

As well as the low income, Wilson is aware that creative individuals often have low status. He says he recently took his children to see a movie and when they saw the credits:

I used the opportunity to say to my kids 'Look at all of those names, all of those people – hundreds of people who have made this thing happen that we have enjoyed, that's made money for this shopping centre, this theatre, all the actors ... the thing is that this

is a massive creative concern ... and it's one of the hugest industries, the film industry and the gaming industry is even bigger apparently ... Theatre and music, all of those things that make our culture worthwhile, there are all of these people beaver away behind the scenes to make it happen, so I said, 'Don't ever let anyone tell you that being in the creative industries is a lesser position, even if the income is less' ... without it this would be a very sad world, I think (Wilson i/v June 2015).

Ange Hailey is another designer/maker who is both culturally and economically active. She runs Studio Melt with her business partner Suzy Manning. Both are jewellery designers. They started with a Renew Newcastle site in Newcastle Mall but after six months they took over the lease commercially. Studio Melt sells studio-made work, mostly locally produced but some of their stock is made by national and international jewellers. Products on sale include ceramics, limited-edition art, cards, handbags and soft furnishings. They also conduct jewellery making classes in the evenings and at weekends and realise the value in a strong social media presence. Instagram and Facebook have been very important for them:

The more we talk about the makers, the more we tell the story behind the products and behind the person making the products, the more people like that I think. Every second day we have a box of stuff that we've never stocked before that comes in and that is a great way for us to do new product shots. So, we've gotten so many one-off products in here that we never run out of things to photograph. We get people calling up and going, 'oh I saw this that you posted' and it works really well for us actually (Hailey i/v, Sept 2015).

Sophia Emmett is also a jeweller. She is based at The Soap Factory, a shared makers' space which she manages with her partner Jono Everett. Emmett designs products and makes and sells them, mainly to retail outlets and galleries. She previously worked with glass objects and functional items, but in the last five years has started making jewellery, notably earrings made from coal because she wishes to explore the politics of materials and encourage people to think differently:

Moving to Newcastle and moving away from the glass world – which is very studio-focussed, you need particular equipment so you're very restricted. So coming here I wanted to use resources that were readily available to me and that were around, so that's how the coal ... well it's kind of a political statement but it's also an aesthetic, using the material. At the moment I'm working on prototyping jewellery, which is made from graffiti that falls off near the skate park and using that with plastics that I find on the beach. So, I guess I'm trying to work with materials that are just readily available but also by working with those materials, encouraging people to look at things, give value to things that are around us and maybe just thinking, 'what if we change the context and the way they're put together'? That can totally change the value of something (Emmett i/v, Sept 2014).

Emmett sells her work through Studio Melt and has sold online into the USA and Japan. She enjoys the process of design even more than making:

I really enjoy designing. Once you design a product, making it over and over again – although each piece is different - it's laborious but it's the design process that I am most interested in, working out how to resolve problems, how to put things together, that sort of thing (Emmett i/v, Sept 2014).

Jo O'Toole is a sculptor and designs furniture for Woodmakers, a business she runs with her husband, furniture maker Warwick O'Toole, and his brother. Their workshop is located in Boolaroo in Lake Macquarie LGA. Jo observes that media has had a strong effect on handmade making:

I do see a strong pull back to the handmade which I think is essential and I think a lot of people want that ... I don't know whether that's from watching TV shows ... It's a great thing. It's a fantastic thing. And they are looking at the handmade, especially at the furniture as well ... I think in a way they are educating people who are not educated about creative industries which is good (O'Toole i/v, Oct 2015).

Jono Everett is also a furniture designer and fabricator, principally using timber but also steel, acrylic and other materials. He works on commission. His focus is 'to establish clients that are galleries or small museums' (Everett i/v Sept 2014), and to provide services including interpretation, graphic design, computing and electronics, and super-fine metal work, which require the input of specialists from all over the country. He says, 'collaboration is an absolutely critical part of my working method' (ibid). Digital technology facilitates such collaboration as most communication is via mobile phone. Everett is concerned that the potential of Newcastle is not being realised and that, for him, there appears to be a lack of leadership and vision in the Hunter Region:

I just can't get my head around how it's not being seized by the business community and by Council and powers that be, that organically there is a real movement of crafted objects, food, fashion, design, just happening under their feet, and I'm still seeing a huge amount of empty office spaces, shop frontages and gigantic industrial sheds, that it seems if there was a collective understanding of what the potential is that we could really put Newcastle on the map as Australia's own creative city. We could do it right now with a handful of shakers and movers (Everett i/v Sept 2014).

Mora Argiris started Flourish Interior Design in 2011 after working as a travel consultant for many years collecting art pieces and curios from South America, Africa, India, Asia and North America (HUNTERhunter 2017, online). 'Initially beginning with a fine arts degree from the University of Newcastle, [she] went on to graduate from Newcastle TAFE's interior design course' (Ellsworthy 2014, online). Her business, now located in Bull Street, Cooks Hill, specialises in interior design for commercial, office, retail, hospitality (hotels, bars, restaurants and cafes), residential, medical and health facilities. Argiris also consults on project management, lighting, colour, all hard and soft finishes and wall coverings and is enthusiastic about 'bespoke design with a strong focus on custom furniture and the salvage and re-purposing of various items and materials' (Flourish 2017, online). As well as multiple residential clients her portfolio includes commercial clients such as Gather Cafe, Westfield Shopping Centre Newcastle; Six Degrees Restaurant and Bar, Newcastle; The Wharf Shop Cafe/ Restaurant, Newcastle; The Lucky Hotel, Newcastle; John Hunter Hospital Café; El Roma, Westfield Shopping Centre; Scentsations, the Junction; 3 Monkeys Cafe, Cooks Hill; HVRM Newcastle; Azabu Guesthouse, Byron Bay; Rouge Beauty Salon, Cessnock; Talulah Bar & Restaurant, The Junction; Lotus Bar, Cafe & Restaurant; Crysalis Hair, Body, Beauty, Cooks Hill; Indulgence Beauty Therapy; Zinc on Darby, Cooks Hill; and the Newcastle Harbourview Function Centre (Flourish 2017, online). The spaces she creates for her clients are:

Modernist, art deco, textured, natural and understated ... I've always loved interior design. I don't feel like I've worked one day, because I enjoy it so much ... I like

to think of the space as a blank canvas, and then I add accent tones to define the space and make it really individual to the person. I think there are a lot of design-based businesses that are gearing towards apartment-style living. You need to focus on making everything really purpose-bought and compact ... If you really source well, you don't need to spend a fortune ... Then, focus on bold prints from unlikely places like dealers or artists to add that wow factor (Argiris quoted in Ellsworthy 2014, online).

Believing that 'interior design, by its very nature, requires collaboration over various disciplines' (Flourish 2017, online) Argiris works with regional artists and designers. As well as engaging industrial designers and working closely with architectural firms such as Webbers Architects she uses the services of people like local Sean McGilvray, of Oneknotttwo, who 'makes really incredible furniture ... He is a very talented woodturner. He can make anything, and everything he creates is so interesting and individual (Argiris quoted in Ellsworthy 2014, online).

9.7.6 Collaborative Workspaces

The INXX Hub in Parry Street, Newcastle West, houses a number of design and design-related businesses including Mezzanine Media, White Magazine and Headjam. The Roost Creative is 'a community of independent creatives sharing space and ideas' which hosts 'a mix of emerging creative and established industry mentors' (The Roost 2017, online). This workplace is located in the Newcastle CBD and the cost for participants is from \$100 a month. The Creator Incubator is a collaborative workspace established in 2017 for artists and designers and is located in suburban Hamilton North. The Soap Factory in the Newcastle suburb of Mayfield was established in 2014 by glass and jewellery designer Sophia Emmett and her partner, furniture designer Jono Everett. It is a 600 square metre industrial shed which houses nine artists including Emmett Everett. Emmett suggests working with others was crucial, and knowing who those people were even more so:

We were here for five years, living in Newcastle, because we had to find out who those other people could be or how we could structure it. So, I guess part of what is happening in Newcastle is that if Jono and I came into this shed and went, 'Oh yeah, we want this space', we couldn't afford it. But because we knew the community a bit and we knew there was potential to get people in and we kind of knew who those people were. That made a huge difference. So I can imagine that there's all this potential and it's all great, but unless you've got a collective of people to move in you can't take it on by yourself, or with two people (Emmett i/v, Sept 2014).

What was important was that the artists were not in direct competition with any of the others, but that they were 'enthusiastic, they work to a high level, they're in the creative industries, they're not going to use the space for self-storage, and that they're proactive in their business' (ibid). Jono Everett explains:

We sort of had a collective ethos about acknowledging where Newcastle is at the moment and possibilities of that, and as it grew – even though everyone would be running their own individual businesses – that we might be able to promote each business as a collective through, you know, tapping into what's happening in terms of the changes that are happening to the Newcastle scene, in terms of the burgeoning craft and design industries that are popping up. So everybody has a

set of keys here and they're welcome to come and go. We don't work as a co-op if you like. Everyone can run their own business and I think that freedom is really important. So when I say we manage it, Sophia and I facilitate that structure – the facilities side of it – as opposed to interfering with anyone's practices. And I think that sense of freedom is really important for people renting this space. So we're nearly a year in and it seems to be working well so far ... I think the way we've set it up seems to be working really well so far (Everett i/v Sept 2014).

Renew Newcastle has also provided affordable studio space and networking opportunities to a number of designers including Trevor Dickinson, Liz Anelli, and jewellery designer/makers Ange Hailey and Suzy Manning. Hailey comments on the value of being able to move out of their garages:

I think that Renew is fantastic. One of the best things we got out of it, I suppose, was meeting a whole bunch of other creative people trying to do what you were trying to do in the same town. As I said before, it can be an isolating experience making things from home and potentially your only contact with the community and other people who are making or buying your products could be at a market but Renew gives you access to a whole bunch of other people doing similar things and it's nice to be part of that community and meet people through that ... Renew, I guess, offered us the opportunity to set up a workshop and give something a go without any financial risk. So perhaps we wouldn't have really done it if we had to find \$30,000-50,000 to kind of take out a lease and fit our shop. We could do it through Renew in gradual steps. We started off with just a desk and just a couple of cabinets and we built up our stock over time (Hailey i/v, Sept 2015).

9.7.7 Education and Training

The University of Newcastle's Bachelor of Visual Communication (Design) offers a three-year undergraduate program which provides the students opportunity to study graphic design, web design, information design, human centred design, advertising, illustration, animation and motion graphics among a number of other subjects. They undertake projects where they learn the 'fundamentals of the design process from idea to execution. This includes visual hierarchy, symbolic codes of design, persuasive strategies, research, audience engagement and collaboration with industry' (UON 2017a, online). The students develop their own professional portfolios and 'engage with international designers and educators renowned for graphic design, advertising, animation, illustration and web design' (ibid). Professor Mario Minichiello, the Head of Discipline of Design at The University of Newcastle, is one of these.

Professor Minichiello started his professional career in the United Kingdom. He worked for seven years for BBC Newsnight as a reportage illustrator making drawings for events such as the Spycatcher Trials, and pre-television coverage of the House of Commons, including the Guildford Four appeals and Beirut Hostage releases. During his 15-year career he has also worked for the Guardian, The FT, Amnesty International, the Terence Higgins Trust, BBC Enterprises, Longmans, The Times and ITN News. Professor Minichiello's most brazen post was when he worked as an artist during the Afghanistan War. During this time he created the book, *The Art Of Conflict?*, which is a record of reportage drawings of the war. Professor Minichiello also covered the 2007 APEC Summit in Sydney with a range of drawings published in the Sun Herald (UON 2017c, online).

In 1993 Minichiello began work at Loughborough University where he became Head of Department of the College of Art and Design and held the position as Academic Director of Loughborough College of Art and Design. In 2007 he moved to Birmingham City University where he was Chair of Visual Communication. He completed his PhD from Loughborough University before coming to Australia in 2012 where he took up the Chair of Design with the School of Design, Communication and IT at the University of Newcastle. Professor Minichiello has held a research fellowship with the University of Sydney and holds a fellowship with Birmingham Children's Hospital as a visiting Professor in Design Communication. He sees design as having the potential to make a real contribution to the Hunter Region at a time of significant change. He argues that 'the university when it works properly, is an agent of change [however] the forces of change that are happening here are not merely regional or even national, they're global' (Minichiello i/v Sept 2016). He suggests that creativity is central to solving those global problems and reminds us that 'the core thing about creativity is it's actually part of what makes us human' (ibid) and it is his task to go about 'creating the conditions for creativity' (ibid).

Like Minichiello, Dr. Melanie James, most recently the Head of School of Design, Communication and IT at the University of Newcastle, also brings her experience as a professional to her educational endeavours. She is a member of the National Education Advisory Committee for the Public Relations Institute of Australia, has run her own PR consultancy firm and prior to this she was the Marketing Communications Manager for the Newcastle Permanent Building Society. She was also a Director of Communications with the Commonwealth Government at the Australian Government Offices (AGO), the Australian Electoral Commission (AEC) and the Australian Bureau of Statistics (ABS). Dr James holds a Master of Arts (Journalism) from the University of Technology Sydney and completed her PhD at the University of Newcastle. She is now the Editor of the *Asia Pacific Journal of Public Relations* and has published widely in this area including books such as *Positioning Theory and Strategic Communications: A New Approach to Public Relations Research and Practice* (2014). 'In addition to a string of teaching commendations and industry awards, in 2015 she won the Public Relations Institute of Australia's "National PR Educator of the Year 2015" Award' (UON 2017d, online). James insists that:

I've always approached my communications work from a creative perspective. I see myself as a constructor of meaning and a creator of, a social creator of meaning. And so therefore I see that as sitting as a creative industry ... a lot of what public relations people do is quite performative (James i/v Oct 2016).

From this position James can claim that 'just as public relations academic research enriched her professional career, Melanie's work offers practitioners a framework to design public relations strategies' (UON 2017d, online).

Design is also taught at Hunter TAFE which offers Certificate and Diploma level training in graphic design, fashion design, interior design and industrial design. Its Design Centre-Hunter is a 'collaborative hub' for project-based learning in broad design disciplines including building, graphic, interior, fashion, furniture, hairdressing, industrial, kitchen, sign-writing and floristry. Furniture designer Jono Everett expressed concerns, however, about funding cuts to arts programs. He is of the view that quality training is important and cannot be replaced by quick online tutorials:

I think it's a bit frightening what's happening with TAFE and universities. If those things are being eroded, then they need to be replaced. I think, you know, handing on high level skill sets in all mediums is really important for the future of arts and

crafts, and society in general. I think a lot of people are YouTubing how to make stuff and that's great, people are having a crack, and there's that whole burgeoning industry of craft and it's got a place. But I also think it's really important that we don't lose sight that it's not as easy as just YouTubing how to do something and 20 minutes later you're doing it. There's a lifetime – I'm still learning, I wouldn't consider myself a great woodworker by any stretch of the imagination. There's a lifetime of learning and I'm constantly learning and I'm seeking that knowledge actively (Everett i/v Sept 2014).

Private providers include the Pumphouse School of Design, which offers short courses and workshops for professionals and others in areas from design software programs to hand-lettering of typography, and Hunter Design School, which offers courses in interior design, graphic design, animation, and events. Donna Burrell established the Hunter Design School in 2010 and is its Principal and Creative Director. The School offers accredited Interior Design and Graphic Design training up to Diploma level and students are drawn from Port Macquarie, Muswellbrook and the Central Coast. Burrell asserts that the employment prospects for graphic designers in the Hunter Region are especially strong, including as embedded creatives:

Graphic design is huge, the fastest-growing industry. Everybody wants a graphic designer now. People are not so much going to agencies, but they want to employ those sorts of people because everything is about design. It could be desktop publishing in an accountancy firm, web designers, they need back ends on their webs - the interface, people are needing brochures, they are needing advertisements, they are needing design-thinking actually in their companies. Interior design and architecture are not so strong but still are growing, in part because of television shows like *The Block* and DIY shows. People are seeing it on TV and thinking, 'It's easy. I can do that. I want it' and so they try, or they just employ someone, so it's actually benefitted our industry (Burrell i/v, Sept 2016).

While various colleges (SEEK Learning, Open Colleges) offer online training in Design, the Hunter Design School is located in a dynamic area of Newcastle West alongside many others also working in the creative industries including venues such as The Edwards. The Edwards café, owned and run by former Silverchair bassist Chris Joannu, hosts events such as book launches, ideas bombing and the Impossible Markets. Located nearby, Earps Tiles and Classic Blinds service the interior design and architecture sectors, and next door is not only Tap Pups dance school but also the INXX Hub where approximately 50 creatives work in photography, sound engineering, film and television, graphic design, industrial design and publishing (White Magazine, a bridal magazine).

9.8 Conclusion

The advertising and design sector of the creative industries is located primarily in the urban centre of the valley. This sector does not include fashion or architecture (they are detailed in separate sections) nor does it contain those who are embedded as designers in other industries. Of those who identify as holding an occupation in this sector there are 2,870 people working within design in the region, with most of these located in the larger urban centres. This figure makes this sector the largest in the region.

There is a wide variety of employment possibilities within the advertising and design sector and most are well represented in the Hunter. Many workers inside this sector develop their skills through a program of study at University or TAFE or at a private college. However, many

are self-taught or learn 'on the job'. Digital skills are fundamentally important for many working in this sector but traditional skills continue to be important. The operatives work primarily in full-service advertising agencies who increasingly offer a broad spectrum of services that intersect with design and PR agencies. These agencies offer services across the range of 'real world' and digital economy applications and while they are physically located in the Hunter Region, a number work nationally. These agencies tend to work on commissions which may be earned dependent on the media form targeted. The profit from these commissions is placed against production costs and any fixed costs such as wages which is where many of the people identified in this study earn their income. Work is increasingly outsourced to specialist design houses or video companies. Nearly all projects are calculated on an hourly rate or else a fixed price will be agreed to be paid on completion of the project.

Many of the operatives who work within and for these agencies also operate within other areas of the creative industries such as music, film and the art world. The roles, and also the recognition of these important cultural workers, are being steadily blurred across sectors with many moving easily across sectoral boundaries. The design field in particular has claimed an increasingly wide array of activities that has moved beyond traditional graphic design and now includes activities such as jewellery design and many others. Not only did the advertising world give birth to design agencies but PR agencies have modelled themselves on this way of working industrially. The art collectives from an earlier time have now become collaborative workspaces, production hubs and co-working spaces run as enterprises for those who fund and constitute them. Education and training in the region has increasingly become an important adjunct to the creative activities of these fields with many educators moving between industry and academia.

Creativity & Cultural Production in the Hunter

An applied ethnographic study of
new entrepreneurial systems in the
creative industries.



Final Report:
Hunter Creative Industries

Fashion

Associate Professor Phillip McIntyre
Professor Mark Balnaves
Associate Professor Susan Kerrigan
Evelyn King
Claire Williams

The University of Newcastle | April 2018, ARC Grant LP 130100348



10. FASHION

10.1 A Brief History of Fashion in Australia

‘Australian fashion design has been informed by its geography, resources, migration and its response to international trends,’ (Ellwood in NGV 2015, online). While the indigenous possum-skin cloaks were a prevalent mode of adornment for thousands of years on the continent, fashion itself was a European concept that arrived when these colonisers took over the country. The mode of attire for convicts and colonial soldiers alike was not of their choosing. The cabbage patch hat, while distinctive, was always a slave to function rather than aesthetics.

During the settler period Australian fashion developed in reaction to European styles with certain adaptations for the newer context. At the colonial centres ‘there was a very strong code about what was worn, by whom and doing what’ (Riley quoted in Penberthy 2012, online). The Europeans recognised this and were sophisticated in reading the signs of status fashion. However, many could leave that behind and ‘change their look when they came to Australia ... and they took advantage of distance and poor communication to reinvent themselves’ (ibid). Once they were liberated from their convict trappings, ‘early convict emancipists were not shy about flashing their wealth around’ (ibid) and this was reflected in the way they dressed. For others:

The simple muslin gown reflected the piety of a well-placed woman in Regency society in England at the time, or those of some means during the post-revolutionary society in France. It featured the Empire line, a fashion that highlighted a woman’s décolletage while covering up the rest of her body, which died out suddenly with the death of Napoleon Bonaparte. This was when Australians were busy establishing towns, cities, infrastructure and industry all a priority. In their fashionable concerns the busy wives of local dignitaries, who made up the ruling elite, were inspired by developments internationally. This was also a period when free settlers, including professional men and merchants and their wives, became recognised as being at the apex of society in the antipodes, where the English and European class system was well in play and rising above one’s station frowned upon in certain quarters. Letters to and from relatives contained magazine images and newspaper reports of the fashions. Fabrics being imported into Australia from China and India were given to dressmakers to interpret their client’s needs (MacDowall 2016, online).

Early dressmakers and tailors ‘adapted European fashions to the Australian lifestyle, class system and climate during the nineteenth century’ (NGV 2015, online). The eventual success of many stores in this period had ‘a lot to do with the expansion and success of the industrial age in England and the discovery of gold in Australia’ (MacDowall 2016, online). Once the Gold Rushes were in full swing and ‘when mansion after mansion was springing up in major regional towns’ (ibid) across the continent ‘labour was in demand so the working man probably had more disposable income than in many other countries in the 19th century and the fashions reflect that’ (NGV 2015, online). But there was always a sense of practicality involved. In the 1800s many garments ‘were designed to deal with climatic condition ... the wearing of sunhats in town and light-weight silk coats in summer’ (Penberthy 2012, online). And yet, ‘despite the pull of the outback and the image of the Aussie bushman, the majority of modern Australians are urban dwellers, living and working in cosmopolitan cities strung around the perimeter of the continent’ (Riley 1997, p. 43). They were also deeply connected to the British Empire and

they ‘remained quick to pick up fashions from overseas. As MacDowall notes, ‘a young Queen Victoria was on the throne by the 1830s when fashions changed triumphantly. While the décolletage remained a highlight for evening dresses, not during the day, now a small waist was accentuated with voluminous skirts’ (MacDowall 2016, online). During this period ‘as reproducible photos became more common, ladies would retire to their living room to flick through [their] 19th century photo albums and see Queen Victoria’ (Riley quoted in Penberthy 2012, online). In doing this ‘all those little styling bits of information get communicated through these images’ (ibid). Many shopped at ‘the nation’s first department stores, such as Buckley & Nunn, David Jones, Farmer and Co. and Bright & Hitchcock’s, which were critical in disseminating fashionable dress during this time’ (NGV 2015, online).

When the department store Myer was established in 1900 its executives sought to give a lasting impression of the pulse of modern life in all its nuanced richness to its customers. Very quickly they became Australia’s largest retailer. They were catering to stylish men and women who wanted to not only reflect the spirit of their age, but also its human element with fashion seen as a ‘by-product of our ‘independence and impertinence’ (MacDowall 2016, online).

Between the first and second world wars, ‘Australia kept up with the rest of the world in flapper fashion and by the late 40s and early 50s, like so many other cities, as it regained its mojo it also required a change in fashion for a new and more ‘modern’ age’ (MacDowall 2016, online). During the 1950s ‘French couturier Christian Dior was in his Salon at Paris developing a new look for a new age. His look was taken up ‘down under’ with alacrity’ (ibid). The 1950s saw a golden age of department store shopping and the ‘Paris end’ of Collins Street in Melbourne boasted high-end boutiques such as La Petite, Hall Ludlow, Beril Jents and La Louvre which is still in business today in South Yarra (ibid).

The colour and experimentation of the 60s then became a significant part of the fashion scene and the mini-dresses designed by Prue Acton helped her become the first female Australian designer to show in New York (NGV 2015, online). In the 1970s, Jenny Kee’s Flamingo Park boutique was established to sell the designer’s ‘landmark range of Australiana-inspired garments’ (ibid). It’s also no surprise that the safari suit and long socks became *de rigeur* at this point. As Margot Riley explains, ‘I think that sort of bush couture aesthetic that they developed in the 1970s and ‘80s was a very important shift trying to create an independent unique look that tried to set Australia apart’ (in Penberthy 2012, online). The Fashion Design Council (FDC) was established in 1983 ‘to nurture independent Australian fashion design’ (NGV 2015, online) and designers such as Jenny Bannister, Sara Thorn and Kara Baker gained some recognition. As Riley wrote in *From the Bush to the Street: A Change in Direction for Australian Fashion* (1997, pp. 43-5), it was during this same period that ‘a self-conscious search by non-indigenous designers for a uniquely Australian aesthetic culminated, in the decade leading up to the 1988 Bicentennial, with a cacophony of Australian themes being explored by local designers in an attempt to translate our culture and lifestyle into a distinctive look’ (Riley 1997, p. 44). Up to this point Australian designers had little to draw on when it came to fabric choice. They had to make do and ‘some experimented with the production of their own materials as a reaction against their isolation from the huge overseas textile markets’ (ibid).

At this time there was an obvious cultural cringe at play, as there was for many other cultural products at the time. Many Australians ‘seemed to prefer international labels to local designs which were often perceived as derivative and lagging six months behind the output of the fashion centres’ (ibid). After the Bicentennial things began to change with many Australian designers now seen to be at ‘the cutting edge of international fashion design’ (Riley 1997, pp.

44-5). These designs drew not on the bush myth or even the beach scene where Speedo swimsuits, Mambo, Hot Tuna and Rip Curl surfwear and Helen Kaminsky's raffia hats reigned, but 'on the cosmopolitan energy of the modern urban Australian environment' (ibid, p. 45). The media started promoting local brands and some Australian consumer converted to wearing 'high-end, Australian apparel ... convinced of its marketability on an international level, Australian fashion was ready to launch itself, wholesale, into the world arena' (ibid). In May 1996, Mercedes-Benz Australian Fashion Week was launched, and 'officially put Sydney on the international fashion map as a developing fashion centre' (1997, p. 45). But this exuberance and the claims attached to it, may have been premature.

The industry began to decline in the 1970s and this accelerated with the introduction of trade liberalisation measures in the early 1990s. In the following decade, the Productivity Commission was tasked with reviewing assistance to the sector and found that in the ten years to 2000, employment had declined by 37% to 64,000 (Productivity Commission 2003, p. iv). By 2015 the figure had reduced to 36,000. Key factors that had contributed to the decline were identified as import competition, technological change and shifts in household expenditure (ibid, p. v). The story of Pacific Brands, wholesale manufacturer of iconic Bonds, Berlei and Stubbies garments, is indicative. They formerly employed thousands at various sites but in 2009 relocated most of its manufacturing to Asia in order to take advantage of lower labour costs.

The small size of the local market meant that local manufacturers were unable to take advantage of economies of scale. At the same time, the Australian market was spread over a wide area, adding to transport and distribution costs, yet designers encountered difficulty taking their product to the international market, not least because of the seasonal mismatch. Companies operating in lower labour-cost countries such as China, Vietnam and Bangladesh began to dominate the mass clothing market and products were sold in huge quantities through retail outlets such as Target, K Mart, Myer and David Jones. Concerns about poor worker safety and conditions in some countries, however, led to the ethical clothing movement gaining some traction and there has been an associated move towards more sustainable manufacture, with smaller, bespoke companies gaining more market share.

Successful companies that survived focused on diversification, design and innovation. A study by the Department of Industry and Science in 2015 into intellectual property use in this industry (DIS, 2015) indicated that designs were a major source of innovation in the TCF industry. Most design applications from the industry were from clothing companies such as Jets and Seafolly, both swimwear makers, high-end fashion designers such as Scanlan and Theodore (high-end fashion), and the fast-growing Melbourne-based clothing and accessories brand Forever New which was established in 2006 (DIS 2015, p. 31). In terms of patents, while Australian Wool Innovation submitted six applications in the period under consideration, the CSIRO submitted 24, suggesting the growing importance of areas such as nanofabrication research (ibid, p. 26). Medical, industrial and sports textiles are growing areas. The SKINS company, for example, manufactures over 100,000 compression garments per month (ibid, p. 38).

Despite the circumstances, the first major survey of Australian fashion opened at the National Gallery of Victoria in March 2016 (NGV 2015, online). This exhibition presented over '120 works from over 90 designers and celebrated Australia's unique voice in the fashion industry' (ibid). As well as work by 'contemporary designers, such as Akira, Richard Nylon, Ellery and Toni Matceviski' (ibid) this exhibition showcased:

Standout designs from the last 200 years including Australia's earliest known surviving dress (c1805), a glamorous 1950s blue feathered ball gown by Collins Street salon La Petite, and a dress from Collette Dinnigan's ground-breaking 1995

Paris runway show, where she became the first Australian designer invited to show on-schedule at Paris Fashion Week (NGV 2015 online).

As well as ‘newly commissioned work by Dion Lee that will signpost the future of Australian fashion and demonstrate the designer’s forward-thinking approach and innovative design practice’ (ibid), the exhibition highlighted ‘the richness of contemporary fashion’ with work from Australian designers MaterialByProduct, Romance Was Born, Di\$count Universe, Pageant, PAM, Alpha60, Karla Spetic, Lui Hon and Strateas Carlucci (NGV 2017, online).

10.2 Structure of the Fashion Industry

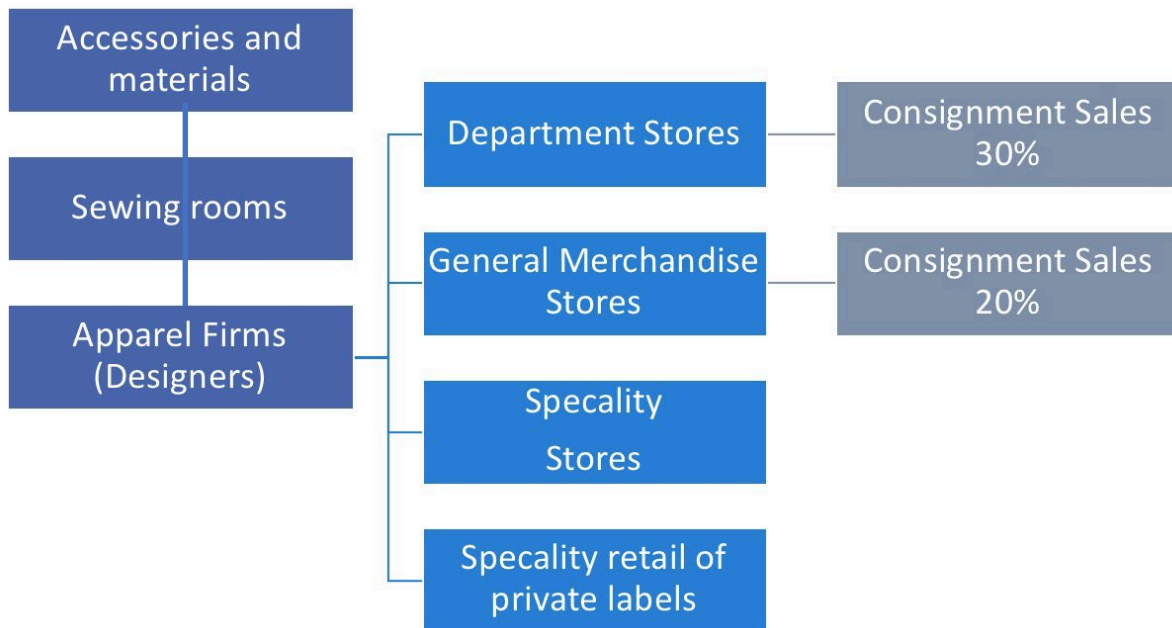


Figure 20 Fashion Industry Supply Chain

Fashion, as well as being a contributor to the creative industries, is also part of the diverse textiles, clothing and footwear (TCF) industry which includes raw materials processing through to the production, sale and promotion of final goods. Linkages extend downstream to the service areas of design and retailing (Productivity Commission 2003, p. iv). This industry comprises more than 7,000 firms and employs more than 36,000 people, many in regional Australia (DSI 2015, p. 5). Textile suppliers, which include fibre suppliers, yarn finishing, weaving, knitting and dying are crucial components of the industry. Manufacturing, distribution, wholesale and fashion retail companies are important sectors. Retail outlets may include large department stores, specialty stores and specialty retailers of private label apparel who may also be manufacturers. Digital distribution and online retailing is an increasingly important arm of this sector. The manufacture and sale of accessories is also included here. Service functions within the industry include design, styling and various consultancies. Modelling agencies and event companies are also important as is the fashion media, press and blogs. Finance, marketing and PR are crucial elements in the structure of the industry and educational and training institutions are complementary auxiliaries to this industry.

10.3 Business Models

Most revenue in the fashion industry is derived from the sale of products or from the services associated with it.

Product sales form the basis of most revenue for manufacturing and retail within the industry. Suppliers sell the basic material and these, as well as production expenses, are base line costs for manufacturers. They on-sell to wholesalers. Wholesalers will mark up the price of goods from the manufacturers and then on-sell the goods to retailer for a mark-up usually of 50%. Some companies import clothing from overseas for distribution and sales nationally. Retailers will take the price from the wholesaler and nominally mark it up at a 50% rate (i.e. 33.3% of retail price) but often at three times the wholesale cost. The sale of accessories, perfumes and cosmetics is possibly the most lucrative source of revenue as often these are relatively cheap to make or purchase but, if branded well, the mark up can be very profitable.

Selling products online is increasing in importance with some Australian 'bricks and mortar' stores moving into the online space. Some businesses are fully online. Large, established businesses based overseas are able to easily penetrate the Australian market using online methods, whether these are catalogue-based or intermediary for example ASOS. Originally called As Seen On Screen, ASOS is now a global fashion firm aimed at 20-somethings. They claim to sell cutting-edge fashion and offer 'over 80,000 branded and own-brand products through localised mobile and web experiences, delivering from our fulfilment centres in the UK, US, Europe and China to almost every country in the world' (ASOS 2017, online). ETSY provides a global online marketplace for artisan and craft-based designers and makers. ETSY 'operates marketplaces where millions of people around the world connect, both online and offline, to make, sell and buy unique goods. Etsy also offers a wide range of seller services and tools that help creative entrepreneurs start, grow and manage their businesses' (ETSY 2017, online).

The services sector of the fashion industry includes design, styling and consultancy. Designers make money from leveraging their reputation to deliver a service to their clients, as do stylists. Costs for designers may include the expense of putting together collections to show. They will employ seamstresses, select and buy fabric, organise photoshoots where they will need to hire models from agencies, photographers, stylists, makeup artists, hairstylists and so forth. They will also need to 'wine and dine' buyers from the retail arm of the industry, all of which costs. They may also have infrastructure costs associated with the premises they work out of. Returns come in the form of commissions and contracts for collections and from direct sales if they also maintain a retail outlet.

Fashion styling is a growing area, serving television, fashion magazines, advertising and promotions. The big retailers and shopping centre owners such as Westfield are increasingly engaging stylists to promote their fashion ranges, sometimes by providing a personal styling service for customers.

Leasing or hiring of apparel is an established way of earning revenue in the fashion industry. This mode of business has been recently facilitated by digital technology and the online services associated with it. Leasing is usually focused at special event wear, for example formal and bridal wear, and designer goods, for example couture and high-fashion handbags.

Fashion publishing in Australia includes magazines such as *Vogue*, *Marie Claire* and *Elle* which are part of a large, international publishing empire. 'Home-grown' publications such as *Frankie* and *Façon* are rare but survive through advertising or subscription revenue. Major newspapers also feature Australian fashion, especially in the weekend colour magazines, to attract readers that can then be on-sold to advertisers in the form of aggregated readerships.

Fashion blogging also provides an income for those able to generate sufficient online followers to represent a marketing asset.

In terms of training, TAFE colleges in the larger centres offer fee-based courses in fashion design, fashion business and clothing manufacture. Private colleges, especially in the larger capital cities, offer fashion courses, often with high fees attached. Non-accredited short courses and informal training are also available. Some training is available online.

10.4 Operational Methods

Most fashion manufacturing businesses are small but it is rare for fashion businesses not to have the backing of an investor or family support. Manufacturers produce clothing in local factories, in home-based businesses, through out-sourcing (sometimes to home-based operatives working on contract or on hourly rates), and increasingly off-shore, to take advantage of lower labour costs. Sourcing materials, pattern-making, grading for sizing, cutting, assembly, sewing and finishing are the key steps in the manufacturing process. Fashion designers generally work as part of a fashion business that also manufactures clothing. Some, however, are freelance, selling designs to companies. Some fashion designers provide designs for manufacturers on a commission or contrast basis. Most designers are also manufacturers who have their own factories but many choose to outsource manufacturing for cost reasons.

SIR the Label is an example of a successful fashion company with Hunter roots which has broken the rules of traditional fashion business and may be indicative of the future of the industry. Not only does it outsource 100% of its manufacturing, its owner/designers are not fashion-trained – instead their backgrounds are in business and marketing. Their success is based on a sophisticated approach to online marketing and supply chain management. The shoot for their Summer 2017 range was conducted on the Amalfi Coast, using international models.

Despite the small size of the industry, Australian fashion designers are acclaimed. Ellery, Toni Matceviski, Romance Was Born, Scanlan and Theodore, Zimmerman and Dion Lee, for example, have achieved success internationally, often after making appearances at Australian Fashion Week. Marketing and distribution vary according to the size of the business and its place in the market. While mass-produced clothing is distributed by wholesalers to major retail stores, couture may be displayed at fashion shows such as Australian Fashion Week and in fashion magazines as well as individually to retail buyers. Sales are conducted in retail outlets ranging from national department stores, to small designer stores to markets, with online retail increasing its market share. Some who work in the fashion industry have trained at private or public fashion colleges, while some are self-taught or have learned on the job. Internships are a common way of developing knowledge and skills as well as networks.

10.5 Important personnel

Important personnel in the fashion industry include designers, manufacturers, wholesalers, buyers, retailers, stylists and consultants, fashion bloggers, magazine and newspaper publishers, fashion colleges, the operators of design and craft markets, and the owners of online sites such as ETSY.

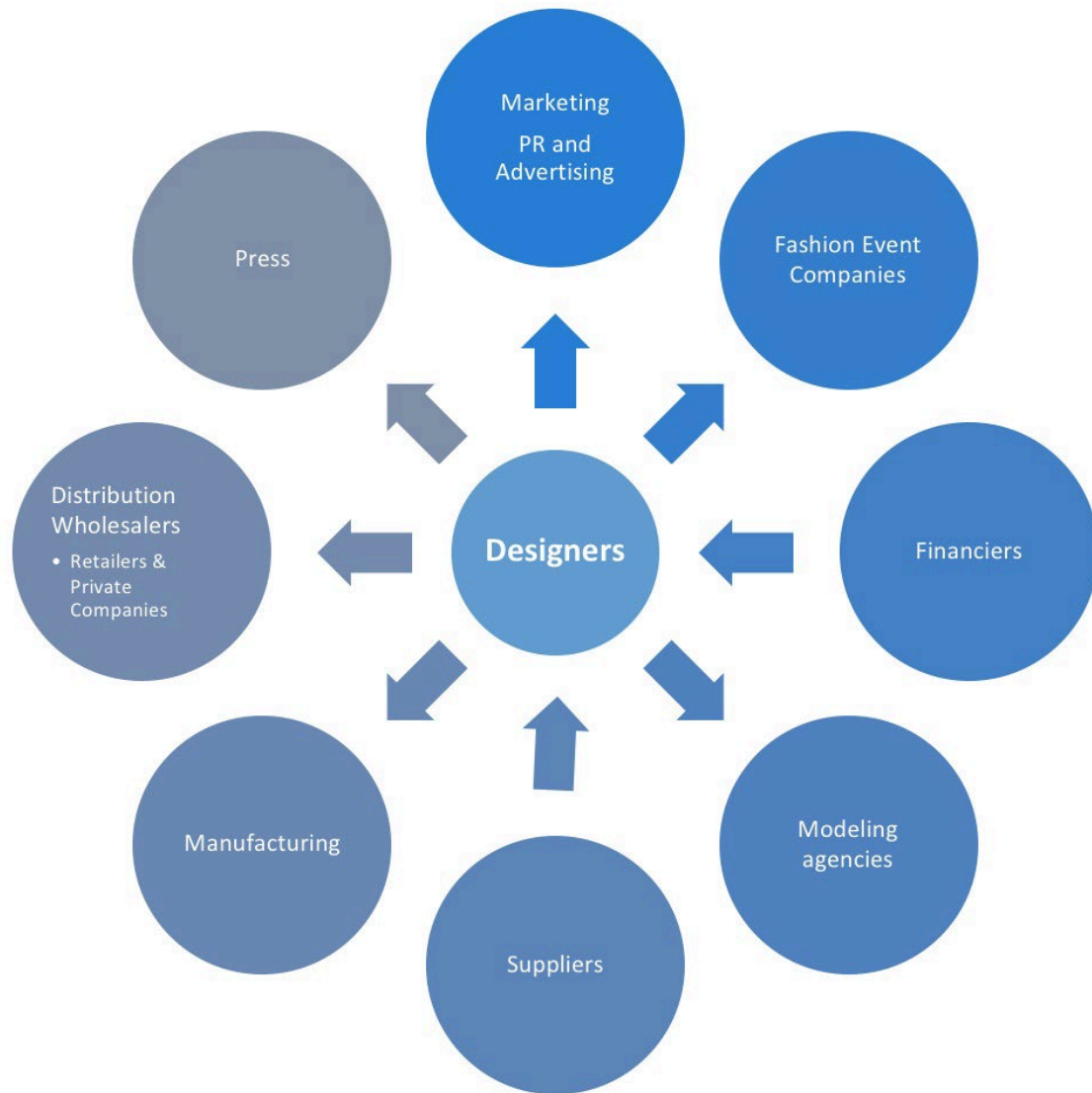


Figure 21 Fashion Design Business Structure

10.6 The Hunter Region Fashion Sector

10.6.1 Introduction

The textile, clothing and footwear industry in the Hunter Region has been dynamic and diverse ranging from design to the manufacture of clothing and sports, leisure and workwear. Despite many changes the valley still has a significant retail sector and a small design and styling sector. Education and training in fashion is also minimal.

10.6.2 Design and Manufacturing

Apparel manufacturers have operated in the Hunter Region for some time. Small specialty manufacturing includes sports and leisurewear catering for the large netball and surf wear market with a very limited number of small-scale operations such as Fashion Fish Design in Warners Bay who make swimwear. Large scale clothing manufacturing ceased in 2010 with

the departure of Pacific Brands from the Hunter Valley at the cost of more than 80 jobs (Wendt 2009, online).

Nevertheless, clothing manufacturing has a long history. In 1893 the Mutual Help Society was founded to clothe destitute women and children by providing pre-cut garments for women to sew (Harrison, 2006). More than sixty years earlier, in 1830, Rundle Tailoring began designing and making suits, dress tails, Scottish jackets and uniforms. Rundles is a fourth-generation business that continues to operate from premises in Hunter St, Newcastle manufacturing, retailing and hiring out men's business and formal wear. Surviving for more than 180 years, Rundle's name is so well known locally they can market by reputation alone. At its peak in the 1970s, the Rundles business employed four hundred staff. By 2008 the workforce had declined to 30 (Wendt 2008, online) and it currently numbers twelve (Rundle Tailoring 2017, online). There are, despite a downturn in the sector, still examples of businesses willing to find a niche and carry on.

Two Hunter-based businesses, Aird's of Lochinvar and Mortels Sheepskin Factory, continue in niche manufacturing and retail markets. Both businesses began in Lochinvar in the 1970s. Airds was established in 1971 as a family-owned tailors specialising in equestrian apparel, manufacturing, as a specialty tailor prior to starting the business, 'custom jodhpurs and riding coats since the 1950s' (Airds 2017, online). Still located in Lochinvar, it now offers a full range of equestrian and country and western apparel (Airds 2017, online). Mortels Sheepskin Factory began in Lochinvar in 1978 (Mortels 2018; online) when Frank Mortel, a master shoe craftsman from the Netherlands, began making fashion shoes and sheepskin boots. During the 1990s the company focused on the production of sheepskin products and the family claims they are 'one of the oldest, continuously running and most experienced ugg boot manufacturers in the world' (Mortels 2018, online). Mortels manufacturing and retail outlet has been located at Thornton since 2015.

Textile art is gaining in popularity. Timeless Textiles in Newcastle is a small business which exhibits fibre art and conducts classes, while a number of independent textile artists have gained a national and international following including Meredith Woolnough who constructs delicately stitched 'drawings' and Katrina Kellett who hand-dyes yarn for the art and craft market. Both are attached to the Newcastle Community Arts Centre.

At the other end of the scale, Wax Converters Textiles (WCT) is an innovative small company manufacturing weatherproof textiles for the architecture, leisure and defence sectors. WCT has grown quickly since 1991 and manufactures its fabrics within their Hunter Valley production facility. The mill uses the 'latest in production machinery technology and capabilities' (WCT 2017, online). It is:

A vertically-integrated operation with the company performing functions in weaving, dyeing, scouring and bleaching, finishing, coating, printing, sueding, brushing, shrinking, proofing and waxing - as well as in-house facilities including a research and development laboratory team and machinery designing and manufacturing capabilities. [They make] camping and industrial canvas, Defence fabrics, PVC for truck tarps, banners, marine, automotive and general purpose applications, awning fabrics, waxed cotton oilskin for drover coats, moleskin and rugged apparel/workwear fabrics, artist canvas, X-Ray screening [and much more including custom ordered projects] (WCT 2017, online).

While many fashion designers import their fabrics, WCT export their textiles to over fifteen countries world-wide.

A number of Hunter-based designers are highly entrepreneurial with many operating as sole traders who also manufacture. Some are freelance, working for other companies when the opportunity arises. Many have additional sources of income. For example, Trevor Dickinson is a textile designer who also sells 'alternative tourist products' such as prints, cards, T shirts and posters in shops and online. Dickinson was born in the UK and trained as a print and textile designer at Camberwell School of Art in London. He took up work as a textile designer, usually working on contract for large retailers such as BHS, Next and Marks and Spencers. He also undertook significant freelance work including designing merchandise for The Rolling Stones' 2003 tour. He has also taught in art schools in England and at Hunter TAFE in Design. Dickinson also undertook an artist residency at Megalo Print Studio in Canberra which introduced him to the Canberra market. His subsequent success there, where his products now sell in the National Portrait Gallery, the National Museum and the National Library, as well as a number of prestigious retail outlets, has meant he has been able to give up textiles and work full-time on design. For the past ten years he has worked for a company called Fred Bare in Sydney as their main designer. He arrived in Newcastle thirteen years ago and thanks to digital technology and the infrastructure that supports it, he is also able to work globally. He says it does not bother his clients that he is living in Australia since the digitally connected world makes it possible:

They would email me the brief, I might email questions, then I'd do the final design, send them the work. We didn't even speak on the phone. Half the people I've never met or spoken to. Often, you don't need to. If you are experienced and you are working with someone who is experienced with briefs then it works well (Dickinson i/v Feb 2015).

It is essential, however, that the person he is dealing with is good at briefing and at giving feedback. This has not always been the case but he says the Disney representative he is working with currently is 'fantastic at briefing' (ibid). He says of his contact with UK clients 'We didn't even speak on the phone. Half the people I've never met or spoken to (ibid).

While there are benefits to working digitally and globally, Dickinson suggests that it increases the chance of a designer's work being unlawfully copied. He says that copying is endemic in the fashion industry worldwide and there's little that can be done about it:

There is a copyright protection if it's localised ... An Australian company ripping off an Australian company is very rude but they get away with it because the turnaround time for fashion is so quick. By the time it gets spotted and things get off the shelf, so many have sold. The big companies have a lot of power. Especially since I've been in Australia, I've regularly been given jobs that are almost ripping off designs because I think Australia feels like it's so far away - or it used to be before the Internet took over. So it's just copies all the time. You see it all the time - the big companies copying smaller companies. In the fashion industry it's just rife (Dickinson i/v Feb 2015).

High Tea with Mrs Woo is a fashion label that has a reputation for both originality and quality. It is owned and operated by sisters Rowena, Angela and Juliana Foong. They design and manufacture a range of clothing from a small suburban studio factory in Islington, an inner-city area of Newcastle. They generously share this factory space with photographer Alexander McIntyre who does all of their shoots in exchange for the rental of the space. The Foongs' parents migrated to Australia from Malaysia in 1988 bringing their children with them. Explaining their company ethos, the sisters recall:

Strong childhood memories of our grandparents' 100 year old goldsmithing and watch shop which was also the family home. Worn wood, rusty tools, age-old materials and textures still resonate with us today. We also grew up with many strong women in our lives – our mother, grandmothers and many aunts. Mrs Woo is the synergy of women who inspire us (High Tea with Mrs Woo 2017, online).

Rowena and Juliana Foong have qualifications in graphic design and visual communication while Angela has an economics and commerce background. Angela manages the finances and legal matters while Rowena looks after the graphics and marketing including websites, corporate identity and imagery. Juliana is the retail manager and does a lot of the pattern-making. All collaborate on design and manufacturing. All work in the store 'because that's the best way you can interact with your customer' (Rowena & Angela Foong i/v March 2016). Together they 'form a dynamic and wonderful sisterly collaboration. With sewing skills cultured from young, their small production team continue to cultivate, create, pattern, grade, cut and construct their designs' (High Tea with Mrs Woo 2017, online). They use traditional tailoring techniques and have developed distinctive shapes from orthodox dress forms. The sisters are also fascinated with weaving memory into clothing and appreciate the ability of fashion to tell a story. They enjoy 'naming each garment like a part in a performance, like *Waiting for Jack*; like *Stuck in Ueno*; like *She sees Vendetta*; like *East of Eden*' (ibid). They also suggest that copyright is an issue, and have taken legal action to stop a manufacturer copying their designs, but they argue it is too expensive to protect designs and the protection is limited. They say:

The design copyright stuff is silly. Like if this top had a pocket on it, it wouldn't be the same. Someone could just take that exact design, tweak it by 2% or something and that wouldn't be considered a copyright breach ... I guess you just need to be strong in your brand, confident in your work and do your best. It would be nice to protect our main designs but we just can't afford it and most people can't unless you are a huge company like Prada or Gucci or something ... We'd rather put money into awesome fabrics than IP (ibid).

Nor do they manufacture overseas, for reasons to do with quality, sustainability and lifestyle. They choose to operate fully within Australia, apart from some online sales, in an effort to make their business more manageable. As Penelope Green explains, 'the sisters source high quality cotton, linen and merino wool, cut and pattern their designs and turn to Sydney-based manufacturers to deal with large orders' (Green 2013, online). They clarify:

Most of our colleagues have gone offshore to produce their work and we are one of few to insist on staying here. That means to us a lifestyle choice and it's also a sustainability choice because we don't want to go and spend three quarters of the year or whatever managing production overseas. The quality comes back as terrible, and it's also the mileage thing. You are sending stuff there, they are sending it back. But all of those costs are not truly captured. There are also environmental costs ... [and] it is a lifestyle choice. We are not interested in spending half our life in China chasing issues ... when you produce overseas, the minimum quantities are high. That means you are producing more than you actually need and all of that excess ends up going on sale ... and anything that doesn't get sold gets dumped. We don't want to be part of that process (Rowena & Angela Foong i/v March 2016).

Gina Ermer's business *Fringe Dweller* is another example of a small, local designer/manufacturer with a flexible, innovative business model. Formerly a textile designer,

Ermer hand-dyes silk and linen fabrics which she uses for small-run clothing ranges. She designs the fabric and the clothing, and makes the patterns, but she outsources the cutting since laser cutting is quick and accurate but requires specialist equipment. She also outsources the sewing. Ermer began marketing her range through fashion events and at local markets. For a time she rented space within Jean Bas' shop in Darby Street where a collaborative 'style collective' operated but in 2017 she opened her own shop in Wolfe Street, Newcastle. Ermer has recently started importing hand-made footwear from South America to complement the range. Like many successful local fashion businesses, Fringe Dweller demonstrates a high level of both vertical and horizontal business integration. Ermer asserts she has complete creative control of her business (Ermer i/v May 2017)

Jean Bas is a high-end fashion house which has been operating for over 30 years. It is located in Darby Street, Newcastle. For many years the company had contracts to design and manufacture corporate uniforms, mainly in the finance sector. Intellectual property also arose as an issue for them, as co-owner Kevin Coffey explains:

It's a very delicate space, where companies say 'Come and show us what you would do for us' and we say 'Well, the problem is that if we show you something really good (which we will), you can't help but be influenced by it and you may not choose us to supply what we will show you during the design or concept phase' ... And that is the difficulty with the creatives - unless they have a bit of protection at that point where they can talk freely and work with a client knowing that their idea is their idea, it becomes a bit of a stand-off. [He explains] in fashion there is no protection for a three-dimensional product. There is protection for the sketches you make, strangely enough, under standard copyright but as soon as it goes three dimensional it's considered a utilitarian product and the only protection say for a label like Chanel is that the person cannot use the label 'Chanel' on the garment they copy of Chanel's. That's why you see much of the top end branded, say handbags covered in logos (Coffey i/v Jan 2015).

Until 2018, Jean Bas operated as a retail outlet as well as designing and manufacturing on-site. The shop now opens by appointment only.

10.6.3 Retail

There are at least 207 clothing retail outlets and at least 118 fashion accessory outlets in Newcastle and Lake Macquarie LGAs, the urban centre of the region (Local Search, 2017/18, pp. 116 & 181-3), with many more outlets in each of the major towns and centres across the Hunter Region. Fashion retailing in the region is dominated by the national chains Myer and David Jones who do not stock local designers, (although the Jean Bas label was sold in David Jones' Sydney store for some time). Malls such as Charlestown Square, Westfield at Kotara, Centro Mall in Maitland and Stockland at Green Hills are the principal centres of fashion retailing in the valley. They house outlets for national brands such as Sussan, Jeans West, Cotton On and Sportsgirl while international brands Zara and H&M are recent arrivals. Other retail outlets in the region include high-end Nutmegs at Warners Bay, Hollie Rose and Dressed on High in Maitland, and Liza's of Lorn. Port Stephens boasts stores such as Pizzaz at Nelson Bay, Portique at Shoal Bay and Morpeth Emporium. Muswellbrook has lower-range franchises such as Suzanne Grae, Rockmans, General Surf Co. and Just Jeans competing with JB Menswear, Fine and Dandy and the Miller Fashion Club. Speciality retailers include Callana

Designs (Maitland); and Belles and Beaux, Calabro and Crystal Confetti (Newcastle) which serve the wedding sector, and Autograph and My Size (plus-size fashion).

The purposeful use of social media by many of these enterprises typifies the profile of early adopting, customer-driven sectors. Many of these enterprises are knowledgeable in the use of social media and use it to evoke a personal brand through targeted marketing, while loyalty building and personal connections are enabled through the use of active websites and blogs, Facebook Pinterest, Tumblr, G+ and Instagram. One example is the Jean Bas Studio which specialises in high quality bespoke and ready to wear fashion and manufactures both locally and overseas. Their website is a portal for discussion, trend-following and commentary on the world of fashion, creativity, innovation and small business. Jean Bas drives the business through personal branding and thought leadership. Similarly, High Tea with Mrs. Woo's proprietors, the Foong sisters, tell a personal, fashion and business story on Facebook, Twitter, Instagram, Pinit and G+, building empathy, personal brand and product recognition. So does local brand, Guanabana. The growing interest in narrow-band fashion also seems linked to social media. Companies such as MisKonduct Clothing (50s inspired clothing); SIR the Label; textile art company Timeless Textiles; House of Androgyny; and micro businesses under the Renew Newcastle banner all communicate and promote using Facebook, Twitter and Instagram.

Some smaller companies in the region also provide repairs and alterations. These include Absolute Clothing Alterations and repairs in Mayfield, Ann's Alterations in Argenton, Em's Zip and Hems in Warners Bay, Tiny Dancer Design in Bonnells Bay, Pin and Stitch in Glendale and a list of others. Custom tailoring is provided by firms such as Little Fashion Design in Hamilton and MB Tailoring in Charlestown. Rundles in Newcastle West are the region's premier tailors.

Some fashion retailers have found their place in a market which increasingly values the small, bespoke, and personal. Darby Street in Newcastle houses a number of these stores including Abicus, Scout, Betty Mim and Ramjet as well as High Tea with Mrs Woo and Jean Bas. Hunter Street Mall houses The Lair which has a significant online presence while the Islington area features alternative and vintage fashion. A number of small fashion design/manufacturing start-ups including accessories and millinery businesses operated from The Emporium in Newcastle, a Renew Newcastle initiative located in the old David Jones building, prior to its closure in 2017 to make way for commercial redevelopment of the site. Hunter fashion is also sold at local markets such as Olive Tree and Hunt and Gather, interstate art and design markets, and online. There are many other boutique operations dotted throughout all the major centres and suburbs in the region.

As a high-end retail outlet Jean Bas, according to its Managing Director Kevin Coffey, sells 'culturally important clothing' for mothers of the bride, business women in the public eye, and others attending special events. Jean Bas herself is the Design Director and was educated at Sydney University and the East Sydney School of Fashion and Design. She started life as a teacher which she thoroughly enjoyed but it was fashion that caught her heart.

She and husband, Kevin Coffey, set up shop in a tiny lot in Hunter Street. 'I would pack my little suitcase and go down to Consolidated Press [in Sydney] and I would knock on the doors and see if I could see anyone, if I could just get a hearing [with the fashion magazines]', she says. 'I probably amused them.' For Bas, the 1980s were characterised by struggling around the clock to make her brand work. 'I went about my craft the hard way. While I might have been charging 10 hours, it was

probably taking me 90', she says. 'That was my learning curve, some people pay for university fees, and that was my education' (Ellsworthy 2013, online).

It was by chance that a young woman who worked for the Michelle Kirk Agency, an agency who represented brands like JAG and Simona, entered Bas' store and was 'astounded by the craftsmanship and detail of her pieces' (ibid).

Bas was catapulted into the world of high fashion ... The Bas range was in the front window of David Jones in Elizabeth Street and on the cover of *Woman's Weekly*. Life became a whirlwind of colour, design and stress. Bas worked in high fashion for 'three or four years'. At one stage, Jean Bas designs were in 100 boutiques nationally, as well as David Jones. She was offered the chance to design Newcastle Permanent's corporate wardrobe, which she says, 'started to put the bread and butter on the table' [At this point] Bas thought it was time to reassess her 18-hour days (Ellsworthy 2013, online).

She now has an atelier and fashion outlet in her own name based in the bustling food and fashion strip in Darby Street, Newcastle. She makes top-end, bespoke, made-to-measure garments which have top-end prices unmatched in the city. These are necessary because of the high costs of their business including the rates they pay to the highly experienced seamstress who works on-site. The company lost contracts they had in the corporate wardrobes area and were on the verge of relocating to Sydney where they felt the market would be more conducive to their wares, when a shopfront in busy, fashionable Darby Street became available. Jean Bas and Kevin Coffey, business partners for over 35 years, have been surprised by their success, as have observers who were not of the view that there was a market locally for clothing costing up to several thousand dollars per piece. Instrumental has been the company's focus on the customer experience and relationship-building.

She finds great pleasure in designing for an older age bracket with 'at least a dozen 80-year-old clients that were my clients in their 50s', she amassed a loyal following. 'I enjoy dressing the more mature client because with her age comes a beautiful sophistication, charm and a lovely level of patience, which I find quite beautiful in a woman as they age', she explains. 'I am an architect of the body, if you like, but my buildings move ... I have to look at the stress points, the size of the person, I have to analyse how they're going to be worn.' It has been a difficult industry to succeed in, but Bas flourished due to her passion, her spirit, and her hard work. 'I've seen people like Lisa Ho and Kirrily Johnson, good designers, shutting up shop. But I know how easy it can happen' (Ellsworthy 2013, online).

The Foong sisters, from High Tea with Mrs Woo, sell their clothing through their retail outlet in Darby Street in Newcastle, online and at various design markets beginning with Youngblood in Sydney at the Powerhouse Museum in 2007 and now Finders Keepers in Sydney, Melbourne, and Adelaide; The Big Design Market in Melbourne and Sydney; markets in Canberra and smaller local markets like Olive Tree in Newcastle. They say of markets: 'They are just popping up everywhere' (Rowena & Angela Foong i/v March 2017). They love the interaction with customers and say that 'markets mean that more people who may not have been interested in creative work now get exposed to that as a shopping avenue' (ibid).

At their peak, High Tea with Mrs Woo had up to 35 retailers selling their garments, they showed at Sydney Fashion Week, and for five years they had a store in Paddington in Sydney where they employed ten staff and had a turnover of \$700,000 pa. Then, 'the GFC happened, rent was too high in Sydney, a lot of our retailers closed their stores so we had to leave. We are still

recovering from that' (Rowena & Angela Foong, i/v March 2016). Their current turnover is less than half what it was at the peak but this has led them to choose simplicity. 'We can pay ourselves, we can pay our staff and we can put aside a bit of money so that's OK' (ibid).

Starting the business 15 years ago with a second-hand clothing store in Darby St, Newcastle which they purchased from a friend, they thought they would run this business for a while until they decided 'what to do after university' (Rowena & Angela Foong i/v March 2016). Once started they became determined - 'OK. We'll give it a go. We'll work the fashion industry to see what it's like and whether we want to have a career in it – see how long it lasts' (ibid). They received a government grant which paid for an industry mentor. They also gained three TCF (Textile, Clothing and Footwear) grants totalling close to \$90,000, the largest to pay for a full retail /manufacturing point-of-sale system to manage the manufacturing, the fabric, and sales.

The sisters won the Mercedes Benz Start-Up award at Australian Fashion Week in 2005 and threw themselves into the national and international fashion show circuit before opening their second store in Paddington, Sydney, in 2009 (Green 2013, online).

The Foongs worked globally, selling through a retail outlet in Treviso, Italy as well as sourcing fabrics overseas. At their peak they had up to 35 retailers selling their work. However, the fashion business cycle of three buying and selling seasons each year proved unpalatable for the sisters. They say, 'we did that for many, many years and it was ridiculous. Like we didn't sleep, we couldn't keep up with it, it was so stressful ... And it's not that sustainable' (Rowena & Angela Foong i/v March 2016). They chose to withdraw from this arrangement.

They do engage in online sales however, including some customers in Europe and the USA, but this represents only approximately 5% of their business. They say of internet shopping that 'in the last five years it's gone gangbusters [but] we didn't really want to have an online shop. We wanted people to come in, feel the fabrics and wear the clothes. We've had to adapt because we were missing out on a market' (Rowena & Angela Foong i/v March 2016). But not all online customers live far away and the personal and local dimension of the business persists in this mode of sale:

Lately we've had a lot of online customers from down the road. We had a customer who bought who lives around the corner in Dawson St ... because people are time-poor, and if they have kids, or who knows? If they can't come in during store hours, they are ordering very late at night ... And if it's over \$100 purchase we offer free delivery anywhere in Australia so if someone has ordered from Hamilton or New Lambton ... we might just drop it off. And we've had customers then who say, 'You came and dropped it off at my house? That's amazing service!' We live down the road. Why would we send Australia Post to drop it at your house? It's just hilarious (ibid).

They say that initiatives like the markets and Renew Newcastle have 'definitely made an awareness of this whole local creative industry stronger' (ibid). However, maintaining enthusiasm can be difficult at times:

If you live in Newcastle running your own show you have to be pretty self-motivated ... It's a tough market here. And also you can get lost in a bit of a black hole. You try doing something and you get rejected, and you feel down about it and you just stop. Or you get stuck. For us, our solution to that is to travel, even just to go interstate once in a while, or go camping or do other things that don't make you feel that you are just here. It is good in a way to be isolated from the

fashion industry but you also need to keep ... feeding yourself with goodness from elsewhere (ibid).

Kevin Coffey, from Jean Bas, also talks about refreshing the creative drive and, despite this being a globalised world, recognises the appeal of regional areas for creative people:

I find the weirdest thing about creatives is that they like to congregate together physically ... It has global impact but the strange thing is that you would think with our internet services and our data streaming and so on that you could operate anywhere but creatives, when they stop, want to be in a really lovely place and it is not always a big city so regions like Newcastle are actually coming up really strongly for building creative cities because of the lifestyle. Creatives when they clunk, they stop, they have to rest, they have to recharge and places like Berlin and New York could be pretty cool ... but nothing beats eyeballing the client, eyeballing the team you are working with, the project members (Coffey i/v, Jan 2015).

10.6.4 Fashion styling

Fashion styling's main proponent in the Hunter region is Lara Lupish, an entrepreneur who has worked internationally (also see Sector 8.7.3). Soon after graduating from The University of Newcastle, she moved overseas, to Vancouver, where she says she 'got thrown into the creative industries there, just by chance. That's where it started' (Lupish i/v Oct 2016). Lupish moved on to successfully forge 'an international career as a celebrity stylist, dressing some of the most beautiful and noteworthy people in the world' (Façon 2017, online).

I began my career as a stylist in North America, after finishing a degree in psychology at uni, I decided to go travelling the world. Once I arrived, I stumbled into styling, starting with a photoshoot with one of the top rock photographers in the country. Then I moved on to London (as most Aussies do), expanding my styling resume there & making a conscious decision that this was what I wanted to do ... Having first worked as a wardrobe stylist in the film industry, styling music videos & TV commercials, I then progressed to feature film costume design [working] with cast members such as Naomi Watts, Sir Ian McKellen, Laura Dern & Mark Ruffalo. It was great to work with such high calibre actors so early in my career. My TVC work in North America was moulded by prominent & notorious Director Marcus Nispel. Working with US ad agencies was also an amazing experience & had an exponential learning curve attached to it. Returning to Australia I saw my career as a stylist move towards fashion & celebrity styling. I further added the title of 'style director' to my CV, working closely with and directing shows for various Australian designers. Currently my focus is on celebrity styling, advertising and editorial. The time I worked overseas was indispensable in building my skills in style direction, design & particularly I learnt about attention to detail & how important it is to styling. I love fashion, great shoes & accessories & above all love putting it all together, whether for an editorial shoot or building a character for an advertising campaign (Lupish 2011, online).

As an in-demand celebrity stylist she has worked with Danni Minogue, Michael Hutchence, Delta Goodrem, Megan Gale, Jennifer Hawkins, Ricki Lee, Sonia Kruger, Eddie Vedder, Heath Ledger, Mel B and many others (Façon 2017, online). Her job entailed 'selecting amazing

clothes and accessories for my clients for red carpet, stage or TV appearances or magazine cover shoots' (ibid). She was involved with 'meeting the designers or going to the fashion PR showrooms and selecting pieces' (ibid) and then took various collections to her clients for fittings. She suggests:

It is a very tough and competitive business. You have to expect 1 'yes' to 10 'no's'. There are many different areas of styling from fashion editing in-house for magazines, to freelance magazine work, to red carpet, TV, costume design for film and music videos. The skill set generally covers all aspects, but I would say film is more specialised' (ibid).

Lupish moved back to Sydney in 2009 and eventually returned to Newcastle in 2013. Lupish's business now includes Façon Creative, a creative agency, and Façon workshops and runways. She is also noted for founding the glossy fashion magazine *Façon* whose third issue was published in May 2017. The Façon business is described as 'a collaboration of creative people producing world-class advertising imagery and a high-end fashion publication, Façon Book'. She remained connected to her clients in Sydney.

At first I didn't know where I would land so I wanted to keep my relationships with those brands in Sydney, bring them here - although I did keep it quiet that I had moved to Newcastle for probably a whole year. I rented a studio in Sydney because I was still involved in the Sydney market as far as styling went and I needed that as back-up. When I did those runways, I invited the Newcastle City Council people and the Museum people and the Art Gallery people, footballers' wives and the socialites of the city because I thought I'd do personal styling or I might dress them for events. I think I still wanted to be at that point what I was in Sydney to an extent. But the cards just laid down differently to what I thought and it pushed me in a different direction and what I got out of that was all the brands that I'd built a really strong relationship with in Sydney were still quite prepared to work with me and when Giorgio Armani would call me - not him personally but the brand - and say 'Look Lara, the new collection is here, do you want to shoot something?' And they would courier it to my door in Wickham I was quite astonished and that's how Façon started, actually. We started an Instagram page, we started shooting material for the Instagram page and I guess from there we spruiked the magazine because I thought that we should turn it into a hard copy (Lupish i/v Oct 2016).

Façon does work for creative agencies where 'brands come to us and ask us to create their imagery for their campaigns or their advertising or their social media to help them develop a brand strategy around imagery' (Lupish i/v Oct 2016). Her skills and experience demand a certain standard. 'I'm trying to train people to be what I used to be but I oversee the whole thing and make sure it is hopefully of an international standard - that's what we are trying to achieve' (ibid). However, she believes the industrial ethos of the city prevents an appreciation of beauty and the worth of those who create it:

There's not a lot of value here yet for creatives and what they do. It's like, if you hired a plumber, you are not going to ask him to fix your blocked toilet for free because they need the experience. They've got the experience! It's the same with creatives. But people are used to paying either nothing or very low prices for things. It's not the case all round. I just think it's a cultural thing. That's not really what we do here. It's an industrial city. That will do. We don't really deserve

better. Why should we make things beautiful and why should we pay for it? (Lupish i/v, Oct 2016).

Nonetheless Lupish recognises that while Sydney has the status, Newcastle is more liveable:

I think still big cities dominate. Absolutely. I'm saying it loud and proud because there are a lot of Sydneysiders I work with who are struggling with the cost of Sydney and what it is to live there. I like to boast now that I have a nice home in Newcastle and we go to the beach after school and it's affordable, all that kind of stuff. Now I'm proud of it. But I have to admit that there are a lot of times I am doing business in Newcastle that I'm reminded of why I left and it happens every week (Lupish i/v Oct 2016).

Lupish's standards are bound up with a belief in her company's mission to raise the bar:

It's all about creating the image and having people feel like they could be in Sydney or London or New York or wherever. I make my staff laugh by saying, 'Pretend you are in New York'! And I hope it's not just about the look of the place but also the way we work, the way we behave and the image we project to the industry as well (Lupish i/v Oct 2016).

10.6.5 Fashion training

Hunter TAFE offers a range of nationally-accredited courses in fashion design, fashion business and clothing manufacture from Certificate to Advanced Diploma level. Students gain a solid grounding and employment outcomes are strong with graduates establishing their own businesses, gaining positions with fashion companies in the capital cities, or finding work in related roles such as Head of Wardrobe for television programs. At Newcastle Campus, students learn in a collaborative Design Centre alongside students from other design disciplines and work on 'real-life' projects. Some graduates continue their studies at colleges in larger centres, for example, Whitehouse School of Design in Sydney.

In 2017, a new player entered the scene. Gabe Robinson, a TAFE Fashion graduate who went on to develop a significant career in fashion in Sydney including as Head Stylist for television program *The Voice* and Style Ambassador for Westfield, returned to Newcastle and established the Hunter Institute of Fashion (HIF). The Institute advertises a customised, business-oriented one-year course of 'specialised fashion training by industry leaders within a stimulated industry studio environment' with 'a mix of studio workshops and work experience' including areas such as TV and multimedia, fashion marketing and fashion styling (HIF 2017, online).

Short courses are also offered by some designers including Jean Bas who conducts 'master classes' in design and tailoring in her workroom and Gina Ermer who teaches from her home studio, and previously operated from her studio at Newcastle Community Arts Centre.

10.7 Conclusion

The Fashion industry across the country comprises more than 7,000 firms and employs more than 36,000 people, many in regional Australia (DSI 2015, p. 5). Most of the people who self-identified as working in the fashion industry in the Hunter region for the 2011 Census were primarily domiciled in Newcastle, Lake Macquarie and Port Stephens areas. Most revenue in this sector of the creative industries is derived from the sale of products or from the services associated with it. Product sales form the basis of most revenue for manufacturing and retail

within the industry. Selling products online is increasing in importance with some Australian 'bricks and mortar' stores moving into the online space. Some businesses are fully online. Large, established businesses based overseas are able to easily penetrate the Australian market using online methods. The services sector of the fashion industry includes design, styling and consultancy. Returns come in the form of commissions and contracts for collections and from direct sales if they also maintain a retail outlet. Leasing or hiring of apparel is also an established way of earning revenue in the fashion industry. Fashion publishing in Australia includes a number of magazines, and major newspapers also feature Australian fashion. Fashion blogging also provides an income for those able to generate sufficient online followers to represent a marketing asset.

Fashion designers and manufacturers have operated in the Hunter Region for a long time. While large-scale manufacturing of textiles and garments has ceased, niche businesses serve high-fashion, bridal, sports and leisure, dance and babywear markets as well as workwear. There is a small number of successful, innovative businesses, some new to the scene and some long-standing, most of which use social media for promotion linked to online sales. The industry operates globally in that international trends are followed, there is a small international market for Hunter-manufactured goods, and fabrics and trim are often imported. Increasingly, aspects of manufacture (for example, cutting and sewing) are outsourced either locally or off-shore. As well as online platforms, craft and design markets have opened up new opportunities. Fashion retail has maintained a strong presence in all of the major centres of the region, especially in the large malls. As well as the larger national and international franchises, there are a number of boutique stores targeting particular market segments. A small number of fashion designers operate their own retail outlets and manufacture locally, notably Jean Bas and High Tea with Mrs Woo. Some designers and fashion stylists had established reputations in the fashion industry either in the capital cities or overseas before returning to the Hunter and they have helped raise standards in the industry, for example through publications, events and teaching. A limited number of colleges and individual designers offer training in fashion design, fashion business and/or clothing manufacture.

Creativity & Cultural Production in the Hunter

An applied ethnographic study of
new entrepreneurial systems in the
creative industries.

Final Report:
Hunter Creative Industries

Visual Arts

Associate Professor Phillip McIntyre
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11. VISUAL ARTS

11.1 A Brief History of Visual Arts in Australia

The visual arts in Australia have a very long history. In *Rattling Spears: A History of Indigenous Australian Art* (2016), Ian McLean indicates that Indigenous communities across the country produced symbolic work that carried meaning for its users for aeons before colonisation saw the paintbrushes of Joseph Lycett and John Glover represent the new settlements and the recent arrival of Europeans. A number of works outline the history of art in Australia (Hughes 1970, Smith 1960, 1979, 1990 and 2000, Sayers 2001, Anderson 2011, Grishin 2013). Christopher Allen in *Art in Australia: From Colonization to Postmodernism* (1997) sets out the stages he believes Australian Art has progressed through, from the early colonial to high colonial, the Heidelberg School, Federation, Modernism, Abstraction and Social Realism, as seen in the work of the Angry Penguins, Postmodern pluralism and more recently, contemporary art from the 1990s onward.

Beginning with Joseph Banks' illustrations of flora and fauna during Cook's voyage to Australia, followed by George Stubbs' 'Kongouro' painting in 1772, images of the flora and fauna of the continent entered the consciousness of Europeans. New settler artists, some of them convicted felons, drew and painted their new home, including its indigenous people. Joseph Lycett, for example, painted 'Corroboree at Newcastle' in 1818 while John Glover's 'Corroboree at Mills Plains' in 1832 represented life in Van Diemen's Land. The landscape also intrigued colonial artists, although their work is very much seen through a European lens, even including English trees: 'European artists in the 18th and 19th centuries often saw the landscapes of Australia and other new worlds in the light of familiar places and traditions' (Jones, Anderson & Allen 2013, online). An example is Eugene von Guerard's 'From the Veranda of Purrumbete' in 1858. Von Guerard 'made money by painting homesteads on commission, and in this picture he raises that hack work to artistic excellence' (ibid). In the production of such art works, we can see that visual artists had become part of the small but burgeoning economy, an economy that had no welfare safety net, as yet.

The Hobart Mechanics Institute was founded in 1827 and the first art gallery opened in Hobart, Tasmania in 1831. In 1839 the newly developed daguerreotype was presented to the public in Paris for the first time and the photogenic techniques of Fox Talbot and Dr Andrew Fyfe were written about in Tasmania's *Cornwall Chronicle*. Then in 1841 'Captain Augustin Lucas produces the first daguerreotype in Australia in a demonstration on Bridge Street, Sydney' (AGNSW 2018, online). The following year 'Australia's first professional photographer, George Goodman, opens a daguerreotype portrait studio on George Street, Sydney' (ibid).

During the same period The National Art School began in Sydney. It traces its origins to 1843 when the first lecture was presented at the Sydney Mechanics School of Art. In Melbourne the Fine Arts Commission was established with a prize worth £200. At this time a transitional period of 'settlement' painting led to the Heidelberg School in the late nineteenth century. Tom Roberts, Frederick McCubbin and Louis Abraham had links to the National Gallery School in Melbourne and were joined by Arthur Streeton. This so-called Heidelberg School is seen as the first artistic movement of distinction in Australia (Allen 1997, p. 58) but still they demonstrated, in their alignment with the Impressionists, that the history of art in this country is shaped by changes in art practice internationally. Art historian Terry Smith would famously write about this in 1974 as *The Provincialism Problem*. Unlike their European counterparts, these artists were nationalistic, emphasising the heroic masculine character of 'the bush'. Tom Roberts' 'A

Breakaway!', 'Bailed Up' and 'Shearing the Rams' have become iconic, as has McCubbin's 'Down on his Luck' and 'The Pioneer' triptych. Things evolved after the turn of the century. A 'new emotional tone can already be discerned in the paintings of Davies, Phillips Fox, Withers and Gruner' (Allen 1997, p. 83). Elioth Gruner's 'Spring Frost' is another of those highly recognisable pastoral works from the same period but it was with Hans Heysen that the next generation made their mark seeing the bush through Symbolist modes and mythologies which tended toward the neo-pagan. With this sense of place, a *genius-loci* took precedence (Allen 1997, pp. 82-7). This situation was reinforced by painters like Norman Lindsay.

In terms of photographic art, by 1854 'exhibitions of works to be sent to the Universelle Exposition de Paris 1855 [were] held in Sydney, Hobart and Melbourne, creating an early showcase for photography [in Australia]' (AGNSW 2018, online). In 1855 'the portable stereoscopic camera arrives in Australia [and] John Sharp and Frederick Frith take the first paper panorama using the wet-plate process in Australia, a five-part view of Hobart nearly one metre long' (ibid). In Sydney in 1857 the Freeman Brothers were 'the first to adopt the English practice of publishing mosaic group portraits of distinguished citizens' and a little later in 1867 'Victorian government photographer RLJ Ellery begins photographing the Moon' (ibid). The initial meeting of the Amateur Photographic Society of New South Wales took place in 1872 and 'mugshots [were] made the standard photographic format for recording criminals and suspects in New South Wales police departments' (ibid). Then, in a development that will eventually have massive repercussions for the livelihood of many painters, 'the first Kodak camera, capable of taking 100 photographs before being returned to the manufacturer for processing, makes photography accessible to millions of amateurs' (ibid). In quick succession the Pocket Kodak camera is made available in Australia and 3000 are sold within two months. In 1899 colour photography is introduced to Australia by Crown Studios in Sydney and then the first of the three-minute automatic photo booths are installed in Sydney. Following this the Kodak Brownie, the first of the mass-marketed cameras, is released in 1900 and in 1905 'picture postcards achieve popularity, combining photography, printing and postage' (ibid). Frank Hurley, in 1917, is appointed Australia's first official war photographer for the Australian Imperial Force during World War I (AGNSW 2018, online).

The interwar years see the emergence of post-impressionism and modernist influences in painting. The tension between figuration and abstraction became a hallmark of Australian painting in the 20th century. Women played a leading role. The works of Grace Cossington-Smith, including 'The Sock Knitter' and Margaret Preston's advocacy of Aboriginal art and modern graphic techniques exemplify this period. The ensuing years saw not only a tendency toward modernism, seen in Cossington-Smith's paintings of Sydney, especially 'The Bridge', but also a return to an idealised neo-classical type seen in the stonework of Rayner Hoff's 'Idyll (Love and Life)'. In painting, the virility, sun and surf of works like 'Australian Beach Pattern' by Charles Meere were the order of the day. Photography was also developing beyond, or perhaps because of, its commercial success between the wars and Max Dupain's 'Sunbather' from 1937 is a classic example of the move of subject from the bush to the coast where most settler Australians were now living. The 1930s also marks the beginning of the modern Aboriginal art movement when Albert Namatjira learned to represent his Central Australian/Arrernte country in watercolour, to wide appeal. In 1938, *Pix* magazine, 'the first Australian weekly to employ North American-style presentation and photojournalism', was launched in Sydney' (AGNSW 2018, online) and as the Second World War developed Damien Parer, Australia's first combat cameraman, travelled to Palestine with the Australian Imperial Force. He was later to become famous for his photographs of the troops fighting on the Kokoda trail in the Pacific theatre of the war.

An Australian Academy of Art was proposed by Robert Menzies in 1935 and The Contemporary Art Society was formed in 1938 just before the start of WWII. During this period a group known as the Angry Penguins, named after the magazine of the same name, came to prominence. This group was composed of avant-garde artists like Albert Tucker and Sidney Nolan. Nolan's 'Ned Kelly' series saw in the bushranger the antithesis to the heroic settler, and produced a 'strange combination of harmony and alienation' (Allen 1997, p. 126). Arthur Boyd, also a member of this group, sought out the excesses of passion as seen most vividly in his painting 'Melbourne Burning'.

William Dobell's painting of Joshua Smith – 'Portrait of an Artist' – was a controversial winner in 1943 of the Archibald Prize, 'the most prestigious annual prize for portrait painters' (ibid, p. 34-5). While he was not self-consciously modernist, this is where his work has been placed, much like that of Russell Drysdale.

The Institute of Photographic Illustrators, which was deeply concerned with 'raising the standard of photography, is formed in Sydney' (AGNSW 2018, online) and in quick succession the Polaroid camera and the 35 mm Nikon were introduced to this country as the Cold War began. In 1952 the Melbourne Argus became 'the first daily newspaper in the world to publish colour photographs' (ibid) and from this point on photography began to build a strong relationship with both newspaper and advertising houses displacing those graphic artists who had made a living from illustrating advertisements and posters. In 1963 Kodak produced 'the first Instamatic cameras and colour Polaroids are introduced [and] Mervyn Bishop begins a cadetship at the Sydney Morning Herald, later becoming Australia's first Indigenous press photographer' (ibid).

In 1968 'The Field' exhibition of abstract art at the opening of the NGV International, polarised the art world. At the same time, 1968-69, Christo wrapped 'Sydney's Little Bay' to much publicity in the local media. In 1971, Indigenous artists at Papunya began 'dot painting' with acrylic paints, now internationally regarded as the Western Desert painting movement. Conceptual art from the 1960s, feminism and postmodernism in the 1970s and '80s, and most significantly the postcolonial, post-Bicentennial conscience, as well as Indigenous artists have shaped Australian contemporary art practice.

In 1982, the National Gallery of Australia was opened. Given the rivalry between the cultural centres of Sydney and Melbourne, it is an irony that the solution to what was seen as an 'irreducible cultural polarity was to invent Canberra, a city without a history or culture of its own, as national capital. It has since gone on to be the repository, in its many galleries and museums, of the cultural treasures of the continent. Today, one of its collection highlights is 'The Aboriginal Memorial' (1986-88), an installation of 200 hollow log coffins by artists from Arnhem Land representing 200 years of colonisation (and survival). In 2004 'social networking sites Facebook and Flickr emerge[d] with image-database functions [and] Kodak Australia close[d] its manufacturing plant in Melbourne' (AGNSW 2018, online). Then in 2007 Apple released the first generation iPhone (ibid). From the late 1990s the combination of the affordances provided by digital technology and the increasing use of the internet has globalised contemporary art across the world, Australia included.

The fortunes of the arts sector have always risen and fallen with economic cycles. Teaching has been an option for artists seeking a guaranteed income and the amalgamation of technical colleges and universities in the late 1980s and early 1990s in Australia provided places for artists to continue to develop their art and disseminate what they had learned. Art classes were offered from the start of what is now TAFE (Technical and Further Education), for example at Newcastle Technical College and School of Mines when it was established in 1896 in Hunter

St, Newcastle West. Today the same campus houses Newcastle Art School as well as facilities for the teaching of digital media. The University of Newcastle no longer offers a degree in Fine Art, but offers visual art majors in its Creative Industries program. In addition, private art classes are popular.

11.2 Structure of Visual Arts Industry

Irvine argues that the art world as it currently stands ‘is structured as an interdependent network of social-economic actors who cooperate - often contentiously or unknowingly - to enact and perpetuate the art world, while at the same time negotiating kinds and levels of cooperation in a mutually understood careerist and competitive context’ (2009, online). This art world is most often structured, in its commercial incarnation, around the creation, production, distribution, sale and, at times, conservation of various artworks such as photographs, paintings or sculptures. Artists often build their working life in art around a ‘day job’ of some sort. Residencies, commissions and grants from funding bodies such as arts councils, other government instrumentalities, foundations or corporate sponsors are also important sources of support but are not easy to secure. Galleries and art schools provide one of the main structures of the art world, however, as Arora and Vermeulen argue, ‘the emergence of countless new interactive sites has added a new layer of infrastructure to the art market’ (2013, p. 327).

11.3 Business Models

While it can be argued that ‘digitization and its online manifestations are causing a shift in the art market from an object based and supply side-oriented market to a more consumer driven market’ (Arora & Vermeulen 2013, p. 328), in his book *Culture* (1981) Raymond Williams sets out the way artists have traditionally gained enough income to continue bringing novel cultural products into being. These ways of gaining revenue range from patronage, through to direct sale of the goods produced, through to government largesse and corporate employment. Williams lists a number of these revenue earning opportunities. They can be summarised in the following way.

The first of these sees a work produced which becomes the possession of the patron, not the artist, who is compensated with a set of living conditions that allow them to keep working. An example would be painters of the royal court. This is not a common mode of income generation in the twenty-first century. This situation is related, however, to one where artists, as individual professional workers, are placed on a retainer or work on commission. The latter is commonplace now. There are also market-based situations where the artist is remunerated by a paying public such as occurs with art fares and markets. Sometimes wealthy individuals subsidise the work and their reputation helps ensure, to a degree, the support and attendance of that paying public. Many arts bodies are funded this way, for example through Gallery Foundations. A fourth way of gaining revenue is from corporate or private sponsorship. Arts festivals, for example, the Sydney Biennale, depend heavily on corporate sponsorship, while individual artists may be supported informally by patrons who are often art collectors. The fifth is public patronage where revenues are raised from taxation to encourage ‘the deliberate maintenance and extension of the arts as matter of general public policy’ (Williams 1981, p. 43). For Williams, ‘certain arts which are not profitable or even viable in market terms are sustained by specific institutions such as foundations, by organizations of subscribers, and still by some private patronage’ (Williams 1981, p. 55). For example, governmental institutions – ‘bodies wholly or significantly financed from the public revenue’ (ibid) such as the Arts

Council and Arts NSW - administer a system of grants and subsidies. These are highly competitive and many draw on a shrinking pool of funds. Some of these public institutions have as employees cultural producers who earn enough through this means to support their artistic practice.

Given these types of patronage, Williams then suggests there are types of artists associated with each form of patronage. There are those who maintain control by offering their own work for direct sale. These are in fact 'dependent on the immediate market' (1981, p. 44). Most artists don't sell their work directly to the buyers in the marketplace but have intermediaries who do it for them, usually for a commission or percentage of the sale. These intermediaries may be gallery owners or agents. The intermediary may become, depending on the leverage involved, in effect an employer of the artist. Related to this agent-based model is the artist who sells their work directly to an intermediary rather than paying a percentage of the profits to them. This intermediary invests in the work outright in order to make a profit for themselves. Then there are market professionals who depend on the frameworks of copyright in the form of royalty payments and/or to engage in contracted work. A resale royalty scheme commenced in 2010 in Australia under which artists receive 5% of the sale price when eligible art works are resold commercially for \$1,000 or more. Auction houses and galleries are required to report sales to the Copyright Agency which disburses payments. Between 10 June 2010 and 15 May 2013 the scheme generated \$1.5 million for 610 Australian artists. Negotiated contracts, usually to produce specific forms of work in a particular timeframe in exchange for a fee, can be an alternative to direct purchase of pre-existing works. In either case, artists are direct participants in the market process (Williams 1981, p. 47). 'In all these types of relationships with the market the artist works not only for themselves but also for the projected demands of the structured commercial space of the market' (McIntyre 2012, p. 193). Then there are corporate professionals. These artists become integrated into a corporation, albeit for a limited period of time, and the ownership of the work is deemed to reside not with them 'but sits within the combined efforts and causal processes of the commissioning corporation' (ibid). They work for wages to produce works that range from portraits to public art, installations and murals. Artist residencies generally pay little more than a stipend but they provide support for artists to work in a conducive environment.

11.4 Operational Methods

Some artists are self-taught but most undertake some form of formal training at art schools before establishing a studio, either in their home or off-site, where they produce their works. Collaborative work spaces have become increasingly popular as a way to manage studio costs and provide stimulating social contact. Artists generally seek representation through an established gallery where their work will be exhibited in solo or group shows and a commission is generally paid to the gallery on sale of a work. Gallerists manage the careers of their artists to some degree. They support them but also exert significant control over the artists contracted to them, usually restricting their freedom to show elsewhere and taking a cut of any prize money won. One way artists can reduce the costs of sales is to sell direct to the public through 'open studio' events while some artists show in artist-run spaces where costs are minimal. In this latter case the artist may be required to staff the show during the period of exhibition. Exhibition costs for artists are significant. These costs might include framing, promotion (e.g. printing of invitations) and catering for the opening. In addition, while artist-run spaces might charge a hiring fee, commercial galleries charge a commission on sales which has risen from approximately 30% to currently 40-50%. This change has accompanied a decline in the market

which has seen prices fall by as much as 40% since the 1990s and again post GFC, representing a double blow to artists' incomes. Online methods are increasingly gaining favour with artists establishing their own websites and providing an online catalogue of works for sale. Instagram has become popular as a means of promoting the work, to advertise exhibitions and make sales. Prizes, grants and residencies also offer opportunities for artists to gain funding, profile, and space and time to work. Some seek private, public or corporate commissions. Many artists will supplement their income with other related employment, especially teaching at art schools or privately.

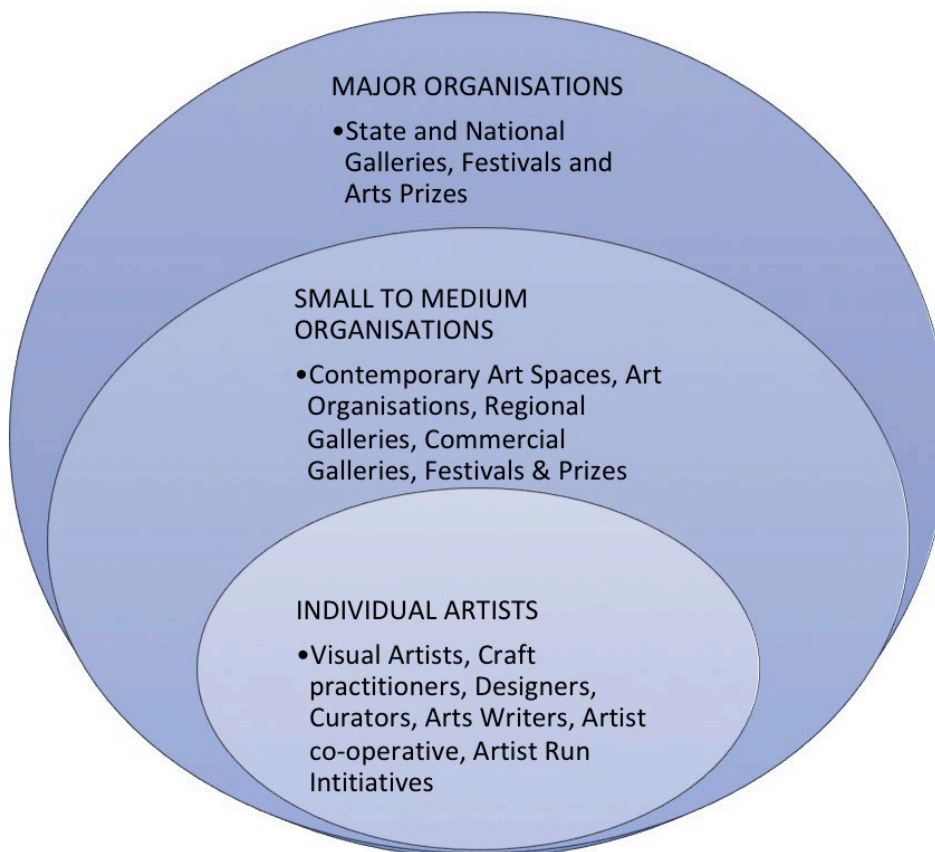


Figure 22 Visual Art Industry Operational Structure

Digitisation is also having an effect on the way the visual art world operates. As Arora and Vermeylen argue, while this area of the creative industries has been generally slow to adopt digital methods in marketing and production, with the expected exception of digital artists, the adoption of websites and the use of social media by artists and galleries has been critical (2013, p. 323). Strikingly, art museums, as they transition in their role from being custodians of cultural heritage to educators that engage and entertain the audience' (ibid), have been at the forefront of making 'extraordinary use of the technological innovations to seek out and engage with new audiences, and to make their collections available to the global community of art lovers' (ibid). In general, art consumers have much more access to basic information relative to provenances, artists, exhibitions and so forth' (Arora & Vermeylen 2013, p. 327).

11.5 Important Personnel

Martin Irvine in his elucidation of the art market indicates that the major actors, institutions, and nodes in this network comprise:

Artists, dealers and galleries, collectors, buyers (individual, corporate, institutional), auction houses, art consultants and advisors, art investment services and funds (many investment banks rolling this into wealth management services), museums and all museum professionals, art media (press, magazines and journals, websites), art fairs, biennials, international art forums like Documenta, art market services (e.g. Artnet, information aggregators, databases) as well as artists, gallerists, curators, critics, patrons, funding bodies, art school teachers, auction houses (the secondary art market) (Irvine 2009, online).

Included here are the operators of various retail outlets and collaborative workspaces that also populate this landscape with personnel who make a living and create cultural value from art.

National, state and regional galleries are operated by various levels of government and hold 'significant collections with local, national and/or international relevance and provide a strong network supporting the visual arts across NSW' (NSWT&I 2013, p. 2). Individual artists may be supported by government-funded bodies such as major galleries, as well as finding opportunities in festivals and prizes, and through commercial small to medium enterprises and commissions (see Figure 20). Artists might also run their own initiatives (ARIs) 'which provide exhibition venues, studios, workshops and resources for emerging artists and practitioners (including curators and writers). They are a key part of the sector in terms of the opportunities and support they provide, and also as locations for risk taking and innovation' (NSWT&I 2013, p. 2).

11.6 The Hunter Region Visual Arts Sector

11.6.1 Background

Despite its heavily industrial and mining reputation, the Hunter Region has a strong history in visual arts. Outstanding early indigenous art can still be admired at locations including the Biami Cave and Mount Yengo. Colonial artist Joseph Lycett painted unique scenes of Newcastle life in the early nineteenth century, including the Awabakal and Worimi people. Drawing and painting classes were taught at Newcastle Technical College and School of Mines in Hunter Street from the time of its establishment in 1896. Despite the city's focus on economic development in the early to mid-twentieth century which was the era of BHP dominance, progressive voices argued for a role for culture. Newcastle Region Art Gallery's collection began in 1945 with a major donation from Roland Pope. Artists emerged, many home-grown. For example, William Dobell was born in 1899 in Newcastle and died in 1970 at Wangi, Lake Macquarie. He is perhaps best known as a portrait painter, winning Australia's pre-eminent prize for portraiture, the Archibald Prize, on three separate occasions: 1943, 1948 and 1959 (LMCAG 2017, online). Margaret Olley said of the regional capital:

Newcastle produced a lot of painters. Besides Dobell, John Olsen came from there, Billy Rose, and Jon Molvig. It's a very painterly city. The sea breeze blows all the smoke out west. I just loved it (Stewart 2005, p. 381)

Other prominent Australian artists who were born or lived and worked in the region include Matthew Perceval, Mary Beeston, Shay Docking and Michael Bell. Margel Hinder's Captain James Cook Memorial Fountain in Civic Park, Newcastle, finished in 1966, is seen as an outstanding example of modernist sculpture.

In 1957, honouring the commitment to original benefactor Roland Pope, Newcastle Region Art Gallery was finally established at the War Memorial Cultural Centre, co-located with the library

and Conservatorium. Lyndon Dadswell's towering sculpture 'Man and Woman' dominated the foyer. William Bowmore was a major donor to the gallery, providing Rodin bronzes, among others (Williams et al. 2015.) The gallery moved into its current purpose-built location next door to the Cultural Centre in 1977.

Over this time the traditional mode of income-generation for visual artists has been the sale of art works through galleries. This mode continues; for example, the most prominent Hunter Region artists show at leading local galleries such as Curve, Art Systems Wickham and Gallery 139. Some have been picked up by major commercial galleries in Sydney. These include Rachel Milne at King Street Gallery on William, Michael Bell at Ray Hughes and Peter Gardiner at Olsen Gallery. These capital city galleries provide access to a larger, more moneyed market. Regional artists find that the price of their work can almost double once they show in Sydney.

While Newcastle provides the most opportunities, artists elsewhere in the region are supported by organisations such as Arts Upper Hunter (AUH) which engages in numerous projects to support regional artists. For example, the Art Trail Weekend, usually held in November, gives access to some forty sites including home studios, galleries, outdoor sculpture, museums and pop-up exhibitions. Towns included on the trail are Maitland, Paterson, Vacy, Dungog, Singleton, Muswellbrook, Denman, Sandy Hollow, Aberdeen, Scone, Murrurundi and Merriwa (AUH 2018, online). In a recent SWOT analysis for Regional Arts NSW, the AUH reported that there was a 'strong culture of painting, exhibition and prizes throughout the region; strong culture of textile art, in particular quilting, and exhibition throughout the region; a number of artists making ceramics, sculpture, jewellery, photography and furniture; [with] art societies/groups in each LGA' (RANSW 2018, online). Some of the regional weaknesses in the Upper Hunter included 'no tertiary arts education; very little touring theatre product; negligible locally written or devised performance work; and a shortage of arts opportunities for young people (apart from school and dance)' (RANSW 2018, online). The opportunities for artists working in the hinterland were perceived to be relative to their proximity to Newcastle and the chance to include arts and cultural activity in non-arts festivals. The installation of the NBN and information technology was also seen as very important.

Some artists from the region, especially those with more of a craft or design focus, sell their work at markets such as The Olive Tree Markets or Hunt and Gather in Newcastle. Merchandising is an option for many artists from the region [also see the Design Sector]. Michael Bell, for example, has designed for Mambo clothing and Trevor Dickinson for Fred Bare and Disney while James Drinkwater's prints are for sale through The Store, the Fairfax online marketplace. Graham Wilson's art work features on T-shirts, mugs, posters, cards and prints sold in his retail outlet at The Emporium, a Renew Newcastle site which operated until 2017. Liz Anelli and Trevor Dickinson are also Renew Newcastle artists whose graphic work is sold in a number of locations including, respectively, Melt Gallery, Newcastle Maritime Museum and the National Library in Canberra. Sculptor and poet Richard Tipping's text-based art work, often produced in the form of amusing and ironic signs, sells nationally and at The Museum of Modern Art in New York with over 20,000 sales to date.

Regional artists also enter art prizes but these are few in number and hotly contested. The Archibald Prize which was won in 2015 by Newcastle artist Nigel Milsom, offers \$100,000 while The Moran Portrait Prize, also won by Milsom in 2013, is Australia's richest, offering \$150,000. Two nationally significant prizes are run in the Hunter Region. The Kilgour Prize, which was established in 2006, is administered by Newcastle Art Gallery and is an annual art prize for figurative and portrait painting worth \$50,000. The Muswellbrook Art Prize was first awarded in 1957 and has a prize pool of \$70,000, with \$50,000 for the Painting Prize and

\$10,000 each for Works on Paper and Ceramics. The Brett Whiteley Travelling Art Scholarship is worth \$40,000 plus a three-month Paris residency. In 2014, Newcastle artist James Drinkwater won this scholarship. Regional artists especially benefit from an opportunity to travel and this is recognised in The Brenda Clouten Memorial Travelling Scholarship for local young achievers administered by the Maitland Regional Art Gallery and The Jennie Thomas Travelling Art Scholarships previously offered by The University of Newcastle.

Hunter Region artists have also undertaken residencies at Bundanoon in the Southern Highlands and Hill End in Bathurst. Some go further afield. For example, Michael Bell undertook an Australia Council funded residency at the Cite Internationale des Artes in Paris in 2011. A local residency scheme is operated by The Lock-Up Cultural Centre in Newcastle, attracting national and international artists.

Teaching provides an income for many visual artists in the region. For example, John Turier has a strong relationship with Hunter TAFE. Employment opportunities through University and TAFE, however, have declined as a result of cuts to art program funding. Many artists in the region, for example Peter Lankas, John Morriss, Anne Caddey and Steve James, run classes privately.

11.6.2 Artists

Leading local artists who are full-time professionals include Archibald Prize winner Nigel Milsom, Kilgour Prize winner Peter Gardiner, Dino Consalvo, Brett McMahon, Pablo Tapia, Aaron Kinnane, Dallas Bray, Rachel Milne, Nicola Hensell, John Turier, the Strutt sisters, Meredith Woolnough, Lezlie Tilley, Vera Zulumovski and Jane Landers. Notable amongst the younger generation are James Drinkwater who was the winner of the 2014 Brett Whiteley Travelling Art Scholarship, Lottie Consalvo, Jo O'Toole and Shan Turner-Carroll who was the winner of The National Tertiary Art Prize in 2013.

Jo O'Toole is a painter and sculptor who completed a Bachelor in Fine Arts at RMIT (Melbourne) and postgraduate studies at Sydney College of the Arts. She moved to Newcastle in 2007 and studied at Newcastle Art School (TAFE) where she completed an Advanced Diploma in Fine Art, majoring in sculpture. She is now self-employed and her studio is located in a new industrial workshop at 7 Edge Street Boolaroo which is home to Woodmakers, a business she runs with her husband, furniture maker Warwick O'Toole, and his brother. The workshop is fully equipped with woodworking tools and machinery for cutting timber. Jo says, 'You need your tools. You can't work without them. And we also have a metalwork area as well to do welding. It's great!' (O'Toole i/v Oct 2015).

As a sculptor, painter and furniture designer, O'Toole believes her 'job is to put art into public spaces, to exhibit in galleries and sell my work' (ibid). She uses mostly timber and recycled materials:

I love 3-D form – sculpture – and I will always try to choose a material like timber or metal, recycled metal because it has character and I like working with those materials. There's a lot of satisfaction working with timber, steaming it and bending it and making it work in a different way to what you see as a conventional piece of furniture. Sculpture is different (O'Toole i/v, Oct 2015).

The materials needed for sculpture can be costly. She responds to this challenge in an innovative and environmentally-friendly manner:

I approach everyone! I don't see the harm in it. I know how it is in industry - you use material and you have scrap material left over and that scrap material goes into a bin and they throw it out. So if you let people know – and we work in an industrial area so people know – they'll often ring me and say 'Look, we've got this material. Do you want it?' so for a sculptor it's fantastic. Sometimes I say 'no'; often I say 'yes'. I needed a whole lot of pallets the other day to do a project so I went around the industrial area and asked and I came back with more than enough. So if you let people know what you do and if you state that it's for art and it's not for personal gain really, it's for sharing with the community with art projects, they are quite often willing to help (O'Toole i/v Oct 2015).

O'Toole has developed her skills informally as well as through formal training. Having her sculpture studio located close to manufacturing businesses has not only provided access to materials for her sculpture, including timber and metal off-cuts that would otherwise be wasted, but also skills. She has learnt a lot:

Just working with trades, learning a lot from industry and tradesmen, metalworkers, welders, just being surrounded by them and learning their techniques and they are quite friendly so if you asked them about a skill they would usually show you. We were in an industrial estate [in Sydney] so there would be other factories around us that had different skills, different trades and we would share our trades and learn from each other, help each other out ... The factory doors often open up into a car park or a courtyard so there would be people coming and going all the time and you would have conversations with them. I find I'm interested in what they make and they would come in and you show them what you are making. You bounce off each other (O'Toole i/v Oct 2015).

O'Toole also runs a small art workshop at Belmont on Lake Macquarie where she teaches children's art classes. Her income comes from a portfolio of pursuits which include sales of her work, teaching and art prizes. She says 'I work really hard and I've always had a part-time job and I just use that money to buy art supplies' (ibid). The prizes she has won include the Sculpture section of the Gosford Art Prize, when she was still a student at Hunter TAFE. O'Toole also won the Newcastle Emerging Artist Prize and the Ford Grant Scholarship, funded by local art patrons Chris and Helen Ford. This allowed her to buy the materials for a large sculpture installed outside Newcastle Art Gallery. She also won the Artist in Residency Prize at Sculpture in the Vineyards which funded a week in the vineyards to do research. The work from that was exhibited in the next year's Sculpture in the Vineyards. Jo says that winning prizes 'helps immensely [since] to win a prize and get some money in a bulk form is fantastic as it just means you can put that money into buying more expensive materials to do the next sculpture' (ibid). For her, art is unlike other professions in that:

It's not a conventional business. You don't know what your market is. You don't know who the people are that want something until they arrive on your doorstep really, or you have that conversation or they walk into a gallery and like your work and buy it. I don't do it to be commercial, that's probably a difference (O'Toole i/v Oct 2015).

While O'Toole gains feedback on her work not only from her buyers, art prize judges, gallerists, and art critics, social media has become increasingly important:

There are people who have their own blogs and with social media now they will tag you in their blogs and they will do reviews. And I think some of the

independent galleries will actually go and ask someone to write a piece and then blog about it. That's a great way to get your work onto social media and out into the public ... There's a woman who also works for Curve Gallery and she'll do all the local exhibitions and blog about them. There's a few in Melbourne too when I've been in sculpture prizes down there and they tag me in their blogs (O'Toole i/v Oct 2015).

Jennifer and Catherine Strutt operate as The Strutt Sisters. They have been finalists in NSW Art Gallery's prestigious Sulman Art Prize, have won the Muswellbrook Art prize and exhibit in Sydney with sell out shows. Working from a studio at Newcastle Community Art Centre (NCAC), the Strutt Sisters run two businesses. These are Lightweight Funky Jewellery (Strutt 2016, online) and Bespoke Surface Design (Strutt 2016a, online). The latter is a new initiative which sees their distinctive collage-based, lacquered designs applied to interior surface panels for commercial and residential interiors.

If only we thought of this 10, 15 years ago, we wouldn't be in galleries. But we studied fine art, we didn't do graphic art, we didn't do interior design. We did fine art. So we've got to try and make good with what we know – we have a product but we don't have that way of thinking. So with the product, we've got to think differently and look at different people and the way they work now. Like more commercially. That's exactly where we are now. We want to aim our product at interior designers and architects and developers – they're the three groups of people we need to pitch our ideas and work to now, not so much galleries (Strutt Sisters i/v Aug 2016).

While an example of their work is the café counter at Goodness Me Organics in Adamstown, they have begun to push further afield. In 2015 their work featured in the Grand Designs exhibition in Sydney which generated media and commercial interest. This is a move away from their fine arts background and they have had to work hard to make their art a sustainable business. Jennifer says in relation to their dedication and skills: 'if we were sports people we'd be sitting pretty' (ibid). They are no longer doing jobs for free and they have taken that economic concept a step further and removed their art works from galleries. There are a number of reasons for this, as they explain:

First of all we collaborate, and we've collaborated since about 1995. And therefore anything we make and sell we have to halve. Newcastle seems to cap their total spend on an artwork at about \$600-\$800 and that's it. That's their limit and on the odd occasion they may stretch to \$1500 but only if they can justify the spend. That's not our limit, so they're not our customers, those ones. Our customer's may not even be here in Newcastle. Then if we have an art dealer they're going to take 40% so we have to share 60% which leaves us each personally with 30%. So in reality the gallery is getting MORE than us. And the exhibition goes for 2 or 3 weeks and then you're in a hole again (Strutt Sisters i/v Aug 2016).

As a result the Strutt Sisters have had to find a more reliable income stream, and their jewellery has provided one avenue. Funky Lightweight Jewellery is sold annually at Newcastle Olive Tree Markets and there is a website where jewellery can be purchased.

Our market found us originally. People who love quirky stuff, colour and humour. Normally they have a bit of spare cash or know they can pay it off with future spare cash and truly understand and appreciate what we are trying to do. Our

jewellery ranges from maybe nearly 20s to late or mid 60s, women, which is pretty large. And it's the same kind of people whether you're in Newcastle, Sydney – we haven't tried Melbourne – but generally the same kind of people where they're leaning towards the art and craft and design movements or interests, and are a bit open to colour and design (Strutt Sisters i/v Aug 2016).

Meredith Woolnough approaches the process of income-generation through her art slightly differently. She is a textile artist who says she 'draws with a sewing machine' (Woolnough i/v, Sept 2015). Using a quilting machine, she stitches intricate designs often based on natural forms, such as coral or leaves, then washes the fabric away, leaving behind a colourful embroidered three-dimensional piece which is then mounted and framed behind glass.

Prior to taking up art practice full time, Woolnough worked as a full-time secondary school teacher. She developed her striking embroidery technique ten years ago during her Bachelor of Fine Arts Honours year. Woolnough draws inspiration from nature and says she finds scuba diving a great way to discover new designs. Recently she has returned to study in the specialised Natural History Illustration degree at the University of Newcastle. She has been making a sustainable living from her art since 2013. Her work is in demand. She holds regular solo exhibition. In 2015 alone, she held an exhibition in Bowral at The Milk Factory, and six other exhibitions at places like Timeless Textiles in Newcastle and Arcadian Artists Trail in Dural. The smaller of her works sell for \$250 and the bigger between \$3,000 and \$5,000, with some commissioned work selling for \$10,000.

Woolnough worked from her home studio for two and half years before a space became available at Newcastle Community Arts Centre in Newcastle West. She felt that working from her home wasn't the most productive experience:

I need to go to work. I work best with that kind of structure. So getting a space at Newcastle Community Arts Centre has been great for me. I come, I do roughly a 9:00 to 5:00 day, all my work is here. I can leave it in whatever state and then leave the door and I've left work behind, rather than constantly going upstairs after dinner and working on things and never leaving work. So it's been a really good thing. And then when I'm here I'm just doing work, there's no other distraction, not even a cat. My studio space is part of the Newcastle Community Art Centre and it's a really great space but I don't think many people know about it. It's basically a huge building full of artists and it's a heavily subsidised rent so that artists can afford to have a professional space that we can work in. And I got a studio space here about two years ago, beginning of last year, and it was a really big step for me and a really positive step for my business and my practice to have that professional space. The Community Arts Centre has many other functions; it's got a gallery attached to it and it's got rooms that people can hire out to teach workshops and run events, there's a theatre downstairs, so it's got all sorts of things going on in the broader art community, but it's also a community of artists within itself (Woolnough i/v Sept 2015).

Unfortunately, Woolnough's enthusiasm for the Community Arts Centre was not shared by Newcastle Council who sold the building after 27 years, causing it to relocate to temporary premises at the end of 2016.

Woolnough's work as an artist has meant she has had to learn to photograph her work, to blog about it and to promote her work via social media but her work has always sold well.

When I started to do this type of work, I found that the response was really good, people were really interested in it, they were really fascinated by it, and it was selling and I was getting this interest ... Following art school I did what a lot of art students do and became a full-time secondary school teacher of Art and Design for about four years and there was parts of that I really loved, parts of that I didn't like so much. And while I was teaching I was still doing this on the side, so my school holidays were like hard core art-making sessions and I had exhibitions happening, and as that side of my life - which I was passionate about - grew in interest and popularity I started to step back from the teaching a little bit. And then it's kept going and I guess I'm kind of lucky (Woolnough i/v, Sept 2015).

While she knows she has been fortunate in comparison with other artists, she does encounter a certain attitude that is typical of Australian culture:

I think a lot of people undervalue the work that artists do. I still have people quite close to me, they don't mean to but they still probably see what I'm doing as a bit of a hobby and they think that I'll grow out of it and go and do something else and get another real job. And they don't mean to be insulting but I think there's just a real lack of understanding that this is my job, this is how I make my living now and it's a real thing [laughs], even if it's not a real common thing. I'm lucky that I think because I produce such a particular product and people can see what it costs and how I sell it, I haven't had too many people approach me and want the free job or the job for exposure or things like that ... I think a lot of creative people don't take themselves seriously or have a hard time doing that, maybe because they enjoy it and it's seen as a hobby in some areas, so taking that step from hobby to professional is sometimes a hard thing to allow yourself to do (Woolnough i/v Sept 2015).

But she insists that working in this environment has been very nurturing.

I think that's maybe why so many artists are thriving in Newcastle because they support each other and, as I said earlier, I think that support and that collegial support's really important in these kind of industries because otherwise it feels really lonely when you're just working for yourself and working on your own things ... It's very much a real job. It's not a typical job, it's not as stable as other things, it's not as predictable, but it's definitely a job. It's my job (Woolnough i/v Sept 2015).

Rachel Milne is a successful, full-time artist who paints in oils. She describes her style as impressionistic, figurative and painterly. She is inspired by the world she encounters.

That reality is so beautiful when you really look at it, light on surfaces and the way edges disappear and colours and tones. You sort of get a feel for a scene and you just desperately want to capture it. All you've got really are your two hands, your brain and some sticks with hairs on the ends and some colours. Your colours will never replicate the colours in reality and your hands and your brain will never quite capture what's in front of you because it is kind of impossible, but you can try because trying is exciting! Even if you just get a little sense a little touch of what it is that you feel, and you translate it and you can say it but it's never satisfying enough. And that is what drives me. I guess it's like anyone, like a musician playing a piece of music. He learns the notes and once he knows the

notes really well he can express emotion and he can say things with his music (Milne i/v Sept 2015).

Milne attended the Royal West of England Academy where there was a strong emphasis on the intellectual side of art. She became steeped in the 'New British Art' movement. Figurative painting was considered highly unfashionable if not irrelevant and Milne eventually became disillusioned with her college education. She wanted to paint figuratively and didn't want to intellectualise or philosophise about her work. After graduating, she went into set painting with a small company called Cod Steaks who subcontracted to Aardman, the animation company contracted to the BBC to produce the series *Wallace and Gromit*.

I was very lucky to get the job on *Curse of the Were Rabbit* which was a Wallace and Gromit film. Set painting is the making of a beautiful thing, and a lot of the sets that get made just don't get seen or they are destroyed. But you have to do it, because the filmmakers are like 'this is what we need', so just get on with it and you make it happen. That type of work has been great training for my artistic practice because you don't get time to be precious, you can't be weird about it, you just have to crack on. And why shouldn't you, just do it! (Milne i/v Sept 2015).

When there wasn't much animation work Cod Steaks created another company 'The Undetectables':

The Undetectables disguised mobile phone antenna with fake hollow fiberglass chimney pots. They employed all these female artists, I think there was one bloke, but eventually it was almost a female painting crew and we will travel around the country working on building sites, at the top of building, at heights, in all weathers painting these chimney pots to look like the original buildings. That was an amazing training, like working that hard, it was physically hard work and having to colour match quickly and that was brilliant. So that in a sense was great. It was really hard graft but also you just had to smash it out and get on with it (Milne i/v Sept 2015).

As well as painting sets and antennae, Milne worked for 15 years in a variety of part-time jobs to support her practice. She took on any employment that would give her three days in the studio and two days' pay. She has been a cleaner, delivered toilets, worked at the Crown Court and run an art gallery. She says 'everything was all about facilitating the painting, painting, painting. It really didn't matter what I did as long as it brought enough money to paint' (Milne i/v Sept 2015). Milne has exhibited in Bristol, Bath, London, Sydney, Canberra, Bathurst and, of course, Newcastle (Milne 2017, online). In 2010 she was shortlisted for the Holbourne Portrait Prize in the UK and won the Singleton Portrait Prize in 2013. In October 2015 she had her first solo show at King Street Gallery in Darlinghurst, Sydney with works ranging in price from \$880 to \$4,800. Her second solo show at the same gallery was held in October 2017. A year earlier she had been accepted as the June 2016 Artist in Residence at Haefligers Cottage, Hill End, NSW (Milne 2017, online). Milne was a finalist in the prestigious Wynne Prize in both 2017 and 2018.

Milne describes her approach to the business of art-making:

I want to paint all the time therefore I have to make money out of it. That's been my way of thinking I guess ... If I think of it as a business it protects my heart from getting bashed about in the art world. If I think about it as a business then I can paint what I want to paint and sell it and move on more quickly. In another sense it is a necessity, if I want to paint I need to make money, if I want to make

money I have to think like a business. I think the idea of the artist as someone who is drinking and crying and having massive ups and downs is a myth. I think if you want to be an artist you have to be professional but you have to work very hard, you have to be at the top of your game and you have to understand it as a business to an extent because if you want to sell something it has to look good. Like framing and stuff you have to think about that carefully - you can't just throw something on the wall. I mean why would you buy something that wasn't professionally finished? So I have my artistic side and I have to keep that in check and look after it in order to sell and in order to produce (Milne i/v Sept 2015).

Peter Lankas is a painter who also brings a very business-like approach to his work.

I do have very clear working times in the studio. I clock and I clock off and I am really strict about my work ethic. I say to my wife, I say to people ... I'm going to work. If someone says to me 'Can you do blah blah for me?' I say 'Sorry I can't cos I'm at work'. So I look at this as my job even though it is a very creative and rewarding thing to do because if you don't see it as a job then you never get anything done, you just fluff around and get to it later. I'm much disciplined in that respect (Lankas i/v Dec 2014).

Lankas grew up in a family of artists and in the 1980s he completed undergraduate studies at Alexander Mackie College of Advanced Education, later called the College of Fine Art (COFA). He also has a Masters degree from The University of Newcastle completed in 2005. After graduation he travelled overseas and on his return he taught himself the techniques and colour theories of the Old Masters. He took ten years off from painting from 1988-1997 and lived in a Buddhist meditation centre, after which he lived in Cairns for three years. In 2001 he took up an opportunity to house-sit in Newcastle and he has lived in the city ever since. Like a number of other artists, Lankas took up a studio at the Newcastle Community Arts Centre in Parry Street, Newcastle West. (NCAC has since been relocated to a temporary site on the Hunter TAFE Campus in Chinchin Street, Islington. Lankas was at this collaborative arts workplace for 13 years. He mounts one or two solo shows a year as well as two or three group shows and exhibits at Art Systems Wickham and Gallery 139 in Hamilton. As well, Lankas teaches painting and drawing at Newcastle Art School (TAFE) as well as privately:

I always say to my students, if you are not plugged in, then the electricity is not flowing and the hair's not standing on your arms and on the back of your neck ... it's gotta be full-on impact concentration. It is a thing of choice where you say 'alright I'm plugging in now and Boom! we are off' and if I walk out of the studio I say, 'Right, well I'm off now, I switch it off. I'm in my car now listening to the radio and I can really switch it off, I no longer think about my work'. Because for many years you are working and your mind is going 24/7 about your artwork and you drive yourself nuts because there is too many ideas and they are not being put down on paper. So I think to reach that balance, that all your ideas are being balanced with things that actually eventuate and creatively hit the paper. You've gotta turn them off and only switch them on when you want to put them down ... if you are mindful of what is happening in your head and what is happening in your body as far as tuning in and deciding I want to tune in now and tune out, that's the switching on and switching off (Lankas i/v Dec 2014).

Lankas speaks highly of the art training provided by Newcastle Art School arguing that 'it works really well, it's very well balanced in delivering the technical skills that you do need to develop as a young artist' (ibid). However, government funding cuts have meant higher fees,

the loss of courses and reduced hours of delivery. He suggests that 'because of the cutbacks we have lost a lot of training. Life drawing has gone, such an important thing in training in regards of your visual development. A course that was once two years is now one. We are losing some of the good developments' (ibid) and this is having an effect on young artist's careers.

As an established artist Lankas has seen the art market decline since the 1990s. While his larger works used to sell for \$4,500, they now sell for \$2,500. Sales used to provide 50% of his income and teaching 50%. Teaching now provides three quarters of his income. He doesn't apply for grants or residencies since 'basically I don't have the headspace or the time available to do it' (ibid). From time to time he does enter some prizes but suggest 'it's a bit like a lottery, so I probably enter an art prize with the same mental attitude as I would walking into a newsagent and deciding to buy a Lotto ticket. I certainly don't expect to win' (ibid). Despite these problems Lankas is still largely positive about the city of Newcastle, saying:

I have always wondered why working towns, whether it be Glasgow, Newcastle, Wollongong, have this really highly concentrated creative drive and a lot of people from this place kind of explode with this creative energy and ideas (Lankas i/v Dec 2014).

Kerrie Coles agrees. A landscape and portrait painter, Coles moved from Sydney in 1980 and observes:

In Sydney the opportunities seem greater and more diverse but I wonder if I would have had the same connections there as I have enjoyed here. Perhaps there are actually more opportunities here (Coles i/v Sept 2016).

Coles completed a Diploma in Painting at the National Art School in Sydney and a Diploma of Education (Art Specialist) at Sydney Teacher's College. From 1970 to 1999 she worked as a secondary school visual arts teacher employed by the Department of Education. She also worked as a Curator and as Director of the John Paynter Gallery at The Lock-Up in Hunter Street, Newcastle. She has served on numerous art committees and boards and was a founder and Director of Newcastle Art Space at Newcastle Community Art Centre. Coles has had two works selected for the Portia Geach exhibition in Sydney and her work is represented in the collections of Newcastle Art Gallery, The University of Newcastle, The Newcastle Club and HMRI Art Series, as well as in private collections in Australia, Italy, Japan, America, Canada, Switzerland and New Zealand. She has held eleven solo exhibitions and participated in numerous group shows in Newcastle, Sydney and the Hunter Valley. Kerrie has completed commissions for private clients and corporates including Newcastle Coal Infrastructure Group. She has worked as an artist full-time since February 2015. Coles believes that artists in Newcastle have a privileged position, building on a history of achievement and recognition:

Artists in Newcastle are very lucky. The city reveres its artists and there have been some very significant artists working here including Molvig, Passmore, Dobell and Shay Docking whose husband Gil was the first Director of Newcastle Region Art Gallery. Newcastle always was creative in dance and other areas of the arts as well as painting (Coles i/v, Sept 2016).

Not all artists who move to the region are drawn to the urban centre, however. John Bradley is a prominent Australian landscape artist who has been painting for 35 years and has lived in Vacy in the Paterson Allyn Valley of the Hunter Region for more than a decade. He moved to Murrurundi in 2016. Bradley's original paintings can fetch \$20,000, and he has over 400 images in print in Australia and internationally. His work has featured in Prestige Calendars for the last 15 years. He has published two books - *Blue Mountains Magic* and *A Journey through Time* -

as well as a range of jigsaw puzzles. He is known internationally for his Australian landscapes and he also paints railways and trains, seascapes, cityscapes, maritime and military craft. Bradley was formally trained as an aircraft engineer in avionics and was working as a National Marketing Manager for a large group in Chatswood for a number of years before becoming an artist full time. One of his first jobs after leaving marketing was to teach art and he often runs master classes in Newcastle. The John Bradley Studio website allows the general public to purchase original works or prints directly from Bradley himself and his originals are for sale in two Australian galleries, the Morpeth Investment Art Gallery run by Trevor Richards, and Articles Gallery on the South Coast. He also exhibits with Kevin Hills Top 10 Group, doing between five and six travelling exhibitions a year. In addition to painting, Bradley runs two other businesses, one in photographing and printing artwork and another in framing artwork. Like Peter Lankas, he has observed a decline in the market, notably the loss of purchasers in the middle band:

We used to have the bulk of our sales [in the] \$2,000 to \$5,000 bracket. What we're finding now is that they're getting back down into the \$1,000 - \$1,500 and then they jumped to the investors. We still sell \$10,000 and \$20,000 pieces but not a lot obviously. The middle ground is gone. In the better days, I'm only going back around about six years ago, I could certainly gross thirty odd thousand on a 2 day show. We have had shows recently where we've got nothing, from all of us or maybe just a few thousand. But lately we've been picking up around about \$12,000 to \$14,000 a show. I have anyway. Not everyone has and who knows if that's going to continue. It's very volatile (Bradley i/v, Sept 2015).

Touring regularly keeps Bradley in touch with buyers' tastes and he notes that older audiences want traditional artworks whereas younger audiences' preferences have changed and there is more interest in nightscapes. As a result, he is now working in monochrome and has started to paint nightscapes and light houses.

Even the galleries are noticing it. You have to reinvent yourself all the time. So basically I used to paint a lot of Blue Mountains scenes, river scenes, just Australian scenes and gumtrees, old building scenes et cetera. But what I'm finding now is I'm doing more narrowly focused things, so I'm doing Australian Lighthouses at the moment. It's really great. I'm enjoying it and they're very different. People like light houses for some reason or another. And night scenes. I never used to paint night scenes but I'm now doing a lot of them. No other artist I know paints them so it's something different and they sell well. Vertical paintings rather than horizontal paintings. I'm just trying to think of other things ... small paintings, much smaller than we ever used to paint. So we're right down into the \$500-\$600 prices, ones that are affordable. Entry-level people buy them and later they might buy a bigger one. Or they might buy a print and move up to an original. But it's reinventing and watching, and framing (Bradley i/v Sept 2015).

Bradley notes a decline in collecting as art is increasingly seen as disposable decoration.

They can buy a Chinese print from 100 or 200 bucks, hang it on the wall. As a decoration, throw it away next year to buy another one. So they're not really collecting our work at all (Bradley i/v Sept 2015).

In response, Bradley has diversified his practice with a licencing arrangement with a large North American company which operates globally to provide images for a range of merchandise

including decorator items. This connection provides him with modest returns of a few thousand dollars a year in addition to the income from his other work.

Other artists from the Hunter Region who do not live or work in the urban centre include Tia Gabriellah, Hank Den-Ouden, Charlotte Drake-Brockman and Anne Morris Lesly Nixon. They are among the 57 visual artists listed on the Arts Upper Hunter website (AUH 2017, online). Also included is David Mahony, a painter who set up an art gallery cum café in Sandy Hollow a decade and a half ago and has had his work represented across Eurasia. Didier Colstoun from Gresford trained in Fine Art and Design and creates two- and three-dimensional work in a variety of media including wood, metal, bronze and acrylic, as well as watercolours, oils and photography. Janice Hanicar from the Upper Hunter is a ceramicist but has gained an interest in painting, printmaking and sculpture after completing a Diploma of Fine Arts at Hunter TAFE in Newcastle. Irene Esteves of Muswellbrook won the Local Ceramic Prize in 2008 and her entry featured 'her distinctive torsos and some particularly beautiful finishes' (Scully 2008, online). Stuart Dawson was a protégé of the renowned Fred Roberts and his landscapes reflect this influence. Emily Esteves, who works in earthenware and porcelain, has 'exhibited widely, won many awards, run 54 workshops and led 5 Community Art Projects' (AUH 2017, online). Andrew Davis, who is located in Muswellbrook, has an abiding interest in long term community mural projects. Georgina Mason, originally from New Zealand, studied art at the Singleton campus of Hunter TAFE before pursuing an Advanced Diploma of Art at the Newcastle West campus. She has completed commissioned work, sold her pieces in galleries and mounted numerous exhibitions. A mixed media work of hers was acquired by the Muswellbrook Regional Arts Centre for its collection. Rene Braeger works in watercolour and has lived at Paterson in the Hunter Valley, NSW since moving from Sydney in 1990. She studied Ceramics at the National Art School, East Sydney in the early 80s and completed a Master of Science (MSc) degree by research into the suitability for use in ceramic glazes of various rock types found in the Hunter Valley (AUH 2017, online).

Painter Denise Hedges is a Wanaruah woman. Wanaruah land borders the Liverpool Plains in the north, stretches south to Wollombi, lies east of Sandy Hollow and Merriwa and stretches across to the Barrington Tops. Hedges has 'sold a lot of art to people from all over the world' (Emberson 2015, online) and she has been associated with the highly successful Ungooroo Aboriginal Corporation in Singleton.

Each year Ungooroo organises the Wupa Art Prize, a project close to Aunty Denise's heart. 'We have a big opening night and then the artworks go to seven or eight venues around the Hunter Valley, people can follow the trail around and see different artworks ... We like to get some of the young ones so we can mentor and help them. Last year Ungooroo donated canvases and paint to the artists to help them along.' Aunty Denise has been an artist for most of her life, choosing to attend TAFE later in life to learn more about her culture and history. 'I'll be doing art until the day I die ... I enjoy seeing people's faces when they look at the art and they start to understand it ... If I sell a piece then I go out and buy some more canvases and paint. It's not about selling, it's about telling the story' ... Mother of two and grandmother to three, Aunty Denise wants her children to be proud of their heritage and hopes to pass on her family history to her three granddaughters. 'As you get older you embrace your culture and you want to know everything about it. That's what I tried to do and that's what I tried to pass down to my children' (Emberson 2015, online).

Leanne Atkins from Dungog works on commissions and sells through her own website. She grew up drawing life in small rural communities.

Growing up on the land with hard working farming parents has influenced my perspective on life and established the values I have today. This is reflected in my art work – always taking time to look and appreciate the beauty in the small things that surrounds me from painting a simple daisy growing at the back door to a commission for a local farmer of his old dog that had sadly passed. With each new piece of work comes an exciting new challenge and sense of achievement knowing I can give back my own interpretation of a subject that is personal and pleasing to the eye (Atkins 2017, online).

Atkins sells through her website a variety of merchandise such as cushion covers, ceramic tiles, fridge magnets, coffee mugs and key rings, all of which carry her distinctive art work. Her work has been written up in *Art Edit* magazine and she generously donates a work of art annually to charity events such as Relay for Life which was held in Dungog in 2015 (Atkins 2017, online).

11.6.3 Photographers

There are many photographers working successfully in the Hunter Region. Some of them are included here. One is Roger Skinner, an award-winning photographer from Scone and contributor to ABC Open, an online forum that was run by Anthony Scully. He claims:

Light is the basis of all life. Photography is described as light writing. Hence it becomes the written language of light. The light etched image of itself, the new hieroglyphics, the story teller of now for the future, the history of life. It is good to be an interpreter in that history (ABC Open 2017, online).

Before taking up photography full-time, Skinner worked for Rio Tinto Coal in Queensland and the Hunter Valley as an eProcurement Co-Ordinator and an Inventory Controller. He works on commission, doing weddings and portraits, and believes in photography as art. His personal philosophy is set out on his Linked In page:

The bourgeois definition of reality is the maintenance of the status quo, the revolutionary definition of reality is the sum total of all possibilities. The pathway to success is not the one you follow ... it is the one you make. More people are excited by the provocative than are comforted by the mundane ... and you can quote me! (Skinner 2017, online).

Skinner volunteers as an Education Officer at the Muswellbrook Regional Arts Centre and is involved in collection management there. A great user of digital media, Skinner promotes his work on Snappr.com and Imageopolis. He also teaches photography through his own Upper Hunter photography studio. Courses include:

Ways Of Seeing, Visual Awareness, understanding the power of ISO settings, capture methods and file size white balance settings, RAW Vs other capture methods, programme modes, archivality of images etc. A detailed study and analysis of composition is followed up with a practical session in the field or the studio, a review session then a final session discussing storage methods, presentation methods framing book publication and marketing (Skinner 2017, online).

Skinner has been awarded first prize in a number of competitions including the Josephine Ulrick Photography Prize 1999, McGregor Prize for Photography, and Slide Of The Year, Northern Photographic Federation (Skinner 2017, online). He is an Associate of the Australian Institute of Professional Photography and an Honorary Life Member of the Muswellbrook & Districts Camera Club. His photographic publications include *The Soft Underbelly*, *This Is Japan*, *The Nude: Interpretations* and *Rossgole Meditations*. Skinner published *A Life in Light: 50 years of Photography* in 2015.

Allan Chawner, originally from Lismore, now resides in Newcastle and has been a photographer of note for some time:

Fine art photography and the moving image are the basis of Allan Chawner's artistic practice. His artwork is based around notions of sense of place in portraiture and landscape. Over many years Chawner has consistently shown exhibitions of photographs and collaborated with writers or composers. He presents exhibitions internationally and has also developed links with small communities, exhibiting in venues outside mainstream art galleries. His work is a response to identity: both of the self and of the communities. Dr Chawner has [practised] in visual arts since 1978 and remains a Conjoint Associate Professor of Fine Art at The University of Newcastle (Chawner 2017, online).

Chawner has exhibited extensively throughout Australia including at Newcastle Region Art Gallery, New England Regional Art Museum, Hawkesbury Regional Art Gallery and Lake Macquarie City Art Gallery. Internationally, he has exhibited at Museum of Art Seoul National University, ME Gallery (Beijing) Poland Drozdowice Chamber, New Zealand Centre for Photography (Wellington), Exposition Bibliotheque Universitaire (La Rochelle, France), Komare Cultural Hall (Shiida, Japan) and many more.

His Kalkadunga Man Performance History multimedia work with DVD and CD toured in 2009-10 to a number of venues throughout Australia. He often works closely with musicians. For example he visited Houston in the USA to photograph in the Rothko chapel and from this produced a work to project on a screen behind the performers at the opening of the Melbourne Recital Centre. The Centre also commissioned Chawner to provide images of ANZAC Cove in Turkey to accompany The Consort of Melbourne in a performance with projections presented on ANZAC day, 25 April 2009 (Chawner 2017, online). Chawner also collaborated with composer Andrew Chubb on the 'Meditation on Bar Beach' project where they worked on an installation of a digital projection on three screens which was shown at the Newcastle Regional Art Gallery in Newcastle and St Mary's University Gallery, Halifax, Nova Scotia.

Chawner's collaborative vision and interest in the environment is reflected in one particular project:

In August 2008, photographer Allan Chawner and environmental ethicist Glenn Albrecht set out in a helicopter from Newcastle to photograph Hunter Valley mines and the countryside surrounding mining areas. Their intention was to generate visual information for later use in programs and projects associated with the concept of solastalgia, which Albrecht had formally recognised and was continuing to research. As they flew over Singleton, out to Muswellbrook and Rouchel, then north toward Stroud and Gloucester and back via the west of Maitland, Chawner took photographs of the landscape below, looking at the visual impact of the mines on surrounding farms and built up areas. Solastalgia is at the heart of Chawner's photographic work. His understanding of, and passion for the

land and his intimate and long-established love of the Hunter Valley is apparent. Chawner's photographs reveal the devastation facing the people of the Hunter. They give visual form to Albrecht's project of solastalgia, aptly describing the sense of loss that might be felt by people affected by the mining industry directly or by its visual impact. In Chawner's images the contrast between natural forested areas, cultivated farming land and the sprawling mines could not be greater. The places may still be there, but they have been irreparably changed. They are no longer 'home' to the people who have lived on, and cared for, the land that has sustained them for generations, but have been transformed into something else. The music by Ross Edwards, *Veni Creator Spiritus* (1st movement), as performed by Tasmanian Symphony Orchestra, Richard Mills conductor, selected by Chawner for his work *Life in your hands*, provides a sympathetic soundtrack to the powerful images. Curator, Meryl Ryan (Chawner 2017, online).

Chawner's photographic publications include *Soundings* (2001), *Beach Houses Down Under* (2006), *Between the Ceiling and the Sky* (2009), *Vision Mexico* (2009) and *The Rouchel Bushman's Carnival & The Rouchel* (2009). *Illuminations Newcastle* came out in 1997 and Chawner continued his investigation of the city through the 'Newcastle on the Edge - Panoramic Visions of Newcastle on the Coquun Hunter River' project. It 'is an outdoor exhibition of 7 panoramas of Newcastle dating from the 1812 to the present. The exhibition includes reconstructed historic photographs and contemporary photographs taken from the same sites' (Chawner 2017, online).

Robert Watson photographs the city in an innovative way. He creates overlays using historic images from the University of Newcastle's Cultural Collection combined with modern photographs taken from the same spot the older ones were shot, drawn or painted from. He imports these into Photoshop and pastes the old images as a new layer, manipulated to fit and flattened ready to export. (ABC Open 2017a, online) These images have proven popular and were part of the Now and Then exhibition mounted at the Museum of Sydney (ibid). Watson runs his own commercial photography business concentrating on weddings, portraiture and travel and his 'images are available for purchase as limited-edition block mounted and framed, individually signed and numbered pieces' (Watson 2017, online). Watson and his team 'have captured over 1,800 weddings locally and internationally [and] shoot weddings from London to Bali and everywhere in-between' (ibid). His portraits are shot 'on location or in the studio with optional make-up artists and hair stylists' (ibid).

In 2016 Newcastle photographer Catherine Croll was contacted by a documentary crew from Chinese state television network CCTV 'about her role in the re-creation of China's nationally significant Long March' (Virtue 2016, online). As a photographer Croll played her part in 2012 in a recreation for the 80th anniversary of The Long March which was sanctioned by the Chinese government and she 'was allocated the Guizhou province to photograph'.

I was able to explore that area, I was able to take a driver and a translator, and I was able to retrace a part of that Long March ... We walked through stone villages with cobbled streets that were 600 years old [and] hadn't changed at all ... The Chinese were very keen to document this new Long March that China is undertaking all over the country - marching towards prosperity (Virtue 2016, online).

A hardcover book, *China: The New Long March*, resulted. Croll was acknowledged for her contribution to the Australia-China relationship in the field of arts through her selection as one of four finalists in the inaugural Australia-China Achievement Awards announced by the

Australian Prime Minister during the visit of the Chinese President Xi Jinping (Croll 2017, online). She is the founding Director of Cultural Partnerships Australia established in 2010 and has held the position of Director Special Projects at Red Gate Gallery in Beijing since 2009. She is a member of the prestigious International Association of Art Critics (AICA) (ibid).

After graduating with a Degree in Fine Art from Alexander Mackie CAE, Croll travelled to the UK, USA and Europe documenting the performances of The Ramones, Graham Parker, The Go Go's, Rubber City Rebels, Iggy Pop, Tom Petty and the Heartbreakers, Bruce Springsteen, Joe Jackson, Madness, Sports, The Troggs, Lena Lovich, Blondie, Mental as Anything and The New York Dolls. Croll has documented the performances of many Australian bands including The Black Sorrows, Captain Matchbox, Sports, The Birthday Party, The Laughing Clowns, The Saints, The Sunnyboys, The Shy Imposters, The Flaming Hands, Radio Birdman, The Visitors, The Hitmen, The Otherside, Surfside 6, The Reels, Subversion, The Scientists, Coupe de Ville, INXS, The Teeny Weenys, X, Filth, The Lipstick Killers, The Hoodoo Gurus, The Sparklers and Billy Field! Catherine's photographs have been published in a number of international music magazines and in Australia including RAM magazine, Roadrunner, Australian Record Buyer's Guide and Rolling Stone Magazine. She has also been employed to take studio and session photographs for the Go Go's (LA), The Plimsoles (LA) The Rattlers (NYC), Graham Parker and the Rumor (London), Nick Lowe and Dave Edmunds (London), The Cure (London), The Shy Imposters (NSW), The Passengers (NSW), The Saints (AUS) and The Sunnyboys (NSW) (Croll 2017, online).

Croll worked as a staff photographer for International Record Buyers Guide and her work has appeared in *Rock Australia Magazine* (RAM), in Clinton Walker's book *Inner City Sound – Punk and Post-Punk in Australia, 1976-1985*, and *Tales from the Australian Underground* published by Festival in 2003. She featured in the 'Women in Rock' exhibition held at the Judith Wright Centre in Brisbane in 2003. She has self-published three books: *Coming Home: 37 Chinese Australian Artists, Beijing* (2003), *China: A Portrait - An Anthology of Chinese 'Faces'* (2007) with her first anthology of poetry called *I Thought It Was Safe* published in 1993 (Croll 2017, online).

Katrina Partridge is photographer whose awards include the RAS of NSW Award of Excellence for Rural Subject Photography. She has been shortlisted for the Moran Contemporary Photography Prize. She is based in the Upper Hunter where she 'specialises in equine, real estate and rural photography' (Partridge 2017, online). Prior to taking up photography Partridge worked extensively in PR and marketing, working for seven years in Hong Kong. Her clients include 'some of Australia's and indeed the world's largest thoroughbred horse studs and associated service providers, real estate agents, government agencies, aged care service providers, and a number of PR and marketing agencies' (ibid).

Alexander McIntyre is a former musician turned photographer, having seen success as a songwriter, singer and bass player with Supersonic before spending time working as a soloist for a number of years in Britain [see music sector]. He attended RMIT in Melbourne on his return to Australia where he obtained an Advanced Diploma in Photography.

[It] was pretty intense but the main things I learnt out of it was the craft, how to put stuff together, how to use a whole different set of film stocks, that actual physicality of doing a heap of things and then the assisting actually taught me how to act on set, how to get work, how to hustle, how to light and how to get my own

voice through lighting and everything like that. That's where the big learning curve was. You could skip the other side of it and kind of learn on set and still be really good but I think the Advanced Diploma was a good foundation. It sort of saved me two years I guess of trying to nut it out myself (McIntyre i/v Sept 2017).

He then worked his way up.

My first assisting job was with a guy that used to shoot the Dymocks catalogues and Lyncraft. We'd also go and do corporate headshots. From there I started going around trying to get to the next level photographers. It's the same thing. You just work your way up and that was just basically running leads and whatnot and then, as I got better, in terms of being more intuitive about what photographers wanted I did some film running work. That's neither here nor there but then I started doing many of the big names in Melbourne and then there's the kind of guys that would be flying to London every second week and to Europe. They'd talk to their people over in London and New York so if there's someone coming to Australia and wanted a team they'd get me so, anyone, I'd sort of work with that way – a lot of Sydney guys that would come down. I did digital work, on set computer work. I'd be responsible for all the digital assets, the grading, making sure everything went where it was supposed to go. I was the last person you spoke to before you spoke to the photographer. It's a no-no on the set that you speak directly to the person shooting and you'd be responsible for all the lighting as well. The team, three or four assistants, would come in and have a briefing with the photographer and producer, find out what was wanted and you basically set up all the lighting with that team and you orchestrate that and then the photographer and producer would come in and tweak it just before the clients would come in and then [laughs] claim all your hard work (McIntyre i/v Sept 2017).

McIntyre has now returned to Newcastle and runs his own photography business. His website acts a promotional tool and contact point (McIntyre 2017, online).

My income comes from small contract work which will last for a day, half a day, mostly. So that's like small jobs, mid-sized jobs and larger jobs. Smaller jobs are usually around eight hundred bucks, mid-sized jobs around two thousand five hundred and larger jobs are up to around probably fifteen thousand. There's a big jump there as well and I'm not sure if this information is relevant so I'm just giving you the details. So my work comes from a referral basis. It's very rare that I'll get someone looking for a photographer and just find me. It's not how my marketing or anything works. I do a lot of agency work because it's more of a funnel. It's much more worthwhile for me to get work from an agency because there's continuing work there ... These days advertising agencies really don't exist as they were in the nineties or eighties or even early two thousands. They mainly deal with a lot of online content for socials. Probably ten percent of my work is print these days. So yeah advertising and that will cross into PR marketing and digital agencies. They all bleed into the same thing ... I'm like a sub-contractor (McIntyre i/v Sept 2017).

Balanced against those income modes is his expenditure. He has to account for the hire of a photographic assistant and his equipment is also expensive. As well as these items specific to his profession there are the general cost associated with running a business.

Where I work, that situation works on a contra-deal so I'm not outlaying money but I do have to give up my time which costs me so there's that. There's internet cost for that space, electricity for that space, there's phone bills, there's insurances which is quite massive, there's my marketing, business cards, email marketing, website, a lot of online software and ... cloud storage, hard drives. A big part of working in the digital sphere is having traceable backups and having that duplicated, if not in triple. The quantity of work that I'm turning over means that I'm using about five terabytes per year just in storage and then every four years those need to be replaced because it's not trustworthy and it doesn't have the track record for me to be completely certain of it (ibid).

McIntyre was recently contracted to take stop motion footage of a building site on the UoN campus. He installed cameras on light poles overlooking the site and these were controlled remotely through his own server in Melbourne. When he was in South America shooting, he was able to remotely command the cameras in Newcastle and download and Photoshop these images *in situ* on the Amazon, combining his aesthetic practice with his familiarity with digital technology. However, a lot of his business comes from referrals through word of mouth and this, regardless of his comfortable use of the digital, has become the most critical part of promoting what he does.

Yep. It's ninety-nine percent of it ... The only social media that I do use is Instagram because the visual communication focus of it is where I'm at and it's where my client base is mostly at. Yeah, it's integral for me. I don't post a lot but I get tagged a lot, especially in the circles I want to be hired in and I make sure that that's a focus and if my tagging drops then I make sure that I post so I've always got a presence (ibid).

And of course his experiences working in Melbourne have fed directly into his work mode here.

Same scenario. Exactly the same scenario. Just in a different city so a different scale. Newcastle doesn't get a lot of those bigger contracts so that's why my larger projects are around ten to fifteen thousand because they just don't have the budget and they don't have the same workings as a larger city like Melbourne or Sydney. Melbourne is also completely different to Sydney ... you work with bigger teams and the expectations were higher and obviously their understanding of what they could get was a lot more educated ... I want to work at a particular level and there's a bit of compromise with that because budgets dictate a lot of things. I try as hard as I can to educate clients on what a budget will do to the end result. If people want to barter me down on a quote then that starts a conversation. Sure I can do it for that much but they're better off to get this person because (a) they'll probably spend more time on it and (b) that's more suited to their budget and their skill set. But if you want something more polished to that higher standard then come to me (ibid).

Justin Gilligan is a freelance photojournalist who works to a very high standard. He has a degree in Marine Science at Honours level and has worked on numerous projects with the Commonwealth and State Fisheries Agencies 'in addition to being contracted to carry out independent research on some of Australia's most remote coral reef locations, such as Lord Howe, Christmas and the Cocos (Keeling) Islands' (Gilligan 2017, online). He has received a Save Our Seas Foundation Marine Conservation Photography Grant and he specialises in nature and underwater photography. Gilligan has been awarded Australian Geographic Nature Photographer of the Year multiple times, the ANZANG Nature and Landscape Photographer

of the Year, Ocean Geographic Picture of the Year, and many more. His images and feature articles have appeared in:

Australian Geographic, BBC Wildlife, National Geographic Kids, New Scientist, Ecos, Ocean Geographic, Asian Geographic, Australian Photography + Digital, Plonge (France), Asian Diver, Scuba Diver Australasia, Scuba Diving (USA), Diver Magazine (Canada), Diver Magazine (UK), Pro Diver Magazine (China), Octopus (Russia), Dive Style (South Africa), Beyond Blue Magazine (South Africa), DYK (Sweden), Sport Diving (Gilligan 2017, online).

John Lechner promotes himself as an artist, not a photographer, but sells his landscape photography as prints through his business John Lechner Art. He consciously avoids the term photography because he believes there is 'a perception that photography is cheap, if you buy art there is no price limit' (Lechner i/v Sept 2015). Lechner has a sound technical understanding of his medium, though he avoids the term craft, a position built on a set of perceptions about photography where the list of activities that have been classified with the honorific 'Art' have been collectively known as the 'fine arts'. As Larry Gross notes, 'more recently the practitioners of new media – photography, film, video – have aspired to be included in this honoured group ... Most notably excluded are those performers and products whose appeal may be too broad - the popular, or low, arts - or too utilitarian, such as crafts ... Art is generally assumed to result from the extraordinary technical abilities and personal qualities of its makers, unhampered by pragmatic considerations of utility' (Gross 1995, pp. 1-2). Despite the problematics of this position (McIntyre 2012, pp. 148-59) Lechner prefers to talk about capturing light rather than photography.

Lechner's business has been running since 2014. In 2015 he was working three days a week on his photography and two days a week at Mai Wel as the Business Development Manager where one of his main tasks was fundraising. John has worked professionally as a fundraiser, working for charities like Ronald McDonald House, Red Cross Door Knock appeal and the State Library of NSW. He completed a Diploma in Management and in 2015 Lechner was working part-time in business development where his 'day job' was part-time.

My professional background is as a professional fundraiser so when I moved to the Hunter I was hoping for a fundraising role. There isn't a lot of fundraising roles in the whole of the Hunter, there is probably about 10 and at senior management level there were even less but Mai Well was looking for someone, to help grow their businesses at the time and the skills are very similar and the alignment was good because it was disability and not-for profit (Lechner i/v 4 Sept 2015).

Lechner's deep understanding of how to fundraise influences every business decision he makes with John Lechner Art. His price range for prints is from \$195, most expensive is \$11,500. He prints on cotton paper and also on glass. The glass printing option offers a unique opportunity to bring depth to his artwork and he sees these as being unique and lucrative products in his range, which also includes small cards and calendars. Developing the business over the last 18 months, Lechner has had three exhibitions, two in Australia. One was in Newcastle (in a Renew gallery), another in the vineyards (a pop-up shop at Pokolbin). He also exhibited in Chelsea in New York City in June 2015, an exhibition which cost over \$10,000 to mount, and he took \$20,000 of stock to it. The benefit was that he built relationships with art networks and with clients. Since his return he has had follow up enquiries with these expected to make a return. In Australia, he is focusing on Newcastle, Sydney, Melbourne and Brisbane. Internationally he is aiming to set up future markets in Dubai and China over the next two years.

Using an example of his recent work, 'Sunset Sentinel', shot in the Hunter Valley, with a limited edition price tag of \$2,450, Lechner asserts that it took him 'a year to take that shot' (i/v 4 Sept 2015). It was taken five minutes away from his house one afternoon when walking the dog. He could see the light was going to be perfect, to really make this tree that was struck by lightning look beautiful. Lechner suggests that 'to me the art is to capture the perfect moment, and it doesn't always happen' (ibid). He also offers photographs printed on glass where 'we do a different print, that is basically fused to the glass and all you see on the wall is the glass and the print. So all you see on the wall is the glass, there are no fittings or fixtures. All you see if the glass, it just floats on the wall' (Lechner, i/v Sept 2015).

When you use glass, glass is green. So we have to use a special type of glass to deal with a pure white image and so that glass is more expensive so that one tops out at \$11 grand. But that is delivered international so in Australia it is seven ish, but we have pricing for the glass prints delivered internationally, so it's door-to-door including shipping, packing, insurance the whole bit (Lechner i/v Sept 2015).

Lechner has some unique strategies for building his business and he says it is about developing relationships with people. He also clearly states that he is 'in it for the long run', not the short term. Lechner exploits social media. He has a program that posts to Instagram, Facebook, Pinterest, Tumblr but he sees Twitter as being less effective for his products and in terms of building his reputation. In 2017 Lechner established a new business 'The Office Art Specialist', which provides office art to corporations and small to medium enterprises., as he says he thrives on helping 'create great workspaces with a positive culture' (ABC Open 2017b, online).

11.6.4 Art Galleries, Libraries and Museums

As David Hesmondhalgh has argued, the inclusion of the GLAM sector is problematic for those examining the cultural industries. At best, he sees galleries, libraries and museums as peripheral to the industrial production and circulation of texts (2011, pp. 11-15). However, as we saw above, the more recent use of the term 'creative industries' has included this sector as important to its activities. For example, the UNCTAD classification of creative industries (2008, p. 14) includes archaeological sites, museums, libraries and exhibitions as important cultural sites in the heritage sector of the creative industries. NESTA includes heritage and tourism services, galleries and museums in its 2005 refined model of the creative industries (NESTA 2006, p. 55). With these latter inclusions in mind we can see that the Hunter Region is well serviced by the GLAM sector. These galleries, libraries and museums are located right across the valley.

In terms of galleries, a key moment for the visual arts in the Hunter Region came in 1963 with the opening of the Von Bertouch Gallery, the first commercial gallery outside a capital city in Australia. Anne Von Bertouch was a leading figure in the movement resisting the demolition of heritage buildings in Newcastle. Her gallery in inner-city Cooks Hill was a centre for artistic activity including exhibitions, events and collaboration until her death in 2003. Since then, galleries have proliferated across the valley. For example, Peter Sesselmann's Art Studio & Gallery is located in Sawyers Gully, Emma's Cottage Vineyard Gallery operates in Rothbury, the Cessnock Regional Art Gallery is in Cessnock, the Little Red Gallery is in Maitland as is the Maitland Regional Art Gallery. The Maitland Framing Gallery and The Hunter Artisan Gallery & Café are both in East Maitland. Marea Kozaczynski-McCaig is an artist who operates the Art Is For Everyone Gallery in East Maitland. The Pokolbin Gallery is located in the vineyards and the Savanna on Swan gallery operates in Morpeth, as does Trevor Richards' Morpeth Investment Art Gallery, while the Cerublu Studio gallery is a feature of Dungog. The

Dungog Arts Society also runs its Gallery & Studio Workshop while the Dungog Contemporary Art Gallery and the Edge of Nature Gallery Workshop are also open for business in Dungog. 'Muswellbrook Regional Arts Centre is located on the New England Highway three hours' drive northwest of Sydney and roughly two hours from Newcastle' (iMag 2017, online).

Other independent galleries in the city of Newcastle include Indigenous gallery Free Spirit Aboriginal Art and the ceramics-based Back-to-Back, as well as newer galleries Curve, The Lock-Up, Art Systems Wickham, Timeless Textiles, cstudios Art Gallery, Gallery 139, Acrux and Alchemy. An artist-run space – Newcastle Art Space – is operated by Newcastle Community Art Centre. Finite Gallery at Caves Beach in the Lake Macquarie LGA displays and sells art work and offers classes and events. Online methods are increasingly gaining favour with artists establishing their own websites or using social media to promote their work and upcoming exhibitions, and sometimes providing an online catalogue of works for sale. Newcastle painter John Morris, for example, sells high quality art prints online at a fraction of the cost of his original oils. Pop-up galleries emerge from time to time.

Mark Widdup's Cooks Hill Galleries operates from a site nearby the old Von Bertouch Gallery and carries on that commercial tradition. In addition, a number of gift shops sell art works, for example Butterflies Gallery in the vineyards. Many of these commercial galleries are also deeply connected internationally. For example, the art gallery Michael Reid at Murrurundi showcases contemporary Australian and Aboriginal art and is linked to galleries in Sydney and Berlin. Michael Reid Berlin is located in the central neighbourhood of Mitte in this vibrant European city and has a permanent display of Australian art. It has become a hub for this in Europe. It mounts around eight exhibitions every year and takes part in fairs and projects throughout Europe including in England, Scotland, Sweden and Germany (Reid 2017, online). The Sydney gallery, operated by Michael Reid in Surry Hills, presents both contemporary Australian art and international art, focusing exhibition space on 'Aboriginal and Torres Strait Islander artists and art from the vast Oceanic region' (Reid 2017, online). Michael Reid and the specialists employed in his galleries 'are experts in contemporary painting and sculpture as well as contemporary photography, print media and media art' (ibid).

The regional arm of this operation is 'situated in the thoroughbred, vineyard and coal-belt of the Upper Hunter Valley, in the small but significant town of Murrurundi' (HAN 2017, online). The gallery does its business in the rich hinterland of the valley right on the New England Highway, 'an accessible drive from Moree, Armidale, Tamworth, Scone and Newcastle' (ibid). Over the last few years there have been solo exhibitions from artists such as Adam Cullen, Noel McKenna, Brian Robertson, Lucy Vader, Deborah Williams, Jasper Knight, Chris Langlois, Robert Jacks, Sally Gabori, David Bromley, Adam Lester and Crispin Akerman (Reid 2017, online).

This gallery has deep historical roots. It was built 'out of the ruins of an early 1840s convict barracks. Bobadil House and the early barracks were built between 1840 and 1842 from locally quarried sandstone for the A.A. Company surveyor Henry Dangar' (Reid 2017, online). It became a hotel for travellers originally called the White Swan Inn, then the Woolpack Inn and finally the Mountain View Inn before being purchased by family members in the 1870s. After being hit by lightning in 1948, which left only a set of fragmented walls, the present gallery took shape around the sandstone shell and was modelled on early 20th century photographs of the original building (UHC 2017). It is now firmly a part of the Upper Hunter landscape and cultural world.

As well as these commercially oriented galleries, many are either public, university-based or artist-run spaces. For example, regional Councils own and operate art galleries in Newcastle,

Lake Macquarie, Maitland and Muswellbrook. While Cessnock gallery recently lost its funding, and thereby its paid Director, Newcastle Art Gallery has a nationally important collection valued at over \$80 million and presents 'a comprehensive overview of Australian art from colonial times to the present day' (NAG 2017, online). This collection was started in 1945 when Dr Roland Pope, a Sydney based ophthalmic surgeon donated his collection to the city on the proviso that an art gallery be established in Newcastle. This gallery opened in 1957 occupying a floor of the War Memorial Cultural Centre. It moved to its current site in 1977. The current collection is highlighted by a number of historical important pieces which include as variety of Indigenous bark paintings. As well as 'the nation's finest collections of twentieth century Japanese ceramics and Australian ceramics, Newcastle Art Gallery's collection is of national significance' (NAG 2017, online).

There are over 6,300 works of art currently in the Gallery's collection, celebrating a wide variety of styles and mediums. Within our main collecting areas of Ceramics, Painting, Photography, Prints & Drawings, Sculpture and Video & New Media both colonial and contemporary works are represented, celebrating Novocastrian, Australian (Indigenous and non-Indigenous) and at times international artists. Key artists include: Arthur Boyd, David Boyd, Rupert Bunny, Judy Cassab, Grace Cossington-Smith, John Coburn, William Dobell, Donald Friend, Emily Kame Kngwarreye, Margaret Olley, Margaret Preston, Lloyd Rees, Brett Whiteley, as well as an extensive Japanese ceramics collection. The collection is conserved, maintained and developed by the Gallery's Curatorial team (NAG 2017, online).

Funding for a gallery extension was returned to the Federal Government in recent years after Newcastle City Council was unable to agree on the project. Despite these problems other galleries are also important to the Hunter. For example, with a modest collection Maitland Gallery has established a significant profile and hosts dynamic exhibitions and events in a newly refurbished gallery space. Key to its transformation was charismatic Gallery Director Joe Eisenberg. Located further south, Lake Macquarie Gallery mounts fresh, contemporary exhibitions and has an active program of classes and events under the leadership of Deb Abraham. To the west Muswellbrook Gallery has a strong collection based in part on the nationally significant Muswellbrook Art Prize which is acquisitive. Watt Space Gallery in Newcastle's CBD is a student gallery operating in refurbished rooms while Newcastle Art School (TAFE) has a small student gallery at its Hunter Street premises, its 'shopfront' Front Room Gallery having closed.

The University of Newcastle Gallery is located on the University's Callaghan campus. Its Director is Gillean Shaw. Gallery Directors like Shaw have a role beyond simply showing an artist's work. One anonymous gallerist explains that being a successful artist is not just about creating work; they must be connected, have a profile, and this is one of the roles of a gallerist:

If those artists are not in some way connected or increasing their profile, then it's really difficult to gain audience for that artist, and really as a gallery that's your main objective for the artist, to promote them to the audience you have and to a new audience ... once you have a profile within a smaller regional city, the opportunities become larger (Anon i/v Oct 2015).

Shaw developed the skills she needs for her role at The University of Newcastle Gallery through her formal study at TAFE and the University but she also acquired many of her skills informally. She managed her father's galleries when she was quite young which she describes

as ‘very much learning on the job and very much learning as an apprentice’ (Shaw i/v May 2015):

I didn't realise how much I was learning, you know, until much later ... He had galleries at a time in Sydney when it was a boom time and there were very few commercial galleries (Shaw i/v May 2015).

Shaw presents as a natural educator and says that she always wanted to be a teacher. Her work with interns and casuals in the gallery is ‘a kind of mentorship’ (ibid); they often ‘own’ a project and she guides and supports them in that. Shaw suggest that the gallery is ‘a very public space, everyone is aware of what goes on, so I do feel a responsibility to keep it buoyant and best practice and varied’ (Shaw i/v May 2015). In accomplishing this vision she stages student shows, shows that are about the University community including those profiling University research and shows that are purely for community interest. Shaw asserts that she tries to have one ‘blockbuster’ every year. A major show she worked on with local photographer Kate Croll and the University’s Confucius Institute exhibited the work of two generations of Chinese artists. It subsequently toured Australia. A very well-attended recent show was with the Wollotuka Institute and focussed on indigenous art and history related to the Hunter region. Shaw is convinced these shows are ‘dear to the hearts and minds of many Novocastrians’ (Shaw i/v May 2015) and they consequently do well.

Shaw is also Curator of the University’s art collection, the second most important collection in the Newcastle region, worth close to \$3million. They have some ‘fantastic gems ... particularly of mid-century Australian art’ (Shaw i/v May 2015) including a Margaret Preston that went on loan to the Art Gallery of NSW for her retrospective and a Margaret Olley that went to the Queensland Gallery for her retrospective, as well as a John Olsen and John Coburn. In addition to looking after this important collection Shaw has done quite a lot of work developing collection management policies. She has no budget for acquisitions so relies on donations. The collection began in the 1960s when the first teaching graduates decided to buy a gift for the university and this was a small Margaret Preston now worth over a quarter of a million dollars. Relying on donations means a ‘raggy’ collection with some ‘holes’. Shaw indicates that:

One focus is to collect indigenous art work. We had next to nothing - perhaps two pieces - in the collection and yet the University has more indigenous staff and students than any other university in Australia. Our collection didn’t reflect that in any way so it was important for us to address that (Shaw i/v May 2015).

One recent acquisition was the Roxanis Collection of indigenous bark art works collected in the 1960s and 70s. Shaw suggests ‘it is very, very precious stuff but the market for it is not buoyant at the moment and [the owner] didn’t want to sell it so he gave it to us. So that was an easy win for me. He is totally satisfied’ (Shaw i/v May 2015). Importantly, she was able to speak to the owner about the University’s Wollotuka Institute and give him an assurance that the work would be culturally respected. Because the collection is appreciating in value, Shaw says ‘It’s seen that I actually make an income...I’m not seen as a drain, I’m actually promoting an asset ... The fact that it is an asset that is rising in value is important’ (Shaw i/v May 2015).

Libraries have also been a significant part of cultural life in the Hunter for some time. This important contribution continues with 32 public libraries in the region (NSW.net 2018, online) including libraries in Kurri Kurri, Rutherford, Maitland City, Cessnock City East Maitland, Thornton, Foster, Tea Gardens and Stroud. Many of these are affiliated such as those working with the Newcastle Regional Libraries network, run as part of the services supplied by the Newcastle City Council, which includes Adamstown, Beresfield, Dungog, Gloucester,

Hamilton, Lambton, Mayfield, New Lambton, Stockton and Wallsend. Lake Macquarie City Library, operating out of Speers Point, has branches at Belmont Library, Cardiff, Charlestown, Edgeworth, Morisset, Swansea, Toronto and Wangi. The Upper Hunter Library Network provides a shared library service ‘to members of the Upper Hunter Shire and Muswellbrook Shire communities’ (UHLN 2018, online). This network, which is crucial to many rural communities and farming families and their workers, has ‘seven library branches including Aberdeen, Cassilis, Denman, Merriwa, Murrurundi, Muswellbrook and Scone’ (ibid). Most importantly they collect and archive not only books but also other products of the creative industries such as movies, recorded music and magazines. Each of the library outlets in this network provides a community space with access to free services and free membership. They also offer research assistance and home delivery for these communities as well as many services most modern library supplies. These include what they call kids and teen resources and a story reading time as well as many advisory and online services. They are also networked with schools, supplying a number of valuable resources including ebooks, downloadable audiobooks and magazines. The network supplies crucial family and local history resources and is linked to broader services supplied by the State Library of NSW. These services provide many, particularly impoverished community members, with facilities they would otherwise rarely be able to access. The digital technologies they use and also supply to their members are often the only ports of call for these devices in these areas. Recently Muswellbrook and Denman libraries hosted special virtual reality events where these selected libraries displayed their new specialty equipment and encouraged members to ‘explore the world of virtual reality’ (UHLN 2018, online) one that is becoming increasingly important not only specialists but also to embedded members of the creative industries. Often these libraries are the points at which creative industries operatives from these communities initially immerse themselves in these works that then allow them to begin their careers.

The region is well serviced by a number of educational libraries including those at Hunter TAFE and the libraries at the University of Newcastle which include the Huxley and Auchmuty libraries as well as the Ourimbah, Port Macquarie, Sydney, Singapore and the Newcastle City Campus library. These draw on sizable collections of texts of all types and electronic databases used by the University’s researchers who then go on to publish from this work (see also Section 8.7.1). As well as providing the foundation for much published scholarship, these libraries offer crucial services such as Cultural Collections, which incorporate ‘the University Archives, and Rare Books and Special Collections. This is the home of the historical and cultural memory of the University and its regional context’ (UON 2018a online).

Cultural Collections, overseen by Gionni Di Gravio, are now building a digital repository of both the University’s collection of books and regionally important material, consolidating all of the University’s images, videos, audio files and digitised publications into a single repository. Of note are the filmed resources from the local television station NBN which has reflected the region’s history in its nightly news broadcasts for many years. This invaluable task is being overseen by historian Dr Ann Hardy, the Living Histories Co-ordinator at the GLAMx Living Histories Digitisation Lab in Cultural Collections, Auchmuty Library. She co-ordinates Work Integrated Learning (WIL) students on placement in the GLAMx Lab (Galleries, Libraries, Archives & Museums). Projects undertaken in the Lab have a multidisciplinary focus, the most recent project is the Deep Time project (UON 2018c, online).

The Deep Time Project has the ambition of creating ‘an immersive 3D VR simulation of a 6,700-year-old archaeological dig of an ancient Aboriginal factory site uncovered in Newcastle West in 2009. Over 5,500 artefacts were discovered on the site by archaeologists working with Awabakal Aboriginal traditional custodians’ (UON 2018a, online). As the website explains,

‘the 3D scans of artefacts are housed within the Living Histories@UON Platform and farmed out to the 3D VR, where they can be accessed and examined in the original places they were found in the dig’ (ibid).

Cultural Collections is also linked digitally and internationally, running a number of highly important blogs, and is active on social media. As well as these services that facilitate and preserve the work of creative industries professionals, and also creates work that is typical of the twenty-first century creative industries (see for example Section 10 above), the University also supports one museum. Located beneath the University Gallery, the Senta Taft-Hendry Museum ‘houses an extensive and diverse collection of artefacts dating back to the 1950s telling the story of Senta Taft-Hendry’s travels to the Pacific Islands and remote Australia’ (UON 2018, online). It is just one of the many museums that are themselves creative outlets for curators and exhibitors.

The museums of the Hunter Region are both large and small and range from fully professional sites through to those run solely by volunteers. They include the Railway Museum in Richmond Vale, the Australian Army Infantry Museum in Singleton, the Hunter Valley Vintage Wings museum in Pokolbin, the Singleton Historical Society museum, Maitland Gaol, Morpeth Museum, the Rail Motor Society museum in Paterson, Singleton Museum, Fighter World at Williamtown, the Dobell Museum at Wangi, Sunnyside Historic Home and South Sea Island Museum at Cooranbong, Tocal Homestead, Wollombi Museum, Brough House in Maitland, Walk Water Works, Edgeworth David Museum in Kurri Kurri, Sketchley Cottage and Museum in Raymond Terrace, the Hunter Valley Museum of Rural Life situated near Lake Glenbawn, the Paterson Court House Museum, the Scone and Upper Hunter Historical Society museum, Dungog Museum, Gloucester District Historical Society, Infantry Museum at the Lone Pine Barracks outside Singleton, the Clarence Town and District Historical Museum, the Lost in the 50s museum in Cameron Park and, of course, the Newcastle Museum.

The Newcastle Museum was founded in 1988 as a major Bicentennial project and has been located in the Honeysuckle Railway Workshops since 4 August 2011 (Newcastle Museum 2018, online). It has worked to collect, preserve and interpret objects that are relevant to Newcastle and the region:

There are over 11,000 objects in the Museum’s collection, including significant large items such as the St Augustine’s pipe organ and The Buck steam engine, both on display in the Link Gallery. We have a broad collection that is designed to help us tell the diverse stories of Newcastle from massive industrial history machinery like the BHP ladle to nationally significant objects from our sporting greats, delicate one-off dresses to comprehensive collections like the Royal Newcastle Hospital collection and from fossils to Commodore 64s ... The Museum works to ensure these objects will be preserved for the benefit of future generations as well as our contemporary visitors. Critical to the value of the objects are the stories that are associated with them. These stories help us understand why and how we do things now. In this way, the collection acts as a benchmark showing change within our society ... Specialised curatorial staff maintain the Museum’s collection as well as manage donations and the purchase of significant items that define the city and the region (NM 2018a, online).

Julie Baird was the Deputy Director of the Newcastle Museum until she was promoted to Director in 2017. She has responsibility ‘for anything in the museum that doesn’t breathe; collection management and acquisition, temporary, permanent and travelling exhibitions and all the broad requirements that come with working in a medium sized museum’ (HBR 2014,

online). She may be found installing an exhibition, assisting with community museum workers, negotiating the display of an exhibition that will be on display in three years' time, or creating a risk management strategy or dressing up as an octopus for a school fete (HBR 2018, online). According to *Hunter Business Review*, Baird has had a circuitous career path:

It has been pretty winding! I started volunteering at my local Council-funded museum as a university student majoring in History and caught the museum bug. I went on to do a Museum Studies post grad while caring for a 4 year old and a baby. My first paying Museum job was in an innovative program which took museum objects into a high security women's prison in Canada. I had no training or experience and I don't think anybody else wanted to take the job but I have always been brave and realised that she who dares wins. I moved back to Australia and settled in SA to be close to my sister. There I took on a role which took private businesses' collections and turned them into museums run by trained volunteers. My next job was Senior Curator of the National Motor Museum where I instigated its first temporary exhibition program. As a museum that only had a staff of 15, we managed to be the only Australian museum to sell an exhibition to the mighty Powerhouse Museum in ten years. I came to Newcastle Museum to redevelop and move the museum in 2002. I had never been to Newcastle before, this city and my job of serving and interpreting its people and past has been the most glorious surprise. My career was always built on moving on every 5 years to keep myself fresh and motivated but I have been here 12 years now and love my job more every day. The gallery A Newcastle Story is my big brick love letter to Newcastle (HBR 2014, online).

Baird has taken the Museum to the community knowing that Newcastle is 'a city that takes pride in its creative industries and their output, there are many unspoken success stories' (Kellar 2016, online). An exhibition curated by Gaye Sheather which focused on pub rock in Newcastle from 1974 to 1987 is just one example. Apart from these socioculturally important events, in 2014-15 the Newcastle Museum 'opened its doors to more than 174,000 visitors. In the 2015-2016 fiscal year, it counted more than 185,000 visitors, boosted by the hugely successful Tyrannosaurs Meet the Family exhibit' (ibid). This obvious benefit in the form of community use and engagement is no doubt what Newcastle City Council is seeking.

While the Fort Scratchley heritage site is part of the remit of Newcastle City Council, just as the Newcastle Museum is, it is reliant on dedicated volunteers. The Fort was first established in 1828 with earthen ramparts and a more permanent fort was constructed from 1882-1886.

Under Council's control the site became home to the Newcastle Regional Maritime Museum in 1977 and the Military Museum/Fort Scratchley Historical Society in 1982. Both of these groups took an active role in conserving the site and interpreting its history to visitors. The outer site continued to be used as recreation space by local residents with picnic tables and children's playground also being used by visitors. The inner Fort was opened to the public with the Maritime Museum and guided tours of the tunnels operated by the Fort Scratchley Historical Society adding to the visitor experience. In January 2004, Council and the Australian Government executed an agreement whereby the Government would restore Fort Scratchley Historic Site, then transfer ownership to the Council. The Fort was closed to the public in April 2004. Restoration works were completed in 2008 enabling the transfer of the site to Council on 29 June 2008 (FSHS 2018, online).

While this work was occurring, Newcastle City Council and the University of Newcastle collaboratively funded a documentary about the site. This work was undertaken by Dr Susan Kerrigan, a former ABC Television professional turned academic, and resulted in a documentary 'Using Fort Scratchley' and website that documented the complete life of the Fort from its indigenous use, through its military incarnation through to its contemporary usage. The website can be found at <http://www.fortscratchley.org/> and the documentary has now been placed on YouTube (Kerrigan, 2017 online). The project, entitled *Fort Scratchley a Living History*, employed local filmmakers, web designers and music composers, among many others, to bring the project to completion. It is a thoroughly digitised history reflecting this museum's ongoing life.

Many of the region's galleries, libraries, archives and museums have found themselves at the cutting edge of digitisation. Supplying services to many others in the creative industries in terms of both consumption and production of creative works has placed them at the forefront of the copyright world. Many commercial outlets are now finding ways to exploit this knowledge of intellectual property more fully.

As an enabler in the GLAM sector, Liz Burcham was appointed as Cultural Director by Newcastle Council overseeing many of the institution described above. These included not only the Newcastle Art Gallery, but also the Civic Theatre and Newcastle Museum. Before taking on this position Burcham had studied linguistics, education and librarianship at University, worked at the CSIRO library, then in publishing and in multimedia where she put together some of the first Australian titles on CD Rom/interactive books, then newspapers, and at the Seven Network when interactive media first became mainstream as a result of the popularity of the AFL and Olympics. Burcham moved from Sydney to Brisbane and took up the position of CEO of Metro Arts which she held for ten years before coming to Newcastle to take up the newly-created position of Cultural Director in mid-2014. She revealed that she is 'a producer, I make things happen, I lead people to make things. The other common theme is new business, change in markets and taking new product to markets' (Burcham i/v April 2016). Burcham suggests that:

Council has a responsibility as the major presenter and producer in this town; we have a responsibility to our local artists, our local makers and producers. So we have got to work with them, to open up our facilities to those parties, but we can't do that at a cost to those institutions operating at the level they need to (Burcham i/v April 2016).

She spoke of the importance of seeking new sources of funding for the culturally important institutions she had responsibility for, beyond Council allocations, arguing that:

Council significantly subsidises its cultural institutions and yes, I have objectives to minimise that subsidy. What's been here is a very significant dependency on Council self-funding. I had objectives set for me to bring in new income streams ... For example, we now have Arts NSW money back into the art gallery. That's new money ... we are [also] being supported by Museums and Galleries NSW, Arts NSW, Copyright Agency Limited and Gordon Darling Foundation (Burcham i/v April 2016).

Newcastle City Council's Cultural Strategy was endorsed by Council in November 2015 and now focuses on partnership, collaboration and engagement. Before Burcham departed her position in 2017 she suggested that:

Collaborations need to happen locally and they need to happen nationally and that needs to be a two-way traffic – people coming in and people coming out. We can't do it all ourselves and we shouldn't do it all ourselves. Vibrant institutions have multiple voices so real commitment to working more actively with curators, presenters, producers, makers so that we create a diversity of a product we present (Burcham i/v April 2016).

11.6.5 Collaborative Workspaces

Renew Newcastle was founded by Marcus Westbury to provide work spaces for artists in unused city buildings at a cost of just \$25 a week. By 2016 there were 23 properties accommodating 50 Renew projects, many of them collaborative. Only ten of these were shops – most were on upper floors and were studios and workshops. General Manager Christopher Saunders describes Renew Newcastle as 'a social and cultural experiment' which aims 'to provide those opportunities, to nurture, to incubate those people who are bringing some alternative activities into a city'. Several of those people are visual artists and designers including Liz Anelli, children's book illustrator; Trevor Dickinson, designer and muralist; and Graham Wilson, printmaker and stonemason.

Renew Newcastle has also provided exhibition spaces for artists and photographers, notably Raw Gallery.

Additionally, Renew has nurtured a number of retail outlets that sell the work of visual artists including Mint, a jewellery shop that also stocks prints, cards, bags and ceramics. Co-founders Angela Hailey and Suzy Manning stayed with Renew for just six months before deciding to take their own commercial lease on the premises in order to ensure their security of tenure (Renew tenants operate under a 30-day licence, renewable if the owner agrees). Hailey enthuses:

I think that Renew is fantastic. One of the best things we got out of it I suppose was meeting a whole bunch of other creative people trying to do what you were trying to do in the same town. As I said before it, it can be an isolating experience making things from home and potentially your only contact with the community and other people who are making or buying your products could be at a market but Renew gives you access to a whole bunch of other people doing similar things and it's nice to be part of that community and meet people through that (Hailey i/v Sept 2015).

Apart from Renew, Newcastle Community Art Centre has been operating for over thirty years to support artists, primarily by providing affordable studio spaces. NCAC artists includes The Strutt Sisters, Rachel Milne, Peter Lankas and Meredith Woolnough. Woolnough says of NCAC:

It's basically a huge building full of artists and its heavily subsidised rent so that artists can afford to have a professional space that we can work in. And I got a studio space here about two years ago, beginning of last year, and it was a really big step for me and a really positive step for my business and my practice to have that professional space. The Community Art Centre has many other functions; it's got a gallery attached to it and it's got rooms that people can hire out to teach workshops and run events, there's a theatre downstairs, so it's got all sorts of

things going on in the broader art community, but it's also a community of artists within itself (Woolnough i/v Sept 2015).

In early 2017, however, following the sale of the building by Newcastle Council, NCAC was obliged to move. Temporary premises were found on the Hunter TAFE Campus. This is a smaller space and does not have a theatre.

The Old Soap Factory is managed by Sophia Emmett, a jeweller, and her partner Jono Everett who designs and manufactures furniture. It is located in a former industrial building in the suburb of Mayfield in Newcastle and provides affordable workspace for artists working across a number of disciplines including glass, silver-smithing and sculpture. Their focus in establishing the space was the 'ethos' of what they were trying to do, as opposed, Jono Everett says, to:

Just offering space and [saying] how much the rent was. We didn't even put numbers on it – it was more about what we're trying to do here, to sort of attract the right type of people (Everett i/v, Sept 2014).

It was important that the artists were not in direct competition with any of the others, but that they were 'enthusiastic, they work to a high level, they're in the creative industries, they're not going to use the space for self-storage, and that they're proactive in their business' (Everett i/v Sept 2014).

The newest collaborative workspace for artists is The Creator Incubator which was established in early 2017 by sculptor Braddon Snape. Located in a warehouse facility in Hamilton North, Newcastle, the space has been configured to accommodate a number of individual artists (including Graham Wilson) as well as a gallery for exhibitions.

11.6.7 Art Schools

Training in visual arts in the region is provided primarily by Newcastle Art School (TAFE) and the University of Newcastle. Art classes are also provided by cooperatives such as Newcastle Printmakers Workshop and Newcastle Studio Potters, and by individual artists, some from teaching spaces at Newcastle Community Art Centre.

Peter Lankas speaks highly of the art training provided by Newcastle Art School (TAFE). He asserts that 'it works really well, it's very well balanced in delivering the technical skills that you do need to develop as a young artist' (Lankas i/v, Dec 2014). Government funding cuts, however, have meant higher fees, the loss of courses and reduced hours of delivery:

... because of the cutbacks we have had we have lost a lot of training, life drawing has gone, such an important thing in training in regards of your visual development. A course that was once two years in now one ... we are losing some of the good developments (Lankas i/v Dec 2014).

Art training at The University of Newcastle is also changing with the introduction of new courses, and a commensurate loss of staff in Creative Industries, which have replaced Fine Art courses. There are also private providers operating in the Hunter. These include the Arts Emporium operating at two sites, one in Lambton and one in Toronto. The education programs offered by this art school provide 'professional art instruction for all ages, across a wide range of medium, from traditional to contemporary and for all levels of skill and experience. First established in Newcastle in 2005 [the art school has] now grown to become one of the largest

private, independent and successful teaching studios in this region' (Arts Emporium 2018, online).

11.7 Conclusion

Those who work in the visual arts sector include photographers, business development managers, digital imaging specialist, corporate photographers, portrait artists, painters, sculptors, gallery owners, customer service managers, public relations officers, display designers, exhibit installers, furniture designers, glass blowers, illustrators, image sales executive, photojournalists, art librarians, library assistants and managers, scientific photographers, museum directors, curators, archivists, acquisitions specialists, multimedia artists, antique appraisers and refinishers, commercial artists, courtroom artists, art appraisers and auctioneers, art directors, gallery owners and managers, art historians, reviewers, art teachers, art therapists, artists' agents, caricature artists and cartoonist, as well as fashion photographers. Of the 593 person who identified as visual artists in the 2011 Census these were primarily drawn from occupations such as photographer, illustrator, painter, sculptor, signwriter, potter or ceramic artist, body artist and gallery or museum curator.

In the Hunter, teaching provides an important supplementary income for many painters, ceramists and sculptors in the region but employment, particularly in the University and TAFE sectors, has been casualised and opportunities for employment here are diminishing. Many artists instead offer private classes. Sale of art works in galleries continues but post-GFC incomes have declined with a drop in prices of art works. Capital city galleries have provided access to a larger, more lucrative market, however, for the fortunate few, regional artists able to double their prices once they have shown in Sydney. Many, particularly those who are craft or design-oriented, take advantage of local and regional markets to sell both their original art works and associated merchandise such as T-shirts, mugs, posters, cards and prints. A very few artists have developed portfolios through designing for clothing companies and some have seen their prints sell well through retail outlets as well online marketplaces. A number of artists also operate out of cooperative studios, thus sharing and reducing their production costs. Museums and galleries remain important to these artists. Some artists exhibit internationally as well as nationally. Some find success in highly contested regional and national art prizes including the Moran Prize, The Archibald and Wynne Prizes, the locally-run Muswellbrook and Kilgour Prizes. The Brett Whiteley Travelling Art Scholarship has a prize worth \$40,000 with the added benefit of three-month residency in Paris and Newcastle artist James Drinkwater was the region's most recent recipient. Hunter Region artists have undertaken artists residencies both in the regions and internationally. It also works in the other direction with a residency scheme operating from The Lock-Up Cultural Centre in Newcastle which attracts national and international artists. Art training is provided by the University, within Creative Industries programs. Newcastle Art School (TAFE) operates despite cuts to government funding which have led to higher fees and reduced hours of delivery. Private art classes are also offered by regional artists.

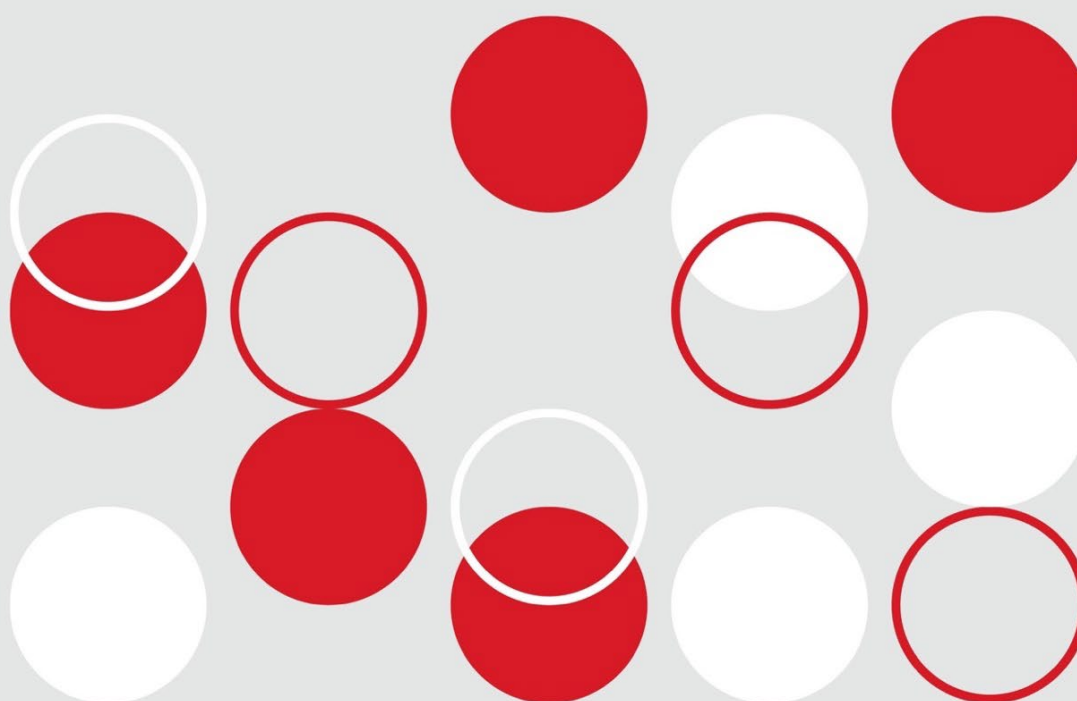
Photographers in the region range from freelance commercial operators to those who see themselves as artists. Some are supported by active organisations such as the Muswellbrook Regional Arts Centre. Many of them work successfully throughout the Hunter Region and some have national and international profiles and are award winning. Many work on commission, gaining a lucrative income from portraiture and wedding photography while maintaining a deep

interest in their own artistic practice. Others undertake briefs from Advertising and Design houses as well as Architectural briefs and others in need of professional images such as Real Estate agents. A few are employed in the media while a very few publish books of their own photography. Many contribute regularly to online forums such as ABC Open, and all maintain professional websites and are active on social media such as Instagram as their online existence becomes increasingly important.

Galleries, libraries and museums in the region have taken advantage of the digital realm. All have an online presence while a number are employing cutting edge technology. Consequently, while many museum exhibitions are creative productions in their own right, many from the GLAM sector have moved into the production realm themselves pursuing avenues such as virtual reality to aid their archival and community work. Regional libraries are at the forefront of these developments.

Creativity & Cultural Production in the Hunter

An applied ethnographic study of
new entrepreneurial systems in the
creative industries.



Final Report:
Hunter Creative Industries

Performing Arts

Associate Professor Phillip McIntyre
Professor Mark Balnaves
Associate Professor Susan Kerrigan
Evelyn King
Claire Williams

12. PERFORMING ARTS

12.1 A Brief History of Performing Arts in Australia

The performing arts sector in Australia is diverse, covering all of those aspects of artistic expression which involve people using their bodies and/or voices, or extensions of those, to communicate with an audience. The performing arts include theatre, musical theatre, dance, music, opera, comedy, circus, mime and much more. The sector has a long history in Australia.

While performance in indigenous culture is intrinsic to the practice of their values, beliefs and way of life, British colonists brought with them a number of Western art forms including music, dance and theatre. ‘The Recruiting Officer’, written in 1706 by Irish playwright George Farquar, was the first play to be performed in the colony of New South Wales staged largely by convicts in 1789, one year after the First Fleet arrived in Sydney. However, the regimental bands of the British military who oversaw these convicts, formed the basis of the first musical ensembles. The military band members were made available to play for ‘theatre orchestras, public promenade concerts, official and private function – soirees, dinners, balls’ (Whiteoak & Scott-Maxwell 2003, p. 482).

Early colonial drama consisted mostly of English-style musical theatre, comedies and pantomimes that took on local themes. The disordered fun of the theatre at this time did not match the idea of Australia as a penal colony, a place of punishment for convicts. Some authorities believed theatre to be a bad influence, others felt it was useful entertainment and these views affected the way theatre developed here. The authorities struggled with issues such as badly-behaved theatre audiences, theatre licences and crime. Meanwhile, a few people set up theatres and presented performances, with varying, and then growing, success (AG 2018, online).

The first full concerts were written up in the first newspaper in 1803. Theatre orchestras quickly became the mainstay of employment for most civilian working musicians where they played ‘overtures, incidental music for the drama, music for specialist dancers, fillers between the acts and more’ (ibid). As the population grew the number of working theatres expanded. Australia’s oldest continuously operating theatre is the Theatre Royal which opened in Hobart in 1837. Professional theatre orchestras not only accompanied drama and musical theatre but increasingly worked for opera companies.

Ballet was staged at this time ‘but generally as an afterpiece to an opera’ (Whiteoak & Scott-Maxwell 2003, p. 79). The first ballet proper was performed in Sydney at the Theatre Royal in 1835.

Other professional dancers arrived in the 1840s and their stage performances included national and novelty dances and other excerpts from ballet. Many newly arrived professional dancers also began to teach dancing or to choreograph and present ballets, including comic ballet ... Theatrical dancers in the 19th century were commonly actors or singers as well (Whiteoak & Scott-Maxwell 2003, p. 79).

While it is generally agreed that the first opera - *The Poor Soldier* - was performed in 1783, the first performance from the standard European canon was staged in 1838 at the Royal Victoria Theatre. In the 1850s the Gold Rushes saw a huge growth in population. The increased trade brought wealth from the goldfields and to the colonies where ‘there was a growing demand for

theatre entertainment, and Shakespeare and opera performances increased. Touring companies such as the New York Serenaders (1851) and the Backus Minstrels (1855) brought minstrel shows to Australia from California' (AG 2018, online).

Opera was originally either staged by a few ad hoc companies or was part of a broader theatre offering, but in 1861, Irish entrepreneur William Lyster arrived in Australia with his Royal English and Italian Opera Company and opera soon became a significant element of the performing arts in Australia. Following the success of the Lysters, some theatres came to stage opera programs exclusively. William's brother Fred Lyster, a baritone, had started this venture as a small opera troupe in the USA but William built up the company so that it employed many singers and musicians in runs around the country. It was said that so began 'a new epoch of the Australian stage. No previous colonial entrepreneur had presented such enormous musical and dramatic forces' (Whiteoak & Scott-Maxwell 2003, p. 470). Many touring companies operated after 1870 including the Royal Italian Opera Company and these were often backed by local businessmen. It wasn't until the 1900s that the first operas were presented in English. In 1908 John Wren established the National Opera Company and imported stars were eclipsed by home-grown performers such as Nellie Melba. After success internationally, Melba returned to Australia and staged a series of concerts in 1911 in conjunction with the promoter J.C. Williamson. In 1916, entrepreneur Benjamin Fuller brought an impressive company from Europe - the Imperial Grand Opera Company - and added Australian singers and performers for a successful national tour. Fuller is best known, however, for his vaudeville shows featuring Australian cultural icons Stiffy and Mo.

Many Italian opera and ballet companies toured the country and some performers were obliged to remain here after Italy joined the war against the Allies in 1918. In Paris in 1909 Sergei Diaghilev and his Ballet Russes had swept away the old formal and ornate style of ballet and established a new mode. While he did not personally make it to Australia, many of his dancers did including Anna Pavlova and her partner Laurent Novikoff in the 1920s. Pavlova was so popular she inspired the establishment of Australian branches of prominent British dance training institutions, the Cecchetti Society and the Royal Academy of Dancing. As the Second World War was starting many of the dancers who had worked with Diaghilev or had moved on to other noted Russian companies found themselves in Australia. They reformed and called themselves the Original Ballet Russe (Whiteoak & Scott-Maxwell 2003, p. 73). They were to become highly influential. The descendant of one of these dancers, Dr John Barnes, is a prominent Newcastle artist and arts writer.

Under the guidance of Harry Rickards in the late nineteenth century, the Tivoli in Sydney had become the preeminent popular theatre in Australia. It drew on both American minstrel shows and the British music hall tradition, giving them a peculiarly Australian character. At the same time jugglers, lion-tamers, bearded ladies and freak shows continued to tour the country in travelling circuses. 'Australia's tradition of circuses stretches back to the early 19th century' (Landragin 2011, online) with 2018 marking 182 years of the circus in Australia.

In the 19th century, when Australia was one of the most enticing destinations for Europeans in the world, many European troupes would tour the colonies. 'So enamoured of Australia were some visiting circus artists', writes St Leon, 'that many remained behind and joined local companies'. Thus, it can be said that they left their own circuses to run away and join the circus (ibid).

While the circus increasingly became a relic of a bygone era it was the Tivoli that 'introduced the gramophone, the movies and the miracle of flight' (Van Straten 2003, p. 2) to many Australians. At the Tivoli they 'celebrated Federation and sheltered from the shadow of the

Great War. At the Tivoli we heard the roaring of the Twenties, the tango and the devil's music – jazz' (ibid).

The Tivoli circuit 'was created in the last decade of the nineteenth century and entertained Australians for more than seventy eventful years. It was an earthy, integral and much-loved part of Australian show business' (Van Straten 2003, p. 2). In the early days there were playhouses, some opulent, and:

Theatres in every provincial centre, and adventurous travelling shows that performed in humble halls and under canvas. Entrepreneurs such as J.C. Williamson and George Musgrove presented carbon copies of the latest overseas successes. Rich or poor, we went to see opera, Shakespeare, melodrama, burlesque and pantomimes, just as we would have 'at home' in Britain (ibid).

The Great Depression forced many live venues to shut their doors. But the Tivoli carried on, providing 'relief and refuge and Roy Rene – Mo' (ibid, p. 3). At the same time the Golden Age of Radio had begun. In 1920 Dame Nellie Melba broadcast from one of the inventor Marconi's transmitters in Essex, England to listeners in many parts of the world (Holloway 1975, p. 9). Following this, radio began to broadcast plays, musical comedy, dance music, grand opera, band concerts, orchestral concerts, vaudeville, symphony concerts, community singing and revues, effectively promoting these art forms and keeping many professional performers in work.

People tuned in nightly to hear their favourite serial and the most enduring drama program was that written by Gwen Meredith. It was initially called *The Lawsons* when it started in 1944 but changed its name to *Blue Hills* in 1949 and ran continuously until 1976 (Lane 1992, p. 234). Apart from the success of the commercial radio stations, ABC Radio in particular became the home of a number of symphony orchestras and opera was broadcast often. It was all live and 'repeat broadcasts meant repeat performances' (Whiteoak & Scott-Maxwell 2003, p. 475). After WWII, in 1948, the National Theatre company was set up in the belief that:

Sydney needed an equivalent to Melbourne's National Theatre Opera Company... Renamed the National Opera of Australia, the Sydney company began its 1953 activities in Newcastle (NSW). Then it gave a season in Brisbane – claimed to be the first opera season to make money there ... the main season, in the Tivoli in Sydney, included two Australian works (Whiteoak & Scott-Maxwell 2003, p. 476).

This period saw the beginnings of a national dramatic identity with the first Festival of Perth held in 1953 as well as the establishment of The Australian Elizabethan Theatre Trust in 1954. Ray Lawler's *Summer of the Seventeenth Doll* was first staged in 1955, and the National Institute for the Dramatic Arts (NIDA) was founded in 1958. The 1960s counterculture brought many changes and saw theatres such as La Mama open in Melbourne. In 1968, The Australian Council for the Arts, soon to become The Australia Council, was set up. This organisation established 'major state theatre companies and provided arts funding' (AG 2018, online). In the sense that they had political concerns, certain community arts initiatives in the 1970s and 1980s recalled the workers' theatre movement of the 1930s. Others borrowed older forms for entertainment purposes:

As with the parallel community arts movements that occurred in the UK, the US, Canada and Ireland from the late 1960s, Australian live performance became a forum for reimagining, and at times re-inventing performance forms that had enjoyed popularity with earlier generations. Re-imagined paradigms of circus and

variety appeared in Australian community arts performances during the 1970s, seeding the establishment of long-lived companies that have endured to today, such as *Circus Oz* and the *Flying Fruit Fly Circus* for young people (Arrighi 2013, p. 2).

The 1970s saw a further flourishing of theatrical expression boosted by the second wave of the Australian film industry. Playwrights like David Williamson came to the fore and the Australian Performing Group and Nimrod Theatre (now Belvoir) were established. Other plays, among many at this time, included *The Front Room Boys* by Alexander Buzo, 'White with Wire Wheels' by Jack Hibberd and 'Chicago, Chicago' by John Romeril. As one later reviewer commented:

Though Australian plays of the late '60s and '70s are infrequently revived, they tend to reveal a ferocious desire for change; politically aware bids to remove the shackles of conservatism through expressive, brazen and irreverent vaudeville-like structures and forms. Some of the plays may be rough around the edges, indulgent or consigned to the bin of noble failures, but they were rarely half-hearted and revelled in the might and mastery of words. McNeil, Buzo, Hibberd, Romeril, Williamson, Hewett and company were far too passionate about the stage, and its promise, for them to have been anything less (SMH 2002, online).

The 1980s and 1990s saw a diversity in performance styles, companies and venues:

A number of experimental women's theatre groups emerged in the 1980s, such as Melbourne's Home Cooking Theatre Company (1981) and Adelaide's Vital Statistix (1984) ... In 1990, the dynamic musical *Bran Nue Dae* by Jimmy Chi and the band Kuckles premiered to impressed audiences at the Festival of Perth, before touring the nation ... John Bell established The Bell Shakespeare Company in Sydney in 1990. In 1993 Sydney held its first Asian Theatre Festival. Australian musical theatre experienced a revival during the 1990s with shows such as *Bran Nue Dae*, *Hot Shoe Shuffle* (1993) and *The Boy from Oz* (1998-99). By the year 2000, Australian theatre-goers could almost take for granted the array of dynamic performance styles, theatre companies and venues available to entertain, delight and challenge them (AG 2018, online).

These diverse sets of performing arts have continued well into the twenty first century. Some of the shows that have had international success include musicals like *Priscilla Queen of the Desert*, *The Boy From Oz*, *Tap Dogs*, STC's *Hedda Gabler* on Broadway. Australian talent continues to impress on the world stage and these include, among many others, opera director Barrie Kosky and theatre director Simon Stone. Bangarra Dance Theatre, 'an Aboriginal and Torres Strait Islander organisation and one of Australia's leading performing arts companies, widely acclaimed nationally and around the world' (BDC 2018, online), is currently located in Walsh Bay in Sydney. They have been in existence for nearly three decades and their ongoing 'annual program includes a national tour of a world premiere work, performed in Australia's most iconic venues; a regional tour allowing audiences outside of capital cities the opportunity to experience Bangarra, and an international tour to maintain our global reputation for excellence' (ibid). They continue to engage in 'education programs, workshops and special performances and projects, planting the seeds for the next generation of performers and storytellers; (ibid).

12.2 Structure of Performing Arts Industry

The performing arts sector comprises performers of all kinds, agents, venues, festivals, training institutions, companies, critics and enablers such as investors and various funding bodies.

At the local level there are myriad independent companies that perform on a DIY basis forming the foundation for all of the other major institutions and organisations. This sector is currently dominated by a number of large professional organisations including Sydney Theatre Company, Melbourne Theatre Company, the Australian Ballet, Bangarra Dance Theatre, Sydney Symphony Orchestra and Opera Australia. Nationally important performing arts institutions include the National Institute of Dramatic Art (NIDA), National Aboriginal Islander Skills Development Association (NAISDA), Western Australian Academy of the Performing Arts (WAAPA), Australian Film Television and Radio School (AFTRS), Victorian College of the Arts (VCA) and the Australian Ballet School. Selective creative and performing arts secondary schools include Newtown High School of the Performing Arts and The McDonald College, both in Sydney, and Hunter School of the Performing Arts in Newcastle.

Performing arts festivals include the Perth International Arts Festival, Australia's first, which was established in 1953, as well as the Adelaide Festival which started in 1973 and includes the Adelaide Fringe, the Darwin Festival and the Melbourne International Comedy Festival. Most capital cities and some regional centres host arts festivals which prove a boon to tourism and economic development.

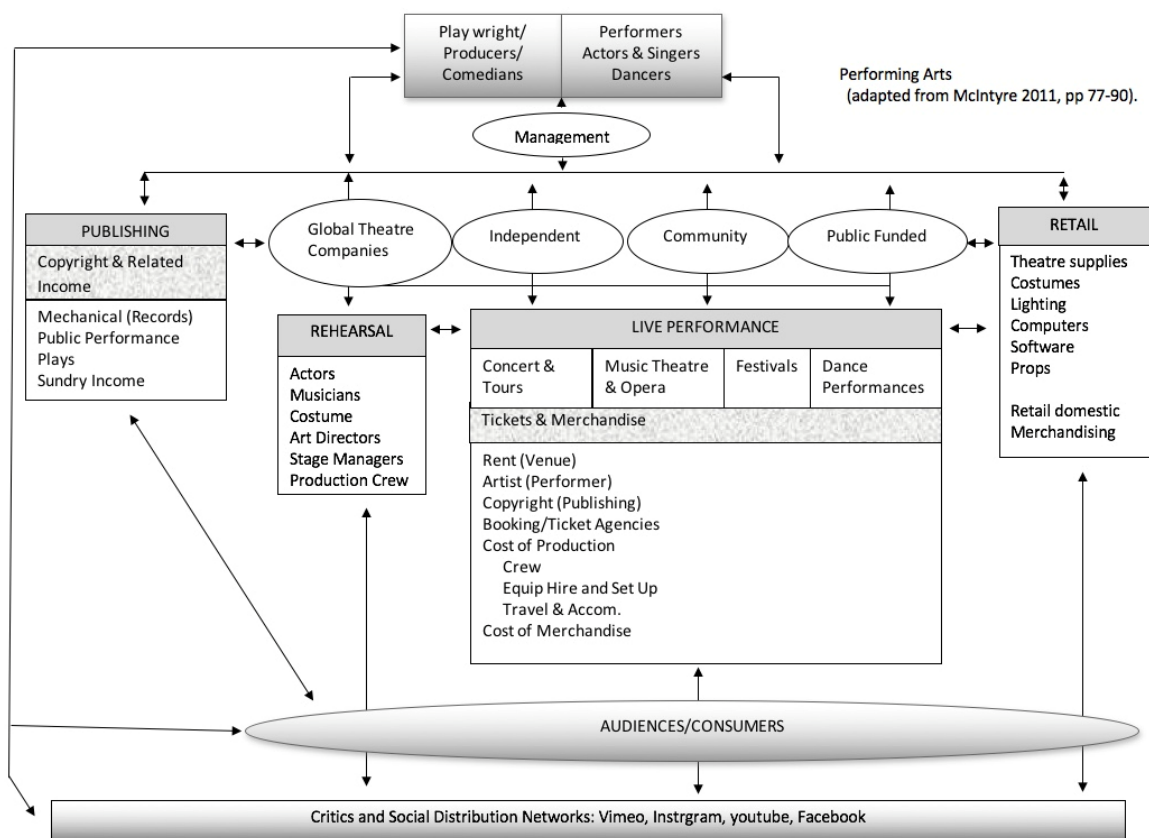


Figure 23 Performing Arts Industry Generalised Structure

The Australian Major Performing Arts Group (AMPAG) is the umbrella group for Australia's 28 major performing arts companies which aims to give its members 'a national voice and presence' (AMPAG 2017, online). The Media, Entertainment and Arts Alliance (MEAA) is the union and industry advocate for performing artists, and was formed in 1992 from the merger of Actors Equity of Australia, the Australian Theatrical & Amusement Employees Association and the Australian Journalists Association, with the later addition of the Symphony Orchestra Musicians Association to the MEAA.

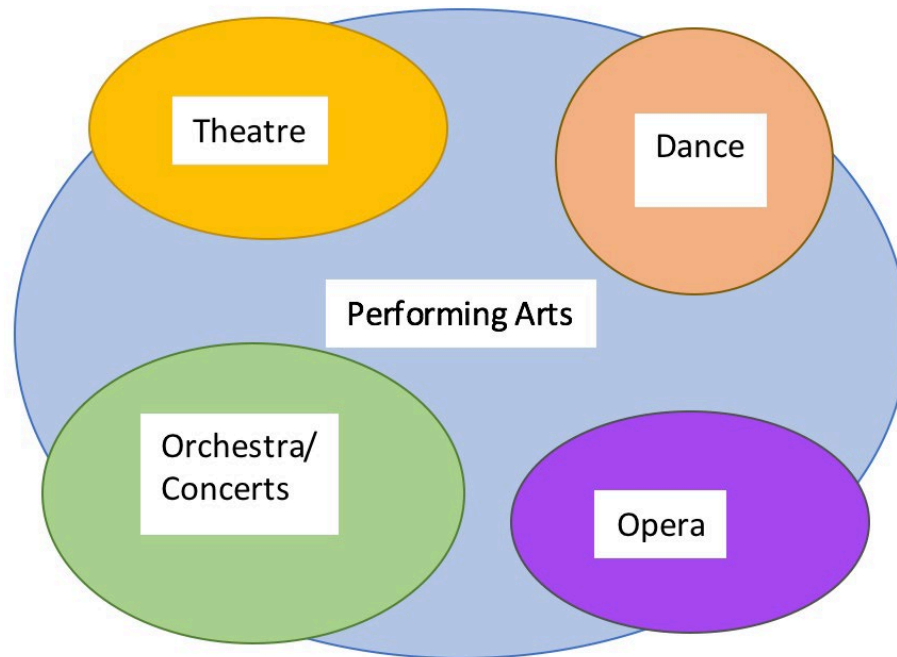


*Figure 24 Performing Arts Industry Company Clusters
(Original from Annukka Jyrama, School of Business, Aalto University)*

12.3 Business Models

The sale of a ticket to attend a performance remains the primary income stream. Performing arts practitioners create a product, the performance, and sell attendance to that performance. They realise a profit if attendances exceed the cost of staging the performance. In this case income is usually dependent on box-office receipts from ticket sales. Subscription to a program of performances provides an auxiliary income stream to box office receipts. Subscriptions make money by offering an ongoing benefit, regular attendance at the performance, which allows the provider, the theatre company for example, to charge an often recurring fee. This subscription service ensures a profit ahead of the performances and can be used to cover some ongoing costs instead of recouping them on the night with box office sales. Theatre owners create a durable asset, the theatre, which can be accessed by a number of performers or companies and then they proceed to charge for its use. Agents market and sell an asset or service they don't own, the performance, on behalf of a third-party, the performer or performers, usually collecting a percentage of the transaction price as a fee. Some companies have a cooperative ethos and pay stipends to performing artists on a profit share of takings. Payments of residuals may also be provided for re-use of produced or recorded work outside of the original contract, for example for television commercials, but this depends on the success of the performance and the contracts that the performers negotiated prior. While some performers are represented by agents, others

self-manage their careers, especially those whose work is marginal or sporadic. In terms of income, performers usually provide artistic services on a freelance/contract basis, as profit-share, or as part of the gift economy where no payment is received. Continuing work – on a long-running drama production or television series or music tour – is rare. Most work is short-term, sometimes ‘one-off’, for example ‘extras’ on a film set, television commercials and voiceovers (including for online games and websites). Some full-time, paid employment is available, for example to teachers of performing arts, venue managers, and local government staff working in the cultural areas.

Limited funding is available from government organisations such as Create NSW (formerly Arts NSW) and The Australia Council for the Arts, while support from local government may take the form of venue hire subsidies or other ‘in kind’ support. Private funding is rare as arts philanthropy in Australia is not strong, despite the efforts of Creative Partnerships Australia, (Australia Business Arts Foundation Ltd), a national organisation which promotes private sector support for the arts through partnering, volunteering and giving. Investors will sometimes take a chance on what is a high-risk investment, especially in the case of large-scale musicals, and place funds with particular producers who have a proven commercial track record. This investment allows the producer to mount shows but the profits are generally split 40/60 with the investors taking the larger share of the profits. Alternatively, crowdfunding has been used to support some performing arts projects, especially smaller scale projects.

Online screening through various forms of social media, webcasting and distribution of pre-recorded product is increasingly being used by performers to promote their services, to showcase their work and garner what at this point has proven to be minimal income.

12.4 Operational Methods

Performing artists often develop their skills through a program of study, for example at a drama or music college. Leading institutions are NIDA, WAAPA, VCA and the state conservatoria while universities and TAFE colleges also offer courses. Many performers, however, are self-taught or learn on the job, often when working in an unpaid capacity as part of the gift economy. The trade-off is exposure to the industry and the development of the necessary craft skills.

Once they feel competent, performers will often seek work through auditions, and casting calls and may also seek a listing with an agent to assist them in finding ongoing work. Agents usually take a commission based on the work they obtain for the performer. Performers may also create their own work, perhaps establishing their own company and/or working collaboratively with others, thus becoming entrepreneurs themselves.

As a general rule, performers usually need to self-manage their careers, which are often ‘portfolio’ careers, with a diversity of types of employment unless, having had some success, they hire a manager who will undertake to secure work for them and ensure their career is viable. Managers do so for a fee or by taking a percentage of the performer’s income. Festivals are often useful for performers mostly in terms of promotion as many are lucky to cover costs. They are like trade shows which allow the performer to show off their wares and establish a presence in the marketplace.

Once the performer or performing company is known they may also tour their product. Touring is an entrepreneurial activity which requires outlays for venue hire, accommodation for performers and crew, insurances, travel costs, van and truck hire, regular weekly payments for technical crew as well as all production costs. Income is derived primarily through ticket sales and possible merchandising which itself requires t-shirt, poster and program booklet design,

printing and other costs such as DVD manufacture of recordings of prior successful shows. The difference between outlays and income determines whether the next production can be staged.

If the tour is successful, a season may be booked at one of the major venues. The same outlays and income are applicable except travelling costs are, of course, minimised but rents and rates may increase. Costs such as the rental of the theatre and rehearsal space, payments for performers, the cost of a stage manager, as well as lighting and sound designers, will still apply while the venue will supply house management, a box-office service which increasingly includes online ticketing of some type, as well as limited marketing. A PR company may be engaged to manage press, television and social media promotion, but the cost of printing posters and paying for costumes and props remains that of the company. All insurances and taxes still have to be paid no matter the size of the production.

A percentage of profits may also be split by the entrepreneur, often the producer, with prominent performers. This split is dependent on the leverage they have in the market which is often based on their popularity, 'pulling power' and reputation. Stars, whether they be directors, actors, singers or others, can usually demand hefty fees or lucrative percentages of the box office. If the deal is also for a royalty this won't accrue until the costs of production are covered. Returns from royalties will increase as the production tours or is successful in the one location. If you are a playwright those royalties, usually fixed around 6-7% after costs, will accrue as the performances become more successful and other production companies take on the show. These latter matters, of course, apply primarily to the operational methods of the higher end of the market for the performing arts.

At this end of the market digitisation is now increasingly a part of marketing and production as well as providing a forum for interactive participation (Towse 2013). Ruth Towse argues from the available evidence that box office functions and promotion in particular have been affected by digitisation. Website are now ubiquitous as is the use of social media, giving audio-visual previews, histories of the show, stories about the cast and so on, all of which are linked to ticketing. These sites also encourage new audiences providing insights through forums for learning about the art forms with virtual back stage tours of theatres, video of rehearsals, interviews with performers, etc. In term of production, digitally controlled scenery changes and lighting have reduced the need for a number of backstage staff while streamed live performances done in real time via satellite to HD cinemas are becoming increasingly common. Of course, this audio-visual material comes with its own production costs, extra crew and necessarily intense coordination with the theatrical event itself. There are of course multiple rights to be negotiated whether the audio-visual material is embedded in social media or unsold on DVD at the event site (Towse 2013, pp. 311-21). Smaller companies and individuals, however, are increasingly using low-cost methods for promotion – mobile phone footage posted to social media platforms, for example.

12.5 Important Personnel

Actors, dancers, singers, comedians, jugglers and so on are the core onstage presence in the performing arts. Their work in the industry may be supported by a vast army of creative, technical and administrative support staff – or, as in the case of micro-theatre, they might do it all themselves. Choreographers, like playwrights, will develop a show to the point where it can be staged, while dramaturgs ensure the viability of theatrical scripts prior to the production going ahead.

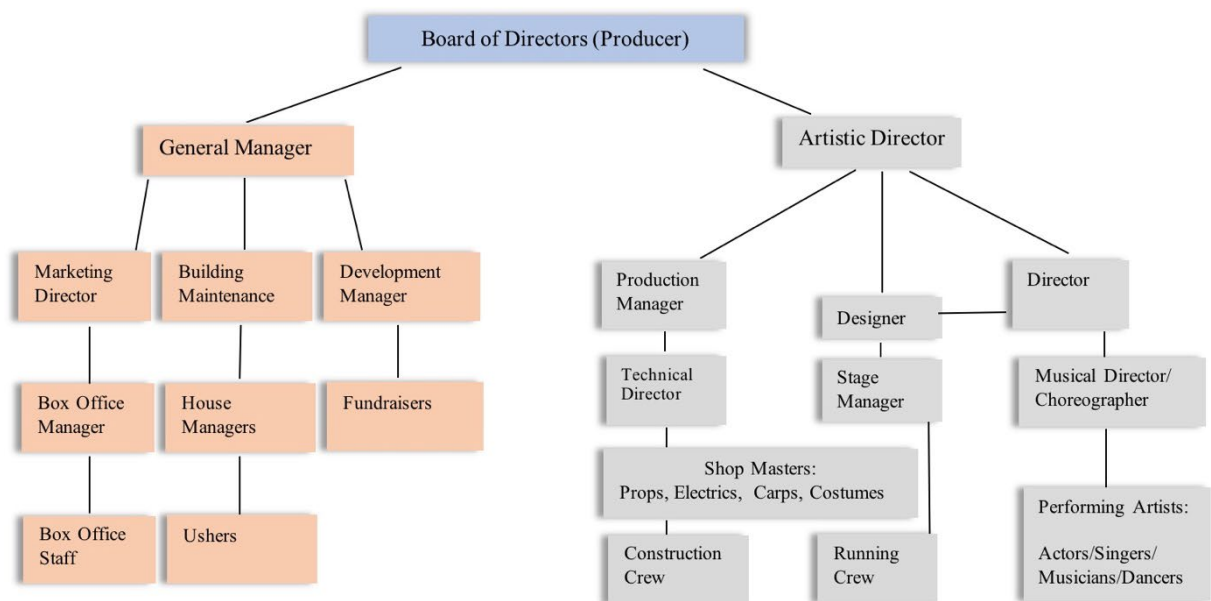


Figure 25 Performing Arts Industry Personnel

Musical theatre depends on those who compose the book, score and lyrics, all of which becomes the blueprint directors use to mount the performance. While musical directors are responsible for the musical elements, directors themselves control the artistic elements of the performance while producers ensure that all other tasks such as financing, legal and administration are taken care of so the director, cast and technical crew can do what they do best. Producers may access patrons, benefactors, funding bodies or investors in order to ensure the production costs are covered. Agents may be used to find a cast to fit the theatrical event while other agents book the necessary musicians to support the performance. Venue managers will ensure the performance is right for the venue and will supply often limited in-house lighting and sound facilities as well as most staging requirements and some marketing. The facilities are often dependent on the position of the venue in the marketplace. For large-scale productions, entertainment lawyers and accountants are crucial to ensure all legal and taxes are taken care of and then there is, of course, the audience, one of the most important groups of people in the field of the performing arts. Without them very little profit can be made. Critics act as knowledgeable intermediaries between the audience and the performances.

12.6 The Hunter Region Performing Arts Sector

12.6.1 Background

The Hunter Region has a long history of performing arts activity and continues to be noted for the quality of performers and associated creatives who go on to have significant careers nationally and internationally. These include writer and actor Jonathan Biggins, comedian Rhys Nicholson, music theatre performers Jye Frasca and David Harris, as well as actors such as Abbie Cornish, Sarah Wynter, Susie Porter, Stephen Peacocke and Ben Mingay. John Bell, of the Bell Shakespeare Company grew up in Maitland and the Hunter has been home to award winning playwright Nick Enright and musical director John Foreman. The Tap Dogs dance troupe has toured internationally for many years while international ballet companies including the Moulin Rouge often include dancers from the Hunter.

The 1980s was a particularly vibrant period in the region which saw two professional, funded theatre companies in operation (Hunter Valley Theatre Company and Freewheels); an opera

company funded by donors, businesses and corporations (Hunter Opera which became Opera Hunter); The Workers Cultural Action Committee of Trades Hall which supported a range of activities including commissioning *Aftershocks*, a play about the Newcastle Earthquake; and the emergence of a number of performance groups including Zeal Theatre and The Castanet Club.

After the closure of BHP Steelworks in 1999, some emphasis was put on the potential of the arts and culture to provide new jobs in the region as part of a diversification strategy. Government-funded TAFE courses offered retraining for retrenched workers in arts-related areas. The closure itself was marked by a major cultural festival funded by the company. This included the commissioning of new work such as John O'Donoghue's play *No More the Fur Elise, No More the Bullied Bloom* which documented work in the steel mill over three generations and travelled to Canberra for a performance at Parliament House.

There have been significant losses for the sector in the last three decades with the de-funding of performing arts companies and the closure of some venues. The level of activity is still high, however. Successful individuals are diversifying their skills, for example by developing their own content and marketing techniques and collaborating on multi-disciplinary work. Successful companies are using innovative strategies such as crowd-funding and alternative staging, for example, site-specific work. New, more intimate venues have emerged and host smaller-scale, more experimental work. The financial rewards for performers are slight, however, and most need to leave the region to find employment that covers their living expenses.

12.6.2 Individual Performers, Writers, Choreographers, Composers, etc.

Individual performers include a number of people who live in the region but work in Sydney where the major film, television and theatre companies are based. These are akin to FIFO (fly in, fly out) workers but might better be termed TITO (train in, train out)! Actors Stephanie Priest, Angie Diaz, Katy Carruthers, Anne Rzechowicz and Barry Shepherd, and educator Carl Caulfield (NIDA) are examples, as are the television and film actor Todd Lasance and operatic performer Guilherme Noronha. The precarity of their position is exacerbated by the travel required and the highly competitive selection process for acting jobs which means that individuals may need to make a number of trips to Sydney for auditions and call-backs, without any guarantee of success. Others have relocated to Sydney or Melbourne in order to be better positioned to secure work in the theatre or to pursue further training but continue to work also in Newcastle. Three individuals associated with leading Newcastle-based theatre company Stooged Theatre provide an illustration. Singleton-born director and actor Chloe Perrett has completed training in Newcastle and Sydney, works at Sydney Theatre Company in a customer service role while she pursues theatre employment in Sydney, and returns to Newcastle as required in her role as Associate Director of Stooged Theatre. Medowie-born Daniel Cottier, Literary and Development Manager of the company, was recently Assistant Director of a professional production in Sydney. Mat Lee, Artistic Director of Stooged Theatre says:

Sadly, the nature of working in the arts means one must work three jobs at times ... I am a humour therapist for people with dementia in aged care (sometimes referred to as a clown-doctor, we call ourselves 'Humour Valets') for the Arts Health Institute (AHI). Performing and engaging with people with dementia in order to bring happiness, laughter and memory back into their lives. Most of my work with AHI is intimate, in-the-room connection ... My second job is working

as a concierge in services apartments in Barangaroo, Sydney. My third job is being the Artistic Director of Newcastle-based independent theatre company Stooged Theatre. This is deciding and overseeing our theatrical seasons, directing and performing in work in Newcastle, and many admin tasks that arise – and there are many! (Lee i/v, April 2017).

Lee says that all of the core Stooged team work for free ‘unless they are working on a production and that production makes money ... a profit-share system’.

The individuals who work in musical theatre have a wide variety of occupational options with some few freelancing not only locally but also nationally and internationally. One of these is David Fitzgerald, a CONDA (City of Newcastle Drama Awards) winner for his work in musical theatre in Newcastle. He works as both a performer and a manager and lives with this family near Lake Macquarie. A Musical Director and Head of Audio, he works nationally and internationally, in which capacity he recruits musicians for the shows he directs and supplies tech specs for the audio parameters of the show. ‘I switch between both being an MD onstage or an MD at the audio, front of house audio position’ (Fitzgerald i/v, April 2017).

After working with big bands in Tamworth as a youngster, his big break in musical theatre came when he moved to Melbourne. ‘I went down there to study at VCA post school and within 18 months of being in Melbourne I was working on *Phantom of the Opera*’ (ibid). At the same time he studied for his Bachelor of Music at the University of Melbourne then went on to do a Grad Dip in Education at Sydney University. Fitzgerald’s time studying in Sydney coincided with the *Phantom*’s run in that town and he worked full time on that production. Awarded the Millfield Fellowship, he relocated to UK for 12 months where he was mentored by the Director of *Phantom of the Opera*, Cameron McIntosh. Even though he was by now trained as a classical concert pianist, he moved into synthesisers and the digital technology that accompanied it. He also studied business through an MBA and now operates under his own trading name of Full Fat Jazz. This is an extension of his theatre work as he has ‘some production values in terms of funding, organising, managing, directing, producing, and that again comes under that Full Fat trading name’ (ibid).

Since his *Phantom* days, Fitzgerald has worked with the Melbourne Symphony Orchestra but more often than not on new productions. ‘When you look at things like *The Full Monty* in Sydney and *Sunday in the Park with George* which was a professional show in Sydney, again up here with things like *The Wild Party*, I love doing it first, I love trialling stuff. Which goes right down the line with what I’ve been doing for the last 10 years with Cirque and Illusionists’ (Fitzgerald i/v, April 2017).

His audio engineering skills have also come in handy. ‘I was MD’ing in Sydney quite heavily, music directing, for a lot of shows and Loud and Clear was the preferred supplier’ (ibid). After some time he managed to also find himself behind the Front of House desk in an effort to understand his MD’ing role from the technical perspective. He now ‘regularly mixes 12 shows a year but I push boundaries and I’m seen a little bit as a renegade but by the same token I’m also seen as a mentor for a lot of the younger engineers’ (Fitzgerald i/v, April 2017).

‘I’d call myself an engineer more than a pianist nowadays although I still do a lot of accompanying here at the Conservatorium in Newcastle and I travel as an MD primarily but the income that I derive is more from ... engineering’ (ibid). He recognises how all the parts of a theatre production need to be synched. For example, he believes there should be a deep link between the MD and the FOH operator.

There should be a strong one, I don't know that there is a defined role. Having just come from Broadway and watching how the Americans work they are still very much defined by the unions, the red tape, and what they should and shouldn't do. And so an audio engineer's role over there is a bit like what we'd consider a lighting person's role is - push go, push go, push go. They expect it to be right coming out of the orchestra. What I love is the ability, having been an MD, to give suggestions to a musical director and say, 'How about you swing this person to this position, how about you place the amp that way, that way you get the fold back and I can control what's happening with one of ours?'. So there's a lot of those techniques that if an audio engineer, especially because a lot of it is not working in professional theatre, we're not talking about every show is mixed in the Opera House with a great D&L-Acoustics line array. So you've got to compromise, you've got to suggest, because sometimes the musical director, especially in the regional areas are semi-pro. Even at the top end I've taken shows into the Seymour Centre and into the Civic Theatre here where the music director actually has no idea what happens past their baton let alone how what they're doing in the pit affects what's happening in a reinforced perspective. And often that's because they're used to band programs or orchestral programs where reinforcement is not part of their sphere. So the short answer is yeah I do believe there should be a massive relationship and they can certainly help working hand in hand. I actually think if you look at the history of music theatre, and I'm talking going back to opera and to even the courts back in, you know the 16th century, 17th century, an MD at the piano in Mozart's day and age would have still had every note and every vocal and every syllable pass him. And even terraced dynamics was something they understood. Why we've lost that understanding or that training in the current day and age is again something of interest to me because they're the ones that actually know the underscore of when the dialogue's happening and then they can bring the orchestra back in but I think that is lost in the place of getting perfection off a score in terms of notes and rhythms (Fitzgerald i/v, April 2017).

Not only does Fitzgerald have a deep understanding and commitment to his various theatrical roles but he also, often through experience, understands the legalities involved in staging a production. He also holds an MBA where he did arts management and a number of courses on copyright. As a result he can link copyright directly to the creative decisions that are being made:

I was on Broadway, you know in November, putting on a show there. We'd ... been touring this show for two weeks and it wasn't until we got to a theatre there, we'd done one preview and I had producers coming to me asking me about the music and is it in breach of copyright, is it acceptable to use, and this was not just the show tracks, this was also then the interval half time music. I had placed complete trust in the artistic director who was actually the assistant director, the main director didn't make the US leg, and I was told it was all cleared and all of a sudden I'm getting producers saying, 'Well no, it's not'. And producers funnily enough have a raft of people around them to give them advice. I'd only had obviously in my chain an artistic director who said it was fine. But having had that training I could actually within the four hours between the preview and opening night find an answer, find a solution and put that into place. I was lucky that I had done that for this client previously, you know going back another 10

years when we first started Le Grand Cirque in Australia. I had done that and dealt with agencies on that all the way through. So it's something, again it's always in the back of my mind (Fitzgerald i/v, April 2017).

For his long-term work with *The Illusionists*, Fitzgerald:

Took a band across to Dubai which is where we re-built this show and then over 18 months we've had it back through Australia. I've done Mexico City, although that was without band so I just naturally slotted into front of house even though I'm still controlling all the playback files and Ableton files. I just did it behind the audio desk and mixed at the same time. The only change in personnel really has been the American side. I had to train four new musicians over there because we couldn't get visas, they're very strict on Broadway, for my Australian crew. So that's the first time the Aussie crew haven't travelled with me (Fitzgerald i/v, April 2017).

He moved from Sydney to Newcastle and it appears to have worked out for him and his family:

I was living in Sydney, I was working as an MD in Sydney and just as I was starting to work as an audio engineer for Loud and Clear, we sort of flipped a coin. I met Wendy, my wife, who's a Novocastrian, and we flipped a coin. Where would we live? And it made sense to go to Newcastle for a lot of different reasons. Has it hindered me? No, except to say that there's a few jobs I've said no to just because of proximity. Has it allowed me to be creative and continue? Yes because I'm not, because I can say no to jobs. If I was in Sydney I'd be full time stuck in that Loud and Clear mentality or back office system and I wouldn't have the opportunities that I've had by being a freelance artist. So I think in hindsight yes it's allowed me a lot of great experiences. How that changes now I've got a young daughter, I'm not so sure. Funnily enough, the last 18 months I've been on the road pretty much continuously and even that's actually been enjoyable even with a young daughter at home because I know I'm doing something to support the family unit. Often there is a frustrating time when you're waiting and 'when is the next job and what is the next job?' I mean my pianist work is great but it's cyclical and regular, you know when university exams are, you know when AMEB exams are, you know when the HSC is, two weeks here, two weeks there, and that's regular as clockwork. And, you know, with people like Philip Sketchley locally taking a backseat I'm picking up more and more accompanying work which is nice. I think that's part of the reason why we do like Newcastle. In terms of the current gigs I'm doing it's not different, it's an extra two hours to travel to one airport than it is to go to the local airport. Just to catch an international flight (Fitzgerald i/v, April 2017).

In the case of dance, performers without exception need to leave the region to find employment but they do so with exceptionally strong skills. Timothy Gordon is an international dancer, choreographer, coach and teacher who was a choreographer for the Australian Ballet and now teaches dance at The National College of Dance. Gordon agrees that Newcastle punches above its weight in terms of dancers succeeding at the highest level and says this is 'because there's nothing else to do here, except go to the beach!' (Gordon i/v Aug 2016). More seriously, he speaks of the difference in culture, especially youth culture, in Newcastle:

These kids in Sydney, you can tell from the way they look, the way they walk, how snooty they are. And how their parents molycoddle them, driving from this

thing to that, never working, never having to lift a finger, living in their pink palace of privilege! Whereas these kids come from the country, way out in NSW, Coffs Harbour, Mudgee, Orange, the outback, all of that western country area. They would rather come to us than go to Sydney. And their parents would rather them be here than in Sydney. By far. And one of the good things about Newcastle - and there aren't many good things, ha! - is that one feels safe. The kids feel safe here. They can wander around and do all sorts of things outdoors. They don't always have to be around shops and having to compete with each other's clothes and shoes and handbags, all that junk. They don't have those distractions here. They look after each other. They have an amazing camaraderie. They hug each other, they get into groups before they perform, they encircle each other, hold each other, they are amazingly good ... Of course they are going to succeed, because people want to work with them. Because they are so likeable, so unselfish about their talent and their abilities, and fun to be around (Gordon i/v, Aug 2016).

Gordon agrees with a comment he says was made to him by Dame Peggy van Praagh, the founder of the Australian Ballet. She said that 'the future of dance in Australia would not be in the main centres; the future of dance in Australia would be in the regional centres' (Gordon i/v, Aug 2016). He explains:

Things are not yet set, you don't have politics driving everything, it's the true and hard-working creatives that will drive everything, not the bureaucrats ... [and] isolation can be tremendously positive because you can focus and not be distracted by all the ridiculous nonsense that goes on in the huge big centres of economic privilege (Gordon i/v, Aug 2016).

Tamara Gazzard is a co-founder of Paper Cut: Contemporary Performance Collective which creates, produces and stages original theatre and movement work. She says:

One thing I think that characterises working in the creative industries is unpredictability. The work doesn't happen nine to five, five days a week, and you don't get paid a regular wage. While it's unpredictable, it also involves a lot of planning. We had to get used to planning 18 to 24 months into the future to make things happen. That was a really big shift as well. I guess for me it's the unpredictability and the haphazard nature of it all sometimes ... there are those periods of like amazing energetic creation of things and then there's nothing for a while so you have to ride those waves. And when a production finishes, that's when you feel it the most because all of a sudden there's this void until you've got something else to do (Gazzard i/v, Amy 2016).

While local employment options are limited, there are examples of successful, full-time professionals working in the region. Some, like Paper Cut and Stray Dogs, create their own work. Chris and Debbie Kelly have for many years run Ship O'Fools which provides entertainment, especially for children. Others found employment with the Arts Health Institute before it folded in 2017 (as discussed below). Many have portfolio careers, combining a number of types of performance-related work, some artistic, some commercial, perhaps supplemented by teaching.

Daniel Stoddart is an example of a performer with a portfolio career. A Drama graduate of The University of Newcastle, he declined the offer of a place at NIDA and worked for two years as Assistant Program Director at Livesites, a place activation strategy run by Newcastle City Council. He later developed the concept for *The Ultra-Swing Lounge*, a 1950s-style jazz music show produced by Phil Collins which was staged at Civic Theatre Newcastle and toured for

nine years. Daniel is an award-winning actor and singer, he hosts and compères events and he was Co-Artistic Director of the Popular Theatre Company with the late Victor Emeljanow (their last production was *Charley's Aunt* at Civic Playhouse in 2015.) He performs in an unpaid capacity with local companies including Metropolitan Players. His full-time, paid job is as Artistic Director of Hunter Drama which was established in April 2007.

Performer Lucy Shepherd points to the issue of the gift economy in the performing arts:

A lot of people do it for free, they do it as a passion and they do it for the high they get from it but when does that line cross over to professionalism? ... When do you start getting paid? ... I guess supply and demand is out of whack (Shepherd i/v, May 2016).

Her creative collaborator Sarah Coffee says that more thought needs to be put into creating professional opportunities for people in Newcastle 'instead of just talking about the lack of them' (Coffee i/v, May 2016). For example, she would like others to be as committed as Paper Cut to paying performers for their work. She argues that 'there's that expectation associated with the creative industries that you should be doing it for free. That's not sustainable. You can't do that. No wonder people are leaving' (Coffee i/v, May 2016).

One anonymous industry identity also comments on the lack of professionalism in the performing arts sector, asserting that 'there's a lot of highly respected training institutions and dance schools but there's not a place for professional artists to work' (Anon i/v, 2016). This identity also regrets the lack of status of dancers in the city:

But it's about the artist feeling valued in their own community by getting paid and having somewhere to take that ... [Newcastle] needs to start paying its artists at a higher rate. I've always paid my artists MEAA rates ... Artists will come here and get \$1500 a week to work ... That changes the playing field. Artists think, 'I'm here to work. It's not a hobby, it's work' but there's still passion about it. Then the funding bodies take you seriously if you do everything in a way that's transparent, and the wages are good, you've got grants, then you are taken seriously (Anon i/v, 2016).

Another interviewee who also prefers to be anonymous goes so far as to say:

We talk about the industry a lot but in actual fact it's not an industry, because people who work in industry get paid, and they get paid properly, and they get paid fairly, I assume, so I don't really think of it as accurate, I guess (Anon i/v, 2016).

Daniel Stoddart is of the view, however, that there is a lack of commitment to professionalism within the sector:

There seems to be a lot of back-patting ... there are lots of self-appointed professionals but in terms of wanting to further their own skills and in terms of pushing their own boundaries and professional development, well I suppose in terms of theatre, there doesn't seem to be any kind of measuring stick for that sort of thing in Newcastle. There seems to be a mentality that effort equals quality but that's not always the case. You can put in all the effort in the world but it doesn't always equal quality or a good show at the end of the day (Stoddart i/v, Oct 2015).

One anonymous employer of performers expressed the view that while artists demonstrate entrepreneurial skills such as resourcefulness and risk-taking in their creative work, they often lack entrepreneurial skills and spirit in a business sense and this has some bearing on their poor

employment status, as has the strong volunteering ethos common in the arts. Artists need to 'claim their value':

In terms of being able to earn a reasonable income, I am not really sure about that. I think that's still a problem ... knowing a lot of artists, they're just grateful for any money, and I think that's sort of hard, and it's also lovely too, but it's more than that ... I think it's important that artists can claim their value, and the value is reflected in the type of work they do and the remuneration they get (Anon i/v, 2016).

The alumni of the now defunct Hunter Valley Theatre Company are also still an interesting set of individual performers with links to the Hunter. Many of them have 'claimed their value' and are still involved in the performing arts in the region as well as nationally and internationally. As Scott Bevan wrote for the Newcastle Herald 'careers were also created and nurtured [at the HVTC]. Among the young actors who inhabited the stage were Celia Ireland, David Wenham and Susie Porter. Others sitting in the audience saw their future' (Bevan 2017, online). For example, Vanessa Hutchins, the former Civic Theatre Manager in Newcastle, got her start as a young woman working as a stage manager and lighting operator with HVTC (ibid). She has gone on to a significant national career as a music and arts touring manager and event manager. Jonathan Biggins was also an early convert to theatre, dropping out of University to perform professionally in a number of plays with the HVTC before becoming a nationally recognised comedic personality working on stage, in television and at corporate events. Barry Shepherd, still working as a professional actor based in Newcastle, is another example. Shepherd was:

A schoolteacher living at Dungog when he began travelling to Newcastle in the 1980s to appear in amateur productions. A Sydney talent agent saw him in 1987 in a Newcastle Repertory production of *Rosencrantz and Guildenstern are Dead* and put him on his books. He began working professionally with Hunter Valley Theatre Company in 1988 and won a CONDA for his role as canecutter Barney in *The Summer of the 17th Doll* that year – one of four he has won (Longworth 2014, online).

Shepherd's expertise is still in strong demand, most often travelling interstate to act in a variety of commercials. He is also an assistant director for film productions and edited a television series. He has acted in movies such as *McLean's Money* (2013) and in the *Rake* television series in 2010 (IMDB 2018, online). He had a major role in Jamie Lewis' award-winning film *Mikey's Extreme Romance* which was shot in Newcastle and released in 2011. He has regularly appeared in popular television series such as *McLeod's Daughters*, *Home and Away*, *All Saints*, *Wildside* and *A Country Practice* (ibid).

Perhaps one of the best-known performers from the HVTC is John Doyle. A former school teacher, Doyle studied Drama at the University of Newcastle. The playwright John O'Donoghue recognised that Doyle had the gravitas for the parts he went on to play in O'Donoghue's ground-breaking play *Essington Lewis, I am Work* for the HVTC. Vic Rooney played the lead role and Jonathan Biggins played multiple characters in the play as did Doyle.

The first production opened to mixed reviews. The houses for the first week at the Playhouse were reasonable, it seemed as if it was going to do average box office. Enter David Williamson. In Newcastle to promote the film *Gallipoli*, he was interviewed by the Newcastle Morning Herald and towards the end of the interview he mentioned that he had seen the play the previous evening, how good it was and that Newcastle audiences should be horse whipped for not supporting it. Next day

the phones ran hot. Performances were sold out, audiences were wildly enthusiastic and an extension to the season was arranged (McFadden 2018, online).

After this success, Doyle worked steadily for a number of years at HVTC, eventually leaving his teaching position. This very solid grounding in the daily grind of professional theatrical life, rehearsing by day performing at night, proved very useful to Doyle's future career. While his credits include the 1985 film *Bliss* and *Babe* in 1995, he has inhabited the now iconic comedic character of 'Rampaging' Roy Slaven, firstly for ABC's Triple J, and then moving the show to Triple M for the Southern Cross Austereo radio network and much more since then:

Roy and his cohort HG Nelson have appeared continuously on *This Sporting Life* on radio since 1986, as well as creating television programs including *Club Buggery*, *The Channel Nine Show*, *Win Roy and HG's Money*, *The Dream*, *The Monday Dump*, *The Ice Dream*, *The Cream* and *The Memphis Trousers Half Hour* for ABC TV. Doyle himself hosted the weekly mid-afternoon shift on 702 ABC Sydney in the late 1980s and early 90s, earning a loyal following with his broad knowledge, versatility and superb interviewing skills, often probing and poking fun at the prevailing views and perceived wisdom of the day ... Over the last decade Doyle has developed a very successful parallel career as a writer of serious television drama. His first major effort as a TV dramatist was the highly acclaimed ABC-TV miniseries *Changi*, an adventurous exploration of the experiences of a group of young Australian soldiers interned in Changi POW camp during World War II. The series was partly inspired by *Hogan's Heroes* and was originally conceived as a situation comedy; using the dramatic technique of magic realism, Doyle developed the script into a deeply moving yet often humorous examination of the experiences of young men at war and the effects it has on their later lives. His drama series *Marking Time*, examined contemporary racial and cultural tensions in Australian society, seen through the prism of an Australian country town ... In 2006, Doyle appeared in *Two Men In A Tinnie*, a documentary of his own making involving a trip down the Murray-Darling river system of Australia with his long-time friend, biologist Dr Tim Flannery. The program focused on the degradation of the once mighty rivers and gave many different insights as to the causes. John and Tim reprised their collaboration in 2008 with *Two in the Top End* as they explore northern Australia [*Two Men in China* came later]. In 2008, John Doyle's play *Pig Iron People* was produced by Sydney Theatre Company at the Sydney Opera House Drama Theatre. Doyle's outstanding contribution to Australia's cultural scene through radio, television and the theatre has been recognised by the granting of an Honorary Doctorate of Letters from the University of Newcastle, eight Australian Writers Guild (AWGIE) awards for comedy, one for Best Original Mini-Series for *Changi*, one for *Marking Time*, numerous Logies for his television work and a 2004 AFI Award for Best Television Screenplay, again for *Marking Time*. John Doyle is the Patron of Spectrum Australia (ASPECT) (Celebrity Speakers 2018, online).

Like Philip Adams (see Section 8.7.1), whom he most closely resembles as a public intellectual, Doyle has also published quite a number of books. He was presented with an OAM in 2010 for his services to the media and he now lives with his wife, the exhibiting artist Deanna Doyle, in Balmain. They met in a theatre production in Newcastle and they are still personally connected to the city. Aarne Neeme, now himself a teacher and successful theatre director in Sydney and Singapore, directed quite a number of the plays Doyle and many others appeared in for the Hunter Valley Theatre Company. Neeme suggests that 'the "great sadness" with the demise of

not just the HVTC but a string of regional theatre companies was the removal of “the opportunities that gave young theatre people a start” (Bevan 2017, online).

Some of those young people in the performing arts have taken matters into their own hands. For example, Ethan Andrews, a nascent comedian, is a recent Business and Commerce graduate from the University of Newcastle who started life in Singleton. He realises that if he is to get anywhere with his performing life he has to do it himself. To that end he began running comedy shows in 2015 in order to learn his craft. These shows ‘also gave locals new opportunities to perform’ (Morris 2017, online). Andrews:

Organises and hosts a Five Dollar Comedy Night at the Croatian Wickham Sports Club and produces *Carrington Comedy* at the Carrington Bowling Club. He also hosted and organised *Tonight’s the Night* at The Press Book House. Lately, he’s been running comedy writing sessions and workshops (ibid).

Andrews also organised a single day comedy festival which he entitled *This is not This is Not Art*. While organising these events and freelancing as a comedian keeps him busy, in terms of income he classes himself as underemployed. In an effort to change those fortunes he applied for and won The NSW Young Regional Artist Scholarship, worth \$10,000. These State Government scholarships, 25 of which are on offer annually, are designed to enhance the professional development of young regional artists. As Alex Morris wrote in *The Herald*, ‘the scholarship will allow him to develop his audience and reputation, including allowing him to perform at the Melbourne Comedy Festival’ (Bevan 2017, online). The grant ‘pays for my venue hire, my accommodation, promotion and registration fees to be a part of the festival’ (ibid). As well as developing his act, Andrews has also been organising comedy writing sessions and workshops:

Basically I got sick of hearing other comedians that I like performing the same jokes. I was like ‘well people will perform at a gig, what if they come out to write’. I was talking to (local comedian) David Gairdner about it. He was really struggling to withhold schoolgirl squeals at our recent writers’ workshop, but I want it to be like a library; I want silence. American improv teacher Del Close used to tell his students on the first day of their classes that there’s nothing f---ing funny about comedy, and I agree. A group of eight comedians can go off the rails, and that’s why I’m trying to reign everyone in (quoted in Morris 2017, online).

Andrews notes that the Newcastle comedy scene is evolving and other opportunities have begun to surface. For example, the Clarendon Hotel offers an open mic night in association with *Comedy under Construction*. The Clarendon was the home of the former comedic groups The Musical Flags and Castanet Club where Mikey Robbins, Steve Abbott (The Sandman on Triple J), Angela Moore, Glen Butcher, Maynard, Warren Coleman (co-writer of Oscar-winning *Happy Feet*), all got their start. *Clown & Anchor Comedy*, hosted by David Gairdner and Chris Butler, is claimed to be ‘the biggest new, fortnightly, Thursday night, free open mic stand-up comedy event in Newcastle!’ (Facebook 2018, online). It is staged upstairs at the Crown & Anchor Hotel in downtown Newcastle. Ethan Andrews surmises that the type of comedy coming from regional centres like Newcastle is different to its more urbanised variants. He also realises that he is now part of an expanding comedic community in Newcastle:

There’s so many opportunities in regional NSW. I wouldn’t be so special if I were in Sydney, but here it’s like there’s this thing that’s happening and not many people know about it and a lot of good work is coming out of it, I think it takes people by surprise (quoted in Morris 2017, online).

12.6.3 Agents

Agencies which operate in the Hunter Region for performing artists include Gina Stoj Management which began in 2002. Gina Stojanovski saw an opportunity in the local market to represent talented actors from Newcastle. Within a year she found that actors from Sydney and beyond were asking to join the agency (GSM 2018, online). While she operates her Australian agency from Lambton, her US management company has offices on Hollywood Boulevard in Los Angeles and Lexington Avenue in New York. She is a member of The Talent Managers Association and is an accredited agent with AACTA (The Australian Academy of Cinema and Television Arts). Since beginning her business she has placed actors in a wide variety of television, film and commercial work. Her actors have worked in numerous television series including *Rake*, *Janet King*, *Black Comedy*, *Underbelly*, *Crownies*, *Here Come The Habibs*, *Home & Away*, *Neighbours* and *Redfern Now*, as well as films such as *Hacksaw Ridge*, *Unbroken*, *Fury Road*, *The Great Gatsby*, *Grandmothers*, *This Christmas*, *Badness*, *A Few Best Men*, *Blood Brothers* and *Happy Feet Two*. The commercials her actors have worked in are numerous and listed on her webpage (GSM 2018, online). When interviewed for a *Huffington Post* article, Stojanovski stated that:

You always get a feel for an actor from their initial email or phone enquiry. Are their materials all in order, do they know their type, and also do they have acting chops? Is there a gap in my agency for a particular skill or quality they may have? I am known for giving new actors a start, nurturing them (Beattie 2016, online).

Her experience has been hard-won:

I started out as a 'stage mum' in Australia and saw a need for a middle tier agency. The only options that were available were either top of-the-line agencies or ones that only took extras. So I decided to start an agency that filled the gap. From there I began with one actor, who happened to be my son! Within weeks, word had spread in the industry and I started filling my books with actors looking for representation. I was a 'person that actors could trust' was the word on the street. I [had]] always been an employee of someone else. I was a secretary to four psychiatrists before I became an agent, (so) everything was trial and error. [But] whenever I had questions, peers in the industry were always on hand to give advice. There were many hurdles, sometimes the simplest things were a challenge. Getting a phone number that is portable to both countries that doesn't get discontinued when you are out of the country for a certain time is one example. And time zones! (Beattie 2016, online).

As well as expanding her agency Stojanovski started a non-profit theatre company - Theatre 48 - in partnership with one of her acting clients and they staged the play *Finding the Burnett Heart* on Theatre Row in Hollywood. It was reviewed positively by the theatrical press there, becoming a Critic's Pick. With that experience behind her she went on to produce a short film, learning as she went. She believes it is important:

To have your ear to the ground and hearing of new projects in development. Networking plays a big part of developing new relationships within the industry. Work hard and don't let anyone tell you that you can't do it. Give your best to the people who believe in you and trust you with their career. Be loyal to yourself and trust the journey! (Beattie 2016, online).

Haylee Knight is the Agency Director for Models and Actors, a Newcastle-based talent management agency located in Greenway Street in Wickham, inner Newcastle. This talent agency has over 30 years industry experience (M+A 2018, online) and is connected to the film, fashion and advertising industries (ibid). They ‘represent a broad range of talent to their local clients, models for fashion editorial and runway nationally, actors and extras to FOX Studios, ABC and the Seven Network, and to advertising and production companies further afield’ (ibid). The other major talent agency in the region is CHAAYS Model and Talent Management which has been established for 25 years. This agency supplies ‘models, actors and extras of all ages to the Advertising, Fashion, TV and Film industry throughout Newcastle & The Hunter, Central Coast and Sydney’ (CHAAYS 2018, online).

Many local performers are signed with Sydney agents.

12.6.4 Venues

The major performing arts venues in the region for large-scale entertainment and events are Newcastle Entertainment Centre which has a capacity of 6,500, the Civic Theatre (1,400) and two leagues clubs venues - Wests City in the Newcastle CBD and suburban Wests New Lambton. The Griffith Duncan Theatre at the University of Newcastle seats approximately 930 but since its refurbishment and an increase in fees the building has become unusable for most theatre companies. It has not been used for theatrical productions for a decade although some dance schools have been using it. Lake Macquarie Council supports a modest performing arts centre at Warners Bay (300 seat capacity) while Cessnock Council’s award-winning performing arts centre (capacity 466) is a showcase facility. Maitland has two main performing arts venues: Maitland Town Hall and Maitland Repertory Theatre:

Located in the heart of Heritage Maitland’s Cultural Precinct, the Maitland Repertory Theatre was a Congregational Church before being purchased in 1964 from the church and being converted to its current use as a theatre by Maitland Repertory in 1965. The theatre is located opposite Maitland Town Hall and the Maitland Regional Art Gallery on the corner of James St and High St (Newcastle Live 2018, online).

Many community halls across the region are used for theatrical and music performances, for example, the Gresford School of Arts. The Cassilis Community Centre Hall has a capacity of 200 people for a performance. Other venues include Singleton Youth Venue which has a multi-purpose function to stage theatre and live bands as well as to conduct training and workshops. The Scone Old Court Theatre is a converted hall, originally built as a court house in the 1860s, which has a stage and back rooms designed for theatre, films and various group functions. In the north western part of the valley, the Upper Hunter Conservatorium of Music (UHCM), ‘the largest cultural organisation in the Upper Hunter’ (AUH 2018, online), includes a purpose-built facility which ‘is the first newly designed performing arts facility in the Upper Hunter’ (ibid). Its auditorium seats 154 or 240 with no seats, similar in capacity to the Civic Playhouse in Newcastle. Smaller rooms are available for hire, one of which is suitable for performances and has a capacity of 58 with theatre-style seating.

At the other end of the valley, Newcastle City Council owns and manages the heritage Civic Theatre, with a seating capacity of 1,400, as well as the Civic Playhouse which seats a little under 200. The Concert Hall and other venues at City Hall and Wheeler Place are also the Council’s responsibility. Civic Park in the city centre has also been used for performances, most recently in the Spiegeltent which presents national and international level cabaret, comedy,

music and dance, as well as in 2018 the ‘headline show, the saucy circus-cabaret, *Blanc de Blanc*. From the creative minds behind LIMBO and Madonna's recent Rebel Heart Tour’ (StrutnFret 2018, online). Council hires out all of these venues and buys in product, that is, the touring theatre, dance and music shows that populate the programs for each of them.

As well as providing venues, local government authorities generally take on responsibility for cultural development. For example, in 2016 Newcastle City Council endorsed a Cultural Strategy which focuses on partnership, collaboration and engagement. Former Cultural Director Liz Burcham insisted that making Council venues more accessible was an important part of this focus within clear budget constraints:

Council has a responsibility as the major presenter and producer in this town; we have a responsibility to our local artists, our local makers and producers. So we have got to work with them, to open up our facilities to those parties, but we can’t do that at a cost to those institutions operating at the level they need to (Burcham i/v April 2016).

Performer Daniel Stoddart, is Australia's only recipient of the Freddy Gershon Fellowship presented by Music Theatre International, New York, for his work with young people in theatre. He is not alone in identifying a lack of suitable venues as a problem for performing arts in Newcastle:

It’s the age-old problem that always pops up – the need for a medium size theatre. We’ve got the Civic Theatre which is lovely and is really nice and fun to use but it suits 1,400 people and it’s pretty expensive to use and then on the other end of the scale there’s The Civic Playhouse which holds less than 200, a very cheap space to use. I love using The Playhouse but something in the middle is needed as a stepping stone to get on to that bigger venue, to the next level business for local producers in terms of growing our economy, that would be so useful but we don’t have that (Stoddart i/v Oct 2015).

While Stoddart praised the Playhouse as a venue, since the 2017 hire increase and a commensurate take of 11% of net box office sales associated with it, the venue remains largely unoccupied and is not used as it used to be before the price increases. This situation underscores the idea that staging productions is expensive and risky, not least because royalty payments of approximately 16.5% on a show’s gross also apply. In 2014, Hunter Drama staged Disney’s *The Little Mermaid Jr* at the Civic Theatre and it failed to cover costs. Stoddart comments, with some frustration, that ‘it lost a lot of money. When we do another show next year at the Civic Theatre ... it needs to be more commercial than a Disney show would be and, let’s face it, what is more commercial than Disney? How do you top something like that?’ (Stoddart i/v Oct 2015). One option is the use of alternative venues for performance and these are becoming increasingly popular. Daniel Stoddart surmises that:

What seems to be happening at the moment, which is really exciting, is that people are realizing, particularly in theatre, that you don’t need a venue, you can just go to a café and stick somebody in the corner and as long as you have got somebody doing something and if you have at least one person there to watch, you have a theatrical event. I think that people are really starting to enjoy freedom of that and I think that younger audiences and younger creative people coming straight out of school like Hunter School of the Performing Arts and the people I work with at Hunter Drama are currently taking ownership of that and really enjoying the opportunity to take risks and to enjoy having no budget to spend and seeing what

they can do. Like the Crack Theatre Festival and the Micro Theatre Festival which had theatre in a gallery, café and bookshop (Stoddart i/v Oct 2015).

Tantrum Youth Arts is gaining a reputation for its site-specific work – *Diving off the Edge off the World* at Newcastle Ocean Baths (2015), *Manning the Fort* at Fort Scratchley (2016) and *Mapping the Lake* on the shore of Lake Macquarie (2017). But their reason for eschewing traditional theatre spaces is not cost but rather finding a unique style of work in a crowded marketplace. Former Artistic Director Amy Hardingham comments that ‘venue costs are enormous but site-specific work isn’t necessarily free’ (i/v Nov 2015). In the lead-up to *Manning the Fort*, she was aware of the problems:

There are so many hidden costs, I’m now sort of thinking, ‘Can we even do this?’ There are so many hurdles - security, OHS, ticketing, and all the things that if we could run ourselves it would be affordable, but it needs to be done by other organisations and that’s a little bit prohibitive. So yeah, it’s not necessarily because of the cost of the work that we do it (Hardingham i/v Nov 2015).

Professional-standard theatres are located at two Newcastle schools – Hunter School of Performing Arts and St Phillips Christian School, both in suburban Newcastle. Newcastle Theatre Company in suburban Lambton has a small, well-equipped theatre with a capacity of 140, but like the school theatres, it is rarely available to outside users. Catapult Dance has performance space at its Hunter Street studios for the use of its students and visiting dancers.

Small, alternative performance venues include The Royal Exchange, The Gallipoli Legion Club and The Unorthodox Church of Groove (now renamed the Black Malabar), all in Newcastle. Local clubs and dinner theatre has a niche role at a church hall in suburban Adamstown (Theatre on Brunker), close to another church facility, The Dungeon at Adamstown Uniting Church. As mentioned above, the Micro Theatre Festival use cafes, bookshops and art galleries as performance spaces.

Newcastle has lost some significant venues in recent years, notably the Drama Theatre at the University of Newcastle (demolished), The Commons in suburban Hamilton and The Black Box at Newcastle Community Arts Centre in Parry St (Council sold the building). The historic Victoria Theatre in the CBD is currently being refurbished and is expected to provide opportunities for local performers, as well as touring shows.

12.6.5 Festivals

A number of performing arts festivals are staged in the Hunter Region. For example, Crack Theatre Festival which began as an initiative of the National Young Writers’ Festival in 2007 (Crack 2017, online) is now part of the acclaimed annual TINA (This is not Art) Festival in Newcastle which is run by Octapod. The festival bills itself as a place ‘where experimental performance artists come from all over Australia to unleash their wildest ideas’ (ibid) and has the aim of championing ‘the creation of safe, non-confrontational performance spaces, invading the shopfronts, streets and unused buildings of the Newcastle CBD to create non-traditional theatre spaces where experimental and contemporary art can exist’ (ibid). While it provides venue, marketing and technical support as well as networking events, but as of 2017 it ‘no longer provides monetary, travel or accommodation support’ (ibid).

Micro Theatre was established in 2015 by Kate Dun and Mardi Ryan as ‘an independent festival of short plays performed in intimate spaces such as cafes and small art galleries where the venue is the stage’ (Micro Theatre 2018, online). Festival to provide live theatre opportunities for a

variety of performing artists where ‘prizes are offered for best actor as well as prizes for writing, direction and production’ (ibid). The festival has the support of a number of local businesses who act as sponsors and promoters, and the non-traditional venues in which it has been held include Curve Gallery, The Press Bookhouse, Vinyl Café, all in Newcastle, and Studio 21 Artspace in Hamilton. ‘Micro Theatre Pty Ltd was formed to be an independent social enterprise company. We are committed to growing the Micro Theatre Festival as a self-sustaining festival, where all net profits are invested back into the festival’ (ibid).

The Newcastle Fringe Festival was established in 2015 and in 2017 offered ‘over 100 unique shows and performers’ across a range of city venues including hotels. Each venue was selected to be ‘within walking distance of the Newcastle CBD. Each venue will have at least 3 shows a day’ (NFF 2018, online). It features theatre, comedy, dance, music, cabaret and circus, nearly all newly-developed work. The Fringe is committed to bringing as much variety in entertainment options as possible to cater for all interests and it ‘showcases the best up and coming acts from around the world ... 25% of all acts will come from students, graduates and amateur companies’ (ibid). The festival is sponsored by a number of businesses including Goldberg’s Restaurant, Noahs on the Beach, the Port of Newcastle, Port Waratah Coal Services, WHO Printing, the City of Newcastle and Hungerford Hill winery.

Hissyfest is a short play competition run annually by Tantrum Youth Arts. Its producer is paid as an Emerging Artist. The festival features ‘new writing from ten emerging writers’ (Tantrum 2018a, online). It not only showcases new writing but also provides an ‘opportunity to emerging and established directors and actors to produce quality new work’ (ibid). It is staged at the Civic Playhouse in Newcastle and also features the Hissyfest Writers Lab where ‘five emerging writers will be given the opportunity to learn from one of Australia’s most renowned contemporary playwrights, Lachlan Philpott’ (ibid) who guides aspirants, 16 years or older, ‘through the process of writing a short, new play’ (ibid).

The Hunter Valley Arts Centre was instrumental in producing Theatrefest Hunter which is a festival of one-act plays performed by the region’s theatre groups and is held in ‘a state-of-the-art entertainment centre, the \$8 million Cessnock Performing Arts Centre’ (Stage Whispers 2018, online). Some of the short plays are unpublished and/or written by students. The adjudication by special guest judges is followed by an awards ceremony supported by Cessnock City Council and the Cessnock Performing Arts Centre.

12.6.6 Training institutions

The University of Newcastle offers degree and post-graduate qualifications in Drama. The Drama Theatre on the Callaghan campus, a much-loved venue, was recently demolished. In addition, Hunter TAFE offers courses up to Advanced Diploma level through its Music Department and Regional Institute of Performing Arts (RIPA). The limited nature of theatre training available in the region has been identified as an issue, however. Mat Lee from Stooged Theatre talks of the strong talent base and high degree of theatre-related activity in the city but he points to the loss of training opportunities on offer with reduced offerings at both TAFE and The University of Newcastle:

... within the theatre world – Newcastle is both thriving and at a loss. We currently have more companies producing contemporary work and theatre in general, than I think we ever had before (especially in the case of dramatic theatre), we have a great assortment of up-and-coming talent graduating high school and producing or performing in excellent work – though, with recent funding cuts, we have seen

[a threat to] RIPA [to] close its doors after many years of successful operation. In terms of dramatic actors, there isn't really another viable avenue to study theatre in Newcastle (this is not including musical theatre with many options available). The University doesn't really offer real acting training like it once did, and young actors – if they wish to pursue a career in this field – have to study in Sydney (Lee i/v April 2017).

Drama schools offer programs mostly for children and young people and they include Tantrum Youth Arts, Hunter Drama, Young People's Theatre and Pantseat Performing Arts as well as the Hunter Valley Actors Centre (HVAC). Young People's Theatre (YPT) is of particular note as they are one of the few companies to return substantial profits according to the audit reports available publicly from acnc.gov.au. This company:

Is the premier theatrical training institution for youth in the Hunter and has nurtured the careers of many young people with aspirations to continue in the industry. It has provided training and performance opportunities for young people between the ages of 8 and 18 for over 70 years ... 400 students attend weekly classes at YPT. As well as staging 6 productions a year, YPT provides technical training and mentors youth directors (YPT 2018, online).

HVAC, located in the Polish Hall in Maitland, has provided acting and theatre courses since 2010. As their website attests, 'in 2014 HVAC celebrated Shakespeare's 450th birthday by including his works within Courses' (AA 2018, online). HVAC instructs in the fundamentals of acting including voice, movement and improvisation. The tutors who deliver the courses have over 20 years of experience in the performing arts, while the courses they teach include 'hands on experience, theoretical understanding, narrative interpretation and direction, spatial awareness & production techniques' (ibid). Students stage a one act play as a performance showcase.

Tantrum Youth Arts also offers a range of programs for young people aged 3 to 26 and describes itself as 'the leading professional youth arts company in the Hunter Region. We develop new, innovative and inclusive contemporary performing arts projects characterised by collaborative processes and participation. Our work is inspired by our local communities and generated through community partnerships' (Tantrum 2017, online).

Pantseat Productions was formed in 2007 to assist young people develop their performance skills with a specific music theatre focus. Their classes and performances were directed by 'tertiary qualified and experienced drama performers and drama teachers. Daniel Kavanagh and Lia Pati, company founders, have over 20 years' experience in the Performing Arts and are both currently qualified to teach in NSW schools' (Pantseat 2018, online). They operated out of St. Stephens Hall in Adamstown, the home of Theatre on Brunker, staging five major productions each year, showcasing the talents of their students and performers from the wider community (ibid). Pantseat ceased operations in 2018 and WEA Hunter took on most of their students and at the same time purchased the old DAPA Theatre on Beaumont Street.

Daniel Stoddart is the owner and formerly full-time Artistic Director of Hunter Drama, an out-of-school hours academy for young people aged from three years to 21, which teaches acting for theatre, screen and musical theatre from studios in suburban Broadmeadow (and, since 2018, Singleton). It employs a part-time Assistant Program Director and twelve tutors. Stoddart says 'we are promoting a new wave of creative people' (Stoddart i/v Oct 2015).

UpStage Youth Theatre in Maitland holds a number of its productions outdoors and in unique locations including such settings such as Maddies of Bolwarra and Tocal Homestead. Once a

year UpStage also presents a One Act Play Festival showcasing the work of students prepared in class (Upstage 2018, online). At Upstage 'students are given the opportunity to learn about the dramatic arts through a practical, hands-on approach to performance' (ibid). Their classes and productions are taught and directed by 'qualified and experienced drama teachers and industry professionals'. The classes cover a wide variety of skills pertinent to the performing arts including 'improvisation, audition preparation, playbuilding, physical theatre, mask, voice work and speech, mime, technical productions, circus skills, performance, script work, stage craft, social development, individual tuition, musical theatre and acting for the camera' (ibid).

Drama Karma has been operating in Morisset since 2008 and offers courses in acting, public speaking, mime, script writing, performance and theatre sports (AA 2018a, online). The Australian Dance and Talent Centre in Cardiff claims to be 'Newcastle and Lake Macquarie's premier performing arts facility' catering to all age groups and holds 'classes and private tuition in all styles of dance, singing, drama, musical theatre, guitar and piano' (ibid). They offer performance opportunities for all students [and] a purpose-built facility with experienced staff' (ibid).

The Pasvolsky Actors Studio was established by Claire Pasvolsky in 2014. It offers voice, movement and acting classes for adults as well as corporate workshops from premises in Cooks Hill, Newcastle.

Barnes Music in Broadmeadow is a family-run business that has been operating since 1980 and employs a number of teachers to conduct music classes. Rod Barnes, who studied at University and became an architect, began playing clarinet 50 years ago and says that many of his students 'have gone on to play professionally, whether it be classical or jazz, and others who have also gone on to become teachers themselves' (Barnes Music 2018, online). He established the legendary Dungeon Jazz Club in Adamstown while his partner Jenny Barnes, who also teaches at Barnes Music, has sung with and directed 'jazz bands and orchestras, performed in oratorios, operas, a capella groups, choirs and recital programs. In 2009, Jenny attained a PhD for research into the operatic soprano voice, an investigation that has had profound implications on her own teaching' (Barnes Music 2018, online). Jenny Barnes has an impressive background:

Former principal soprano with Opera Australia, Opera Queensland, State Opera of South Australia, Sound Construction Company, Sydney Metropolitan Opera and soloist with Sydney Philharmonia, Perth Philharmonia Choir, Newcastle University Choir, Newcastle City Choir, Gosford City Choir and member of a capella groups The Hunter Consort of Voices, Bash and Waxing Lyrical. Roles include Cio-Cio San (*Madama Butterfly*), Grimgerde (*Die Walküre*), Micaela & Frasquita (*Carmen*), Antonia (*Tales of Hoffmann*), Ellen Orford (*Peter Grimes*), The Governess (*The Turn of the Screw*), The Alms Sister (*Suor Angelica*), Hirsinde (*Abelard and Heloise*), Rosalinde (*Die Fledermaus*), Mother (*Amahl and the Night Visitors*), Mother (*The Shining Isle*), Trilby (*Trilby*) (Theatre Newcastle 2018, online).

In the Upper Hunter, the Platinum Dance Centre is located in the main street of Muswellbrook and its principal teacher and owner Emily Manning is an experienced teacher who was a dancer for 14 years. She has completed her major ballet exams with BBO, has a Certificate IV in Dance Teaching and Management, and is 'a registered member of both A.T.O.D and B.B.O. Dance Syllabuses' (Platinum 2018, online). Her assistant 'started dancing at the age of two and has completed all major exams in Classical Ballet and Tap. She has performed in selected groups for Starstruck, competed at eisteddfods in groups and solos for various dance schools and also

Cheer Comps all over the state' (ibid). Together they teach classical ballet, tap and performance group classes as well as selected modern and jazz classes.

The Hunter Dance Academy also operates out of Singleton while the Newcastle Premier Dance Co at Caves Beach provides dance tuition in a 'variety of dance forms to all age groups, levels and abilities ... Classes include: ATOD Ballet, Jazz, Lyrical/Contemporary, Tap, Pre-School Programs and Stretch & Conditioning' (AA 2018a, online).

At the coastal end of the valley, Newcastle is renowned for its talent in dance with many local dancers finding placements in leading companies internationally, from ballet companies to the Moulin Rouge. Dance schools include Newcastle Ballet Theatre and, for children, Tap Pups and the National College of Dance as well as Catapult which is a not-for-profit contemporary dance organisation for professional artists, emerging artists and young people (McCarthy 2018, online). This studio offers a range of training programs including The Flipside Project (youth dance and multi-arts), master classes with nationally acclaimed choreographers, community open classes for all ages, and a community and schools outreach program. It also conducts Propel, a professional artist in residence program. The studio has received funding from Create NSW, the City of Newcastle, the NSW Department of Education & Training, and Ausdance NSW (ibid). Catapult was founded by Cadi McCarthy in 2014. She is a professional dancer and choreographer with twenty years' experience in the sector:

Between 2009 and 2013, Cadi was the Artistic Director of Buzz Dance Theatre, WA. With the company she created 9 full-length works for a variety of age groups including *Look the Other Way* which received a 2014 Australian Dance Award for Outstanding Achievement in Youth and Community Dance, *Restless*, *Fragile*, *Goodbye Jamie Boyd* (collaboration with Monkey Baa Theatre Company) and *Stop! don't Blink*. The community programs she established with the company include: the largest Artist in Residence Grant (AIR) in Australia, collaboration with Southern Edge Arts: Albany, the Big Stretch program that was awarded the 2010 Outstanding Achievement in Community/ Regional Dance at the WA Dance Award and the 2010 Arts and Aboriginal Health Award, the community partnership program with the Metropolitan Migrant Resource Centre and Aranmore College, and collaborations with the Michael Leslie Foundation (Pilbara). She has also been the education consultant for the Queensland Ballet and the Western Australian Ballet. Previous to this position, Cadi danced with Paige Gordon and Performance Group (1996–1998) and with Buzz Dance Theatre (1998–2002). She created the independent company Cadi McCarthy & Company in the ACT in 2002, where she created 6 full length works including *Awkward*, *Shambles* and *Grappling for the Edge*. With the company she was the Recipient of a 2004 & 2006 Canberra Critics Circle Awards. As the recipient of a 2007 Churchill Fellowship, Cadi spent time working with dance companies in Denmark, UK, Germany, USA, and Canada. In the same year she was awarded a residency at Chez Bushwick in New York. In 2009 Cadi travelled to Taiwan as the Australian Delegate of the World Dance Alliance, International Youth Choreographic Project (ibid).

The National College of Dance (NCD) in Lambton, Newcastle was formerly the renowned Marie Walton Mahon dance school. Marie Walton Mahon completed her advanced exams in ballet at the Royal Academy of Dance in London where she was awarded the Solo Seal Award in 1970. She then went on to a professional career touring Europe as a ballerina with Les Ballet de Marseilles in France before returning to Newcastle. She set up her own Academy and

‘entered students for all levels of examinations for 36 years’ (RAD 2018, online) while continuing her affiliations with professional dance and ballet in Europe. As she explained ‘many visits abroad to the Genée International awards have always given my students exceptional inspiration over the years. One highlighted experience would have to be training my own daughter Veronica Mahon for the Genée and her being awarded the Gold Medal in London’ (ibid). Her name eventually became ‘synonymous with dance in Newcastle’ (ibid). She maintains a role as a vocational examiner for the Royal Academy of Dance and is also a registered tutor with the RAD. She was awarded a Life Membership of this prestigious institution in 2011. Her Academy was bought in 2012 by Brett Morgan, formerly of the Australian Ballet Company and Associate Director of Sydney Dance Company. His wife Vicki is CEO. NCD teaches classical and contemporary dance and jazz from Certificate to Diploma (semi-professional) level. Students in the accredited one-year Diploma course work long hours, from 8.15 am until 5 pm or later. They often do night classes as well and at the weekends they may be performing or engaged in competitions. Students are drawn from the Hunter Region but also Coffs Harbour, Mudgee, Orange and western NSW. Graduates gain places in professional dance schools or move into a junior company such as the Sydney Dance Co or Queensland Ballet and some audition for big theatre shows ranging from Disneyland to Moulin Rouge. Teacher Tim Gordon says that 98% of them are placed.

12.6.7 Companies

Circus Avalon is a community circus company based in Newcastle which has been active in the performing arts for the last 25 years. It is ‘one of Australia’s largest non-government funded community circus organizations’ (Circus Avalon, 2018 online) and delivers ‘high-end circus acts to clients of all types. Whether it be large scale big top shows, corporate functions, local events, or even birthday parties’ (ibid). This company of performing artists has over 100 members as well as highly skilled trainers. In 2018 they expanded their repertoire ‘to include not only family friendly circus and physical theatre performances, but elegant dinner shows at local nightlife hotspots’ (ibid). They also run a Circus Academy, training people in circus performance and delivering workshops for schools and corporate clients. They subsidise their costs by hiring their equipment, including the green and yellow big top tent.

Since the demise of the Hunter Valley Theatre Company and Freewheels, there are no fully professional theatre companies in Newcastle. One anonymous interviewee commented:

There’s a lot of people interested in the theatre in Newcastle but my perception is that they are doing stuff here until they can go somewhere else. So there is either kind of more amateur stuff or they are emerging/preparing to leave, I don’t know. It’s very tempting to say that I want the Hunter Valley Theatre Company back and that we need a professional theatre company here in Newcastle. Why don’t I just say that? Yes, I think that would be good, if there was a professional theatre company here in Newcastle (Anon i/v 2016).

Some companies, however, aspire to a professional standard of work and are committed to paying performers, on a profit-share basis. These include Two Tall, Knock and Run, Stray Dogs and Stooged Theatre Company.

Stooged Theatre began in 2003 under the leadership of Carl Young who remains on the Committee as a Treasurer. Ten years later, it became an incorporated, not-for-profit company that operates on a profit-share basis. The company was established with an initial government grant but funding now comes from earnings from productions and fundraising. Personnel

include an Artistic Director, Associate Director, Literary & Development Manager, Treasurers, Head of Ensemble, Production Manager, Technical Manager and an ensemble of actors and other creatives. Since 2011, Stooged has staged three or four shows a year, generally at the Civic Playhouse. They have been the recipient of numerous CONDAs (City of Newcastle Drama Awards) including Best Production in 2011, 2012 and 2014. Their most recent production was *Neighbourhood Watch* by Lally Katz directed by Daniel Cottier. Stooged is known for its innovative marketing which includes video trailers distributed via social media. Artistic Director Mat Lee explains:

Our product is bringing contemporary international and Australian plays to Newcastle that other companies have not yet staged, or classical/modern work that has a social message. We aim to produce a high-quality standard of theatre and aim to work with the brilliant actors Newcastle has on offer (Lee i/v April 2017).

Stray Dogs Theatre Company is a co-op headed by playwright, director, actor, dramaturg and educator Carl Caulfield. He founded Stray Dogs with his partner, director Felicity Biggins. A grant from the NSW Ministry of the Arts funded its establishment. The company stages new plays written by Caulfield, including *Where Late the Songbird* which was part of the Civic Theatre's Subscription Series in 2015. Performing Arts Newcastle (PAN) provides insurance coverage for the company. Caulfield's main income comes from teaching drama and creative writing. He currently teaches screenwriting at the University of Newcastle and screen studies at NIDA. He has also worked as a dramaturg (script consultant). He has written, staged and performed in a significant number of works across his career:

His works include *Seems Like Old Times*, *Dante's Dream*, *Human Resources*, *Shakespeare's Fools*, *The Anatomy of Buzz*, *Where Late the Songbird* and *Hecuba Reimagined*. *Being Sellers*, Carl's award-winning, one-man play about British Goon Peter Sellers, was first produced in 1998 at the Playhouse in Newcastle, before transferring to the Edinburgh Festival and then to London at the Man in the Moon Theatre, Kings Road. *Being Sellers* was recently reprised at the Waterloo East Theatre in London with David Boyle as Sellers and then went on to the 59E59 Theatre in New York. His most recent play, *Mark of Cain*, explores the impact of PTSD (post-traumatic stress disorder) on a group of returning soldiers. Carl has just written, directed and co-produced his first short film, *Chloe Comes Through* (NWF 2017a, online).

Caulfield is experienced enough to realise that a playwright's work is constrained by the limited budgets theatre companies have to work with currently. He comments that:

Theatre companies won't look at your work if you're writing for more than seven actors anyway ... nobody is putting on these large-scale plays unless you're the National Theatre ... I mean it's great to have the chamber pieces, but we also want to see the large-scale work that deals with big social issues, you know, or the movements of history (Caulfield i/v May 2015).

Sydney Theatre Company's 2017 production of the large-scale show *Chimerica* overcame this problem to an extent through a partnership with NIDA which involved the participation of a whole class of drama students. These opportunities are rare.

Other performing arts companies such as Opera Hunter have operated successfully, mounting large productions for a number of years:

Opera Hunter was formed in 1986 and has presented more than 60 productions and events in its years. It has won many City of Newcastle Drama Awards and presented operas in many parts of the region. Among its repertoire are *The Magic Flute*, *The Marriage of Figaro*, *Rigoletto*, *La Belle Helene*, *Julius Caesar*, *Sweeney Todd*, *The Music Man*, *Die Fledermaus*, *The Merry Widow*, *The Merry Wives of Windsor*, *The Telephone*, *Amahl & the Night Visitors*, *West Side Story*, *Oliver!*, *Les Miserables*, *Miss Saigon* and *Cats* (Sticky Tickets 2018, online).

Its founding figures included Mercia Buck as President, Tom Naisby, (the then Newcastle Herald music critic) and Colleen Potts as well as Susan Hart, Karen Hawkins (now Walmsley), Philip Sketchley, Barry Walmsley and Rob Langley (Opera Hunter 2018, online). After much fundraising and planning, workshops began at Newcastle High School in 1987. Since then the company has gone from strength to strength, adapting to its regional audiences and gaining necessary sponsorship along the way.

While Opera Hunter often works closely with the Lake Macquarie Philharmonic Orchestra and The Hunter Orchestra, the company is dedicated equally to opera and musical theatre and this combination has worked to its advantage. Since 2000 Opera Hunter has used 'popular musicals to support financially the mounting of opera productions' (Opera Hunter 2018, online). As a result, audiences for the company developed into 'two distinct categories: opera and music theatre. The company continued to be truly Hunter in its ability to move to many different venues' (ibid). The main venues it uses are the Lake Macquarie Performing Arts Centre, Civic Theatre in Newcastle and they used to use the Griffith Duncan Theatre at the University of Newcastle's Callaghan Campus. They have used other venues such as Lake Macquarie's Awaba House, The Highfields Azzuri Sports Club, Speers Point Park, the historic St. John's Church in Cooks Hill and the Newcastle Conservatorium of Music's Harold Lobb Theatre, dependent on what type of production they are staging. By the turn of the new century the company had 'an increasing commitment to larger budgets supported by increased funding from donors, businesses and corporations' (Opera Hunter 2018, online). Sponsors for the 2018 season and the staging of *Don Giovanni* are Centennial Coal, Crest Financial Services, Eclipse Communications and the Newcastle Herald.

Perhaps the most ambitious company in the region is Metropolitan Players, a musical theatre company that has been operating for 40 years. Julie Black is Artistic Director of the company while Graeme Black is often Set Designer and Stage Manager for productions as well as being President of the Player's committee. *Les Miserables*, in August 2017, was the ninth show they have staged at Civic Theatre in Newcastle. The company has been the recipient of numerous CONDAs (City of Newcastle Drama Awards) over the years.

The Company was first formed in 1977 and has been producing quality musicals ever since. We produce one major musical each year, although in the past there were sometimes 2 each year ... For many years we have used the 924-seat Griffith Duncan Theatre at Newcastle University. Our most recent productions have been at Newcastle's premier theatre, the 1400-seat Civic Theatre. The Company is run by a Committee that is elected each year at the Annual General Meeting in February. We used to rehearse at Broadmeadow Uniting Church Hall in Broadmeadow, but after 33 years have now moved to Glendale High School. Set construction is at our warehouse in Cardiff. Over the years our productions have received many City of Newcastle Drama Awards (the CONDAs). The most successful was *The Producers* in 2008 which won 6 Awards. However, this has now been beaten by our 2014 production of *The Phantom of the Opera* which won

7 Awards. After *Wicked* in 2016 the Company has now won the CONDA Best Musical production 5 years in a row. We make all our own costumes for each show and many of these are for hire (MP 2018, online).

Metropolitan Players currently receive neither government nor corporate support. They have had some in-kind support from Newcastle City Council in the past but were unsuccessful in 2016 in their application for event funding which offered up to \$20,000. With budgets of approximately \$400,000 per show, Graeme Black suggests:

It's a huge financial risk. It could be the last show every time ... Last year's production took nearly \$500,000 at the box office but the costs are significant. Performing rights cost 16-18% of gross which was \$80,000 last year, theatre hire was \$140,000, \$80,000 was spent on sound and lighting hire, and \$8,000 on billboards (G. Black i/v May 2017).

Metropolitan Players represents a surprising hybrid of professionalism and amateurism in that the quality of work, the budgets and the operational methods are of the highest industry standards, yet everybody involved works on a voluntary basis. Graeme Black explains that this allows them to work to a scale and level that would otherwise be impossible. As Julie says, they all do it for the love of it. Those who compete for roles with Metropolitan Players shows appear to be happy to work for nothing, attracted by the opportunity to be part of a successful, high quality show where they can develop their experience, skills and profile in a positive atmosphere. Daniel Stoddart, who has performed in several Metropolitan Players shows, says that to ask for pay would be 'pricing yourself out of the market' (Stoddart i/v Oct 2015). He asks, 'Why would Metropolitan Players pay you if there are ten other people lined up who are happy to do it for nothing?' (ibid). Indeed, roles with Metropolitan Players shows are hotly contested: in 2016, 207 people auditioned for 50 roles, only nine of which were leads.

Importantly, experience with Metropolitan Players can assist performers develop the skills and knowledge they need for professional careers. Graeme Black says the company tries to give performers 'as close to a professional experience as possible and a rare opportunity to work in a theatre such as the Civic Theatre' (G. Black i/v May 2017). Several performers who have worked with Metropolitan Players have gone on to significant professional careers. Jye Frasca came to the company as a young tap dancer and is now working in shows in the West End of London, David Harris has had professional leads in Australian musicals and now lives and works in Los Angeles, Costa Nicholas worked as a singer/dancer and now runs a casting agency in the USA, Nigel Turner Carroll directs shows nationally, and Tyran Parke and Seth Drury are both currently appearing in the musical *Big Fish* at the Hayes Theatre in Sydney.

While Metropolitan Players shows do not pay performers, the economic value they generate is significant. Daniel Stoddart estimates that the 2015 production of *Mary Poppins*, in which he was a lead, had possibly one hundred people working on the show. (In actual fact that production of *Mary Poppins* included a production crew alone of 100 plus a full cast of 56 actors, accompanied by a 17-piece orchestra):

Each of those people was going into town for up to two weeks. They were all putting money in the parking meters, they were all going into the little shop next door buying iceblocks. How much money did they spend on petrol to get their car into town? How much money was spent on buying stockings for that production from Lowes up the road, and costumes, fabric, wood from Bunnings to make sets and things? If there was some way of quantifying that in a really tangible, practical way and saying the arts contribute X amount of revenue to the local economy ...

comparing that to a packed-out Newcastle Knights stadium, I think we would probably give them a red hot run for their money (Stoddart i/v Oct 2015).

Shane Bransdon is a long-time performer in acting, singing and dancing roles who lectured in the Drama Department at the University of Newcastle 'teaching teachers how to teach drama' (Bransdon i/v Oct 2014). Having resigned his position as a Vice-Principal in the NSW School system he is described as 'an actor/director and educational specialist based in Australia. His recent show credits include *Les Miserable* (2017), *Wicked* (2016), and *Mary Poppins* (2015)' (OzTheatrics 2018, online). He also runs, along with Daniel Stoddart, a company called OZTheatrics. Their objective is 'grow Australia's musical theatre industry by providing young people with quality musical theatre programs' (ibid). They are doing this by:

Engaging students in a variety of large scale events that inspire and motivate young performers; building the capacity of teachers, educators and directors to deliver successful musicals; building a national network of creative artists (students and teachers); staging exciting new works; engaging industry experts and international artists to work with our young Australian performers and teachers; and, offering international experiences for young people and professional development for educators (OzTheatrics 2018, online).

Like Stoddart Bransdon argues that:

When we are talking about the representation of performing arts as a subsector of the creative industries in Newcastle, I think dance will be the biggest chunk of the pie. If we can somehow capture the economy created just by parents taking their kids to dance class every week, creating costumes and performances! I know that every theatre is booked out entirely at this time of year because of the dance concerts ... In fact on that list of who is employed are dancers, more than anything. And musicians, they just don't work for free. In all of our theatre productions, if you have orchestras and bands they will always be paid. It might not be Equity rates but generally speaking they don't work for free in Newcastle. Actors you get scores and scores of. If an actor was to say 'I won't work unless you pay me' there would be ten lined up behind them that would be willing to do it for free (Bransdon i/v Oct 2014).

To attempt to quantify this phenomenon Bransdon (2018) conducted a study, as part of his PhD research at the University of Newcastle, which was focused specifically at theatre. He surveyed half of the theatre companies running currently in the urban part of the region. With these 21 companies putting on shows and using employed staff and volunteers, Bransdon calculated the paid roles of all full-time, part-time and casual employment and bundled this together. He then added an additional calculation which included the amount profit-share actors were paid divided by the industry award rate. The result was 8 FTE (full-time equivalent) paid workers. Given the sample was precisely half the number of companies he then assumed that the full-time equivalent employment in the region in theatre would be 16 FTE bodies. He then went on to count the number of volunteer gigs.

When surveyed, Newcastle theatre companies indicated how many volunteers contribute to each production and the administration of their company. The data indicated that a range of between 5 and 380 volunteers were utilised for each production staged by typical companies. The research population indicated that 3589 volunteers were used. This is then doubled as the research population accounted for 50% of the industry, making the result 7178 volunteer gigs. This

figure has been further increased with the inclusion of a large combined schools production, which was not included in the research catchment but contributed through interview. The school's production relied on 4000 volunteers each year for their major production. The total gift economy of the industry is therefore assessed to provide 11,000 volunteer gigs (Bransdon 2018).

This is an extraordinary figure indicative of the extent of the gift economy at work in the creative industries. It also applies to companies like Tantrum Youth Arts which is the leading professional youth arts company in the Hunter region. It was:

... established in 1976 under the name 2 Til 5 Youth Theatre Co-op as a Saturday afternoon drama workshop. The company steadily grew, providing drama skills workshops and original productions for people aged 8-18. In 1996, 2 Til 5 established Tantrum Theatre, an off-shoot company, catering to emerging actors and theatre artists aged 18-25, and the two companies later merged. In 2014, we relaunched as Tantrum Youth Arts, which better reflects the work we do: a greater integration of a range of art forms including performance, filmmaking, writing, physical theatre – all with a strong focus on developing young people's creativity, confidence and communication (Tantrum 2018, online).

Tantrum aims to develop innovative contemporary performing arts projects which are collaborative and participative. The work they stage is developed out of the local community and depends, as Bransdon's study indicated, on community partnerships.

Amy Hardingham was Artistic Director and CEO of Tantrum from 2013-2016. She completed a BA at The University of Sydney majoring in performance studies and was President of Sydney University Drama Society (SUDS) for two years where she developed important skills and connections including with playwright Tommy Murphy and Australian Theatre for Young People (ATYP). Her first job was at Regional Arts NSW as part-time administrative officer, next door to ATYP where she was assistant directing shows on a voluntary basis and then paid. She was mentored by leading Director Marion Potts. Hardingham then completed a Grad Dip of Arts Management at UTS and a Dip Ed in Drama from Charles Sturt University. At 25, Amy took a job running Outback Theatre, a youth theatre company based at Hay in south-west NSW where she learnt about site-specific work because there were no theatres out there. 'I don't really know what to do in a proper theatre, that's the truth'. After five years she moved back to Sydney and took a job at ATYP for two years as the Regional Manager where she ran programs mainly in Tennant Creek and Palm Island. She then had her son Leo and taught workshops at ATYP working two days a week as an associate producer with the arts company Big hArt before moving to Newcastle. She says that Tantrum is:

One of the few funded youth theatre companies in Australia that is run by professionals and in a professional way and works with young people to do a range of things – one is to help them be the best they can be - so, to improve their confidence, communication, teamwork, all of those things ... But on the other hand, I think we also exist to give people a head start with their careers. And I think that's a responsibility that we have because we are a funded organisation ... people should be looking to us if they are interested in actually building a career. And so that's why we have things like the emerging teaching artist position, and a range of initiatives for emerging theatre makers (Hardingham i/v Nov 2015).

Finances are tight, even with government arts funding. Hardingham contends that 'at Tantrum we really just survive. You know, we work so hard on these tiny grants and it's constantly like

riding a bike, we're constantly pedalling the bike to create the power to run the company, and there's never any respite' (Hardingham i/v Nov 2015). The company's main income comprises operational funding from Arts NSW of \$240,000 over three years, workshop fees of \$50,000-\$60,000 dollars per annum and ticket sales of perhaps \$25,000-\$30,000 per annum. Lucy Shepherd, the new Artistic Director, comments that a strong creative strategic goal of Tantrum over the last three years has been to create more paid professional opportunities for artists, for example, paid part-time teaching positions, as opposed to casual engagements. Tantrum partners with Newcastle City Library for the 'Stories Come Alive' program which employs one emerging artist to devise and present performances for children. As well, Tantrum has a program called 'Opening Doors' whereby emerging artists are commissioned to create work.

Other youth-oriented companies include Young People's Theatre, Upstage Youth Theatre, and Reamus Youth Theatre (based in Maitland). Community-based theatre companies include Newcastle Theatre Company, Maitland Repertory Theatre and Valley Artists based in Wollombi. Club 71 (until 2017) and Theatre on Brunner offer dinner theatre.

12.6.8 Other employers

The Arts Health Institute (AHI) was the largest employer of artists in the region, employing more than 80 performers (Connell 2016, online). While arts health is well-established internationally, especially in the UK and USA, it is an emerging area in Australia. The AHI in Newcastle was established as a social enterprise by Dr Maggie Haertsch and Jean-Paul Bell in 2011. Unfortunately, it ceased operations at the end of 2017. The AHI operated nationally including in remote regions and had an office in Sydney. The AHI recruited professional artists from a range of disciplines including music, dance, theatre and comedy and trained them to work in aged care facilities and hospitals implementing various programs which both entertain and engage people but also bring therapeutic benefits. The approach was research-based and AHI worked with a number of Australian universities. The AHI website outlined the range of programs offered in healthcare settings. These include one-on-one 'valet visits', Sing Out Loud (choirs), Music and Memory (a licensed program offering personalised playlists especially for people with dementia), We Think You Can Dance (dance classes), Access to Express (art and art appreciation), Word Power (creative writing, reading), and Theatre of Life (play readings and theatre experiences) (AHI 2017, online). The Institute AHI also curated short courses for health, arts and aged care professionals through their Arts Health Academy. They paid their artists above Equity (MEAA) rates and drew them from throughout and beyond the Hunter Region, from Wollombi, Newcastle, the Central Coast, Mid-North Coast and Northern NSW. Not only were their artists paid well, they enjoyed meaningful work that they knew was making a difference. The AHI website states:

The Arts Health Institute is a major employer of professional artists with specialist skills in residential aged care, dementia and working with elders to provide meaningful creative experiences. While immensely enjoyable, the purpose of these experiences goes way beyond the simplistic idea of 'entertainment'. Every interaction is carefully designed to actually improve quality of life with therapeutic benefits (AHI 2017, online)

Good Eye Deer also employs local talent. It is an award-winning production company owned and managed by Olivia Olley and Gavin Banks (see Section 15.7.5). It operates nationally, producing training videos for corporates, promotional films and television commercials.

Local television stations and advertising agencies produce commercials from time to time, providing small-scale local employment and some voice-over work. In an indication of the value of diverse skills and vertical integration, one leading voiceover artist actually records her read and emails it to the client; she has become her own producer and sound recordist. The University of Newcastle, some professional organisations and some corporates employ actors from time to time as simulated patients or clients for medicine and social work programs, for example.

12.6.9 Enablers – Including Funding Bodies

Funding is available for performing arts practitioners and groups from the Australia Council and Create NSW (formerly Arts NSW). Major changes in federal funding in 2015 saw the transfer of significant funds from the Australia Council to the office of the Minister, Senator Brandis, in the form of a program called Catalyst. In early 2017, the new Minister announced the closure of Catalyst and the return of \$80.2 million over four years to the Australia Council. The total funding of the Arts Council, however, remains less than the pre-2015 level (AMPAG 2017, online). Very little funding comes to the Hunter region from these sources – Tantrum Youth Arts and Paper Cut are rare current beneficiaries.

Paper Cut: Contemporary Performance Collective is an initiative of Lucy Shepherd, Tamara Gazzard and Sarah Coffee which began in 2012. Each year since, the company has created and produced a new work. Paper Cut has received a number of grants, the first of \$15,000 from the Australia Council for their first show, *The Past is a Foreign Country*, which allowed them to pay everyone in the production and cover the venue hire. For *Spent*, a work about consumer culture performed in an abandoned retail store, they got a grant from Arts NSW (now Create NSW) for part of the creative development. *No-one Cares about Your Cat*, a work about social media, was commissioned by Tantrum Youth Arts so they were paid a commission fee. With *Hello Stranger*, a work about social isolation, Arts NSW provided the total funding of \$60,000 and they subsequently successfully applied for production funding and touring funding so ‘we weren’t out of pocket in any way, shape or form ... That’s the dream’ (Gazzard i/v May 2016). They say that grants are very important but generally only cover half of the costs of a production.

There is a shared sense that the region’s performing arts sector is not receiving its fair allocation of government funding. While Carl Caulfield from Stray Dogs comments on the vibrancy of the theatre scene in Newcastle, he contrasts the reality of poor funding with the city’s image as a creative hub:

From the inside, I think it’s exciting ... what I’ve always been amazed at is ... the kind of ferocity that people have here, the passion that people have here, and that’s for real ... there is this strong tradition here of doing good theatre. It’s been around a hell of a long time, and it’s one of the best things about this city, to me. I mean, I think it’s very easy to get projects up here ... but on another level, I have to be frank with you and say, it’s as depressing as it ever was. And the lack of support is just as it ever was, if not getting worse, in a way ... I think we’re moving into a kind of brutal, corporate kind of mindset ... But at the same time there’s all this talk. So we’re getting all the feel-good talk about how creative a place it is ... There’s not enough ... people putting their money where their mouth is (Caulfield i/v May 2015).

Councils are traditional supporters of local arts. As mentioned, Newcastle City Council approved a new Cultural Strategy in 2016 which focuses on partnerships, engagement and accessibility. While Newcastle Council provides important infrastructure in the form of the Civic Theatre and Civic Playhouse, currently the only funding support comes in the form of small grants from the highly competitive Events Sponsorship, Economic Development Sponsorship and Community Assistance Program. In 2017, however, Council approved a new scheme which promises up to \$50,000 funding for three years to selected performing arts companies. The total funding allocation for the scheme is at this stage unclear. Newcastle Council also publishes an online newsletter 'Creative City' to promote arts events and opportunities.

The City of Newcastle Drama Awards (CONDAS) also enable the recognition of outstanding achievements in theatre in Newcastle in the previous year and the awards event is attended by several hundred people. The CONDAS were originally supported by Council and hosted by Civic Theatre but are now run independently. Shane Bransdon, a CONDA Judge, is also Drama Representative on the arts funding body for the New South Wales Department of Education. In addition, he is Chairperson of the Newcastle Performing Arts Taskforce which represents theatre organisations:

I started that with Theresa Conicella in 2012 and it came about because there is a state body that is called the State Creative [Industries] Taskforce. It was established by the current Government in Sydney and we had a look at it and it is very Sydney-centric (because) of all of the people on it. We got together in response to things that were happening here, lack of funding in the area from the New South Wales Arts Council, lack of venue space, and things were being taken away from us. The TAFE was being hammered, their courses heavily cut back. The University had performance spaces taken out of licence. The only theatre company that received funding were Tantrum and they were losing part of their funding. Performing Arts Newcastle which was supported by Newcastle City Council lost their building and at that particular point everything seemed to be targeted at us and we wanted to have a voice. So after consulting with our state Member for Parliament and pointing out that this so called Creative Industries Taskforce in Sydney was very metropolitan-based, it was actually Tim Owen's suggestion (who was our sitting MP at the time) that we establish our own taskforce (Bransdon i/v Dec 2014).

In his role as a CONDA judge, Bransdon sees most of the shows produced locally, more than 60, he estimates, each year. In addition, there are other productions not submitted for judging. He says 'I have really been able to appreciate just how vibrant the performing arts sector is within the creative industries' (i/v Dec 2014):

We have essentially more performances, productions happening than we have room for in terms of audiences. We don't have enough audiences for the number of shows we have. In terms of participation within that sort of ecology within performing arts would be incredibly high. The participation rate is wonderful. In the last twelve months there were 25 active theatre companies but we do have a list of about 36-40 that from time to time may do a show bi-annually. Burnout is a big issue because people are so passionate that they may do six shows in one year and then decide they need a break. But their theatre company is still live. Footlice is a wonderful example. It was dormant for a few years and just in the

last twelve months probably did six shows and are now doing a lot of things. So I think it is a very vibrant performing arts industry (Bransdon i/v Dec 2014).

Octapod contributes to that vibrancy. Described as ‘an arts organisation which seeks to enable the region’s arts and cultural sector and creative communities through capacity building and cultural development initiatives (Octapod 2017, online), it receives funding from Create NSW. Octapod runs the annual TiNA Festival (This is Not Art) for independent, emerging and experimental arts; Culture Hunter (culturehunter.org) an online arts and cultural information hub for the Lower Hunter region featuring news, events, artist profiles and sector resources; and Smart Arts, a mentoring and development program delivered in partnership with The Business Centre (Newcastle Region) (Octapod 2017, online).

There are other enablers. Performing Arts Newcastle (PAN), for example, provides insurance cover for performers and previously offered rehearsal and performance spaces at a site in Auckland Street in the Newcastle CBD, until Newcastle Council resumed the premises.

In 2016, the ‘Theatre Newcastle’ website was launched by Marty Adnum from OOTS (Out of the Square Media), a Newcastle-based Advertising and Design agency (see Section 9.7.2), and performer Rachelle Schmidt Adnum. It is designed to be a ‘one-stop theatre hub’ to provide a directory of theatre performers, companies, auditions, training, events and venues and to act as ‘a collective voice’. It states that in the Hunter Region, there are over 30 theatre venues, over 40 local companies, over 70 local productions each year and over 1,000 local actors, musicians and artists (Theatre Newcastle 2017, online).

12.7 Conclusion

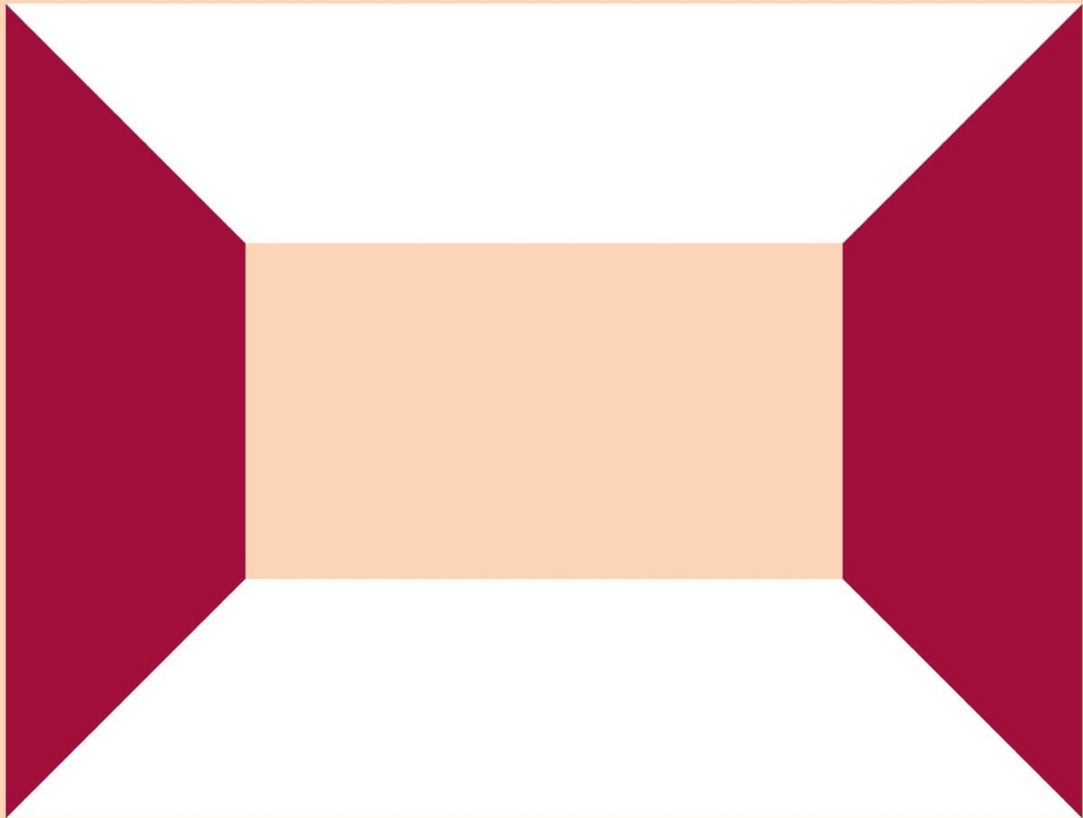
The performing arts sector in the Hunter Region covers drama, musical theatre, dance, opera, circus and comedy. While the statistics compiled via the ABS for this study indicate minimal involvement at 2% of the total number of the creative industries numbers who declare work in this sector as their primary occupation, a further study by Shane Bransdon (2018) paints a slightly different picture. His study was focused specifically at theatre. Surveying half of the theatre companies in the urban part of the region he calculated that there are merely 16 full-time equivalent (FTE) employment positions in the region in theatre with approximately 11,000 volunteer gigs (Bransdon 2018). It is therefore not surprising, given the wealth of avenues for experience, if not the wealth of income, that this region continues to act as a significant ‘rookery’ for practitioners, some of whom go on to professional careers on the national and international stage. A number of these individuals later return to the region, bringing significant expertise and connections with them which ‘raises the bar’ for the sector and helps the next generation of aspirants. The gift economy, nonetheless, is dominant for the many individuals, groups and organisations engaged in the performing arts in the region. The area has a small number of agencies which place actors, singers, dancers and other performers in paid positions and one of these has expanded their activities internationally.

A large number of performing arts companies operate in the region staging drama, musical theatre, opera, circus and comedy. Some mount large-scale, professional-standard shows with budgets of up to \$400,000 but the majority operate with meagre budgets of a few hundred dollars. Performers are rarely paid (except, often, for musicians working on music theatre productions) but some companies use profit-share mechanisms. A few companies are supported by grants but all rely heavily on the gift economy, as Bransdon’s work indicates, to survive with only a few principals deriving a wage from their artistic activity. Since the demise of the Arts Health Institute, the main paid work for those in the performing arts sector in the region

comes from teaching, employment with Councils, and precarious, usually 'one-off' engagements locally or, more often, in Sydney. Training institutions are numerous although Drama offerings at The University of Newcastle have been reduced and funding cuts to Hunter TAFE have put pressure on their dedicated school RIPA (Regional Institute of Performing Arts). Private dance academies are well-established and well-attended right across the region with many of their students moving on to the national and often international stage. Teaching is the only employment their graduates would find in the Hunter if they stayed, however. Private drama schools are also numerous but cater almost exclusively for children. The region has a number of performance venues but several important venues have closed and there is a lack of mid-size venues (seating 400-600) in the urban centre. There are a number of performing arts festivals which are growing in popularity along with the use of non-traditional venues including for outdoor performances.

Creativity & Cultural Production in the Hunter

An applied ethnographic study of
new entrepreneurial systems in the
creative industries.



Final Report:
Hunter Creative Industries

Film

Associate Professor Phillip McIntyre
Professor Mark Balnaves
Associate Professor Susan Kerrigan
Evelyn King
Claire Williams

13. FILM

13.1 Introduction

The Australian film industry, its history, structure, business models, operational methods and important personnel are detailed below, followed by a closer look at these components in the Hunter Region. By locating the Hunter's film industry within an Australian film history and in relation to the US industries, this scaled approach provides a global perspective on national and local activities. For example, the Australian film industry is as volatile as all importing and exporting industries are. The industry tends to be vibrant when the Australian dollar is low, as it is economically attractive to foreign producers to use Australian crews and facilities. This foreign income is of course beneficial to the Australian economy but it also helps filmmakers to be internationally recognised and keeps them globally connected. Structurally the film industry they work in is comprised of three major and related sectors, i.e. Australian film production, foreign film production, and distribution and exhibition. The last of these three has the primary function of generating box office revenues. Associated with each of these major industrial structures are training institutions, hire companies, funding agencies, legal firms, regulators and affiliated media. There are various business models used within the sectors while operational methods are both formal (e.g. use of contracts, government funding) and informal (e.g. sharing of labour and equipment within a gift economy). The film industry's production personnel include screenwriters, producers, directors, cinematographers, art directors, editors, colour graders, VFX supervisors, actors, musicians, sound designers and many others. These people are in many ways dependent on the work of the distributors who play a significant role in the success of a film at the box office. Audiences who judge, support and appreciate the work of the filmmakers, are also vitally important in relation to the business of filmmaking.

13.2 A Brief History of Film in Australia.

The first screening of films began in Australia in Melbourne in 1896. The first feature film ever made, *The Story of the Kelly Gang*, was made in 1906 in Australia. It was then exhibited in the UK and was a commercially successful enterprise. A boom in Australian cinema then began with over 150 local films being made in the short period leading to WWI and the Depression. The First World War and its consumption of material and resources negatively affected the production of Australian films. After the process of distribution was consolidated into what was effectively a single company, the way lay open for a takeover by foreign interests. In those early days, American distributors, who were better financed than the Australians, made the most of this opportunity by buying the extant Australian distribution businesses. As a result, by 1923 the industry was crippled as there were only a few locally produced films being screened in Australian cinemas. The American owned distributors now preferenced US films over Australian releases. By 1939 Australian film critics had recognised the harsh reality that Hollywood film producers needed to pick winners that appealed to audiences (Weaving 2016) and by 1945 newspaper articles written for the Sydney Morning Herald confirmed the overwhelming box office successes of American musicals and murder films (Weaving 2016). The takeover by US interests seemed complete.

At the same time production companies such as Frank Thring's Efftee Studios in Melbourne succeeded for a short period, but succumbed once they realised the government would not put a quota on American films which had already recovered their costs in the USA before being exhibited here. The local industry, again, simply could not compete. There were other successes however. Ken G. Hall was the main driver behind Cinesound Productions and they made 17

feature films, most of which were produced by Hall. Cinesound, based very clearly on the Hollywood model, demonstrated that commercial success was possible for Australian companies despite the competition from the US. Cinesound went on to win an Oscar for *Kokoda Front*, but as with WWI, WWII and the military consumption of resources, this impinged on their activity and they eventually went out of business. Just as Cinesound was beginning its journey, director Charles Chauvel gave Tasmanian actor Errol Flynn his start in *The Wake of the Bounty*. Chauvel also helped stars such as Chips Rafferty with the war films *Forty Thousand Horsemen* and *Rats of Tobruk* and in the 1950s Chauvel made the socially daring film *Jedda*. This was the first colour film shot in Australia and Chauvel's last movie.

What these few local successes had demonstrated was Australia's long-term adoration of most things from Hollywood. In fact, several Australian filmmakers were so enamoured of Hollywood that some producers, together with the established distribution and exhibition interests of the late '60s and early '70s began to focus on what, to them, would hopefully be 'Hollywood Down Under' (Jacka 1993, p. 182). After the Australian Film Institute was set up in 1958, and quickly established the AFI Awards, local producers continued to face great difficulty in the early '60s in keeping local production going and the US and UK distributors and exhibitors appeared to be content to leave things as they stood. However, there was a second and highly coupled impetus at play in the revival that was soon to occur. This was the simple fact that Australians at the time appeared to have 'no daydreams of our own' (Fitzgerald quoted in Jacka 1993, p. 183). As a result of not being able to adequately tell our own stories on screen there was a strong desire to foster a national cinema and a campaign began, mainly by film societies, critics and buffs, to have government support for a national film culture. Most filmmakers and especially the unions simply 'wanted a film industry to provide work for their members' (Ibid). Then, after a 1968 report from the Interim Film Committee of the Australia Council for the Arts, the Government implemented its recommendations. They included 'the establishment of government support in three key areas: the creation of a film development funding agency; the establishment of an experimental film fund; and the formation of a national film school' (Verhoeven et al. 2015, p. 152).

The establishment of the Australian Film Television and Radio School (AFTRS), also pushed for by film producers like Philip Adams who had had success with *The Adventures of Bazza Mackenzie* (see Section 7.7.3), was a direct result of this campaign for a national cinema. Most significantly a series of tax incentive schemes launched by the Federal Government in the 1970s, stimulated a resurgence in the production of Australian films. This resurgence became known as the Australian New Wave. The early films to succeed are now Australian classics such as *Picnic at Hanging Rock* (1975) and *Sunday Too far Away* (1975). This generated two almost diametrically opposed ideas for Australian cinema. One was the business imperative to emulate Hollywood and the other was driven by the national cinema group who saw Hollywood as the enemy of all local cinemas. As Elizabeth Jacka writes, 'the history of Australian cinema production since 1970 is marked by the changing patterns of tension between those two poles' (1993, p. 185). While the 80s, marked by the use of tax incentives known collectively as 10BA, saw a proliferation of Australian films, some of which quickly disappeared, it did produce successful films such as *Gallipoli*, *The Year of Living Dangerously*, *Mad Max* and *Crocodile Dundee* and allowed several Australian producers, directors and actors to establish international reputations. Many of these filmmakers are still trading on that reputation today. These include Bruce Beresford, Gillian Armstrong, Peter Weir, Mel Gibson, Jack Thompson, Bryan Brown and a host of others.

Inevitably, as neoliberal policies took over and governments changed, the huge 10BA tax incentives, were peeled back. However, ongoing government support in other ways has led to

the Australian film funding sector being recognised as now providing sustainable opportunities for a limited number of Australian filmmakers (Olsberg SPI 2016). The 1990s saw Australian successes with films such as *Muriel's Wedding*, *The Castle*, *Strictly Ballroom* and *Romper Stomper* all of which were shot on relatively low budgets. These films gave actors such as Toni Colette, Nicole Kidman and Russell Crowe the start they needed in the global film industry while films such as George Miller's animated production *Babe* demonstrated what Australian film makers could do in the international market place. In the early 2000s Ray Lawrence's *Lantana* showed, yet again, where and how Australian films could find their niche, but this last decade proved to be a lean time for Australian cinema. Films such as *Animal Kingdom*, *Bran Nue Dae* and *Tomorrow, When the War Began* were notable exceptions.

Since 2007 an average of 30 Australian films have been produced annually, with budgets around \$6.92 million (Screen Australia 2017). Unfortunately, these films have not had any impact at the global box office (Verhoeven et al. 2015). In 2011 the Australian film industry ranked 11th in the world (Screen Australia 2011b) with the local industry being financially dependent on government funding agencies like Screen Australia and the various state-based agencies. The production of Australian feature films has been in a slow decline for a few decades.

13.3 Structure of the Film Industry

The current film industry, like the screen production industry more generally which also includes television and digital games, supports a broad range of individuals and organisations that in turn constitute the structural sectors of the industry. Working within these sectors are those who are engaged in content creation and production through to those employed in various avenues for consumption, promotion and distribution. There is also a set of ancillary services that support these arms of the industry.

The production sector creates content which feeds the rest of the supply chain. The pre-production phase of production, as well as being populated by screenwriters, producers and so on, is structured around various funding agencies and business investors as well as national, state and regional screen agencies. The production phase itself includes content creators, usually seen as those paid above the line such as cinematographers and directors, and screen practitioners of all types that range from individual actors and booking agents through to all crew members and their support services. Many of these people operate as sole traders or are part of fully constituted film production houses like Working Dog Films and Kennedy Miller Mitchell. The production and post-production phases of producing a film involve infrastructure, facilities and various rental services, including equipment and freight services, and these come into prominence once a film is financed and under way. This complete production sector stimulates activity across the promotion and distribution arms of the industry.

The promotion arm of the industry operates mainly through industry events and festivals, and is serviced by dedicated industry PR agencies and the media (both traditional and social). The distribution arm of the industry is currently built around cinema exhibition, retail, rental and increasingly online subscription services. Most of this latter sector is foreign owned or controlled. While US companies still tend to dominate in this structural sector there 'are also numerous smaller independent distributors in film such as Studiocanal, Rialto Distribution, Icon Film Distribution and Australian distributors such as Village Roadshow' (DAE 2016, p. 3). The exhibition subsector includes businesses that operate cinemas including 'independent operators, chain operators, single-screen complexes and multi-screen multiplexes. These

include Village Roadshow, Reading Entertainment Australia and Auholdco1 (Hoyts Group)' (ibid). While DVD rental companies such as Video-Ezy were prominent outlets for distribution these have been largely superseded by mainly foreign-owned subscription and streaming services such as Netflix. Some Australian companies such as Ozflix are included in this sector. Films can also be seen on ABC iView and SBS on Demand.

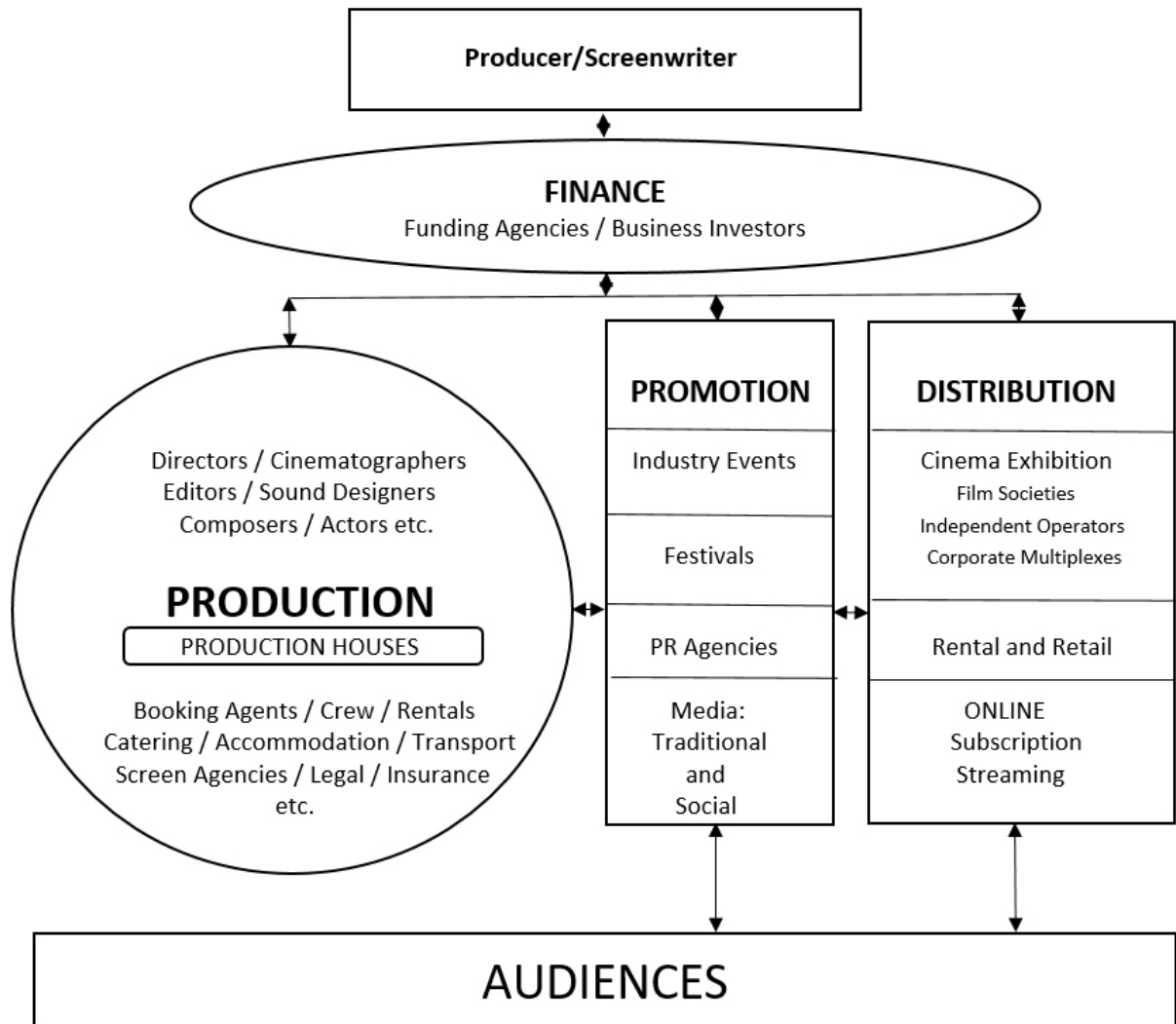


Figure 26 Screen Industry Generalised Structure

Other structural components of the industry include financial and insurance services as well as the support and input from educational institutions such as AFTRS. In terms of methods for earning income, there are several models in operation enabling several revenue streams to be operative.

13.4 Current Business Models in the Film Sector

- 1) The Film Production sector functions traditionally with a business to business (B2B) model or a marketplace where exchanges are brokered between film producers and those offering their services either through SMEs with many operating as sole traders. The B2B model functions on a contractual or sub-contractual basis. Many sole traders are increasingly operating as freelance workers and may be represented through talent

- and booking agents. The booking agents are constantly in touch with their networks about potential upcoming productions and opportunities to be had there. These agents act as intermediaries or gatekeepers helping to organise their clients onto productions and helping to negotiate fees for service. They work on a commission basis.
- 2) Government support is provided through multiple agencies and schemes offered through the national and state screen agencies. The types of government funding often reflect the stages of production and these are broken into development, production, distribution, and festivals, marketing and awards categories. One of the schemes available is the producer offset which is a refundable tax offset, where feature films currently receive a 40% offset. Documentaries are also eligible, but the rates are based on overall production budgets. The eligibility criteria for these funds are quite strict and often require existing screen credits to be eligible for funding. There is one specialist Australian category, Indigenous, where films made by and for indigenous Australians are exempt from the requirement to have pre-existing film credits.
 - 3) Film distributors also operate with the brokerage model. They bring businesses to consumers, and this model is known as the B2C model. Cinema owners generally operate as franchisees and they are supplied with a slate of films by the franchise, which usually makes the decisions around what films will be available for screening in their multiplex cinemas and the prices to be charged. Box office receipts are crucial forms of income.
 - 4) Film subscription models have emerged over the last few years. Previously film producers would have used sales of DVDs to extend their reach into the domestic film market but now they can sell their films to services such as Netflix or Stan so that subscribers can view their content online via a streaming service for which they are remunerated through royalty payments. Some producers release their films through iTunes, a new digital model which has been described as the pay-per-click model.

13.5 Operational Methods and Processes in the Film Sector

Filmmaking is a broad term applied to a range of methods used to make screen content produced as feature films, short film, documentaries and television shows. The operational methods of production are commonly seen in the various stages of production; project development, pre-production, production, post-production and distribution (Cohen et al. 2009). The production of feature films frequently follows this linear process, while other types of productions such as documentary making may take a non-linear route.

The filmmaking stages are impacted by a range of variables that include financial, technological, procedural, editorial, aesthetics and creative practices (Kerrigan 2013, Kerrigan and McIntyre 2010). All films are made using a number of highly-standardised filmmaking practices which are based on the type of film to be made, its genre, the script, and the size and scope of the production as determined through the production budget. The budget allows for the selection of personnel such as the cast and crew and the allocation of post-production facilities. Generally, a film's production is organised to maximise efficiencies by focusing on logistics and casting availability. Frequently post-production, in particular editing, occurs in tandem with the production and is the stage where the best filmed sequences are selected and re-ordered to create the film's narrative. The distribution phase is the final component of filmmaking where the film, as a product, is delivered to its audience. The film may be marketed

and distributed to cinematic audiences, film festivals or via online means such as Netflix or iTunes.

Feature films use standard filmmaking approaches based around shooting methods and cinematic continuity (Brown 2012). This allows sequences to be filmed out of script order, according to location and other variables like day/night or cast/crew preferences (Cybulski 2014). Documentaries use an approach called cinema verite (Rabigar 1998) that accommodates material being shot in a range of locations.

The structures that support the functioning of the industry in Australia at the national and regional levels are reflected in the challenges faced by the global film industry. Lee and Gillen present some business practices that can help to reduce the risk of making feature films by instituting three separate entities within the production house. One is for production operations, a second is for development operations and the third is a single picture producing company. 'Though these operations are accounted separately, typically each production company's group of operations exists in the same offices and are operated by the same people' (Lee and Gillen 2011, p. 158). The critical component here is that the single picture producing company will only ever produce one feature film and that 'isolates both the pictures accounting and its liability from the producer's other pictures' (Lee and Gillen 2011, p. 158) as well as from the producer's development and production operations. This strategy is one of a number that can be used to manage the financial risk or failure, should the picture not do well which, given the ROI statistics, is likely.

Australia is named, along with seven other countries, in the 2012 report on *Building Sustainable Film Businesses: The Challenge for Industry and Government* as having 'interesting policy and business tendencies' (Olsberg SPI 2012, p. 8). In the past there has been an emphasis on supporting specific film projects but now there is a move to support the development of film companies themselves. Screen Australia has had an Enterprise Development Program since 2009, set up to do this. On several levels government policies have been designed to support and facilitate film production of Australian and foreign content. But there are some operational problems. Australia is considered economically viable and attractive to off-shore production companies when the Australian dollar is trading around 70 cents in the US dollar. Combining a low dollar with any government incentive used to lure foreign productions to Australia, means that blockbuster productions can offer longer-term employment opportunities for filmmaking specialists, as opposed to an Australian feature film, operating on lower budgets and filming a feature in a matter of weeks. Add to this situation the fact that film producers are keen to deliver a high ROI film, it is more common for films to fail rather than recoup their production costs based on box office returns. ROI is the ratio of cost to profitable income. In this regard *The Producer's Business Handbook* written by Lee and Gillen, lays out the three objectives for a film producer.

- 1) Creation. To powerfully reveal the producer's vision of the story
- 2) Audience. To ply the picture to as extensive an audience as possible.
- 3) Profits. To recoup production costs and receive a fair participation in the future earnings (2011, p. 11).

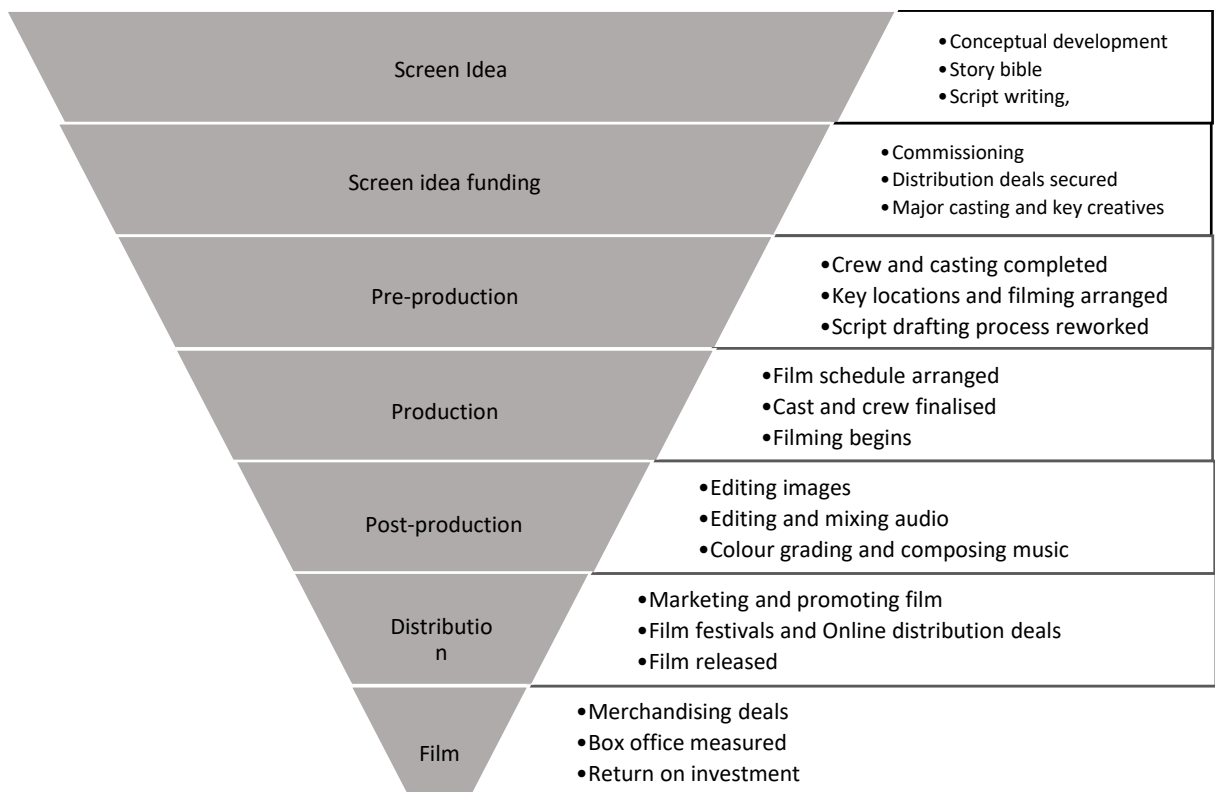
The balanced producer is one who understands and can sustain a steady equilibrium between these three objectives. Working Title Films in the UK is an example of a company that takes this balanced producer approach. The other type of producer is the creative protectionist producer. They are generally 'not skilled business people, well exercised in planning and execution' (Lee and Gillen 2011, p. 10). Lee and Gillen argue that the creative protectionist producer keeps the distributors at arm's length and that a commercial success of a picture

‘appears to represent a threat to the artistic integrity of their pictures and are commonly blamed if their pictures financially underperforms’ (2011, p. 10). The risk of a film failing is very high. As Velikovsky (2016) argues:

Movie performance research reveals that 70% of movies do not ‘break even’ or recoup their production budget in cinema release (Vogel 1990, 2014) and that 98% of screenplays presented to producers go unmade (Macdonald 2004, 2013). Successful (thus, creative) screenplays and movies are rare (2016, p. xv).

Given this situation, a film producer must be wise enough to manage and reduce the financial risk of a film’s production while also maximising the marketing and distribution opportunities of the film to a potential audience. The process of coming up with a screen idea, making a film, and sending the film out to be judged by audiences is laid out in Figure 28.

Creative Production Process



Social and Cultural Consumption Process

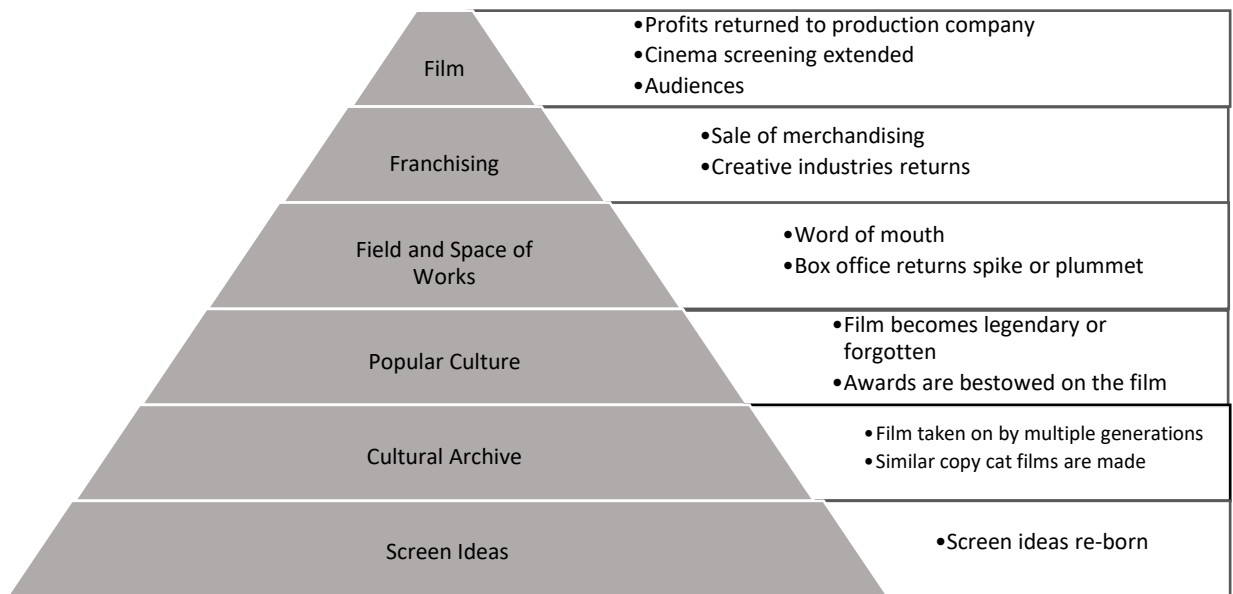


Figure 27 Filmmaking processes translating to legendary or forgotten film

An engagement by film producers with the space of works (Bourdieu 1993) is a critical stage as it contains all films that have been made and are being judged as being creative at the point of distribution. If a film does not pass muster then it will be forgotten, not seen by current audiences, not shared by friends, and not recognised for awards. Those films that do pass audience critique become part of the popular culture - they are shared by friends, are nominated and win awards and eventually may become appreciated across multiple generations with the very best ones becoming legendary. Once legendary status is achieved, others will use them as inspiration to make more films.

13.6 Important Personnel in the Film Sector

Creativity and collaboration is the basis upon which most film-making process is founded (Petrie 1991, p. 204). This is in opposition to the notion of an 'auteur' which is the term given to a film director who is given credit for, supposedly, single handedly creating the look and feel of a film. As Redvall (2013) argues, auteur theory is particularly offensive to screenwriters because it ignores their contributions entirely while others argue that any person involved in the crew must also be seen as an auteur (Hogan 2004, p. 84). Putting these debates aside it is undeniable that a number of collaborative processes are vital to film production, one of which occurs at the initial stages and is largely reliant on the scriptwriter to realise. This is the screen idea (Macdonald 2012) which describes the social aspects that emerge through the screenwriting process. The social and cultural aspects that account for the creation of a screen idea have been studied by Eva Novrup Redvall (2014). She has extended the notion of the screen idea by adding Csikszentmihalyi's systems model to create the 'Screen Idea System' and use this term to describe the individual and social aspects of the collaborative filmmaking process. The critical personnel who make up this collaborative process are described more fully below.

Film producers are critical personnel because they commission film ideas. Lee and Gillen (2011) describe two types of producer – the 'creative protectionist producer' and the 'balanced producer'. One of the criticism of the Australian industry (Sheenan 2009), is that there are a lot of creative protectionist producers who are high-risk operators which leads to higher rates of attrition because they are focused on 'the creative purity of the vision they have for each picture' (Lee and Gillen 2011, p. 10) which may come at the expense of business details and tend to result in less box office return.

Led by the producer, film crews are engaged in hierarchical structures that are scaffolded according to the production method and the stages of production (see Figure 29). Key production crew roles are screenwriter, producer, director, cinematographers (director of photography), sound designer, art director and editor. The actors are important of course but usually there is a separate casting process that is conducted to determine each cast member. The responsibilities and duties of each key above-the-line role depends on the scale and scope of the production. In some instances, these key personnel may lead a team of people, known as a department. Feature film crews can be as large as 250 or as small as 40 members and this number is dependent on the budget. Film financing is the producer's key role (Lee and Gillen 2011). Once a film is financed and crewed, the production crew will be led by a cinematographer (Brown 2011) while the director leads the cast. The cinematographer and director collaborate closely on what is to be shot where and how it is to be filmed. As far as the cinematographer goes this role is supported by a gaffer, usually an electrician who places and sets the lights, and the key grip who organises the camera equipment and how camera movement will be achieved. The sound designer is responsible for the overall sound of the film

and they will be supported by audio recordists who work both on set and separately in the field capturing the necessary dialog or SFX.

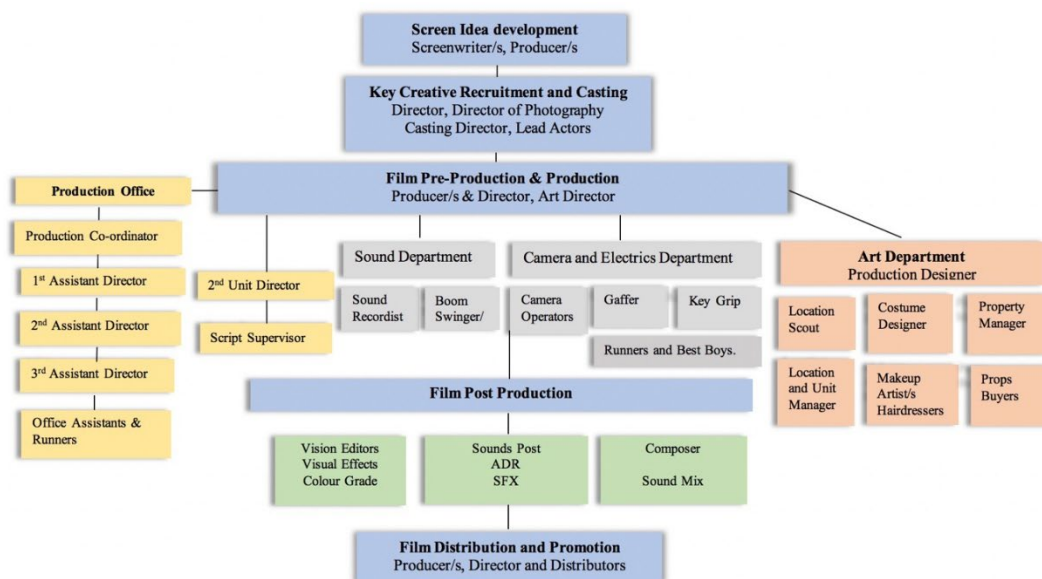


Figure 28 Feature Film Personnel Organisational Structure

The crew's daily logistics are organised by a team of assistant directors (led by the first AD) who manage the daily call sheet and prepare all the logistical details for the filming schedule. The post-production team's crew roles have been expanding and becoming more important as technology has allowed more procedural manipulation to occur. There are now also visual effects supervisors, VFX and teams of Computer Generated Imagery (CGI) crews who, through their work in the digital realm, enhance and affect real worlds as shot by the production crew. The FX team can also build virtual worlds to help realise the film's narrative. The role of colour grading has emerged as a creative opportunity to give a film a completely unique aesthetic. Then there is the musician composing the score, the Foley artists laying in audio effects and ADR producers attending to re-recording the dialogue. The editor, in collaboration with the director and the audio mix editor, brings all this together in post-production. These personnel complete the production team.

13.7 Background to the Current Film Industry

As a global industry, the main economic imperative of the film industry is measured around a film's box office success. The delicate relationship between the financial risks borne by film producers and a film's anticipated success at the box office continues to be influential. While ROI and box office success can sometimes be measured in cultural terms too. For example, the highest grossing Australian film is *Crocodile Dundee* (1986) which earned over \$47.7 million, compared with foreign and domestic titles. It placed eighth on the highest feature film earner of all time list but was partially instrumental in carrying mainstream values overseas. Other notable income earners were *Australia* (2008) with \$37.5 million and *Babe* (1995) with \$36.7 million (Screen Australia). These films were created by Australians and filmed in Australia whereas some films made in Australia could be classified as foreign productions. For example, *The Lego Movie* was produced by Americans, but it was made at Animal Logic in Sydney and consequently received Screen Australia funding.

Australia boasts excellent filmmaking studios and facilities with Fox Studios in Sydney and the Gold Coast movie studios. These facilities have successfully accommodated many Hollywood productions and they are part of what has become known as 'local Hollywood' (Goldsmith, Ward and O'Regan, 2010). This 'local Hollywood' dynamic provides work for Australian film industry specialists, that is key creatives and crew, as well as Australian casts. This concept of the 'local Hollywood' is not a new phenomenon as Australia has in fact played host to Hollywood productions since 1938 (Weaving 2013). Hollywood titles from the last 30 years include *Mad Max Beyond Thunderdome* (1985), *Babe* (1995), *Oscar and Lucinda* (1997), *Dark City* (1998), *Moulin Rouge* (2001), *Australia* (2008), *The Great Gatsby* (2013), *The Lego Movie* (2014), *Unbroken* (2014) and *Hacksaw Ridge* (2016). The production of each of these films has helped sustain Australia's film industry and given it a global cache and currency.

However, there is some concern about dwindling Australian budgets as was discussed in his paper *Embracing Innovation: A New Methodology for Feature Film Production in Australia* (Connelly 2009). Connelly's main concern is that 'the film production methodology and distribution system jointly compromise Australian films because the decision-making processes prevent the films from reaching their audiences at the box office' (Maher et al. 2015 p. 13). Essentially film distributors are the service providers who make feature films visible to consumers by 'taking products to a mass-audience' (Davies and Sigthorsson 2013, p. 132-3) and the film distributors, controlled by foreign interests, have considerable leverage as they are keen to have their cinemas full and box office profits maintained. This situation frequently means Australian filmmakers are the ones asked to take most of the financial risk which leaves them at the mercy of the film distributors who may remove a film from the cinema if audiences and therefore returns are not immediately forthcoming, thus preventing audiences building by word of mouth as they once did. The film distributor and film producer relationship has not changed markedly for 70 years and the onus remains with the film producer to select the most marketable genre and narrative in the hope that the risk producers take will result in adequate box office returns.

Film studies scholar Deb Verhoeven believes that the domestic production industry could 'benefit from adopting a more global outlook in its analyses of Australian cinema rather than treating it solely as an outcome of local dynamics' (Verhoeven et al. 2015, p. 18). This may be reasonable advice but making an Australian film requires expertise and talent and with the small budgets on offer there is frequently little left over to market a film to a global audience. One strategy used by Australian film producers to raise the profile of their films is to take a film to the film festival circuit, to build an audience and create that much-needed word of mouth so that broader audiences will anticipate the arrival of the film and attend its cinema screening. This strategy means that Australian producers must be willing to absorb the marketing risks by managing films on very small marketing budgets. In the digital age there are now opportunities for producers to share in downstream revenues created by successful content. By diversifying revenue streams across several activities, the risk/return parameters are reduced (Olsberg SPI 2012). Taking an Australian example, *Alex and Eve* (Andrikidis 2015) had a limited release in Australian cinemas and it has also screened on Foxtel. It is available on Stan and iTunes and in July 2017 it secured an American cinema release after winning the audience award at an American film festival in 2016. In this case understanding the structure of the Australian film industry is key to unlocking the right industrial choices that are faced by film producers as they continue to move into what has been described as an increasingly digitally-disrupted age.

While Australia has built a reputation as a reliable place to create Hollywood films, it has not been able to do the same for its own local industry with the production of Australian films operating in a holding pattern for the last decade (Maher et al. 2015). It can be claimed that the

Australian film industry currently operates as a cottage industry ‘caught between the competing logics of a subsidized cultural activity and commercial enterprise’ (Maher et al. 2015, p. 2). The film production sector operates on two-speeds, the cottage industry model where feature films are made on modest and subsidised budgets of \$3 million (AUD) and a model where foreign films are made in Australia, frequently by US corporates, with budgets of more than US\$20 million. Blockbuster examples from 2015 include *Hacksaw Ridge*, filmed in New South Wales with a production budget of US\$40 million.

While Sydney, the Gold Coast and Melbourne have film production precincts that can accommodate blockbuster productions, the state-based film agencies will frequently compete with Vancouver in Canada or Dublin in Ireland to lure blockbuster productions to Australia. In 2014 *Pirates of the Caribbean* was filmed in the Gold Coast Movie Studios and the Queensland government provided a \$20 million incentive to attract the production to the state (Lewis 2104). The film’s budget was US\$350 million and a spend on that scale in a regional area is a major injection into a local economy through the economic multiplier effect. An economic multiplier, which is the ratio of impacts of increased economic activity to the initial spend on film production, measures the increase in income from the injection of funds into a local economy. In the case of foreign productions working locally this effect accounts for the money spent on hiring crew, equipment and vehicles, accommodation, catering etc. and how this money then flows directly or indirectly to have an impact on others in the economy, such as retailers, manufacturers and various service industries - money which would otherwise not have come into the country. Most film industry economic multipliers sit inside a range of between 2 and 3 and in 2011 Australia’s was 2.67, NZ was 2.55 and the UK was 2 (Olsberg SPI 2012, p. 15).

The economic multiplier effect is one reason why national and state governments are willing to currently offer subsidies to blockbuster productions. Such subsidies are negotiated with film producers and are often deal-clinchers or deal-breakers. Similar subsidies occur at the local and regional levels to encourage Australian film producers to film in the regions using stage government tax breaks as incentives. A number of locally-made films are produced outside of the cities in regional areas, using available tax breaks and through regional film agencies. For example, Screenworks is a regional film agency operating from the Northern Rivers of New South Wales (Henkel 2006, 2010). It connects film producers with regional filmmakers, hence making it more viable for producers to move their films into production in a regional area. The Hunter region has Screen Hunter, previously called Screen Hunter Central Coast, which has been operational since 2004.

13.8 The Hunter Region Film Sector

13.8.1 Film Distributors, Societies and Festivals.

Cultural Collections at the University of Newcastle which is housed in the ‘Auchmuty Library holds records relating to the history of theatre and cinema in the Hunter Region’ (Records NSW 2018, online). While this history is significant in demonstrating industry activity in the past there are a number of distribution outlets for film still currently active in the Hunter. These include mainstream cinema distributors, film societies, film festivals, summertime ‘Cinema under the Stars’ and independent cinemas. Hoyts and Readings Cinema, both located in Charlestown, cater to the general consumer looking to view the latest Hollywood blockbuster. Similarly, Event Cinemas are located at the rooftop complex of Garden Square in Westfield Kotara. Tower Cinema in Newcastle’s CBD, now part of the Event Cinemas chain has found a lucrative niche by ‘showcasing diversity in cinema - from blockbusters to foreign and

independent movies' (Flicks 2018, online). Readings Cinemas in Maitland have '4 wall to wall cinema screens featuring the highest quality crystal clear Dolby digital sound' (Readings 2018, online). The Heddon Greta Drive-In 'is the only drive in theatre in the Hunter Valley servicing Newcastle, Lake Macquarie, Cessnock and Heddon Greta' (HGDI 2018, online). Raymond Terrace is catered to by Scotty's Cinema Centre while the Great Lakes Cinema 3, a family run business since 1999, screens a mix of blockbuster films with a varied 'selection of specialized and arthouse titles' (GLC 2018, online). A number of Australian productions are noted among the following list of the most successful films over the life of Great Lakes Cinema 3 to this point being:

The Dish (2000), *Moulin Rouge* (2001), *Crackerjack* (2002), *The Devil Wears Prada* (2006), *Australia* (2008), *Mao's Last Dancer* (2009), *Avatar* (2010), *Red Dog* (2011) and *Last Cab to Darwin* (2015). In addition, the *Lord of the Rings* trilogy and the *Harry Potter* franchise have also been very successful (ibid).

The James Theatre in Dungog is the 'oldest purpose-built cinema still operating in Australia, built in 1918. A multi-purpose facility, the venue (owned by Dungog Shire Council) also hosts live performances, dance and film classes' (James 2018, online). Muswellbrook Cinema is a newly opened twin cinema and is located inside the old Muswellbrook Workers Club. Singleton is catered for by Majestic Cinemas while Port Stephens has the Nelson Bay Cinema Complex. The Regal Cinema, in Birmingham Gardens has been operating as an independent cinema for decades and was recently refurbished. The managers, Jo Smith and George Merryman, have built a strong community audience by offering an alternative screening program, including Australian new releases, Oscar-nominated films and film classics. They have also supported community film audiences by screening Bollywood films and Indian documentaries.

Several active film societies exist in the region. These include Newcastle Film Society and Newcastle's Italian Film Festival. These cater specifically to the local film connoisseur wanting to view a diet of films produced by independent and international filmmakers. Each year the Newcastle Film Society 'screens a season of classic, arthouse and rare films' and has been active since 1984. In 2018 among other events they 'will showcase the best of international cinema with films from Denmark, Canada, UK, Finland, India and Italy' (NFS 2018, online). The Newcastle Italian Film Festival of course screens only Italian films, from romantic comedies to dramas, and often finishes with a classic Italian film such as Sophia Loren's *Two Women*. It is a true festival in as much as while all films are shown on the ground floor of the Tower Cinemas and are screened with English subtitles, all the guests at the night screenings are 'offered complimentary continental treats from Delikacies, Burraduc Farm buffalo cheese, Angove wine, Napoli Centrale pizza and dolci or desserts from The Umbrian' (Gregory 2017, online). The festival also features 'the awarding of the Dino Cesta Memorial Scholarship, which will provide a student with \$2500 to study writing, music, visual arts or film and television at a tertiary level' (ibid).

Newcastle also regularly hosts travelling film festivals like Flickerfest and Sydney's Travelling Film Festival but since 2012 the city has hosted its own locally run festival - the Real Film Festival. The Real Film Festival (RFF) is an initiative of Annette Hubber at Screen Hunter. It offers a screening program of films based on real stories, a short film competition and film networking opportunities offered through a three-day program. Documentary and independent films are screened and there is a short film competition and a one-day workshop program where local high school and university students can attend directing, editing, mobile filmmaking and make-up workshops. The festival has a community impact as it has been designed to educate and inspire film production in regional areas.

The regional town of Dungog hosted the Dungog Film Festival from 2007 until 2012. The festival aimed to showcase Australian films for Australian audiences and was run as a not-for-profit venture in the James Theatre in Dungog. The project was initiated by Allanah Zitserman and Stavros Kazantzidis who were both film-makers and in 2010, at its peak, it attracted over 9,000 people to the town. In 2014 the Dungog Festival was launched by the Dungog Arts Foundation, with a focus on film, food and fresh-air and in 2016 it included a major short film prize of \$30,000 and a program of documentaries, feature films and screen industry workshops and panels. A key feature of the Dungog Festival is the Long Table dinner where the main street is blocked off for a long table banquet where local produce and wine is served.

The Shoot Out was a 24-hour filmmaking festival that began in Newcastle in 1999 and it ran for a decade. The Shootout attracted up to 180 film crews, all filming on specific Newcastle streets to ensure their films contained specific filmmaking locations, the details of which were released when the competition began. The other unique part of the festive was that films had to be filmed 'in a linear order to comply with the "in-camera" editing rule. The Shoot Out rules definitely challenged the filmmakers' creativity' (Street 2014, p. 1). The Shoot Out Festival has also been held in Geelong (VIC), Toowoomba (QLD) and New Zealand, and continues to run in Colorado in the United States. The Newcastle festival launched the career of Jason Van Genderen who has also won Tropfest in NY (Street 2014).

Some production of films in Newcastle occurs through amateur clubs and student film programs offered by TAFE and the University of Newcastle. Filmmaking clubs exist for both the amateur and the professional with Newcastle Video Moviemakers being an amateur movie club who meet weekly to discuss movies. For the professional Newcastle filmmaker, Film Republic functioned for a number of years and was committed to connecting local industry professionals from the Newcastle screen industry.

13.8.2 The Regional Film Agency

The concept of setting up a regional film office in the Hunter began with Newcastle City Council. Initially it operated as the filming unit for the Council with the first round of funding enabling the establishment of a Film Hunter office. The Department of State and Regional Development (DSRD - NSW State Government) provided two rounds of 'seed funding' which was used to establish the office and to further develop the Hunter's regional film office. Screen Hunter is now the longest serving regional film agency in NSW. Its primary goal is to build and help sustain the local industry in the regional area. It has been operational since 2003. The business of filmmaking brings in \$8 million every year to the Hunter region and Screen Hunter is crucial in connecting film industry productions with regional communities through accommodation, catering, hire cars and employment for local filmmakers and crews.

Annette Hubber has been the manager at Screen Hunter since 2008. She has developed Screen Hunter's networking functions both inbound and outbound by servicing filming enquiries for the region. Hubber suggests that 'a lot of the production companies come to the Hunter because of our proximity to Sydney and our stunning locations and they know they can rely on Screen Hunter to link them in with almost anyone they need, both stakeholders and local crew' (Hubber i/v Aug 2015). Hubber has monitored the value of the dollar in relation to the filming enquiries for the Hunter region and she has noticed that 'when the Australian dollar is trading around 70 cents in the US dollar we have the opportunity of pitching on a lot more overseas work. The film industry thrives in Australia when the dollar drops, so it's a good thing for Screen Hunter' (ibid). But when the dollar value increases against the US, jobs evaporate. 'We quoted an

American job when the Aussie dollar was trading low and then it bounced back, and we lost it. It was a huge blockbuster, which is disappointing but that is the landscape we live in' (Hubber i/v Aug 2015).

Screen Hunter has had several managerial arrangements. Initially it was set up through Newcastle City Council, and funding from DSRD helped it to be independent for about 6 years. Currently Screen Hunter is managed through the Hunter Joint Organisation of Councils. There are five satellite organisations managed by the Hunter Joint Organisation of Councils which include Screen Hunter, Regional Procurement, HC Environmental Division, Legal Services, Hunter Records and HC Tourism (which has been on hold while they sort out local, state and federal funding). Many of these satellite companies make a profit and the finances are pooled so those organisations that produce a deficit can be supported. Screen Hunter is one of the latter organisations. Its deficit occurs because some of the work done to attract film production to the region is done in lieu of a booking and payment only comes when the production group confirms it will film here.

Productions that do film in the region include a combination of feature films, television shows, commercial advertisements and video clips. These have included *Tomorrow when the War Began* (2010), *Air Rescue*, *Baggage Handlers*, *My Kitchen Rules* (Channel 7) and *Farmer Wants a Wife* (Channel 9). Locations in the region are many and varied ranging from 'spectacular sand dunes, beaches, harbours and rivers to picturesque vineyards and mountain ranges [as well as] sweeping plains, horse-studs, open-cut mines and historic architecture' (Screen Hunter 2018, online). The Stockton sand dunes, for example, are a prime location for filmmakers because of the dunes' characteristic desert appeal and proximity to major facilities. Many national and international film and television productions have scouted the Hunter's filming locations, and many have chosen to shoot here. These have included *Wolverine*, *Matrix Reloaded*, *Superman Returns*, *Top Gear*, *Home and Away*, *Suburban Mayhem*, *Lockout* and many others. Several video clips have been shot here as well, including Beyoncé's *Mine* and Daniel Johns' *Aerial Love*. Sri Laxmi Productions and Template Productions from India have also used Hunter locations for their Bollywood titles. Screen Hunter pitches on big budget productions to lure them to the region and offers a production directory that promotes Newcastle's skilled filmmaking professionals. Some US productions that have scouted here but chosen other locations include Angelina Jolie's *Unbroken* (2015), Mel Gibson's *Hacksaw Ridge* (2016) and the US sitcom *Modern Family* (2015). When a producer decides to film elsewhere, the hours Screen Hunter has spent with them and their location scouts go unpaid. Annette Hubber is optimistic about the jobs that go elsewhere to film though. 'We might have lost the job this time around. However, they did recce several locations in the region so there is always the potential they'll come back' (Hubber i/v Aug 2015).

In 2014 Screen Hunter processed 360 filming permits. Each filming permit has different variables depending on the production. The processing of film permits represents more than 80% of the administrative work done by the office and every filming permit has a different set of parameters. For example, the Channel 7 Reality TV show *My Kitchen Rules* might film for a week in the region and *A Farmer Wants a Wife* might film for several weeks, whereas a feature film like *Tomorrow when the War Began* filmed for 32 days in 2009 across various regional towns including Dungog, Raymond Terrace and Maitland. That was considered to be one filming permit. Even with this range of productions coming to the region, Screen Hunter has struggled to turn a profit and in 2014 they produced a deficit of \$3K that was absorbed by the overall finances of the organisational group. Ongoing support from the Councils is critical to the sustainability of Screen Hunter as a regional film office. In 2015 the 'fee for service' model

was introduced which means Councils annually pay a fee for the services Screen Hunter provides to their area.

One key cost that affects a film's budget is the location fees. In 2009 the NSW State Government decided to cut red tape when it comes to filming in NSW and to create a more film-friendly state. This was a sensible decision as it kept the blockbuster films in Sydney at a time when Melbourne was attracting them because there were no location fees charged to film in that city. Essentially, Sydney had been overcharging for the use of the city as a location for some time. However, the policy that removed NSW location fees also removed the main source of income for regional offices and essentially crippled these regional film offices who had relied on the paltry sums they were getting to keep their offices viable. This action resulted in only two of the seven regional offices surviving. These are Screen Works in the North Rivers Region of NSW and Screen Hunter. This decision has also had ongoing impacts for the film industry with many producers and production companies being forced to individually manage government stakeholders like Councils or National Parks to gauge what out-of-pocket expenses there will be, based on number of filming days, vehicles, size and impact of crew.

Screen Hunter has a great reputation in the industry, with its manager, Annette Hubber, working to ensure they provide a consistent service. Managing the brand well is crucial for sustainability. Screen Hunter assists many local filmmakers through film industry forums and by supporting locally-produced projects like the ABC broadcast documentary *Honeymoon in Kabul* made by Limelight Creative Media and the independent feature film *Mikey's Extreme Romance* created by Jamie Lewis. It is a fact that the production of local content would slow down if Screen Hunter wasn't operating. At a film industry event in 2015, Screen NSW identified Screen Hunter as a great model for a regional film office but the irony is that it is struggling for funding. It has proved an ongoing task to find funding and investors to back this 'great model'.

13.8.3 Film Production Companies

The Hunter has several film and television production houses, all of which are 'small to medium enterprises' (SME). These SMEs have managed to build a reputation nationally and sustain themselves while remaining in Newcastle. While a lot of work for them comes from the local community, they frequently solicit work from outside the region. These standout film production houses are Limelight Films, Storyhaus, Good Eye Deer and Final Post. These SMEs are owned and run by multi-skilled, highly talented individuals who have been able to multi-task and create diverse media content. These businesses undertake a range of film work including television documentaries, advertising and television series.

The film production companies in the Hunter produce high quality screen productions which receive awards from the Australian Cinematographers Society (ACS), Australian Teachers of Media (ATOM) and Australian Video Producers Association as well as a number of Film Festival awards. While the main source of income is generated through advertising and corporate film work, they do nurture pet projects with Storyhaus making *Barinia* (2015), a TV series filmed in 4K, about a couple who sail the Mediterranean and make beautiful seafood dishes. Limelight Creative Media shot a documentary in Afghanistan entitled *Honeymoon in Kabul* (2009). A community funded documentary *Face of Birth* (2013) about pregnancy, childbirth and the power of choice (Face of Birth, online), was co-created by Kate Gorman and Gavin Banks from Good Eye Deer. Released globally in 2013 and translated into 12 languages this compelling documentary was created to advocate for changes to Australia's maternity policy. These SMEs are primarily independent creative content producers (Davies and

Sigthorsson 2013, p. 128-30) as they create their own intellectual property, generate production revenues from private and government investment and they work on a project-by-project basis.

Karl Brandstater, for example, owns a production company in the Hunter called Storyhaus. Brandstater was born in Sydney, lived in Europe and the US for a period and moved to Newcastle in 2000. He was introduced to the industry by his father who was a multi-cam director for TV. He completed a Science degree but could not 'fight [the] desire to capture imagery and tell those stories' (Brandstater i/v Oct 2016). He started in documentary, working in Tahiti and USA and has since worked extensively overseas including 14 trips to Russia. Brandstater has worked with Universal Music, Disney, Village Roadshow and Sony Music primarily on music video clips and for six years he was at Warner Brothers on contract cutting movie trailers for cinema and TV. He was there when they launched home entertainment and is now pleased to be located in Newcastle:

Newcastle brings that wonderful balance of authentic art and creativity and processes and I think the future of taking good IP and ideas and craft needs to then extend to other markets ... our ideas must be considered when we think of other territories whether it is Asia or the Americas. We've got to have the courage to think that way ... we came to Newcastle and it was the best decision we made in every respect. It's easy to live here. It's still got that village feel. As an independent practitioner you fly. You shoot for a few weeks overseas, you come back here for months and edit. It's not difficult to work internationally and live in Newcastle (Brandstater i/v Oct 2016).

For example, as a film and TV writer and director Brandstater and his company Storyhaus, completed an 8-part documentary series *Barinia* in 2015. The series, filmed on a yacht, sailed the Italian, Greek, Turkish and French coastlines and shared local recipes with Narelle, the chef, and Patrick, the skipper, hosting the show (Barinia 2016, online). The TV series has been screened in France, Italy, Poland, Russia and Brazil. Brandstater worked with an all-Newcastle team including the design agency Headjam who did the charts, Tim McPhee who composed, played and recorded all the music, Mike Preston who provided creative support and helped write the accompanying book, and Rob Preston who did the sound mixes.

Limelight Creative Media is a boutique communication studio which has been operating in Newcastle for 15 years. Limelight offers a fully integrated communication service including film production, writing, photography, time lapse and design. Company Directors Dr. Anna Kelly and Ian Hamilton have a shared passion for producing content that makes a positive difference in the community with a strong focus on health and education. Limelight wins national tenders to produce educational, health, corporate and training videos as well as producing broadcast documentary projects. Ian Hamilton explains that their competitors are really in Sydney and the other capital cities (Hamilton i/v May 2015). They work from creative concept to completion across a number of areas.

We offer a range of creative services including filmmaking, web-design, still photography and instructional design. Most of our work, our bread and butter, is in large national initiatives into health and education so often those involve a whole strategy and a whole campaign, so it's everything from copyrighting, instructional design, filmmaking and design so that the work that we like to do is integrated. So, you're not just making a film, you're actually just creating a whole experience for the audience, which is what we have come to do (Hamilton i/v May 2015).

Their past television work includes making four broadcast documentaries for the ABC Series Australian Story. An extreme adventure documentary made by Limelight, *Honeymoon in Kabul* (2009), was also nationally broadcast on the ABC. This feature length documentary won the People's Choice Award at the Zero Film Festival in both New York and Los Angeles. In terms of health and education they undertake ground breaking work. Their *Pain Management Network* films won a national ATOM award in 2014 for Best Instructions/Training Resource. Anna Kelly explains 'a lot of our commercial work is about making a difference to people's lives, so we really enjoy doing that type of work' (Kelly i/v Sept 2015).

To create their award-winning work, Limelight employs six full-time staff who work as an ensemble team. Ian believes that not only must his team be multi-skilled but being a filmmaker requires a certain knowledge about the subject matter 'because I want the so-called technicians to be actual storyteller-filmmakers and we're all collaborating together because I know, in the best of worlds, that happens with specialists as well' (Hamilton i/v Sept 2015). This attitude reflects the position put by Dawson and Holmes where they assert in their book *Working in the Global Film and Television Industries: Creativity, Systems, Space, Patronage* (2012), that 'the practice of drawing sharp distinctions between above-the-line and below-the-line workers needs to be interrogated' (2012, p. 14). They suggest that there are 'other ways to understand creativity in an industry with a complex social division of labour involving large numbers of people working cooperatively' (ibid). To aid in accomplishing the creative integration that Hamilton and Kelly see as necessary, they have ensured that their staff are well trained, highly skilled, extremely versatile and have an opinion on not only the technical aspects of a production but how the content being filmed should be approached. Limelight's company ethos is about agility, diversity and creativity and while Hamilton is the Creative Director, he works as a producer/director/cinematographer while Kelly also operates as a producer/writer/presenter and can step into the role of Director whenever that is needed. As Kelly states 'we know we can have three separate crews out on the same day filming three different jobs and we have the people that can do it' (Kelly i/v 4 Sept 2015). They are both satisfied with the results of the work they and their team do, the current size of Limelight and the direction their business is headed.

Gavin Banks, from the Good Eye Deer production company, has worked on feature films as a cinematographer and edited multiple broadcast documentaries. He grew up travelling the world with his parents who worked for a humanitarian organisation. This experience gave him access to a broad set of cultures and communities and an insight into a variety of stories. He was fascinated with cinema and after completing his Communication degree he founded Good Eye Deer. He has produced and executive produced 'over 200 commercials, online videos and advertising campaigns. Recent TVC work as a director and producer includes a range of national campaigns' (GED 2018, online). Olivia Olley became a partner and producer in 2012. While at Good Eye Deer she 'has seen the company grow to be a nationally-recognised video production house. In her time, the company has won 12 national and international awards for brand films, corporate videos, educational series and TV commercials' (GED 2018, online). Olley began her career in 2002 as a cadet with the Sydney Opera House. She moved to London and worked in post-production before completing a Creative Arts Degree back in Australia. She specialised in screenwriting and graduated with an Honours degree in documentary production (ibid).

Good Eye Deer was the birth place of the independent documentary, *Face of Birth* (2013). This community-funded documentary is about natural childbirth and the power of choice (Face of Birth: online). Gavin Banks worked as technical producer, cinematographer and editor and worked with director, Kate Gorman, who created the idea. The documentary was released

globally in 2013 and translated into 12 languages. *Face of Birth* was created to advocate for changes to Australia's maternity policy (Banks i/v May 2015). Banks describes what brought him to make this documentary:

It came to a point where I quite literally thought, 'Fuck it! I just have to make this film'. I met another woman who had a passion to make a film on the same topic just as home birth was about to become illegal. So, we decided to join forces - to shoot enough footage to put together a teaser to see if we could raise some cash. And that is what we did. We spent five days filming in Melbourne, because that is where our contacts were. We shot it and we cut a teaser. Within a week of uploading the teaser we had six thousand views which at the time was really big, and big interest from all over the world – 'how outrageous Australia's going to make home birth illegal'. And so from there, we realised, we'd seen Indigogo [crowdfunding] campaigns. They were very much at the beginning in Australia at that stage ... (Banks May 18th, 2015).

Face of Birth was privately funded and it eventuated just as the crowd funding platforms were emerging:

Pozzible was just getting started, I think. We looked at those models and thought, we're not making any money and we're not going to get much money for this and they want to take 10%, so we thought it was too much risk and we decided to run our own thing (Banks i/v May 2015).

Gorman and Banks both believed there was a market for a film about natural child birth:

We had seen other films that never quite did what our film was going to do. We had a very clear outline of what the film needed to address and who we needed to talk to in order to illustrate those points. So, we launched our teaser and kept on making posts on Facebook to build a Facebook profile and to build a Facebook following. We got an injection of cash through the other director when an opportunity came up. I was going to the UK for a family holiday. We thought 'hey, what if we use the opportunity to film some extra stuff'. We got an injection of cash by selling a portion of the film to an investor who believed in the other director. That financed a good part of that trip. We involved our audience too. We invited our FB audience to ask questions of our interviewees. That made the audience feel connected and empowered and involved with the process. So we actually asked each one of our interviewees a question that came from our audience, and we posted that result. Then we came back and to finish the film we pre-sold the film. We basically said, you know, 'support the finishing of this film by buying a download or a DVD' ... That was really master-minded by the other director, Kate Gorman. Ultimately in that year we turned over about a quarter of a million dollars (\$250,000) (Banks i/v May 2015).

As the film was independently made for a niche audience, they had to find a way to reach that audience:

We'd done deals with people. So, the way we rolled out the screening was that we said 'if you have your screening within the first two weeks here is how it will work. You can have the film for free, you take 50% at the door, you arrange and pay for the venue. Also, you agree to sell the DVDs of which you'll take 20% of the price. So, they'll be on sale'. So we gave away a lot (Banks i/v May 2015).

Completing and distributing the *Face of Birth* was an enormous undertaking. Unfortunately, the production didn't break even. As Banks asserted, they were 'not even close' (ibid) but he can appreciate the process as 'an invaluable learning experience. We do get a little bit of income from it in dribs and drabs. But what it did teach me, was I started to realise the importance of the business side of filmmaking' (Banks i/v, May 2015). This means that he appreciates the kind of corporate work that is done by Good Eye Deer:

In our corporate work when we hand over a film, we don't have to do anything more. That is the end of our contract. Whereas when you produce a film, everyone thinks 'if I make a great film people will buy it' - not so. The Face of Birth has been described as 'the best educational and inspirational film on childbirth ever made'. But even with a quarter of a million dollars' worth of sales and all that anecdotal success (translated into twelve languages) and viewed across the world, the film had not paid for itself (Banks i/v May 2015).

13.8.4 Post Production Facilities and Shared Working Spaces

One of the longest operating post-production facilities in Newcastle is one80 Digital Post. It has a highly experienced team and runs as an independent production arm of Nine Entertainment Co., associated with NBN Television. One80 offers production services for outside broadcast, and TV production and advertising as well as offering high-end, post-production facilities to national clients. It services media agencies and television networks with many national and international clients coming direct. They run a full complement of AVID suites, two audio suites using Fairlight and Pro Tools and a 'graphic arts department that specialises in 2D and 3D design' (one80 2018, online). They run an outside broadcast (OB) unit that can be set up for 'analogue, standard definition, high definition or direct web streaming' (ibid).

Final Post, another creative service provider operating out of Newcastle, is run by Shane Burrell (Kerrigan and Hutchinson 2016). Established by Burrell in 2012, Final Post offers a high-end film finishing service that uses DaVinci Resolve to colour grade and complete the look of a film. Final Post has graded a number of Australian features including *Love is Now* (2014). Burrell feels that Newcastle is an accessible location and is 'coupled with lower regional overheads to provide clients with cost-effective, high-quality films, television series and commercials' (Kerrigan and Hutchinson 2016, p. 7). Final Post is located inside a shared working space called Innx, which is one of several communal working locations that accommodate creative production houses across Newcastle.

Currently many film production houses have humble beginnings in bedrooms, living rooms and home offices. These working arrangements are possible because of the domestication of professional film equipment, editing software and hardware. This situation enables new career trajectories to start in bedrooms as amateurs and hobbyists film weddings and dance concerts. As the tasks become larger in scale many feel it is not professional to invite clients to meetings in the bedroom or the living room. Cheap shared working spaces offer these professional places as well as opportunities for aspiring filmmakers to turn nascent skills into a business.

There are others providing these services. Roost, a Renew Newcastle initiative, offers bedroom filmmakers, amongst other creatives such as designers and app developers, an opportunity to hire a desk or use a meeting space. Good Eye Deer once inhabited a desk at The Roost and they have since expanded and created their own professional space called The Production Hub where likeminded digital production companies can rent professional spaces for 'creatives' (The

Production Hub 2016, online). Taking desk rental to another level is Innx, a company offering rooms for businesses to hire. Innx is home to twenty businesses including Mezzanine, Headjam, Final Post and Fisheye Creative. It also offers the hire of co-working hot desks, co-working permanent desks, meeting spaces or private studios (Innx 2016, online).

This is not a complete list of co-working spaces. There are more offered throughout the region and their use shows that filmmaking communities desire to be perceived as professional and to have the opportunity to network with likeminded people. Some filmmakers in the region travel to Sydney to work and are managed by an agent, which is another approach for local filmmakers who are employed as sole traders.

13.8.5 Independent Filmmakers and Freelancers

Vanessa Alexander works as a freelance film and television writer, director and producer. Originally from New Zealand she has lived in the US and now resides in Newcastle, Australia. She works as a story-liner for a variety of programs and as a mother of six she has a special interest in work for and about women. She also brings a unique perspective to her screen writing because she has been a director of television:

I'm currently mostly working as a writer because I did some work as a director last year after having a baby and it was just so incredibly difficult to do from Newcastle. I thought that I really just have to try and cope with writing, which I can kind of at least half do at home (Alexander i/v Aug 2015).

Working in a freelance environment means you have to put yourself forward for work and as a freelancer you are invited to many meetings:

I remember working out what the point of the meeting was 'cause when you first go and have a meeting, you think 'Well are they going to offer me work?'. Then eventually you realise that the meeting is an interview for some imaginary thing that might happen in the future. It's really just about whether you like each other. And you know because it's such a collaborative industry nobody wants to work with people that they don't have any connection with. And just navigating that is a minefield. If you can become relaxed with that it is easier. Whereas I know people who get very tense in those environments and it might unfairly disadvantage them (Alexander 24th August 2015).

To find out what jobs are on offer in the industry she is represented by an agent in Sydney who takes a commission from any work she does secure. Her agent sends examples of Alexander's work on to film producers or broadcasters for consideration:

I mean it's not a guarantee that you're going to get work but that support structure enables it and enables me to live in Newcastle. I think it would be quite hard for me to be here and not have an agent (Alexander i/v Aug 2015).

Another local filmmaker had a different route to gaining an income. Jamie Lewis works as a Creative Director at Out of the Square Media (OOTS) in Newcastle. He graduated from the University of Newcastle, Bachelor of Arts (Communication Studies) program some decades ago. During his studies he was a member of the Footlice Theatre Company and he began work at the then Media Communication unit at the University of Newcastle. In 1996 he started in advertising in a junior role as a copywriter/production assistant with a local company:

In Newcastle, we often have many hats and I do a lot of copyrighting and direct commercials, corporate videos and different forms of content as well as presenting to clients. That is kind of my role in a nut shell as a creative director, but as a creative practitioner I just call myself a writer and director and I just love creating fantasy stories in terms of anything that has a twist on reality. I love to take something that is quite normal and put a spin on it in some way (Lewis i/v May 2015).

Lewis is also an independent filmmaker who has been involved in productions for some time.

The problem for me and for the creative projects I do is to actually finish doing them. There is never a shortage of ideas or concepts. It is which one should I do and then, 'but just fuckin' finish it!' Don't start it and then go 'oh I'll move onto another one' (Lewis i/v May 2015).

Lewis completed his full-length feature film *Mikey's Extreme Romance* in 2013. He wrote, directed, edited and co-produced this romantic comedy and it is available online through a pay per view US aggregator.

13.8.6 Hunter-Based and Hunter-Shot Films

There have been a number of films made in the Hunter with one simply called *Newcastle* (2008). Hollywood productions have also filmed in the region (McIntyre and Kerrigan 2015) while several Australian films have been partially shot in Newcastle and the hinterland. *Tomorrow When the War Began* (2010) notably 'blew up' the historic Luskintyre bridge. A number of independent productions, both feature films and documentaries, have also been made in the region by local people. These examples show that there is talent in the region and there are compelling stories to be told here.

These local film productions have been in general limited but include an exceptional feature called *Young Einstein* (1988). With Yahoo Serious starring in the film and being the film's writer, director and producer, this comedy was very loosely based on the life of Albert Einstein and had him splitting the atom with a chisel while inventing rock and roll and surfing. The film, funded by the Australian Film Commission and private investment, was pre-sold to a US company to raise the millions needed to cover the production budget. Eventually the film was on-sold to Roadshow and picked up by Warner Bros eventually grossing \$13 million in the Australian box office and \$11 million in the US. Yahoo Serious was born and bred in Cardiff in Newcastle. In the beginning he was called Greg Pead and he attended the former Art School in Hunter St which was eventually incorporated into the University of Newcastle. Pead took advantage of his intimate knowledge of the area and located all the scenes in his internationally successful film in the region he grew up in:

A derelict pioneer's cottage on the Wollombi Road just out of Cessnock became the Einstein farm. Fort Scratchley became the mad scientist's Mental Asylum. The old Newcastle Police Station became the Sydney Patent Office. Newcastle Town Hall became the Science Academy in Paris. And Newcastle Baths, the place where I learned to swim, became the birthplace of The Theory of Relativity (Serious 1997, p. 283).

A number of real local stories have also been made into feature films. *Blackrock* (1997) supposedly re-told the story of the rape and murder of Leigh Leigh from Stockton. The film was based on the theatrical play written by Maitland local Nick Wright. Directed by Steve

Vidler it proved to be a controversial film with the local community (Sandner 2009) and grossed \$1,300,000 with a limited release around the country.

Newcastle (2008), written and directed by American Dan Castle, was the cinematic story of a group of surfers with one aspiring to be a surfing champion. Scenes were shot at the iconic Nobbys Beach and starred Lachlan Buchanan and Xavier Samuel. The film also boasted Shane Jacobson, Barry Otto and Joy Smithers in its cast and 'Andrew Johns, Layne Beachley and Mark Richards have cameo roles' (Joyce 2008, online). Icon Film Distribution, co-owned at the time by Mel Gibson, acquired the rights to distribute the film. It had a world premiere at the Tribeca Film Festival in New York and was featured at the Seattle International Film Festival and 'was among 212 films from 25 countries featured in July at Outfest 2008, the 26th Los Angeles Gay and Lesbian Film Festival' (ibid). It began its 'Australian commercial release with a red-carpet premiere at Greater Union Newcastle on October 29 before opening nationally on November 6' (ibid) of 2008. It grossed a limited \$214,000 at the box office.

Another film, this one based on the Newcastle earthquake of 1989, was *Aftershocks* and like *Blackrock* it was also originally a play that was turned into a film this time by scriptwriter Paul Brown. Newcastle film researcher, Judith Sander, interviewed Paul Brown about how he structured the film from:

A series of first-person dialogues from actors talking to camera ... augmented by reconstructions of the storytellers' points of view, using highly stylized close-ups and extreme detail shots of objects that people [talked] about... [interspersed with] archival video fragments such as news coverage of events at the time (Brown quoted in Sander 2009, p. 165).

Aftershock's producer, Julia Overton, stated that 'the film was produced for a tiny budget of less than half a million dollars' (quoted in Sander 2009, p. 166). The funds were raised by the Newcastle Workers Club, SBS Independent and the NSW Film and Television Office (Sander 2009, p. 166). This restricted budget meant the producers relied on the gift economy, the informal good will of a local network of professionals (ibid), to complete the film.

As mentioned above, *Mikey's Extreme Romance* is another example of a well-made local film. Its production is instructive. Lewis raised the funds privately with executive producer David Jowsey:

He was really into digital cinema and I think what appealed to him was that, as he said, 'We can make it on \$2, \$20,000, \$200,000 or \$2 million. Where do you want to play?' and he kind of said 'do you want to go down the government funding route or' ... and we kind of agreed that it was just this raw indie thing that we would do ourselves. So, we thought let's just try and raise this certain amount of money and go for it (Lewis i/v May 2015).

The film was made as a low budget independent feature and was shot on weekends with editing occurring in Lewis's home office. It had a local premiere at the Event Cinema Newcastle where Lewis promoted it through the film's website and Facebook page by staging an Arts Market like a farmer's market but all the stalls in the cinema foyer were stacked with literature, art works or music CDs from local artists. The premiere was a roaring success with one review likening Lewis to Jacques Tati, Gene Wilder and Marty Feldman. The film was then distributed internationally. It was an official selection at the Chicago Comedy Films Festival and was a winner at the Los Angeles Comedy Fest in 2011. The film made little money for the investors, but the feedback Lewis received from one of the investors proved to him that they were satisfied:

One of the investors, a lovely lady, she came to the screening, gave me the biggest hug afterwards and said 'This is so wrong, it is just wonderful. You've done such a beautiful job I don't care what happens with it'. And another similar gent, he came afterwards, and he said 'I'd forgotten you were acting in it. You did a really bloody good job!' He was quite a knockabout sort of guy. He said 'Oh, let us know when you want to do another one, we'll help you out' (Lewis i/v May 2015).

Another locally made film was *Lockout* (2008), a documentary filmed in Cessnock about the Rothbury riots in the Hunter Valley which is described as Australia's most violent industrial conflict. Ten thousand miners were seeking 'a fair day's work for a fair day's pay' and were locked out of the mine for 15 months with some violent battles ensuing. The documentary had an all-local crew and was produced by Greg Hall and Diane Michaels, directed by Jason Van Genderen, with cinematography and editing by Gavin Banks. Music was composed by John Roy who was also the sound designer:

This film was shot with extremely limited crew and cast over about 8 days. The re-enactments were mostly shot with a skeleton cast in and around the Hunter Valley, NSW, with the larger crowd scenes shot over one day using lots of locals. Clever use of lenses, light and frame gave a sense of scale and scope beyond what was available. The film was then brought to Good Eye Deer for post. Edit, fine cut and grade were done in-house before the project was mastered in Sydney (GED 2018, online).

A documentary that was filmed in Afghanistan and told the story of a Newcastle couple on their honeymoon is *Honeymoon in Kabul* (2009) made by Ian Hamilton and Anna Kelly from Limelight Creative Media. The documentary 'beat a host of films from six continents to take out the audience choice award at the Zero Film Festival in Los Angeles [2009] ...The festival is exclusive to self-financed films and looks for works that take risks' (ABC News 2009, online). The documentary is 'an inspiring story about two passionate Australians who discover that the delivery of aid in Afghanistan is a complex and delicate process' (Ronin Films 2018, online). It was broadcast on the ABC and is now distributed by Ronin Films as part of its educational series.

Another community-based documentary, funded by Newcastle City Council and the University of Newcastle, *Using Fort Scratchley* (2008), utilises oral history to tell the historical, military, maritime, coal mining and Awabakal stories of a Newcastle headland. This production was also part of a research project into the Living Histories of Fort Scratchley (Kerrigan, 2013). It was shot on a budget of \$39,000.

Jacquie Hicks, from Newcastle, also produced a documentary and this one is called *A Way We Go*. It was shot in 2013 in ten cities across the globe. Hicks filmed 'what goes on as people travel from A to B and delve deep into the footpaths, highways, tramways and bikeways of these ten very different hubs' (Hicks 2017, online). Hicks explains that:

I took my cameras and all the courage I could muster to try and use (and film) every different mode of transport that is on offer – from rickshaws to metros, bicycles to buses, and even my two feet. I talked to local people about their experiences as they show me around their cities. After arriving safely home I pieced this footage together to make a film so that everyone can share in the charms and wonder of how people across the world are experiencing urban transport (ibid).

As well as shooting the film Hicks also edited it, Brad Klenk from Ascent Audio was the music composer and sound editor, and Shane Burrell from Final Post did the colour grade. The documentary was self-financed and promoted and was premiered at the Tower Cinemas in Newcastle to a full house and also at the Ritz Cinema in Randwick.

In terms of telling fictional stories, the indie feature film *Bathing Frankie* (2012) was shot around Dungog, Gresford, Paterson and Maitland. *Metro Magazine* described it as an ‘eccentric arthouse drama’ that deals with ‘compromising themes of palliative care, personal sacrifice, abusive sexual relationships and drug dependency’ (Millar 2013, online). This independent low-budget film was a labour of love for the screenwriter/producer Michael Winchester, director Owen Elliott and cinematographer Gavin Banks. It was shot in 20 days on a nano-budget of \$60,000 (AUD). The film took years to complete with a work-in-progress version screened at Dungog Film Festival in 2010.

Love is Now (2014), a love story made in the Hunter, took 5 weeks to shoot with much of ‘done in the Hunter Valley region, including Bulga, Maitland, and surrounds’ (Herron 2015, online):

The production was led by Eponine Films, a company established by director, Jim Lounsbury (Seattle-born, but now Newcastle/Sydney based), and producer, Behren Schulz (originally from Maitland). The crew was made up of mostly locals, including Newcastle’s Shane Burrell, who handled post-production of the film at Final Post on Parry St (ibid).

The music was written and recorded by Kram, the drummer from 90s pop/rock legends Spiderbait and the producer, Behren Schulz:

... who's worked a lot in advertising, stitched together the financing by approaching private companies, starting with Nikon, who put forward the idea that the film be shot entirely with one of its digital single-reflex cameras. The private investments were then topped up with a small grant from Screen NSW, plus the concession available to Australian producers through the industry's tax-offset scheme. And the film went on to secure a national release through Hoyts along with an international distribution deal with Universal Pictures (Hall 2014, online).

This professional support was especially important as ‘for many of the crew, it was their first feature film experience’ (Herron 2015, online). It premiered at Hoyts Charlestown and went on to win 5 international awards, including ‘Best Film’ across 3 continents.

Pop-Up (2015) another PhD film from the University of Newcastle, is a feature-length film based on an original screenplay, written and directed by Stuart McBratney as part of his doctoral studies in Design. The film is set in Newcastle and Romania. The screenplay combines three interweaving stories of an unemployed father, a Romanian immigrant and a sleep-deprived theatre director. The film has been screened at international film festivals and was played at Grauman's Chinese Theatre in Hollywood and it received an Honourable Mention at the 2016 ‘Dances with Films Festival’. McBratney has now picked up a contract in Hollywood to make further films.

While these films may not have been financially successful, demonstrating in some cases a lack of experience or expertise in the art of promotion and distribution, they have proven that there are dedicated filmmakers in the region who have the tenacity and dedication to complete large productions in a range of genres. Whereas filmmakers from outside the region come here regularly for a range of filmmaking activities, these examples, described above, demonstrate that feature films and documentaries can be made in the Hunter by locals.

13.8.7 Film Education in the Hunter

The University of Newcastle has taught film production courses for thirty years as part of the Bachelor of Communication degree program. The courses include screenwriting, cinematography, documentary, television production and short dramatic films. Courses are offered in 2D Animation through the Visual Communication Design degree and 3D and VR courses are offered through the Information Technology degree. TAFE NSW – Hunter also offers a range of diploma programs in Communication and Media and animation as well as performance and has invested heavily in industry software like Maya (3D Animation) and News Cutter, an editing software for newsrooms. The University has hosted information nights held by Rising Sun Pictures from South Australia, a visual effects company. The University has also hosted talks from Animal Logic, a large animation production house in Sydney.

At the secondary level there is the Hunter Valley Performing Arts High School that specialises in acting, dance and music tuition, amongst other creative endeavours. The Department of Education and Training has also supported a creative arts filmmaking program for primary students run in conjunction with the University of Newcastle, Bachelor of Communication program. This program has been operating since 2007. It has attracted year 5 and 6 students and taught them how to make film over 3 days. In 2017 the program was reduced to 2 days and it saw 66 primary school students attend the news filmmaking workshop.

13.9 Conclusion

The above material has described in detail how the Australian film industry operates in the Hunter region. This study's ABS statistics reveal that full-time work in the Hunter film sector is minimal with one of the lowest levels, at 1%, that is, of all people employed in the creative industry who declared this as their primary occupation. This is not to say that filmic activity is minimal in the Hunter since the extent of the gift economy and those making films whose primary occupation is in other sectors, describe the larger story and structure of the national industry which is also replicated on a smaller scale in the Hunter region. Structurally all sectors of the film industry are represented in the Hunter, to a greater or lesser degree and all are deeply connected at the industrial level through traditional business relationships described as B2B and B2C models. The B2B model describes the relationships between producers wanting to make films and the businesses and services that are needed to realise these productions. This situation is also encapsulated in foreign producers seeking to locate their film's production or post-production in Australia. For US productions, locating films in the Hunter, as it is elsewhere in Australia, is much more attractive when the Australian currency is around the 70 cents in the dollar mark. As an industry then, it is at the mercy of the global economy. The type of foreign work, where the Australian film workforce is working at the cutting-edge end of technology and refining their own creative skills, is itself an attractive factor for other producers who are looking for strategic reasons to come all the way to Australia to create or finalise a film. Australian film crews have a reputation of being efficient and effective and because of the decades of association with Hollywood film production, Australian filmmakers are recognised as being at the top of their game. These are attractive factors for any producer. These highly skilled creative crews are also invested in telling their own cultural stories and are willing to take a reduced rate to work on lower budget Australian feature films to do so. And in the Hunter region we can see the same scenarios playing out with the productions of features such as *Mikey's Extreme Romance* or *Bathing Frankie*. This generosity, coupled with a desire to tell

local or national cultural stories, is what drives producers to try and make low-budget films and it represents the other extreme of big-budget filmmaking – nano-budget or no-budget filmmaking. In this way filmmaking in the Hunter region represents in large part the gift economy that is endemic to most of the creative industries. One sector is enabled by the other and vice-versa. As long as there are Hollywood blockbusters that produce huge box office revenues for big corporations there will also be the other end of the spectrum, the ‘Mickys’ and the ‘Frankies’ that represent opportunities where Australians want to try and tell their own stories for themselves. What the blockbusters provide is an ROI that permits an investment in the next film. This creative cycle is visible in the film system as it operates nationally and regionally. It is both cultural success and the economic profitability that allows this sector to keep generating new content be that at the global or the regional level.

Creativity & Cultural Production in the Hunter

An applied ethnographic study of
new entrepreneurial systems in the
creative industries.



Final Report:
Hunter Creative Industries

Television

Associate Professor Phillip McIntyre
Professor Mark Balnaves
Associate Professor Susan Kerrigan
Evelyn King
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14. TELEVISION

14.1 Introduction

The Australian television industry, its history, structure, business models, operational methods and important personnel are detailed below, followed by a closer look at these components in the Hunter region. Like film and digital or electronic games, television is part of the broader screen production industry and shares many attributes with them.

This section teases out the global flows of television and how they are replicated locally by describing the global industry, particularly the UK, US and European sectors, and then adds descriptions of the Australian and Hunter Region's television industry. The Australian free-to-air television industry is under great economic and political pressure as new technologies offer new distribution methods that are disrupting traditional business models. What is being seen in the Australian sector is the potential financial collapse of some businesses in the free-to-air markets with the government funded network's budgets being annually lowered. Unlike the film industry, the television industry appears less reactive to the value of Australia's currency, though the global development of digital technologies affects how television is watched and what is watched. Structurally the television industry is comprised of five major and related sectors, i.e. commercial (free-to-air) networks, community not-for-profit TV stations, public television that is government funded, subscription services and the newly established video on demand sector, e.g. Netflix, Stan and iTunes. Television business occurs in global market places which are quite traditional and formal with television production employing strict commissioning processes and television distribution moving to more innovative pay per view, digital models. The television industry's personnel are similar to the film industry with highly experienced film crews working interchangeably across film and television projects. Television production personnel include screenwriters, producers, directors, cinematographers, art directors, editors, colour graders, VFX supervisors, actors, musicians, sound designers, recordists and audio mixers. There are also television executives and commissioning editors who are very powerful gatekeepers who decide what is being commissioned, where it is being made and by whom.

The distribution sector has been digitally disrupted. It has transitioned from a global networked era through to a multi-channel system where video-on-demand, time-shifting and appointment television are changing audience preferences for content. The industry is seeing drama, a free-to-air staple, move to multi-channel delivery while traditional broadcasting, which uses appointment television, focuses increasingly on serialised reality TV, news and live sport broadcasting. US television scholars are predicting that audience viewing experiences may eventually allow complete free choice. A post-networked era, driven by audience demand, will challenge regulations and content creation in countries like Australia which have comparatively small populations and limited ability to realise profits.

14.2 A Brief History of Television

The history of television was initially dominated by technological developments in the field followed quickly by the development of content to be broadcast. What followed these developments was the creation of businesses which owned both the means of broadcasting and the content creation processes. As this brief history shows, the technology to distribute and the copyright ownership of the content for broadcast, have systemically been enabled and constrained by each other for decades.

Television was a global invention beginning in the early 20th Century, with a focus on mechanical and electromechanical technology. The race to invent, patent and experiment with broadcasting began in 1907 in the Soviet Union while in the US, Lee de Forest invented the vacuum tube system that formed the electronic basis of television as it broadcast images via radio signals. In the Soviet Union Boris Rosing began inventing the cathode ray tube (CRT) that produced a video signal. In the UK in 1926, inventor John Logie Baird demonstrated the first electromechanical TV system. Baird created the first live broadcast of the face of a ventriloquist doll. It was crude technology, but the blurry face was recognisable (Davis 2017, online). EMI were also creating their own broadcasting system. From 1929 the BBC radio transmitter provided a limited service. By 1936 the BBC was broadcasting using both Baird's and EMI's systems, with Baird's system delivering a sub-standard quality. By 1937 the higher quality EMI system was selected as the sole broadcasting system. The UK broadcasting format eventually became the Phase Alternating Line systems (PAL) that was adopted in England, Western Europe and Australia. Television broadcasting in the UK was disrupted by World War II, with the BBC resuming after the war and commercial TV beginning in 1955. This hiatus allowed the US to take the lead and by 1951 US stations were transmitting in colour.

The work done by the American inventor de Forest in 1907 continued and by 1928 the US had 18 experimental TV licenses. Regular broadcasting developed in New York City in 1931. Viewing time was limited to 1-2 hours a day, whereas radio was broadcasting all day and would often play in the background. By 1941 the US had developed a television signal that was created by the National Television Systems Committee, which became the acronym for the recording format known as NTSC. As visual quality had improved, and broadcasting technology began to stabilise, those in the industry started to express economic concerns with 'an early belief that commercial television was not viable' (Collie 2007, p. 11) because it concentrated on the sale of advertising time. Television in the US did not begin as a networked medium but by the 1960s the networked medium with industrial practices and modes of organisation was becoming more visible (Lotz 2014, p. 22). It was acknowledged that 'television production costs were thought to be prohibitive and would lead to a loss of sponsors. Concerns were expressed about the disruption of family life and eyestrain from prolonged viewing' (Collie 2007, p. 11). From that point of view, the purpose of television was to draw audiences to watch sponsored messages (Collie 2007, p. 43). During the 1950s 60% of America's middle to low income families owned a TV set. Networked television had to meet an early economic challenge from Hollywood and there were concerns that the television content needed to be censored through public policies. Collie describes the major concern with television content. He suggests that 'low-brow programming was a concern with its potential for poor taste, sacrilege and immorality; but the networks headed this off in 1951 with a Television Code' (Collie 2007, p. 12).

In the late 1950s the single sponsorship format started to change 'After the elimination of the single sponsorship format, networks earned revenue from various advertisers who paid for thirty-second commercials embedded at regular intervals within programs' (Lotz 2014, p. 23). This is the basis of the free-to-air financial models that exist globally but are under more and more pressure from subscription models for television content to be accessible through multiple channels.

In terms of technology Australia has always remained a long way behind the rest of the world. Australia began broadcasting in black and white in 1956, almost 20 years after the US and the UK. The first broadcast by TCN was from Sydney. Colour TV arrived in Australia in 1973, and at that time the US had established its cable TV network. The profitability of the US networks was becoming clear throughout the '70s and '80s. The consequences of this were 'marginalisation of public television, an absence of foreign programming in the US and high

proportions of the American gross national product spent on advertising' (Collie 2007, p. 20). The profit that could be produced through global audiences continued to grow with only eight million global viewers in the 1970s, but by 1988 that had grown to 500 million viewers.

The sharing of content occurred initially between countries that had the same technical system and common languages. By the mid-20th century most developed countries had adopted one of three technical systems. NTSC was used in America, Canada and Japan. In the UK, Western Europe and Australia they were using PAL (see Section 14.6), while in Eastern Europe and Africa, Sequential Colour with Memory (SECAM) was the preferred standard. As technology advanced networks began transferring content so they could sell it globally. Foreign language programs began being subtitled or dubbed for the country they were heading to. News production was localised as well as global and this continued in television with news syndication services operating in television as they did for print and radio. Other television genres included current affairs, drama, documentary, children's, light entertainment, quiz and sports. Eventually, reality TV emerged as a result of the immediacy of television and its ability to reflect the ordinary person's taste. How these genres have been developing on television is partly due to each country's media ownership regulations, but it is also about how profitable the programs are to the networks that own the content. How these profits were controlled was more predictable and manageable in the highly structured network model, however the 1980s saw small changes in technology being introduced. These included the remote control. This device marked the beginning of the erosion of the US networked television era. As the television industry transitioned to a multi-channel system (Lotz 2014) which was hungry for content, this situation again put the networks in a superior financial position. As Lotz describes:

Film studios and independent television producers had only three potential buyers of their content and were thus compelled to abide by practice established by the networks. In many cases the networks forced producers to shoulder significant risk while offering limited reward through a system in which the producers financed the complete cost of production and received license fees (payments from the networks) that were often 20 percent less than costs (2014, p. 23).

The transition to a multi-channel system didn't improve the plight or amount of risk that the film and television production houses were forced to accept.

Australia's television system had been operating on a free-to-air networked era model for decades longer than the US, UK and Europe. This situation had more to do with population and profitability of television content and the expensive industrial and technological systems which are used to deliver it nationwide. Australia also has complex media ownership regulations which are outlined in the Convergence Review Report. They 'provide a framework to ensure diversity of ownership of news, information and commentary services at both a local and national level' (Commonwealth Government 2012, p. 19). Australia's major television companies are Nine Entertainment Co, WIN Corporation, News Corp, Southern Cross Broadcasting, Ten Network Holdings, Seven Media Group, Fairfax Media. The sector has also recently operated with a set of subscription or cable services. The multi-channel transition that occurred in the US in the '80s, started in Australia with the introduction of Foxtel and Austar but these subscription services were not taken up to the same extent as in the US. In Australia, the transition to a multi-channel era really began with the introduction of Digital Terrestrial Television (DTT) in 2008.

The introduction of DTT (the digital service) a decade ago, allowed each terrestrial channel to be allocated additional digital channels to broadcast more content which were offered through catch-up services. DTT provides 'close to 20 free-to-air and more than 100 subscription TV

channels. In 97 per cent of homes every working TV set can access DTT channels, while in 96 per cent every TV set is high definition (HD)-capable' (OzTam 2016, p. 6). 'Freeview' is the public facing platform that shows what DTT offers and advocates for free digital television services, boasting 32 freeview channels in 2017 (Freeview 2017).

The commercial FTA networks currently have a main channel and an associated digital channel; Channel 10 plus one HD; Channel 9 plus GEM and Go!; Channel 7 plus 7TWO and Mate. The main commercial channels bring in advertising revenues which are officially monitored through OzTam a television audience measurement (TAM) system covering Australia's five mainland metropolitan markets (OzTam 2017, online). Australia also has strict content quotas for the broadcasting of Australian content (ACMA 2017, online) and this means that each television station has an obligation to produce its own content, with the cheapest being talk shows like breakfast television. But Australia also broadcasts a lot of foreign content, mostly from the US, and this is purchased at global market places like MIPCOM where acquisition executives and production houses come together to view, sell and purchase international content.

Additionally, Australia has two national public broadcasters, the Australian Broadcasting Corporation (ABC) and the Special Broadcasting Services (SBS). SBS is the foreign language network that also houses the National Indigenous Television (NITV) service. In Australia, these public television networks are protected by their charters which are designed to outline what types of content they should deliver and to protect their services from editorial influences of the government of the day. The SBS and NITV charter both permit limited advertising on the network. The ABC has its main channel and two digital channels, one that has a focus on children's television and another which is a catch-up service called iView.

The viability of subscription television in Australia remains in doubt. The dominant network has been Foxtel, although in the 1990s there were three subscription operators - Foxtel, Optus and Austar. Austar operated from 1994 until 2012. Optus was a subscription provider that delivered Foxtel content. Foxtel has struggled to remain competitive in the market and has altered its pricing options and packages, designed around genres, to try and remain competitive. In 2017 Foxtel subscription packages were structured around a base subscription, called entertainment, which offers over 40 TV channels costing \$26 per month and includes a Foxtel app and an IQ3 box which is a recording device allowing time-shifted viewing. The premium subscription rate is \$100 a month, which gives access to all content. Clients wanting particular channels can tailor subscriptions to their preferences. For example, the sports package of \$29 per month, provides sport across 12 global channels including football, V8 Supercars and Formula 1. Or channels that screen drama, movies, documentaries, kids and MTV are all priced around \$20 a month and offer a broad range of American and UK programs. Foxtel's market dominance is certainly in decline with SVOD services disrupting the market (i.e. Stan and Netflix). The last regulated television provider is a not-for-profit community broadcaster which has stations in most state capital cities. In Sydney the service is TV Sydney (TVS) which operates out of Frenchs Forest.

In June 2017 the Ten Network was in financial trouble and went into voluntary administration. By July it seemed that the company may have been saved from receivership, allowing it to be privately purchased by media owners - either Lachlan Murdoch or Bruce Gordon's private companies. Ten's administrator Mr Korda reported the business has a positive cash flow and it was just the balance sheet causing an issue, 'at the end of the day the debt to the Commonwealth Bank is only \$97 million. This is not a huge debt in the context of a free-to-air television station' (ABC News 2017, online). Nonetheless this potential financial collapse of one of the three

Australian networks indicates the vulnerability embedded in the Australian television system that is using a networked-era model, one that started to erode in the US over 30 years ago.

How do Australia's television networks compare globally? In the United Kingdom the British Broadcasting Corporation (BBC), is funded through a household television license. These funds are used to support the BBC television, radio, online and mobile content services and it means they can operate independently from the UK government. They can plan their budget and content around licensing projections. The UK also has Channel 4, a commercial network, and Sky TV, a privately-owned subscription service.

In New Zealand TVNZ began in 1960 as a state-run public television station. It had a charter similar to the ABC, but it was abolished in 2008. In 2004 Maori TV began and has continued to be funded partly by the government and partly by commercial revenue. NZ TV remains predominantly dependent on commercial revenue and is obliged to continue paying dividends to the Crown.

How television is consumed today is connected to its ability as a live broadcasting medium and to the multi-camera technique, which permits the coverage of events occurring seamlessly from multiple camera angles (Duthie and Brown 2016). Multi-camera 'is edited as it happens, cutting online between shots from different cameras or other sources, and mixing sound at the same time. This type of production requires instant decisions and fast reflexes' (Collie 2007, p. 311). Sport is of course frequently broadcast live using outside broadcast techniques that are multi-camera based. While the news is usually broadcast live, it can be pre-recorded, sometimes being recorded immediately before it is broadcast. On the other hand, Reality TV really embraces the multiple camera recording of live events and it genuinely illustrates how effective multi-camera can be, as Reality TV shows can take hours to produce but are seamlessly edited to appear as if they are live when in fact they are highly scripted and heavily mediated, so they fit neatly into a one-hour broadcast time-slot.

Currently sports content is considered one of the last remaining genres of 'appointment television' (Maxcy 2013, p. 18). It is resistant to time-shifting technologies and attracts a valuable demographic for advertisers, the male audience (Maxcy 2013, pp.18-35). These audiences are embracing the video on demand television distribution models because they support both appointment television (i.e. being able to watch on multiple screens), as well as time-shifting technologies so that content can be watched on demand, known as video on demand or VOD.

The traditional television networks are becoming known as legacy television and over the last 5 years these business models have been digitally disrupted with time-shifting and video on demand services like Netflix and Stan. This has pulled viewers away from traditional forms of free-to-air content and is a global trend (Screen Australia 2015, online). While these new distribution services were anticipated to radically change how Australian's watch television, the 'Australian Multi Screen Report' from the third quartile of 2016 confirms that traditional forms of television viewing remain dominant.

Eighty-six per cent of the population in people-metered markets watch at least some broadcast TV (free-to-air and subscription channels) weekly: on average 90 hours and 16 minutes per Australian each month. The average Australian home now has 4.5 connected screens in addition to their TV sets, up from 3.9 four years ago. The number of TV sets is fractionally lower today however, at 1.8 (OzTam 2016, p. 2).

There was a recognised decline in broadcast viewing with the 'year-on-year total TV screen use down by 24 minutes on average per month across the day, and by 1:58 in prime time, impacted

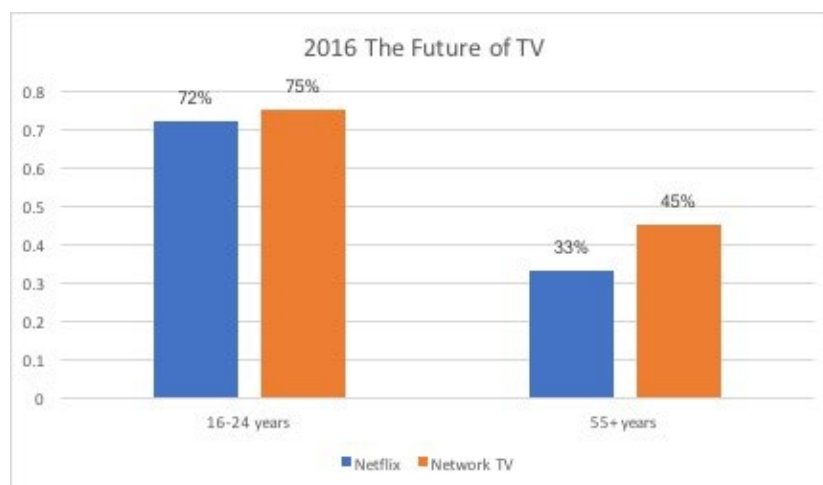
by the decline in broadcast viewing' (OzTam 2016, p. 15). But the multifunctional nature of the television set, the Smart TV connected to the internet, digital set-top boxes, time-shifting services have all contributed to changes in what is being viewed and when:

The shifting composition of total TV set use follows adoption of internet-capable sets and/or devices attached to the TV set that enable 'other TV screen use'. It captures activities such as gaming; viewing TV network catch up services; watching DVDs; playing back recorded broadcast material beyond 28 days; internet browsing; streaming music; and accessing over-the-top internet-delivered video services (OzTam 2016, p. 13).

While this is a snapshot of the Australian TV viewing audience, one can ask how it compares with global trends.

A report called the 'Future of TV 2017: Thinking Outside the Box about how we Consume' Video (BI Intelligence 2017) presents very similar findings as it compiles several US television and mobile viewing studies. There are a number of interesting finding including that live TV usage among adults is in decline, showing a 40% reduction in 2016 when compared with 3 years ago when viewing was measured to be at 52%. While it is clear that traditional TV audiences are getting older (2016, p. 7) and millennials are cutting the cord (BI Intelligence 2017, p. 4) it is surprising that live sport in the US has lost 7.4 million households in 2 years (BI Intelligence 2017, p. 6). Also surprising is that there is a decline in the production of original television content for traditional US TV with 2016 reporting 362 scripted original series which was 13 series less than the previous year's peak. This compiled research is recognising a change in viewing habits and predicts that the definition of television is changing. It is no longer brand oriented with millennials viewing on any device whenever they want (BI Intelligence 2017, p. 12).

From this perspective, Australian statistics appear to be in harmony with these US studies confirming an increased use of multiple screens, and preference for mobile device viewing with a particular increase in social media video viewing. It is predicted that online video will be a clear winner by 2022 (BI Intelligence 2017 p. 13). This can only be good for social media that use online video platforms like YouTube, Facebook, Instagram and Twitter. Of note was that Facebooks social video viewership increased by 200% in the last 12 months (BI Intelligence 2017, p. 46). This increase in viewing audiences also saw Facebook's advertising revenue peak at \$9.1 billion, surpassing television for the first time ever (BI Intelligence 2017. p. 47).



*Graph 18 The Future of TV
(Original in Future of TV 2017, 2017 p. 12)*

While this is a significant factor that may probably contribute to the demise of television, Google advertising revenue in the same period was \$21.5 billion. While audiences are changing what they are watching and how and when they are watching, it is also clear that video is becoming more dominant with shorter content being consumed on mobile devices through social media. The report ends with the slogan ‘modern TV is anywhere, anytime and on any platform’ (BI Intelligence 2017, p. 54).

Amanda Lotz argues that a post networked ‘era will be fully in place only when choice is no longer limited to program schedules and most viewers use the opportunities offered by new technologies and industrial practices’ (Lotz 2014, pp. 31-2). Exactly how Australian television fits into the model needs further thought as Australia has been slow, for a range of very pragmatic and legitimate reasons, to move away from the networked era.

So, the question is where Australia fits in this model. As the global television industry appears to be moving to a post-networked model, the certainty around businesses and content success stories are being challenged by splintering of the market leading to the development of so-called ‘niche’ audiences which may have a tendency to undermine profitability.

14.3 Structure of the Television Industry

The *Australian Broadcasting Services Act 1992* is the policy that outlines commercial television networks, and which explains media ownership and control. This Act is enforced by the Australian Communications and Media Authority (ACMA) which is the regulatory body that manages network and public-sector broadcasting. ACMA also houses the codes of television practice for the commercial, community and subscription sectors with similar codes for narrowcast television and subscription broadcast television (Pay TV). There are regulations around censorship as well as the amount of Australian content to be broadcast on Australian TVs. Australian television broadcasting models include public, commercial, community and subscription television, with the video on demand models remaining under the umbrella of subscription television.

Public television is usually run by the state and can either be editorially controlled by the government or can be managed through policies and charters, which is what occurs in Australia with the ABC and SBS. Both have charters that describe the type of content they can commission, purchase and broadcast as well as how their organisation will be funded. The principals of public television are built on:

Providing a universal service, diversity of programming, and providing for the needs of minority audiences and the cultural and educational enrichment of an informed electorate. It is a lofty ideal, but one that has been difficult to live up to (Collie 2007, p. 14).

Commercial models of television broadcasting, that is networked TV, rely on freely available content that is provided, without charge, because of advertising revenues. The US television advertising revenue for CBS in 2016 was US\$5.4 billion. This is indeed a lucrative market but when that sum is compared with Googles’ advertising revenue of US\$21.5 billion it is clear that there is more revenue to be made through advertising on other media platforms (BI Intelligence 2017, p. 47). These revenue figures indicate that these advertising models will continue to drive media industries into the future.

The third model is user-pays, subscription services. The US trends confirm that the differences between traditional pay TV as subscription service and subscription video on demand (SVOD)

is narrowing and if the trend continues, by 2020 these two services will both cover the same percentage of US households (BI Intelligence 2017 p. 37). These three models have traditionally relied on a concept known as appointment television, that is where programs had to be watched when they were being broadcast. The VHS introduced the idea that we could control when and how we watch through time-shifted viewing that is viewer managed and this has led to more options around video on demand subscription or pay per view services.

The fourth model is not-for-profit, community-based broadcasting which was once cost prohibitive, but with current technology pricing can function in a more sustainable way.

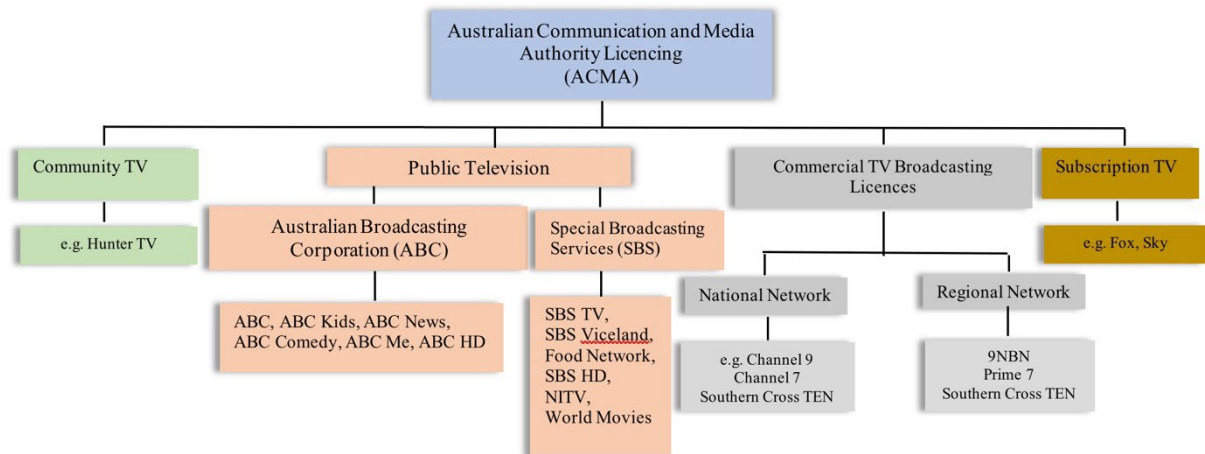


Figure 29 Television Industry Structure in Australia

The Australian Content Standards (ACS) are part of the Broadcasting Services Act and protect the creation and broadcasting of Australian content. Australian content attracts a minimum annual quota of 55% with regulations for sub-quotas in adult drama, children's drama and documentary. There are four other regulations protecting the broadcasting of Australian content around children's programming, local content, Australian content in advertising and anti-siphoning of sport. The Screen Australia website explains the Australian Content standards:

The standard requires all commercial free-to-air television licensees to broadcast an annual minimum transmission quota of 55 per cent Australian programming between 6 am and midnight. In addition, there are specific minimum annual sub-quotas for first-run Australian adult drama, documentary and children's programs (Screen Australia 2016, online).

Statistical data on Australian compliance with these standards shows that Australian content currently exceeds the 55% quota and is increasing on primary channels. The 'Comparison of Compliance Results' for 2016 show that Channel 7 broadcast 72.5% Australian content whereas in 2008 it was 58%. Channel 9 now broadcasts 71.9% Australian content whereas in 2008 it was 64.9%, while Channel 10 broadcast 64.9% in 2016 compared with 57% in 2008 (ACMA 2017, online).

Australia is not the only country to have such regulations in place. Canada has a 60% local content quota between 6 am and midnight and a primetime quota of 50% from 6 pm to midnight. The European Union has two important regulations, firstly broadcasters are required to reserve most of transmission time for European works, excluding the time used for news, sport events, games, advertising, teletext and teleshopping. Secondly a minimum of 10% of broadcasters' programming budget, or 10% of transmission time, must be reserved for content created by producers who are independent of broadcasters.

These regulations are directly connected to the way television functions as a business.

14.4 Current Business Models in the Television Sector

All Australian television networks operate as both producers and distributors of content. This means there are two aspects to these businesses. One is the costly production of original content to comply with the Australian Content Standards and the other is the selling of advertising or subscriptions for the consumption of that Australian or foreign content.

The commercial television networks operate on the brokerage model of marketplace exchange. These two business functions are described through different business models.

1. As producers of content the television networks create their own content and sell advertising time to pay for the content. The content broadcast must comply with ACS quotas. Usually this is achieved through the production of news and current affairs or morning breakfast television. The network model is that of a business that employs workers as specialists to create content for specific broadcast time-slots and to make genre TV to meet the ACS sub-quotas for adult drama, children's and documentary programs. The rights to these programs belong exclusively to the network and in some instances can be sold to other global networks to increase return on the production investment.
2. The television networks also sell advertising for programs that they commission from external production companies. The commissioning editors receive pitches based on original program ideas or based on formatted programs that have been made in other countries and are being remade for the Australian market. This is usually how Reality TV works, an example being *MasterChef* which was originally made in the UK with the format being purchased and remade here. This can be described as the B2B model.

The television production companies who pitch ideas to the networks operate in a similar way to film production companies.

3. The Television Production sector functions traditionally as a B2B model or a marketplace where exchanges are brokered between television producers and those offering their specialist services either through businesses or as sole traders. The business to business models function on a contractual or sub-contractual basis, whereas the sole traders, also known as freelance workers, may frequently be represented through talent and booking agents. The booking agents are constantly in touch with their networks about potential upcoming productions and opportunities. These agents act as intermediaries or gatekeepers helping to organise their clients onto productions and helping to negotiate fees for service.

The commercial television networks operating as distributors also operate on the brokerage model of marketplace exchange where they are using the B2C model.

4. Television distributors directly service consumers by buying or acquiring television content made in other countries and selling advertising to pay for timeslot.
5. Video on demand (VOD) is offered through the digital television network that provides catch-up TV services as well as a number of advertising and pay-per-click models. VOD uses new digital revenue models that are advertising-supported. Screen Australia has identified four business models (Screen Australia Infographic 2015).

- a. The transactional VOD is where the viewer downloads to their own electronic device and can subscribe to watch what they want, e.g. iTunes or Google play. The user pays a rental price or a share of the sales price which can be based on tiered prices.
- b. Subscription VOD (SVOD) such as seen in Stan and Netflix is solely a subscription revenue model where the user pays for a blanket subscription and gets access to what is on offer.
- c. Ad-supported VOD (AVOD) such as YouTube.
- d. Catch-up TV offers time-shifted television content available through iView, Plus7 and Tenplay. This model also includes subscription services purchased through Foxtel. Depending on the television network, this model can be free for users because of screen advertising.

The public television sector uses a government funded model.

6. Public television operates as a business, but it is not required to make a profit. These services are completely or partially government funded.
 - a. ABC (the Australian national broadcaster) is funded through their charter by the Federal Government which uses Australian taxes. Some profits have been generated through television content such as children's programs like *Bananas in Pyjamas* but this money is acquired through a business arm of the ABC and does not come directly back to production.
 - b. SBS is partially funded through a charter drawing on the same government revenue, but there is an additional revenue option through which it can schedule limited advertising.
 - c. NITV functions the same as SBS.

14.5 Operational Methods in the Television Sector

The operational methods used in Television generally follow a standard process of development, pre-production, production and post-production. This is the process where a screen idea is pitched and commissioned for production and a completed program is delivered for broadcast as can be seen in the Television Production Pathway Generalised: Screen Idea to Screen Ideas (see Figure 31), which lays out this process that is standard for most genres. The decisions about how a program will be made are dependent on three operational methods used in the television sector which are studio productions, outside broadcast and field productions.

1. Studio Productions use:
 - a. Single-Camera studio in the presentation of simple programs like news
 - b. Multi-camera studio production for sit-coms, children's studio programs and Reality TV.
2. Outside broadcasts (OB) are recorded using:
 - a. Live sports broadcasting for cricket, football, netball, golf and even the Olympics with up to 1,000 cameras.
 - b. Musical or entertainment events like operas or live concerts, Reality TV and sometimes even theatre.

3. Field Productions employing single camera or multiple camera that need to be edited are used for:
 - a. Genres like drama programs and infotainment or magazine programs with large production crews working on scripted content.
 - b. News and current affairs, frequently called electronic news gathering (ENG), with reduced small crews to report on factual and live news events.

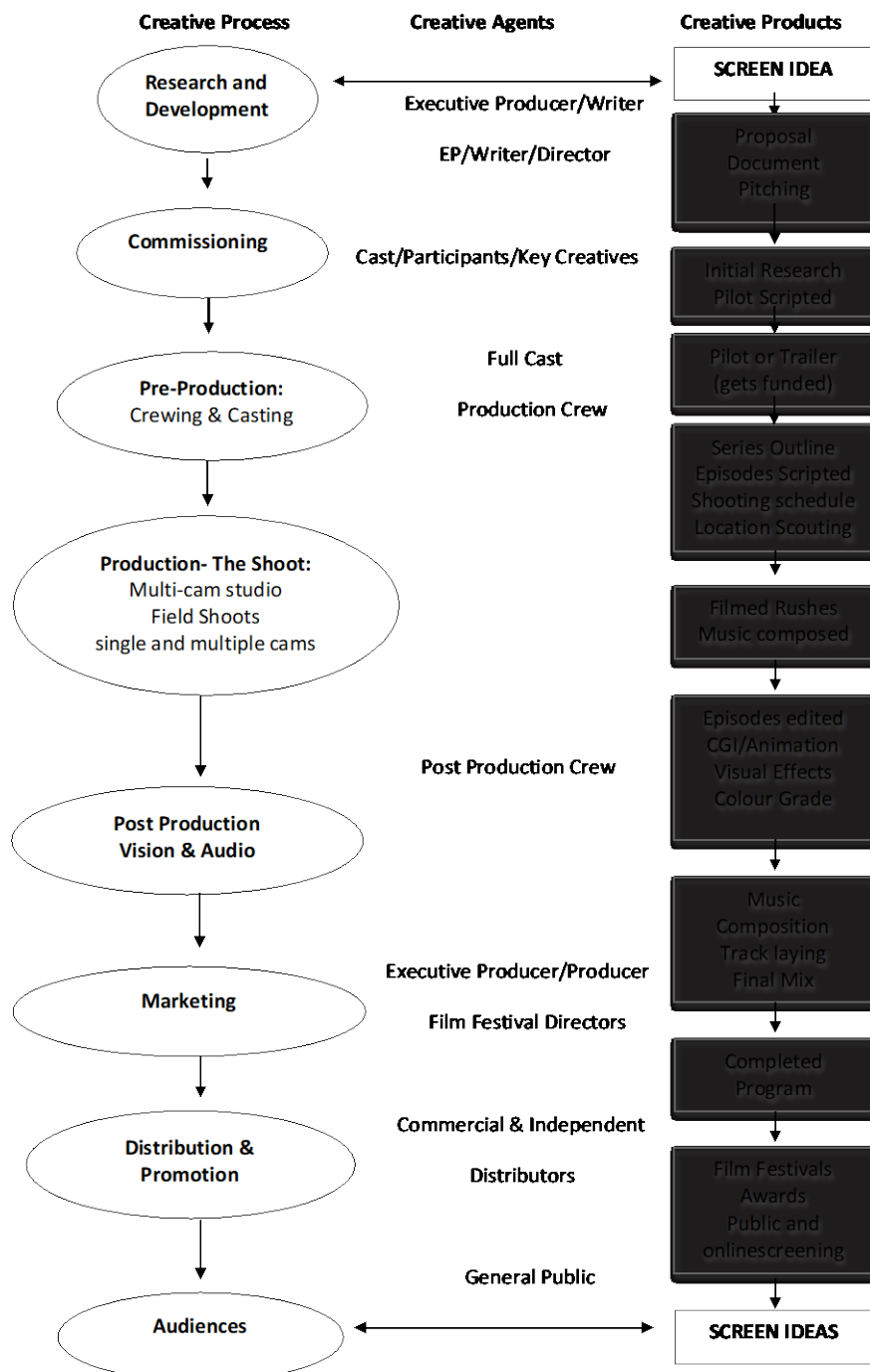


Figure 30 Television Production Pathway Generalised: Screen Idea to Screen Ideas

There are two basic methods of television production - multi-camera or single camera approaches. Both shooting styles have different benefits and they are generally chosen for their economic effectiveness and this depends on the genre of the production. The multi-camera technique requires the co-ordination of large crews, 'requiring a considerable degree of planning, co-ordination and communication' (Collie 2007, p. 311) and therefore are well suited to live events or activities that unfold over longer periods of time. They can also suit a program that requires a studio set that will run for a year or longer such as *The Footy Show*; or has a daily deadline, like a breakfast show; or which is recorded weekly such as a sit-com. These types of shows can be recorded and broadcast 'live' or they can be recorded 'as-live' and then broadcast later either 'unedited or with minimal post-production' (Collie 2007, p. 311). For example, live events including weekend football games are well suited to outside broadcasts that use multi-camera techniques in the field. There are also programs that use both single and multi-camera production methods and, like Reality TV, that 'may be shot with multi-cameras or with several field cameras, often single-person, following the participants' (Collie 2007, p. 227). The ease of operating modern cameras and editing has negated much of the production cost and efficiency advantages of multi-camera production (Collie 2007, p. 310). Two cameras, operating as recording units, can be effectively used to film drama productions, the benefit being that while it takes less time to film a scene, the footage needs to be carefully logged and edited. This is more time consuming but costs less because the crew is smaller. So, while post production time may increase, the personnel cost will most probably be significantly less.

Field production uses a technique called single camera, but currently more than one camera may be used to film a few angles at the same time. The traditional single camera technique for filmmaking allows the scenes to be shot out of script order. Single camera shooting means the camera operator must decide where the best position for the shot will be. This technique offers flexibility to move to different angles to obtain better shots but may possibly miss some of the action. 'After a sequence of shots is carefully edited, the continuity can appear so natural that viewers will not think about the fact that it was originally shot as a disjointed series of individual setups' (Owens & Millerson 2012, p. 322). The single camera technique requires the actors to repeat their action for each change in view point. In this case continuity becomes important with particularly attention being paid to performance actions, costumes, lighting, audio, weather and locations.

On the other hand multi-camera studio productions use two or more cameras linked to a control room. They are edited in real time and recorded or broadcast simultaneously. 'Multi-camera direction is the simultaneous coordination of a variety of production elements through a control room or an OB van. The output from the studio is as near to a finished program as possible. If the program is a live telecast it is the finished program' (Collie 2007, p. 311). Multi-camera productions use a vision mixer, which is operated by a vision switcher who precisely manages the camera selection or pre-recorded video segments or graphics. The vision mixer is the device that creates the chroma-key image, using a green screen, and it also does a luminesce or alpha channel key as well as doing digital video effects (DVE) such as scale, crop, aspect ratio, position and border to video images.

Multi-camera shows frequently require most of the 'on-camera' action to take place in a fixed 'studio-set'. A set is expensive to design for camera and to 'bump in' to and 'bump out' of the studio. Sets need at least one day to be lit for camera. Multi-camera productions have a distinctive approach to production as they use large crews responsible for the technical and editorial quality. These productions mostly work from scripted or semi-scripted content that is usually filmed in script order and sometimes in front of a live

audience. Multi-camera programs may be pre-recorded or broadcast live in a timeslot, but even with pre-recorded programs some post-production is required to make corrections and finesse the recorded content.

Outdoor live events suit multi-camera or outside broadcast coverage. Shooting with multiple cameras allows the director to show a variety of angles, assisting in maintaining the audience's attention and is a very effective model to use for live events. Over 40 cameras were set up in London's Westminster Abbey to cover the 2011 *Royal Wedding*. Over 1,000 cameras are used in the coverage of the *Summer Olympic Games*.

14.6 Technical Standards

The biggest difference between a film, television or video product is how the image is technically reproduced. Film is celluloid, and it is light sensitive and chemically treated so that the exposure can be imprinted onto the celluloid, frame by frame. Each second there are 24 frames that pass through a film's gate. Celluloid produces a very different aesthetic to electronically produced images.

As indicated above there were three television standards developed globally that were adopted in the countries where they were invented and by surrounding nations. All these video signals have different frame rates, and each frame is made up of two fields of horizontal lines that are displayed sequentially to make up one frame. There are two options with video allowing the horizontal lines to be displayed as interlaced or progressive. It is often said that the progressive function makes video content look more filmic.

The specifications of the three original television standards that were known as standard definition video are as follows:

- PAL that displayed 625 lines and 50 fields or 25 fps – UK, Western Europe and Australia
- NTSC that displayed 525 lines and 60 fields or 29 fps – US, Canada, Japan
- SECAM that displayed 525 lines and 50 fields – Eastern Europe and Africa.

Each of these standard definition (SD) video codecs had a different frame size, and the image below shows how SD compared with high definition video (HDV).

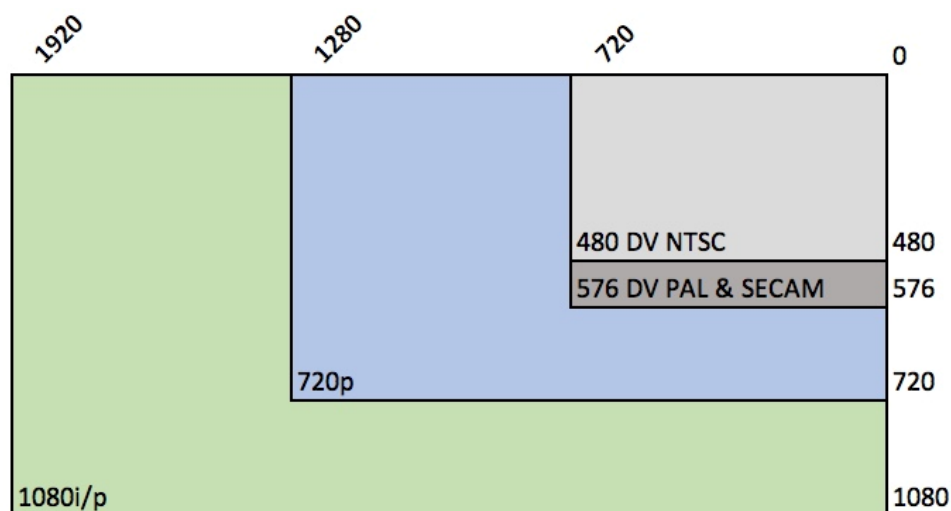


Figure 31 Standard Definition and High Definition comparison

The HDV codec continued to have the two options called 1080i or 1080p, where 1080 describes the width of the video frame, 'I' refers to the fields being interlaced and 'P' denotes progressive. Today's video cameras can film in 4K and 16K, with 32K recently being released. These frame sizes are so large that they create issues in post-production because of data storage.

These technical standards can sometimes affect how production practices are executed. Current obsessions lie with creating larger and better high definition quality at one end, while at the other end is mobile phone filmmaking which is attractive for its speed in delivering content to audiences and its ease of use.

14.7 Important Personnel in the Television Sector

There are two business aspects to television, namely production and distribution. The production personnel who commission and make programs can be either employed by the network, termed 'in-house', or they can be employed through a production company that has been sub-contracted to make the content. Sometimes these personnel interact although mostly they function discretely at different points of the television process.

The network executives are the ones who carry out the acquisition of content and generally each television station has a team who do this for one or more genres. Sometimes these executives also commission local content. Once the program is acquired by the television station it is then marketed to audiences and scheduled for broadcast or delivery via time-shifting pathways. Each stage of commissioning, acquisition, marketing and scheduling requires different personnel.

The production of the program usually occurs through four phases: conceptual development, pre-production, production, and post-production. How and where each creative agent contributes to the production is outlined in *Television Production Pathway: Screen Idea to Screen Ideas* (Figure 31). The conceptual development phase is usually led by an executive producer. There are slightly different approaches according to the genre of the program. For example, a drama or sit-com would be worked on by a script writer or executive producer; the idea would be scripted or a story bible containing episode synopsis, story arcs and character profiles would be produced. These are used as documents to attract further funding for script development. A Reality TV show may have a script and further funding may see a pilot program being commissioned. When a complete script or series of scripts are delivered, or a pilot episode is delivered, the network executives will decide about taking the program into production. Once it has been given a 'green light' then the production crew will be assembled, key creatives decided upon, i.e. director, cinematographer, editor, composer, and key casting finalised. Decisions about where the program will be made and the methods of production will all be discussed, and the production crew will have its own hierarchy based on either multi-camera studio production practices or field/location filming (Brown and Duthie 2016).

When the program is scheduled for production, the crew and cast are brought in to make the program, and when completed the program is delivered to the television network for marketing and broadcast scheduling.

14.8 The Hunter Region Television Sector

14.8.1 Television Broadcasting Networks

As elsewhere, the television industry in Newcastle is comprised of two primary and overlapping sectors – production and distribution. News and advertising are the types of content produced. The commercial free-to-air (FTA) networks operating out of Newcastle are the Channel 9 affiliated NBN, Prime 7 and Southern Cross Austereo. These all produce their own local advertisements which are broadcast from Newcastle as part of the Northern NSW regional broadcasting network.

NBN's broadcasting footprint covers a large area of New South Wales and southern Queensland, from the Central Coast to the Gold Coast and out west to Moree and Narrabri. This market has 1.9 million people, and is the fourth largest television market in Australia, behind Sydney, Melbourne and Brisbane (NBN online). One of NBN's key businesses is the production of its nightly, one-hour news bulletin.

NBN News currently produces over 20,000 news stories annually and has 60 employees working as news producers, journalists, and camera, production and administrative staff. These employees produce a daily news broadcast of an hour on weekdays and a half hour on weekends into six regional markets: Newcastle, Central Coast, Coffs Harbour, Port Macquarie, Gold Coast and Armidale. NBN's news production is sophisticated and complex and it ensures regional audiences are receiving state, national and international news alongside local and regional news. This is all done seamlessly and is managed daily by NBN's news production team at the hub in Newcastle. The news crews working from the regional offices produce local content with 'windows' for the six markets. This news production model has been recognised as a success and in 2016 Southern Cross Austereo announced they would be rolling out similar models to 15 regional markets in Queensland, Southern New South Wales and regional Victoria (online 16 November 2016).

NBN offers starting positions for journalist and production staff particularly in the regional offices but it is well known that regional journalism is not a well-paid pursuit and people frequently move into PR after only a few years as a regional journalist. However, NBN employs a mix of very experienced staff who have settled down with families and have chosen to stay in Newcastle and the regional area, rather than move to Sydney and never be able to afford to buy a house. NBN takes a lot of people straight out of University and this creates a large churn of employees as many of them move on after approximately 18 months.

NBN has been operating in Newcastle and the Hunter region since Sunday 4 March 1962. The call letters mean Newcastle Broadcasting New South Wales. It was originally an independent station but has been a Channel 9 affiliate station for a few years and in 2014 it was rebranded and is now part of Channel 9's network. NBN also creates Community Service Announcements, approximately 2,000 spots per month. They run a Kids Project featuring the Junior Journo program and deliver the region's leading news service.

The production facilities in Newcastle can produce both live and pre-recorded television genres but these facilities are only used for news production currently. The last live broadcast program was in 2007, *Today Extra*, which was a morning television talk show that ran for 15 years. In the '70s and '80s several children's programs were made including *Romper Room* and *Big Dog* and there was an annual telethon broadcast to raise money for local charities.

Newcastle is the main news hub and is supported by six regional offices located at the Central Coast, Coffs Harbour, Gold Coast, Lismore, Tamworth and Taree. Each regional office has a journalist and a news cameraperson/editor who create local news stories. In Newcastle, there are four TV News crews operating daily. The Newcastle newsroom is led by the news line-up producer and a windows producer. The news line-up producer co-ordinates the national and

international news from Channel 9 and its affiliates, while the windows producer coordinates the local news from the five regional journalists. Regional content created daily for each of the six areas and two local news 'windows', of up to 6 minutes in length and one weather report are pre-recorded. To ensure that the daily news is broadcast live out of Newcastle at 6 pm, the studio crew and news presenters begin pre-recording the news at 4 pm to ensure that each of the 15 regional segments are pre-recorded in time to playback into the live news bulletin broadcast at 6 pm.

NBN has broadcast an hour of news for about 40 years. Historically it used to receive news stories from other commercial networks and then aggregation occurred and NBN created their own 'windows' news production model, as a way of integrating local news with national and international news. The windows model allows the bulletins to remain local and to keep the content relevant to everybody watching in the different markets. The news producers realised that what interests somebody in Tamworth is of little consequence to somebody in Coffs Harbour and Lismore unless it's a national story which occurs in one of those markets. When the 'windows' model began there were four markets - Newcastle, the Hunter and Lake Macquarie as one market, North Coast, Lismore and Tamworth. That has since been expanded to Gold Coast and Central Coast. There are now six markets with NBN producing 48 minutes of news on weeknights, which in fact is more likely to be about 1 hour and 20 minutes of content because of the 'windows' model. Each news bulletin has five commercial breaks that also advertise to a local audience. Just as the 'windows' are made for each market, so too the advertisements are scheduled for each market. In Newcastle you might have an ad for a Holden car and in Lismore you might have an ad for a local boutique. But, more importantly, news and advertising don't really meet. There is a separation there and the news team don't have anything to do with how advertising content is created or sold.

Taking a two-year period NBN has been relocating to new facilities at Honeysuckle as their Mosbri Crescent studios have been re-zoned for development. The move allows the newsroom to update its very reliable yet very out-of-date production equipment.

The NBN facilities used to also house the Australia Network which was an international television satellite service reaching a potential audience of 144 million. It broadcast a combination of ABC and Australian made commercial content. The Federal Government withdrew funding for the broadcaster in 2014, and the Department of Foreign Affairs and Trade cut the broadcast that went to 46 countries including those in the Asia Pacific region (ABC 2014). The service has been replaced with a multi-platform online service called Australia Plus.

The ABC Newcastle office employs a journalist/cameraperson/editor to create content for ABC Televisions NEWS 24 channel. This posting allows the Sydney-based news team to feature stories from the region that are of national interest, like bush fires or floods.

Other networks broadcasting into Newcastle include Southern Cross Austereo and the Prime Media Group (PMG), but they do not produce as much material locally as NBN has historically done. Southern Cross Austereo delivers Channel 10 programming to Newcastle as part of the Northern NSW Coverage Area which includes an audience reach of over 2 million viewers. In Newcastle the Southern Cross Ten office does some limited regional community news and produces television commercials with a few local production crews. The Prime Media Group has a sales office in Newcastle and their website states that 'in regional areas local sales teams work closely with their local clients, often arranging commercial production and promotional campaigns to support their advertising' (PMG 2013, online). Prime news does broadcast locally-produced short nightly news breaks.

14.8.2 Television Production Companies

One80 digital post is an independent production arm of Nine Entertainment Co. Associated with NBN Television (one80 Digital Post 2016, online). Situated with NBN television in Newcastle it offers three services: production, facilities provision and outside broadcast (OB). One80 has 13 fulltime employees, who are producers, editors and directors who create television content. The OB service offers live coverage of events for networks like Channel 9 and Fox Sports. In 2016 from March until September, they completed 70 outside broadcasts. The facilities provision has been a declining service because a lot of the local agencies now have their own editing and audio postproduction facilities. The production services are where one80 offers companies a complete solution by making commercial, web content, corporate projects and TV programs.

One80 attracts three types of client. The first group is the broadcast industry - other networks wanting outside broadcast production services for sporting or cultural events. These jobs are tendered. The second group of clients is generally drawn from national or local companies wanting to promote their business where they may have a concept and need some expertise to bring it into reality. The third group of clients are national, seeking training videos or internal communications.

One80 has a national reputation in the outside broadcast market. For the last 10 years the company has been making a sports program that is broadcast nationally and delivered to 910 stations around the world. The production includes three helicopters, four motorbikes and eight cameramen. One80 was the first business in Australia to hire out a high definition OB van. Their van takes 14 cameras and they have two full time employees with freelancers crewing on an as needs basis. The OB van frequently operates interstate. There is a continuing demand for tier one sports coverage like AFL and NR, with some demand for tier two sports, like netball and the tier three sports are local sporting competitions which can be found on social media. Locally, one80 annually broadcasts the ANZAC Day Dawn service from Nobbys Beach for NBN. One80 will relocate with NBN to new facilities at Honeysuckle.

14.8.3 Community Television

Hunter TV (HTV) is a live streaming and video on demand service that began on 1 March 2014. The service applied for a narrowcasting frequency to the Australian Communications and Media Authority in mid-2014 but their license request was rejected. The Newcastle Herald reported that 'The ACMA is generally not making spectrum available for high power open narrowcasting television in order to preserve options for the use of the unallocated TV channels' (Rigney 2015, online). So, over the last few years the service has re-focused on offering content through video on demand and live streaming options, which can be found on the Hunter TV website (Hunter TV 2015, online).

14.8.4 Sports Production Companies

Bar TV Sports began by filming grassroots sports in a very cost-effective way and distributing it through a closed-circuit network of pubs and hotels. After four years it has become a hybrid sports broadcaster specialising in creating and streaming high definition sporting games for mid-tier and grassroots competitions. Using social media platforms like YouTube and Facebook, Bar TV Sports has been able to stream sporting games from over 900 sporting

fixtures across Australia, the UK and Europe. As a distributor of sporting content Bar TV offers a variety of stakeholders including supporters, sponsors and advertisers a cost-effective way for sporting fans to view local competitions. As a content creator, Bar TV Sports offers pathways for production staff, commentators and camera operators to enter the sporting media market. This sports production company emerged from within a Hunter region business called Quizmasters, which is one of Australia's leading entertainment companies specialising in trivia nights and on-line quiz games (Quizmaster, online). Quizmaster owner Mark Priest worked closely with Brendan McCormick and Josh Mason to establish Bar TV. On 13 April 2013, a Newcastle Rugby League game was recorded for the club, for the referees and for audiences who were able to view the game through the Quizmasters closed-circuit hotel subscription service. Bar TV predicted that television, particularly sport was going to be a big disrupter. Four years on Bar TV Sports has become a sub-contractor to Foxsports.

We're at that new media side, so we can adapt quicker than the TV networks. And because of that, we can keep things under budget, you know, \$60,000 to film at Fox for one game of football, and we can do the equivalent for, let's say, \$5000. And it's mainly because of technology (McCormick i/v Aug 2015).

In 2017 the Newcastle Herald reported that 'BarTV have attracted more than 1.04 million views for the first quarter of 2017 and are expected to reach four to five million by the end of the year' (Leeson, 31 March 2017). While in 2015 a typical weekend's sports coverage includes the logistical co-ordination of 40-45 staff travelling to cover local sporting games (and this includes commentators and producers). Bar TV set out to find production staff by pitching a 20-hour work experience opportunity to University of Newcastle Communication students. This work experience was attached to a television production course and it gave university students an opportunity to experience filming in an outside broadcast situation. McCormick explains:

We tapped into the university system, tried to encourage some students to come and do some work experience with us, and then through that work experience, offer them jobs. Now, to pay a second and third year communications student, who's trying to get his foot in the door, or her foot in the door, it's - it was economically better for us to pay them \$30 an hour, as opposed to paying an established camera operator a \$700-day rate. Because that just - you can't film local sport at that level. Hence, that's why Foxtel and Channel 9 can't film that lower level, because they must pay so much for their equipment, so much for their operators. So, what we've done by being a lot smaller, Bar TV's been able to use motivated and passionate staff, but also keep that cost level down, which then allows us to then get more and more sports. And as we make profit, we then buy more and more equipment and expand into other sports as opposed to making a profit and just, sort of, sitting tight. We want to keep growing (McCormick i/v Aug 2015).

These relationships, that began as a work experience opportunity have led two graduates to be stationed in London and working part time for Bar TV Sports as they continue to grow their brand. Justin Cassel and Briana Fergusson both filmed the European AFL Championships in Lisbon, Portugal in 2016.

Bar TV has also covered University Games. In 2015 when Gold Coast hosted the national event and when a team of five travelled from Newcastle to cover it, that team included camera operators, producers and commentators. When the South Australian Regional University games were held, Bar TV used:

Four or five students from both the University of South Australia and Adelaide Uni. So yeah, we're slowly tapping into making ourselves - not so much franchised out, but essentially that's what it is. If we've got camera operators and people there, then we can approach lower level sport and get them that exposure that we're offering here in the Hunter, that's what it is (McCormick i/v Aug 2015).

In 2003 McCormick, working with Josh Mason, created an SMS based trivia game called *Pubtriv*, which has since been upgraded to a smartphone app. Bar TV grew from this idea and extended into the idea that local sports could be filmed and screened through the closed-circuit channel established through the Quizmasters contacts. McCormick and Mason also realised there was a judicial need to film football matches for rugby codes. As McCormick explains 'Somebody had high tackled somebody, they needed proof to say, "You head high tackled, you're going to miss the next three weeks"' (McCormick i/v Aug 2015).

In this case there was a legitimate reason to film a whole game, and anyone with a handi-cam was paid about \$250 to film. Bar TV offered to film 'with good quality equipment and we would not only film it for judiciary purposes at a low resolution, but we'd also film it at, you know, 50 frames, or whatever it was, so that we could then broadcast the same footage and overlay it with score boards and clocks and logos, and actually make it look legit'. The other important detail that came from filming for the judiciary was that it permitted Bar TV to mic-up the referees and to record all the referee's calls. From the idea to repurpose this judicial content, Bar TV emerged (McCormick i/v Aug 2015).

Eventually McCormick and Mason realised that it was more accessible to load the footage up to YouTube. 'Free to air is commercial TV, but you can only watch it there. But if you put it on YouTube, it's archived, and anybody can watch it later' (McCormick i/v Aug 2015). In October 2014 Bar TV Sports – Media on YouTube had 561 subscribers with 162,680 views. Bar TV is always chasing new audiences and they approached Newcastle Herald, to live stream local sports games and The Herald TV was created - <http://www.theherald.com.au/multimedia/the-herald-tv/>. Brendan explains that the Herald is always looking to modernise and 'so we approached them and said that we would give them access to our live games. So, they put our games on their website - on the Newcastle Herald website. So, suddenly, it opens a brand-new audience, it opens up the Fairfax readership' (McCormick i/v Aug 2015). This is a contra-deal for the sporting associations.

We say not only will Bar TV film you, but we will also advertise you and your sponsors around the grounds, on the signage and things like, all of that's going to be run through the Newcastle Herald website or the Maitland Mercury website, et cetera. Down the Illawarra, in Wollongong they have also their own newspaper, but we also allow WIN television to use our highlights on there. We give them a clean feed. And we allow them to place their own graphics and commentators over the top. And the main reason is because we want to allow the exposure to the association (McCormick i/v Aug 2015).

Bar TV began operations in Newcastle and it initially offered a service to the Rugby League, which was to film their games for the club, for the judiciary and for a subscription service that was available in local hotels. These humble beginnings allowed the business to iron out the service.

But the luxury of us starting in Newcastle allowed us to really debug ourselves. We were hidden away, and it allowed us to, kind of, be a new business in a new market. And if any errors occurred or things like that, we could adjust them and

make them better the following week. And sort of, skim under that radar. And then we had to fundamentally get all the local guys on side before we even went to Sydney, for example. So, I think that helped us, because by the time we did go to Sydney, we already had an established brand, we already had an established workflow, and we had a successful model. And then that allowed us to sit down with some of these bigger networks, bigger sporting associations, and then say to them - actually give them some real advice to say stop chasing this top tier coverage, because you're not going to get it. You know, 2.5 billion for the AFL rights - the difference between a VFL player and an AFL player is TV rights deals, which hence, is a \$400,000 contract or a \$40,000 contract. So, you know, the big thing for us is that sport is so immediate, the television networks are now dependent on reality TV or live sport. Well, we only do live sport. So not only are we going after that upper tier, we're also going for that lower tier, and mid-tier, even to the point where we can do the upper tier, but there's too many hoops to jump through and the profit margins aren't there, and things like that. So, for us, grassroots sport is where we're going to be based, really (McCormick i/v Aug 2015).

In 2015 Bar TV was charging Newcastle sporting associations between \$400 and \$800 a game. The difference in pricing is about the style of coverage, single camera coverage being the cheapest with 2 or 3 camera coverage being the more expensive option. A typical weekend involves filming in NSW and interstate:

So, this weekend we had three sets of game days in the Illawarra and up to Wollongong. We had one game on the Gold Coast and two games in Sydney, so we covered all sports from Rugby Union, Rugby League, AFL, Soccer, to the point where we had our biggest viewership online which was the women's football Grand Final held on Sunday at Match Park here in Newcastle, and they had over 1,200 viewers live. So that was quite good. And you might have one computer with a single IP address, but there might be three or four people watching on their smart TV or whatever device they use (McCormick i/v Aug 2015).

McCormick was contacted in 2016 to provide an update on Bar TV sports activities:

In 2016, one of the areas of this growth has been within the realms of Women's Sport. We have been commissioned to film and broadcast the Women's Domestic Twenty20 cricket tournament (Women's Big Bash League) which is a national competition as well as filming and broadcasting all the Australian Women's cricket internationals versus South Africa. We are now Cricket Australia's exclusive Live Streaming provider (we film all the non-free-to-air matches including the Sheffield Shield Final) (McCormick i/v Oct 2016).

Bar TV had worked out that their relationship with sporting associations was critical to them having access to film weekend games. This all unravelled in early 2015 when Fox sports blockaded the live streaming of an Australian Rugby Union game in Campbelltown. It was a Waratah's preseason game that was to feature the return of Sonny Bill Williams coming from Rugby League back to Rugby Union. Bar TV had been employed by the ARU and had a deal with Fairfax to live stream the game. Fox Sports turned up and shut down Bar TV's live stream just before the game started. Josh Mason from Bar TV explains what happened:

Half an hour before we went live we got a call from Fox Sports and then SANZA, which is the global governing body for Rugby, it's the South African, New Zealand,

Australian Rugby Association. They said, 'You can't do this.' And we said, 'Well, we're doing it. You've got to talk to the Waratahs, it's not us,' and then it was, 'Can we geo-block?' and all this stuff, sort of, happened in the space of half an hour. They blocked it. We didn't stream. We actually streamed to a private link because we just thought 'we're going to do it'. Then there were tweets saying sorry to the fans due to technical difficulties - so we had to say, 'Well, you told us to remove Tweets saying that due to broadcasting rights we can't do it.' They said, 'Take that down,' and then they came back with, 'Technical,' and we said, 'Well, you take that down,' you know, because that's our business (Mason i/v Aug 2015).

The fans really reacted to the stream being shut down and Fox were ravaged by social media comments that pointed out they had 50 channels but didn't even have a camera operator at the game to film it. As Josh Mason explains 'Not only are you not showing it, you're going to stop someone else from showing it. So you're all about the game and the fans, but you're not (Mason i/v Aug 2015).

While this was a very unfortunate incident it made Fox Sports realise that there was a company that existed who could cover a number of games that were included as part of the digital rights for the Rugby Union. When Foxtel realised that, they made an offer to Bar TV Sports, who eventually became a sub-contractor to Foxtel. They were offered contracts to cover the Rugby Union and the Soccer as well as the Cricket. In 2015 Bar TV began creating content for their Fox sports contract. It originally ran for six weeks beginning in August. It was a national contract and covered Rugby League games in Perth, Melbourne and Brisbane. At the same time Bar TV was also managing a contract with the FFA Cup soccer that started in June. These contracts have allowed Bar TV to alter their operating models. 'It's allowed us to establish camera operators in the various capital cities, and we just literally send over producers' (Mason i/v Aug 2015). For these fixtures they have a team of up to five people including producers and commentators travelling to venues and using local crew on the ground in those cities.

Besides delivering national games of cricket and football to Foxtel's Sports Network, Bar TV has also been an advocate for women's sports and local sports. In 2015 Bar TV was able to monitor IP address and they could discern who was watching what content and for how long. This kind of extremely detailed data has been very valuable and could be used to help monetize a very niche market. But what they know they have is a product that a lot of niche markets want. 'The coaches want footage, the referees want footage, the broadcasters want footage, the judiciary wants footage' (McCormick i/v Aug 2015).

Bar TV continues to grow their brand, throughout the UK and Europe. Indeed, they have found a gap in the market where there is an audience for mid-tier sport. Their contract with Fox Sports means they are working as a production company, but their own outlets and business arrangements with local sporting associations and Fairfax shows that they are also a distributor of locally recorded sporting content. As McCormick states 'being low level, we're really a marketing company, we're a promotions company, we're a live streaming company, you know, we wear many hats' (McCormick i/v Aug 2015).

14.8.5 Television Advertising Companies

The three main networks in Newcastle all offer local businesses opportunities to buy advertising time on their regional broadcasts. This situation creates business for local advertising agencies many of which have been previously named in the Advertising and Film sections including Out

of the Square Media (OOTS), Limelight Creative Media, Storyhaus, Kent Woodcock Creative Solutions and Good Eye Deer.

Other advertising businesses include Enigma who have an office in Newcastle and Sydney. Enigma offers a range of services including branding and strategy, CX – customer experience, media, PR, and digital design production. They work with national and international clients that include McDonald Jones, Newcastle Knights and Red Energy. Toy Box Films are also video content creators based in Newcastle and Sydney. They offer an extensive range of video services including web and social media videos, product and corporate videos, TV commercials, 360-degree videos and stop-motion and time-lapse. Nodding Dog is a boutique creative agency established in 2002 and located in both Newcastle and Surry Hills in Sydney. Working with over 300 clients on more than 4,000 projects they have a multidisciplinary focus and work across all areas of print, digital, video and animation. Mezzanine Media is located at INNX, in Newcastle. It offers a diverse range of digital and brand building services that include Austability, Hunter Design School, Hunter Christian School. Fisheye Creative is new to Newcastle beginning in 2017, it specialises in filmmaking with drone and steady-cam devices for corporate and real estate promotional segments. Fisheye Creative's Jacob Payne graduated from the University of Newcastle in Communication in 2013 and returned to Newcastle to set up his business after working in Sydney as a cinematographer. He saw an opportunity to offer a service to high end real estate agents in the Hunter. Fisheye Creative are located at INNX and have two drone operators and two editors. They mainly work for real estate agents in Newcastle, Lake Macquarie and the Hunter.

14.8.6 Video Production Companies

Wedding video companies offer specialised services in capturing those personal celebrations and this type of business is spread across the Hunter Region. Frequently these services are offered through wedding photography companies like Adam's Photography and Videography operating from Glendale. Sometimes these companies specialise in producing wedding videos like Newcastle based I Heart Productions located in Tighes Hill. Capturing weddings requires multiple videographers in multiple locations, to capture the bride and groom as well as the nuptials and the reception using multiple camera techniques. These types of SMEs are perfect examples of creative businesses who engage with a number of clients who are looking for a range of screen based services and various price points.

14.8.7 Television's Use of Digital and Social Media

Hunter TV and Bar TV both use social media platforms as the primary way to distribute their content. ABC Open also uses its social media pages and websites effectively whereas NBN uses social media and its business website as an adjunct to their broadcast service.

NBN News has focused on having a digital online presence and over the last 5 years they have had a web producer creating content specifically for their website. This means that when something happens they can take ownership of the story and can try to be the first to get information out there. For example, during the Dungog Floods in 2014 NBN was doing online updates every 15 to 20 minutes. NBN also uses social media with about 160,000 Facebook 'friends' in 2017 and 1,500 twitter followers. The newsroom uses these Facebook pages to drive traffic to their website.

NBN is well entrenched in the community and the 'Neighbourhood' is a website where the community can post notices to promote their community events. For example, during the 2014 ANZAC Day long weekend there are 20 links to events like ANZAC dawn services, charity markets like Rotary and churches and musical festivals. Other NBN community initiatives are 'Mind Matters' designed to help the community understand mental health issues and the NBN School News Program, which visits local schools and encourages children to have a better understanding of the news. These initiatives confirm and expand NBN's presence in the Newcastle community and demonstrate what it is doing to maintain its community connectedness.

NBN has just started podcasting one hour each week, where reporters talk about their opinions and thoughts on news, current affairs and sport.

14.8.8 Television Education in the Hunter

Hunter TAFE offers a range of Diplomas and the University of Newcastle offers a range of degree programs that provide a tertiary education for those wanting to enter the television industry. At TAFE they offer an advanced diploma in Acting, Marketing and Communication, Screen and Media, and Music Industry Sound Production. The University of Newcastle offers a Bachelor level degree in Communication with a major in Media Production that delivers courses in screenwriting, cinematography, sound production, documentary, multi-camera television and short filmmaking. Other degrees offering some of these courses include Creative Industries, Information Technology, Music and Visual Communication Design which offers courses in animation both 2D and 3D as well as some Virtual Reality courses.

In 2012 the University of Newcastle Communication students produced video work for an ABC Open project which resulted in students' work being featured on ABC Open's home page and nationally broadcast as an interstitial on ABC 2 during Grandstand in 2012. The opportunity for students to make work for ABC Open's projects are ongoing.

Work placement opportunities are offered through NBN television for Communication students with NBN frequently employing graduates as both journalists and production staff.

At the secondary level the Hunter School of Performing Arts is a selective school that takes in students who have particular interests in the creative and performing arts. Many of these go onto University or TAFE courses. The Department of Education and Training also offers a range of specialist programs where primary and high school students can participate in creative arts workshops and camps on acting and performance, dance and music. Starstruck is held annually in Newcastle and all the regional schools can participate. The University of Newcastle has annually partnered with DET since 2006 to offer 'School Shorts' a primary school video making workshop. Each year about 50 students from Years 5 and 6 come to the university and use professional equipment to make a short film. This program has been so successful that it has raised the community profile of the Bachelor of Communication and has resulted in further enrolments for that program in its media production and television courses.

14.9 Conclusion

The post networked television era has not fully arrived in Australian nor in the Hunter, though the transition to a multi-channel system is partially underway as digital terrestrial television (DTT) and subscription video on demand (SVOD) offers non-linear viewing for some genres, that is the ability for audiences to freely choose content and viewing times. It seems that

appointment television, linear and fixed viewing, which is offered through the live broadcasting of content, especially news or sport, remains attractive for regional broadcasters and for regional audiences.

There are 122 FTE people claiming work in the television sector of the creative industries in the Hunter. Of these 37% are females and 63% are males. The ABS measure used in this study revealed that these people worked as directors, artistic directors, media producers or were identified simply as media professionals. As such it is worth noting that these statistics did not capture the wider set of occupations involved in television production and management which includes actors, variety artists, agents, camera assistants, broadcast journalists, news directors, chiefs of staff, camera operators, production managers, costume designers, directors, executive producers, gaffers, lighting directors, tv presenters, accountants, location managers, make-up and hair artists, transmission engineers, marketing executives, sound supervisors, marketing managers, network operations assistants, public relations officers, researchers, script supervisors, art directors, sound recordists, vision mixers and others, all of whom had a place at local television facilities such as NBN.

NBN television is a networked television station and it has been broadcasting local content within the Hunter region for 55 years. Even though its facilities no longer produce children's or talk programming, it still offers the network a viable business model when the genre of news is coupled with advertising. Together this combination has proven to be viable and sustainable when delivered as networked television in the Hunter region and beyond as daily local news content has a cultural currency that cannot be found elsewhere. Similarly, because the news is being produced and broadcast freely to its audience, there exists an opportunity for local advertising to pay for the delivery of the networked content. This unique combination of factors built primarily on the supply of local content to a networked television service is sufficient for the regional broadcasting model to be a self-sustaining system.

As such it provides opportunities for smaller businesses to establish themselves as regional production houses that offer services locally and nationally. These businesses benefit from the lower overheads that are offered by being in the region. Additionally, the airport and train links to Sydney mean that many SMEs have been able to pick up work from outside the region which in turn continues to develop the creative skills and capacity of local screen based workers. These regional television production activities use identical business models to those that are offered nationally and globally, and can be both B2B and B2C. The broadcasting models offering content to viewers regionally are using free-to-air (FTA) advertising models which appear viable at the local level, whereas nationally they seem to be under threat of collapse. While the FTA models and production of advertising is viable for the three television channels operating out of Newcastle it is proving extremely difficult for new players to enter the market with Hunter TV being denied a narrowcasting frequency by ACMA. Bar TV has been able to remain viable by finding new markets through working with tier-three sporting associations who are willing to pay a significantly reduced fee for sports coverage. In learning how to do these sports broadcasts, Bar TV's services were recognised by Fox Sports, as being worthy of sub-contracting.

But the most valuable innovation in this sector is that a regional news service found a way to broadcast a non-linear news model which offers the viewer a viable mix of local, national and global news as a seamless package. The technical mastery required to create six slightly different news bulletins from one location when they are simultaneously broadcast, demonstrates a level of creativity that has emerged from a need to deliver collective and localised news to regional areas. The replication of this model by Austereo across 15 other

regional areas in Australia is proof that the production of local television content can be isolated from global trends and can operate as a self-sustaining system. This is heartening as it may signal the longevity of the advertising-supported broadcasting models which deliver free content via a digital network. Furthermore, it suggests that these financially viable models of broadcasting can deliver non-linear options where the choice is not retained by the viewer - the choice of content is curated by the expert, news editors, at the point of production. This example embraces the non-linear functions offered through an expertly curated, multi-channel system while simultaneously endorsing the principals of legacy broadcasting where one well-crafted cultural message continues to be valued for many members of global and local communities.

Creativity & Cultural Production in the Hunter

An applied ethnographic study of
new entrepreneurial systems in the
creative industries.



Final Report:
Hunter Creative Industries

Electronic Games and Interactive Content

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15. ELECTRONIC GAMES AND INTERACTIVE CONTENT

15.1 Introduction

Some software development, the exploitation of serious gaming and the use of virtual reality characterises the electronic games and interactive content sector of the creative industries in the Hunter Region. While each of these areas is related in various ways to each other, each has its own unique features. Interactive software, for example, is defined as ‘a computer program, device, game etc. that, in response to a user’s action or request, presents choices (paths) depending on where in the program the user initiated the action. By following different choices, the user can accordingly control or change the action of the device or outcome of the game or program’ (Business Dictionary 2017, online). Software for our purposes is digital product developed for use on personal, business and institutional computers, embedded in cars, stoves and smart buildings, or found in phones, tablets and game machines; it has become ubiquitous in the digital world and is fundamental to first world living. On the other hand virtual reality (VR) is a computer-generated artificial reality which simulates a three-dimensional image or environment which, at this time, is still most often experienced through stereoscopic goggles that ‘leverage pre-determined audio and visual data from a digital source, using specific software and hardware to create an interactive and artificial environment for the user’ (Juniper 2015, p. 1). Alternatively, augmented reality (AR) supplements the real world with virtual (computer-generated) objects that appear to coexist in the same space as the real world (Van Krevelen and Poelman 2010). AR systems bring together real and virtual objects in a real environment; aligns them with each other and runs interactively, in three dimensions in real time. AR is not restricted to particular display technologies and is not limited to sight alone – constraints that limit VR (Juniper 2015, p. 1). It relies on interaction with the physical world and gathers and process data from that dynamic world (ibid). AR is seen as the technology to create a reality-based interface and is moving from laboratories and specialist environments into various industries and consumer markets. As the final example, gaming is built on certain types of software and draws on many of the features of VR but is distinguished by its use of a console and hand-held devices which are used to control the function of characters within a screen-based gaming space although games played on mobile devices, thus doing away with the console and hand-held controller, are increasingly popular. Popular games have become nearly ubiquitous while serious games have been deployed primarily for the purposes of education and training as simulated environments embedded within other industries which act separately from the creative industries.

15.2 A Brief History of Electronic Games and Interactive Content

The software industries started in the 1950s/1960s with the concept of a ‘stored program’ attributed to John von Neumann (Grad 2015, online). This advance grew out of the technology of punch cards and manual electrical relays, and the massive mainframe calculating machines of IBM through magnetic tape technology, transistorised circuits and random-access storage (Random History 2008, p. 1). From there, further differentiation developed between the programs and instructions that run a computer and the physical machinery or hardware. The coming of the digital age and exponential growth and innovation through ubiquitous access to the World Wide Web consolidated what had become the distribution and sales of software as a significant and fast-moving industry sector (ibid). The software industry’s importance today comes from the significant volume of software for sale as final products to consumers and businesses, both in domestic and international markets and through its input to production in other industries. It comprises four broad areas: systems infrastructure, applications

development, mobile and embedded software, and applications solutions (OECD-KISA 2015). While Siemens (2017) quotes a prediction that demand for digital transformation software and IT services will grow by an average of 11.2 per cent annually until 2017:

The U.S. Bureau of Labor and Statistics anticipates a 17% increase in employment between 2014 and 2024 for software developers a gradual but accelerating transition to a software society because of software's ability to monetize, customize, and create a responsive digital environment (Steel 2017, p. 1).

As Sahil Sharma points out 'the first handheld mobile phone was created by Motorola in 1973' (2015, p. 12). The full development of its potential didn't start to occur until the 1990s when GSM or 2G connection was introduced which 'provided constant connectivity and portability to mobiles' (ibid). This expanded the market and allowed it to outgrow landline connections. The 2G connection also led to SMS, with 'the first computer generated SMS being sent in 1992 in the United Kingdom' (ibid). NTTDoCoMo was introduced in 1999 as 'the first ever Internet service on mobile' and then in 2001, 3G was introduced which 'enabled the use of Internet on mobile phone and transformed the use of the devices which could now telecast TV and Radio services' (ibid). Then at the turn of millennium 4G was introduced which 'upgraded the 3G mobile data transmission ten-folds thus bringing the mobile internet in line with the wired home internet connections. According to the recent figures, there are around 3 billion 3G/ 4G subscribers worldwide' (ibid). As Ben Goldsmith indicates, the software 'apps' industry 'has grown phenomenally quickly on the back of the popularity of smartphones and tablet computers' (2014, p. 339). Its commercial history is a short one.

Goldsmith notes that 'the first recorded use of "app" as shorthand for "application" -meaning a computer software program – was in 1985 when Apple released the MacApp programming tool' (ibid). Nonetheless the term did not become commonplace until the Apple App Store and the iPhone 2 were launched in 2008. The term is now commonly understood in reference to 'software programs designed to run on mobile platforms and devices, although apps have now been developed for a range of devices from televisions to cars' (ibid). With the proliferation of the mobile web, smartphones and to a lesser extent tablets app development has been boosted by the realisation that they, in league with the mobile web and smartphones, facilitate 'innovation in market development and work practices, as well as being conduits to investment and new revenue streams' (ibid).

On the other hand the idea of a virtual world has appeared in writings and film for a very long time, but has only recently emerged as a serious industry. Brown states that in the 1930s, 'in *Pygmalion's Spectacles*, Stanley G. Weinbaum explains a goggle-based game in which individuals can watch a holographic recording of virtual stories including touch and smell' (2017, p. 1). This, she says, was followed in the 1960s with the development of a virtual reality (VR) headset designed for use in military training. At the same time augmented reality 'as annotation of the physical world with computer-generated information occurred in the 1960s' through the work of Ivan Sutherland (Hollerer and Schmalstieg 2016, p. 1). In the 1990s, VR headsets began to make their way into arcade games and then into homes but at considerable cost and without user comforts. Then in 2014, Oculus VR became available commercially and the opportunity for devices and new interactive consumer products emerged (ibid). It was only in the 1980s and 1990s that computing performance advanced to the point where it became functionally useful for assembly, repair and maintenance applications and later for medical uses. It has also been important to defence, in particular in terms of training pilots, as it is much more cost effective and safer to instruct pilots in how to operate in difficult conditions. This has been the goal of instructors for some time:

Early simulators were wooden boxes mounted on a universal joint and driven by organ bellows in 1930, but were critical to training. By the 1990s, full flight simulators were more mechanically sophisticated and incorporated large, high resolution screens that projected virtual scenes for the pilots-in-training. These cost millions of dollars, and in some cases less expensive solutions were sufficient. By 2007 helmets incorporating projected dual screen images a few inches from the user's eyes were being used for training, both for flight simulation and land combat training. We congratulate VR on what we expect will be its first billion-dollar year, and we forecast rising revenues in coming years: it is possible that the industry will generate tens of billions of revenues in the medium term. What appears certain however is that VR's potential is unlikely to be reached imminently; as with all emerging technologies patience is required (Lee and Stewart 2016, p. 1).

The first VR software for non-research laboratories had become available in 1999 but it was the advent of smart phones which led to hand-held simulators and games emerging in 2005. Today, VR applications are wide-spread in industry, training, personal information, translation services, navigation, TV broadcasts, advertising and increasingly complex gaming (Hollerer and Schmalsteig 2016, p. 1).

The creation of 'video games', according to Larissa Hjorth (2014), was connected in the 1950s and '60s to the development of computer science as a discipline at MIT. These early games were a by-product of funding by the US military so MIT could research artificial intelligence (AI). In 1962 the Tech Model Railway Club (TMRC), a research group operating at MIT, created *Spacewar*, a game designed around the PDP-1 computer at MIT but it had no facility for simultaneous player interaction. This changed in 1971 when this game was developed enough to become the first digital arcade game. Its developer, Steve Russell, then made *Pong* and started the Atari game company that went on to dominate the 1970s industry built around games. In 1972 a US defence contractor then developed this game technology for television which enabled the transition of electronic games from the arcade to the domestic sphere. The stand-alone games console appeared soon after. In 1976 consoles used 'microprocessors, allowing them to be programmable – in short, hardware and software could be separated. This meant that games, like other popular media such as vinyl records, could be “bought, collected and compared” (Haddon 1999)’ (Hjorth 2014, p. 273). *Space Invaders* was released by Atari in 1979 and ‘the early 1980s saw the introduction of many home consoles from Atari, Nintendo, Sega, Microsoft and Sony’ (ibid). At the same time personal home computers such as the Commodore 64 and Apple II were becoming commonplace. With this technology now readily available many users began experimenting with their own games.

This period also fostered the rise of two of the most enduring directions in gaming - online and mobile gaming. Early online gaming could be seen in the form of dial-up Bulletin Board Systems (BBS-a precursor to Web 2.0 social networking systems), which allowed for some of the first examples of MUDs (multi-user dungeons) and basic, textual fantasy role-playing games that would eventually evolve into Massively Multiplayer Online Role-Playing Games (MMORPGs) (ibid).

Concurrently, mobile handheld gaming developed in the shape of *Game & Watch* from Nintendo but for video games, ‘after the software and hardware peak of 1982, the boom was over - suddenly production dwindled and declined’ (Hjorth 2014, p. 274). Then to add to the games industries troubles, in the 1990s ‘arcades declined dramatically in the face of the rise of

handheld gaming and MMOGs' (ibid). Following a disastrous move from CD-ROMS to cartridges which held less data at a time when more complex graphics were needing more memory, Nintendo lost tremendous market share to the new PlayStation platforms. There was now a 'growing significance of the portable (mobile) game systems (Sony PlayStation Portable [PSP], Nintendo DS) and the rise of the online, networked UCC in the form of game "modding" (whereby players could remodel games environments and gameplay)' (ibid).

These developments had become so popular that many game companies included custom tools to allow for the 'modding' phenomena. At this point Sega exited the business and Sony gained a larger share of the market. The games industry became very attractive to Microsoft. At this time portable (handheld) games were being produced for mobile phones. Social and locative games were now possible. In South Korea, haptic games were being made for the mobile phone market. It wasn't long before mobile technology became the central entertainment medium for players with the launch of Apple's iPhone in 2007. By 2008 'more than half of the iPhone's applications sold were games' (ibid) generating revenue of more than a billion US dollars. Major players such as Sony PSP and Nintendo competed heavily in this market with Nintendo introducing the highly successful Wii. As Hjorth asserts, 'since 2000, the increasing dominance of games within the popular culture imaginary has become evident' (2014, p. 275).

15.3 Structure and Significance

As seen above mobile software applications and interactive media in the form of VR, AR and games are increasingly important elements of the digital economy. This economy is 'expected to grow significantly over the coming years ... fuelled by new waves of technological developments' (Deloitte 2016, p. 3). Its general structure has been described as 'the global network of economic and social activities that are enabled by information and communications technologies such as the internet, mobile and sensor networks' (NSW Industry Action Plan (IAP) 2012, p. 7).

While general workforce data is inconsistent, a Deloitte study states that 'the contribution of digital technologies to the Australian economy is forecast to grow from \$79 billion in 2014 to \$139 billion in 2020. This represents growth of over 75% and an increase in the digital economy (overall) from 5% to 7% of Australia's GDP. The vast majority of this growth (97%) is expected to take place in sectors outside of the traditional Information, Media and Telecommunications industry', and 'demand for ICT workers is therefore forecast to increase in the future. In 2015, there were around 628,000 ICT workers in Australia, with 53% of this ICT workforce employed outside of ICT-related industries' (Deloitte 2016).

In 2011/12, the software and interactive content segment contributed around 50% to both total IGP and total employment for the creative industries. Internet publishing and broadcasting experienced the highest growth in IGP and employment between 2004/5 and 2011/12. In 2011, the software and interactive content sector workforce totalled 197,062 people. The largest proportion of the workforce (51.8%) is support workers (CIIC 2013, pp. 11-12). In 2013, the global games market was worth \$75.5 billion and it was calculated that there were 1.6 billion gamers (NewZoo 2014, p. 1). By 2017, that was predicted to reach \$108.9 billion with mobile taking 42%, while by 2020 the market will reach \$128.5b with \$64.9b in mobile. Gamers were using TV/consoles, hand-held devices, as well as tablets, alongside the web, massive multiplayer on-line games (MMOs), computers and phones, with the greatest growth being in TV/consoles, mobile phones and MMOs with the biggest market share in the Asia-Pacific area. Western Europe and North America together control some 80% of the market (NewZoo 2017,

p. 1). The Australian Government characterises the Australian games industry as dynamic and sophisticated, offering the best in creative talent, advanced technology and management experience backed up by a strong base of complementary creative industries, including film and television, design, advertising and new media (Austrade 2014, p. 1).

The linear structure of this lucrative games industry is as follows. Developers make the game, publisher market and promote the game, distributors are involved in the logistics of delivering the game to retailers or direct to consumers, the platform is the machinery, the console or format, the game is played on, retailers sell the game to consumers and of course there are the consumers themselves. For Williams and Srivastava 'production takes place at the development stage in which games are conceived, created and programmed – the content. Games designed for one platform are often recoded at lower costs for another, a process known as "porting" and recently made easier with the rise of Unity as a platform' (2014, p. 1). As Lukefollows11 (2013) explains, development occurs in three or four ways. First party developers generally confine themselves to one platform. Nintendo is a good example as most of their games are made internal to the company. Financing is often unproblematic and the platform limitations are very well known to the developers. Second party developers are generally owned separately from the platform but games are made for the platform owners. In other words, the platform owners outsource the development of the game to an independent studio who then makes the game exclusively for the platform or other company who funds the game. Third party developers make games for multiple systems or platforms. They generally work for publishers who supply the finance. Both have input to the development of the game but, as elsewhere, whoever finances a production is the party who makes the final decisions. Independent developers are generally small firms who self-publish. They generally do not have the budgets of the prior categories. They do however get to make all the creative decisions with no financier establishing input. There have been successes here, however, as exemplified by Mojang:

It started off as a two person company, Markus Persson and Jakob Porsér being the founders, with a third being brought in as a CEO at a later date, Carl Manneh. The game they produced was a huge success selling over 12 million copies and is still very popular to this day, that game was called *Minecraft*. Within a year the company grew to a size of twelve people to produce there second title named *Scrolls* and the company is still going strong (Lukefollows11 2013, online).

Publishers, on the other hand, 'are the rights-holders for the games' (Williams & Srivastava 2014, p. 1). When the developer delivers the game 'the publisher is responsible for marketing the product's launch and the manufacturing process if there is a physical product. The manufacturing process is part of the licensing deal when making console games, and the major three manufacturers maintain strict control' (ibid). This publishing sector has moved toward a concentrated oligopoly where there are 'fewer and fewer publishers, which tends to mean less competition – and a tougher life for developers' (ibid). Self-publishing has recently begun to develop as a force in the market but 'the big publishers retain a lot of power in the industry' (ibid). While the device manufacturers are also important, retailers sell a vast array of games primarily for entertainment purposes.

As well as leisure games, serious games have become significant. Serious games are those that have at their heart something other than entertainment – real learning. They move on from simulations through the addition of gamification. They are also linked to VR and AR simulations. In terms of virtual reality Juniper Research (2015, p. 1) predicted that the major consumer markets for the development of VR will be in games, film, adult entertainment and gambling. However, there is a growing application for both VR and AR in areas such as

military, safety, mining, medical and pharmaceutical training, and for sales and heritage presentations. As Siemens (2017, online) argues, ‘from research and development to planning and production, products and processes are increasingly taking shape in the virtual world’ (ibid). They depend on ‘the growing power of simulation technologies’ (ibid). These technologies are designed to replicate reality with augmented reality (AR) supplementing the real world. These environments are ‘overwhelmingly virtual, such as buildings, trains, and models of wind turbines or drilling platforms, which are supplemented by real-time images taken by technicians in the real-world’ (ibid). For example, ‘information about a building’s architecture can be augmented by knowledge of how people move inside it, thus opening the door to precise and dynamic crowd flow simulations of evacuations’ (ibid). Virtual reality goes one step further which is a ‘computer-powered, immersive world’ (ibid).

It is at the far end of the spectrum – in the virtual world – that the potential for revolutionary competitive advantage ... is taking shape. The reason for this is clear: businesses that can test products in a virtual environment before they are actually built will save time and money while simultaneously increasing quality and flexibility ... Driven by the fact that ever more manufactured items are created in the virtual world, the digital transformation has become a fundamental economic factor. Digital technologies are revolutionizing business models, value chains, and organizational structures in almost all industries. Virtual testing processes, they say, have advantages over real-world counterparts, regardless of whether they are based on the use of avatars, virtual product models, or model-based software, allowing companies to consider the human factor during the early stages and to train people accordingly and to eliminate the key step of building expensive and untested prototypes by using advanced simulations which save money and improve quality and safety (Siemens 2017, online).

This is where serious games, using these VR and AR approaches have come into their own. App developers, on the other hand, cater primarily to the mobile phone industry supplying applications that cover a vast range of uses. Marcus (2005) notes that in areas dominated by software applications there are both large conglomerates concerned with production and distribution of creative goods as well as small firms seeking and promoting talent. Some of these companies develop applications in house from creation to development to engineering while others outsource each aspect using freelancers from across the world. Some work to a specific brief, planning and documenting meticulously while other use a more agile and iterative process; the first gives control to the financier and costs less overall while the second method tends to be costlier and take longer but its reliance on feedback makes it solid when it enters the market.

15.4 Business Models

Revenue for the games industry overtook the movie industry in 2008 (Velikovsky 2013, p. 15). Then in 2010, it was estimated that the global games industry was worth \$105b. It is worth noting, however, that games’ sales figures include games hardware, so the revenue for software – the games themselves – could be estimated to be approximately 50% of the global annual value of the games industry in its entirety. In 2012:

A series of new reports from DFC Intelligence forecast that the global market for video games was expected to grow from \$67 billion in 2012 to \$82 billion in 2017. This forecast includes revenue from dedicated console hardware and software

(both physical and online), dedicated portable hardware and software, PC games and games for mobile devices such as mobile phones, tablets, music players and other devices that can play games as a secondary feature. This is good news for all companies involved in gaming including Sony, Microsoft, Activision, Electronic Arts, Disney, and even Nintendo with its Wii U (Velikovsky 2013, p. 16).

During this period the most reliable growth was with PC and mobile devices. A further report by the NPD Group Australia and the Interactive Games and Entertainment Association (IGEA) indicated that the Australian video games industry recorded \$1.161 billion in sales in 2012. However, as Velikovsky indicates:

The NPD data excludes sales from online retail, downloadable content, online games subscriptions, in-game micro-transactions and mobile games, iGEA's CEO Ron Curry said that the data fails to account for the growing popularity in the mobile and digital space (Velikovsky 2013, p. 17).

Just four years later:

Newzoo released the latest quarterly update of its Global Games Market Report. It shows that 2.2 billion gamers across the globe are expected to generate \$108.9 billion in game revenues in 2017. This represents an increase of \$7.8 billion, or 7.8%, from the year before. Digital game revenues will account for \$94.4 billion or 87% of the global market. Mobile is the most lucrative segment, with smartphone and tablet gaming growing 19% year over year to \$46.1 billion, claiming 42% of the market. In 2020, mobile gaming will represent just more than half of the total games market. The PC and console game markets will generate \$29.4 billion and \$33.5 billion in 2017, respectively. Asia-Pacific is by far the largest region, with China expected to generate \$27.5 billion, or one-quarter of all revenues in 2017. Newzoo expects the global market to grow at a CAGR of +6.2% toward 2020 to reach \$128.5 billion. Based on its review of final 2016 financial results of more than 70 public companies, Newzoo also upped its final take on 2016 by \$1.1 billion to \$101.1 billion. Mobile games performed even better than expected, especially in China, while the PC games market performed worse than anticipated in Newzoo's previous quarterly update (McDonald 2017, online).

During the same period 'Australia's video game industry generated \$2.958 billion in revenue ... a 4% increase from 2016' (Walker 2017, online). These figures were produced by the Interactive Games and Entertainment Association (IGEA) who 'also revealed that digital sales of video games generated \$1.893 billion last year. That's a substantial chunk larger than retail sales, which fell by 16% to \$1.065 billion' (ibid). Some retail improved with accessories for the PS4 and Xbox One increasing by 25%. However, the fastest growing area was downloadable content (DLC) that enhanced the games experience, which rose 31% from the prior year. It appears that 'Australian consumers are increasingly comfortable buying games and DLC via digital storefronts, with this trend set to continue as more devices get connected via high speed mobile and fixed networks' (Fadaghi quoted in Walker 2017, online).

Games come in a variety of forms such as massive multiplayer games (MMOs), core PC/MAC games, casual web games, mobile phone games, tablet games, handheld games and TV/console games. According to Pelipaja (2015, online) making money with games occurs in a number of ways. While the costs structures include advertising the game, as well as the cost of development, and depending on type, cost of server space plus app store commissions, e.g. from

Apple App Store, Google Play, Windows Store or Steam, the revenue stream often comes primarily from direct sales, selling virtual goods or selling ad space. As far as online games go, in-app advertising appears to be increasing in relation to direct sale of games via app stores. Direct sale or paid games give an immediate return when people purchase and/or download it with a usual 30% commission going to the store. The downside of this model is that there tends to be an initial surge of sales on release but this surge slows down quickly after that. To keep downloads continuing after the initial surge this must have propelled the game into the Top 100 chart which then keeps its profile high enough for further sales. The Freemium model is a variant of this with F2P or free-to-play games largely relying on advertising while the 'average revenue per download (ARPD)' is a very important figure when it comes to assessing the cash generated by any mobile app. Not only does the ARPD data give a sense of how effective the application is at generating income, it also can give you a sense of which features the money comes from, and what kind of spending behaviour users are demonstrating' (Pelipaja 2015, online). Subscription services on the other hand work primarily for MMOs or serialised games and this revenue earning opportunity relies on a paid, usually monthly, fee being made via credit card. And of course merchandising also features heavily with many games and apps. For example, IPR capitalisation is a term used to describe the situation where you use 'your brand to sell other items' (ibid) Rovio and Angry Birds can boast 'over 30,000 different products world wide from t-shirts to theme parks' (ibid). There are other revenue generating models such as:

Player to Player trading of Virtual Items, Auction (letting them trade land, property, characters, items, also by auctions). You keep a cut of all the money exchanged. You also keep the transactions safe for the player (they don't have to go to the gold farmers or risk the black market for characters.) Some games let the players cash this money out of the game, so it can become a full time job, but is also a major fraud generator (Pelipaja 2015, online).

Other models such as pay-per-tap advertising also generate profits. It works when 'people download your app for free and every time they tap on one of the advertisements scrolling across the screen, you get paid. Apps best suited for this method are those that have a high use factor: Games, News app, weather app etc.' (ibid). Daily use is important for this model and it generates more visibility for the ads but lots of downloads and a good retention rate are needed to make money. Revenue is earned from apps in very similar ways to games. These include:

Freemium where the app is free to download but it contains in-app purchases; Paid, where there is a direct purchase with no in-app purchases; Paidmium, where the download comes with in-app purchases; In-App Advertising which contains ads (banner ads, video ads, etc.); and the Dynamic Business model which shifts depending on certain factors (app shifts to an ad-supported model if the user does not make in-app purchases, etc.) (Pelipaja 2015, online).

A standard practice, as indicated above, is to supply the app for free but embed advertisements within the interface and 'when a user clicks an ad, revenue is instantly generated for the app's publisher' (Rakestraw, Eunni & Kasuganti 2013, p. 10). However, the royalty payments are often low and too many ads will affect the viability of the app with consumers. App developers may sell their apps directly to consumers 'for a predetermined price in an online marketplace. In such cases, the platform owner, Apple or Google, charge a 30% royalty fee for each app sold while the remainder goes to the developer. No fees are however charged by the platform owner for the free apps' (ibid). Another way to generate revenue is to combine the prior two

approaches by delivering ‘a “for sale” version with no ads and full functionality, and a second version made available free of cost but with sponsored ads and limited functionality’ (ibid). To be successful here ‘developers must strike a balance in the number of features offered in the trial app. If too many features are offered free, the incentive for customers to purchase the full version may be reduced’ (ibid). Apps may also add to, complement or advertise the existing products of a business. A good ‘quality app can potentially speak for the quality of the entire business which in turn could attract new customers. Alternatively, an app can improve the way existing customers use a product’ (ibid). In this case the app is integrated into the revenue streams of a wide variety of businesses. Revenues are also generated by ‘creating an online store within the app itself’ (Rakestraw et al. 2013, p. 11). Some games companies offer a free-to-play game with the additional feature of offering paraphernalia associated with the game for purchase. Services may be sold directly from an app that acts as an estore, for example selling tickets to films by attracting customers with dense information such as reviews and trailers of the movie. As Rakestraw et al. suggest, ‘since the app is free, the additional payment is not directly linked to the app and therefore entails a lower risk of downloading and using it’ (2013, p. 11).

15.5 Operational Methods and Important Personnel

Creative industry personnel such as programmers, software developers, IT practitioners and content developers are increasingly embedded in convergent projects and across traditional industries with ICT significant right across the economy. Personnel are also embedded in non-ICT sectors such as finance and insurance, construction, health and community services and cultural, recreational and personal services (OECD-KISA 2005). Most ICT businesses, like the creative industries in general, are SMEs. Women are typically under-represented in this sector (28%) as are older workers (11%). Both are seen to be subject to stereotypes but together represent a significant worker sector and are perhaps particularly in need of ongoing training, given that graduates represent only 1% of the ICT workforce each year (Deloitte 2016, p. 5). Additionally, ‘there was a net migration flow of around 19,600 ICT workers in 2014-15, with software and applications programmers recording the largest net inflow of workers ‘while Australian businesses are also investing increasing amounts of funding into ICT research and development, spending more than \$6 billion in 2013-14’ (ibid, pp. 23-4).

Of note here is the fact that ‘existing technologies will see growing uses in new industries, sectors and occupations; and new forms of technology will also emerge over the coming years – including 3D printing, drones, robotics and artificial intelligence’ (Deloitte 2016, pp. 10-11) and in particular cloud computing and social media. Deloitte lists mobile, analytics, cloud, social, web and content as current disruptors and the currently expected future wave may come from wearables, genomics, Internet of Things, robotics, drones, electric and connected cars and Oculus Rift. With this background in mind operational methods need to be adaptable as do the roles people in these industries take on especially as shifts in the workforce through outsourcing and casualisation take hold. Important roles in the current software sector more generally include programmers, business and systems analysts, management and organisation analysts, ICT managers, ICT sales professionals, support engineers, graphic and web designers and illustrators, data base and systems administrators and security specialists. Other creative groups such as musicians and writers also increasingly play a role, especially in terms of the development of games.

The operational methods of the games industry generally follow a similar process. As Velikovsky sets out, a game development company will bid, in competition with others, for a

contract with a game publisher. Once a contract is secured, a 'Milestone Delivery Schedule Contract' will be drawn up 'between the Game Publisher and Game Developer, and the Publisher will pay a pre-agreed monthly amount to the Developer (e.g. say \$500,000 per month) based on whether the Milestone each month has been delivered on time and to the Publisher's satisfaction' (Velikovsky 2013, p. 5). The game developer might construct their 'own proprietary game engine - or more often, will license a commercial game engine, for a fee' (ibid). The game gets built using the art and sound assets the team has created and 'the game engine makes it all "work" on the relevant game platform, in each case (e.g. on a PS3, an Xbox360, or a PC, the web, a smartphone, etc.)' (ibid). Once the game is completed by the developer, it goes through what is called 'the Playable Demo, and then Alpha, then Beta, and finally Gold Master stages (say, from 2 to 4 years, for a AAA game) and the Gold Master (disc) is finally delivered by the Developer to the Publisher – then a Distributor (which, may also be the Publisher) markets it, and places it in various Retail outlets. A Consumer (5) then buys it, from the store (or online) and plays it' (ibid).

Important people in the electronic games industry, according to NewZoo (2017), are developers, publishers, retailers, servers, distributors and marketplace operators (Google, Apple, Windows, Steam) who take about 30% of income from this supply chain. As Velikovsky (2013) indicates, typical games development studio employs around fifty people across the two years it often takes to develop a game. These will include producers, a project manager, a game designer who is like a director on a film, and assistant game designer, around five level designers or builders, a dozen programmers and a dozen artists, one or two sound engineers, a music composer, an interface designer, an animation team of around four people, one voice over artist or, as is most often the case, two dozen v/o artist working across two years which is the equivalent of employing one person to do this for two years, and of course a writer (Velikovsky 2013, p. 6).

In terms of operational methods for the mobile apps development industry, indicates there are generally four stages involved after entrepreneurs have sourced finance from venture capitalists, clients who are financing the development or through advances from apps stores themselves. These stages are, firstly, identifying the type of app required, secondly, bringing the idea into the tangible realm. While a software developer may 'present wireframes to show how the app will function' (Quora 2018, online) input from all relevant parties is important at this stage to ensure the app is usable in the market. Thirdly, there is design. As indicated, 'this stage includes both the backend and frontend development phases. It involves management of users, server side logic, customization of user experience, data integration, caching of data, synchronization of data, UI design and development and various schedules for testing' (ibid). Fourthly, when the app has been tested and certified to go live by the software development team, either in-house or outsourced, it can be launched into the market. There are considerations here for those using an app store to deliver the product to consumers such as having 'the built-in Xcode installed so your app can be featured in the App Store' (ibid). Of course, the platform for delivery will have been decided on earlier, but there are a variety to consider and these include Java and Windows but the two main platforms are Android or iOS. The 'choice of platform may depend on the market you are targeting. While iOS is more popular in the U.S., Android has slowly gained ground and in fact leads in Asia, Africa and South America' (ibid). The mobile app development team will consist of a number of players but the central ones are the project manager who 'oversees the entire development of the mobile app', the UI/UX designer who is 'tasked with the app's habitus and the impressions of the user' (ibid), the coder who 'oversees the app's hidden structure' (ibid) and the QA engineer who 'oversees all testing protocols' (ibid).

The cost of this team depends on the complexity of the app. Simple apps take approximately 10 weeks to build, with design accounting for up to 90 hours and backend development up to 800 hours. Complex apps take around 28 weeks to build. Design would need approximately 370 hours and backend development up to 2,200 hours (Quora 2018, online).

15.6 The Hunter and the Electronic Games and Interactive Content Sector

The relevance of the digital economy for the creative industries and its future is clearly laid out in the NSW Industry Action Plan. 'Sydney and NSW, with leading strengths in Creative Industries and Information and Communications Technologies (ICT) are primed for growth in the expanding global digital economy. The convergence of these two sectors in the digital economy is bringing together our leading strengths in ICT and creative capabilities ... underpinning a step change in productivity across multiple industries with technology convergence and digitisation key trends providing opportunities' (ibid). The opportunities provided by the exponential growth of the games and apps industries have not been taken up in the Hunter in any significant way.

15.6.1 Virtual and Augmented Reality Simulations

The VR and AR sector of the games industry is represented in the Hunter, in part, as arcade games. While arcade games are said to be exploding in China, the costs of staying in business compared with capacity to earn basic revenues have driven many start-ups out of business. This situation doesn't appear to be the case with the Virtual Reality Studio, VRXP, at 20 Watt Street in Newcastle. It opens its arcade doors at 10 am from Wednesday to Sunday and encourages bookings rather than walk-ins. The session cost \$30 for 30 minutes with an hour session costing \$50. They charge 'per space, rather than per person' (VRXP 2018, online) with the shared space accommodating only 4 people. They also advise that 'the more people you share with, the less time each person will be able to spend in VR' (ibid). The virtual reality experience they offer allows customers to 'explore underwater worlds, create 360° interactive paintings and defend your castle as a medieval archer' (ibid). According to the VRXP website customers 'are not bound by sitting in a chair or standing still. Room scale VR allows you to move freely, walk around and interact within a large area. You might need to crouch down to unlock a safe or maybe you would like to walk through the 3D model of your architect's latest design' (VRXP 2018, online). This room scale virtual reality business which uses HTC Vive hardware is run by Andy Gallagher. Gallagher's earlier foray into the creative industries consisted of making videos, which he still does through his Modular Production company but he now takes this process further. He made the region's first 3D virtual reality video project, *360 Reasons to be in Newcastle*, which was 'produced in collaboration with Enigma, The Newcastle City Council, Newcastle Now and The Business Centre' (Gallagher 2018, online). His business operation is not just aimed at providing opportunities 'for the community to experience high-end room scale virtual reality'. He suggests that 'the studio provides a platform for not only an entertainment destination but also a professional technical space that will facilitate collaboration with industry to enable a wide variety of sectors to explore the application of virtual reality technology to enhance the way they do business' (Gallagher 2018, online).

Slice Virtual Golf located in King St, Newcastle, allows customers to experience 110 of the world's most famous golf courses (SVG 2018, online) while in Lake Macquarie at the Charlestown Mall games such as Batman, The Blu, Space Pirate, Tilt Brush, Google Earth,

Elven Assassin or a treasure trove of other VR Games can be played at Unreal VR (UVR 2018, online). While these commercial VR establishments are entertainment focused, facilities such as those at The Virtual Reality Technologies (VRT) centre located at Argenton have a serious intent. This service is a training centre used by hazardous industries like the coal industry which relies on virtual reality, augmented reality and mobile applications to train underground workers and reduce the risk to workers in the initial stages of their training. VRT is run by Coal Services which is:

An industry-owned organisation committed to providing critical services and expertise to the NSW coal mining industry. Operating a specialised Health and Safety Scheme, Coal Services provides an integrated suite of services aimed at preventing injury and illness in the workplace by helping employers to identify, assess, monitor and control many risks inherent in the NSW coal mining industry (VRT 2018, online).

VRT shows something of how the creative industries can function in a region with a base in heavy industry where ‘creative’ inputs have made a regional industry the global leader in safety. This business deploys desk-based training as well as physical training in an artificial ‘mine’ where physical scenarios are implemented via interactive dome-based presentations for small groups and within large hemispherical spaces where interactive virtual reality scenarios are designed for teams to deal with a wide range of potential incidents. These options offer high-level visual inputs, sophisticated programming, training and practical applications which have now been developed to the point where their expertise can be deployed for other industries where people are at risk – transport, fire-fighting, police work and other emergency services.

As Matt Farrelly (i/v April 2016) explains, the facility has an underground physical structure that simulates a mine and three hemispherical, 4 metre domes which, like the mine, are duplicated at each of their sites (Argenton, Wollongong, Singleton). The third piece of infrastructure at each site is a large curved 360-degree screen – about 30 metres across and 10 metres high, which each provide for about 30 people. When miners undertake the training, they do so ‘fully kitted up’ with breathing equipment so the experience is a full one, part of what they call the ‘Knowledge Triangle’: knowledge transfer, classroom style which uses practical training in the underground simulator where you can light a fire and put a real fire out or pick a person up and put them on a stretcher - it looks and feels like a mine ‘because you need the muscle memory, to know what smoke smells like, to know the heat from the fire, what it feels like to pull out an extinguisher and put the fire out. It’s resource intensive but essential’ (Farrelly i/v April 2016). Then there is the Virtual Reality experience which fills that gap ... a way to pull that data across from the knowledge centre and visualise it and make it more engaging. People can be thrown into an operating environment and see things – almost to the point of interacting or feeling as if they are interacting with it:

A simple fire; or a complex one; or a fire that’s around a corner or a on a vehicle; or a fire that’s got high-voltage cables above it or where there’s people involved, or a fire with multiple issues. With V.R. they can fight 20 virtual fires, in all these different circumstances and then they can talk about the differences and have the opportunity to experience those differences (Farrelly i/v April 2016).

The Gen4 learning management system is used by VRT as a complement to more traditional training techniques and allows the coal industry to ‘maximise the benefit of valuable face-to-face training services. Through regular and targeted virtual reality refresher training, face-to-

face time can focus more exclusively on those aspects which cannot be replicated through technology solutions' (VRT 2018, online). Farrelly explains the journey:

When we started ten years ago Virtual Reality was much like playing a video – simple and rigid, but still better than NOT playing a video. Then we went to the second generation. In effect we had a whole Lego box but every time we wanted to do something new, we had to construct a whole scenario from scratch and build the assets. So to deal with that, we built the environment once and then just changed the assets. Then there was a third generation which happened about 2010-2012 – a two-year period. We took everything we had as assets and we broke it up into small blocks – even though we had the whole mine in blocks, we had to keep going back and having it hard coded – so we still needed to have a programmer develop each scenario. We went through a process where it was still like Lego blocks but now we could move it around where we wanted to instead of starting from scratch. We were able to move to a generation of propriety software engines – but we still needed a programmer to compile things even though it was relatively easy. By then, we could rewrite scenarios internally because we had a programmer in-house and we could make a new scenario in only a couple of weeks for whatever the cost was in labour. But there was still one step to go. We felt the user should be able to make their own scenarios – drag and drop. It was like in the old days when you had a specialist who knew how to make a presentation and they did it for you. And then Microsoft developed Powerpoint and you think 'where has this been all my life?' So that became the gold standard - an agnostic tool that lets people drag and drop things around. Easy to use. You don't need skills – you just drag the asset around, like painting something here. Then put a truck over there, and then put it on fire, and then add a car that's crashed into it. And then maybe put in a guy who's collapsed over here. We can do that in real time now which allows the users themselves to create the story. That's fourth generation. It's been a big journey. We didn't just wake up and say, hey, I've got a good idea for a new product'; it's about this overall journey, however, all that being said – we've been able to build it because of the prior ten years. We didn't just come up with it. People have done lots of case studies and we've won lots of awards (Farrelly i/v April 2016).

Karen Blackmore, a senior lecturer in IT at the University of Newcastle and a former cartographer, believes simulation will be more beneficial to the Hunter, rather than gaming, since:

The world is full of unemployed game developers. And Unity make their game engines free and it's what every little kid wants to do. And the nature of that work force is entirely project based. So, not in gaming but in simulation – absolutely. Totally. It's ongoing so it ties in many of the skills. It encapsulates many of the skills we see in game development, particularly in asset generation – that kind of thing (Blackmore i/v Sept 2016).

With the co-location of research institutes like HMRI, the training facilities run by Coal Rescue and those at Defence, Blackmore believes there is opportunity to 'create a hub that is broader based' (ibid). While the R&D for digital assets or simulation environments is primarily one of refining what already exists, as it's a mature technology. As she attests, 'the technology for our work is available globally now. It is changing quickly but it is readily available. The innovation

is around how we use it to achieve our goals' (ibid). The immediate question is not 'can this be done' but whether it is an effective approach to take. She asks:

How do we know that our trainees are learning what they need, particularly if we are training them for mission-critical missions in life and death situations? They don't care whether one approach costs less or one approach saves time because ultimately it's the efficacy of the approach that dictates which approach is the best one to use' (ibid).

For Blackmore, there is thus a necessary distinction to be made between the creation of digital assets for games and the purpose and use of those assets.

What you've got with Defence, for example, is a digital training environment. Their work is not so much the development of digital assets but rather the development of training scenarios from a pedagogical approach. So you have a library of digital assets and a world that you can compile that in, so you can establish scenarios around which you can develop training – e.g. U.N. peace keeping or it may be other scenarios ... Much of it isn't about using the digital environments for recognition or how to do certain things, but rather you get a team of people operating within it and then the training occurs in mastery of communication protocols or procedures and it just acts effectively as a prompt. So what you are after is the simulation scenario to act as that prompt (Blackmore i/v Sept 2016).

HunterNet, a regional manufacturing cluster, estimates that over 4,000 staff and contractors are engaged in the Defence industry in the Hunter region. Together with the Hunter Business Chamber, HunterNet has been working to grow the regional input to defence supplies, but appears handicapped by the global aggregation of SMEs into large corporate suppliers whereas the Hunter defence suppliers are largely SMEs. Parliamentary Secretary for the Hunter Scot MacDonald MLC recently said the region's defence and related industry is poised to do well, noting that:

The new Defence Research and Innovation Hub at Williamtown Aerospace Centre will be an exciting addition to the region, helping drive more innovative projects and growth in the sector including for start-up businesses ... Defence was worth \$1.3 billion to the Hunter in 2014-15, a quarter of NSW's spend. We have the largest regional defence presence in NSW with 4,000 defence personnel, prime contractors like BAE Systems, Boeing, Raytheon and Lockheed Martin, and a deep supply chain of smaller businesses servicing the sector ... The NSW Government's \$18 million Boosting Business Innovation Program has provided \$1.5 million to Newcastle University to establish four innovation hubs across the Hunter including a Defence Research and Innovation Hub at Williamtown Aerospace Centre to allow the university - with strengths in cyberspace, control systems, autonomous vehicles, simulation modelling, propulsion and energy storage - to work with defence companies to develop commercial opportunities. There is a growing market for local Defence start-ups focusing on technology innovation in the sector, such as Applied Virtual Simulation (NSWT&I 2017, online).

This confidence signifies the growing importance of software development and interactive media linked to real-world simulations and serious games. Part of this is enacted by Bohemia Interactive Simulations (BISim) which is most likely the best representative case of a serious

game environment to be found in the Hunter region. BISim is located in Nelson Bay and uses game-based technology, much of which is derived from their commercial games arm, as well as a significant and highly skilled in-house group of engineers to develop 'high-fidelity, cost-effective training and simulation software products and components for defence applications' (BISim 2018, online). BISim incorporates virtual reality hardware with its own software for training and their round-earth visualisation technologies allow military exercises to be conducted on an epic scale across all sort of terrain and urban locations as well as developing and using artificial intelligence to create predictable, understandable and customisable civilian and traffic behaviours in its comprehensive games environments (ibid).

Applied Virtual Simulator (AVS), a smaller simulation business associated with the Defence forces, was founded by Martin Carr. Carr is a former army officer who worked at defence software specialists Bohemia Interactive Australia prior to taking on his own business. AVS showcased their technology at the Australian Army Open Day in 2017. Carr indicates that he 'used my knowledge as a trained officer to design simulators to achieve training outcomes that I would have wanted and saw were required' (Green 2017a, p. 1). The company develops and upgrades simulation-based training systems such as simulators for heavy vehicles. Carr understands that 'the move to go solo was risky when considering the fact that it is difficult for small companies to gain traction against defence prime contractors. As an SME you tend to sell to prime contractors who sell to defence; we mostly sell direct to defence' (ibid). Carr also commented that 'commercial firms are now investing more in the area and leaping ahead. Gaming is so huge now and the pace of change is so fast' (Ibid). Carr indicated that he has been based at the University's Three76 Innovation Hub, but will soon move into a new co-working space with custom electronics SME Innovasy who are located in Newcastle West.

Apart from this major activity in the region with ready access to the Williamstown air base and Singleton Army Camp, there are also smaller companies operating in the Hunter who are not associated with other major industries. For example, Tim Davidson and Ivan Demidov are the principals of Virtual Perspective. They run separately another two companies. These are Demidov Innovations and Visualised Media-3D Animation. Tim Davidson outlines their businesses which operate out of the one workshop:

The three businesses reflect how our story happened. Ivan has Demidov Innovations which is an IT technology company and I have another business called Visualise Media – which is a 3D animation company. We met at DASH – a concept launch for the DANTIA co-working space. We had both been commissioned to do projects for them separately (virtual reality walk through plus a 3D fly-through of something else they were working on) and we were invited along. Ivan was working on 3D technology from a programming perspective and I was working on 3D scenes – that's what I do, I build scenes. We were a perfect match – so we started working together. I build scenes and then Ivan works with them for the VR' (Davidson i/v July 2016).

As Demidov adds, 'I work to build the engine and Tim makes them look really good' (Demidov i/v July 2016).

We work mainly on our own with external collaborators or use others who have specialist skills. We have an intern starting with us in a few weeks so we can teach her all that things we do so she can do it herself and then go onto maybe end up

working for us one day. We would like to get to a stage where we could employ people who are also passionate about this technology. And have an office, like – there is a company on the Central Coast that is pretty well the largest host provider in Australia now. Started out on a garage on the Central coast – so that is possible now. We work with others to increase our capabilities – we work with a guy in Sydney who does 3D scanning and photogrammetry. We also have contacts who do drone flyover footage. What one of my other businesses does is to take that drone footage and I superimpose a 3D object building on drone footage. That allows real estate companies to show their investors what the building will look like when it is finished, when it is that location but with the existing cityscape around it (Davidson & Demidov i/v July 2016).

Jet Flight Simulator Newcastle is another VR/AR experience that is locally based. It is located in Newcastle West and, as their website indicates, the business offers an immersive ‘flight experience to suit the complete novice right up to highly experienced commercial pilots wishing to pass the Air Line Candidate Recruitment Assessment Check Flight’ (JFSN 2017, online). Customers are met by a ‘First Officer’, all of whom have experience in aviation industry, who initiates a pre-flight briefing where the basic checks are completed and an introduction to the relevant features of the flight simulation are given. Customers then choose the conditions of the flight which includes weather and a choice of a possible 22,000 airports to take-off and land at. They are instructed on ‘the primary controls, instruments and procedures necessary to be ready for take-off. After permission from Air Traffic Control you will accelerate the plane down the runway and take-off’ (ibid). The flight is fully immersive as customers/pilots manage airspeed, altitude, headings and so on while monitoring other air traffic. As with the real world this virtual one provides multiple screens, indicators and monitors to simulate the real experience.

15.6.2 The Games World in the Hunter

Linked to both the role and future of VR and AR, the related games world in the Hunter, in terms of production, is quite small. This appears unusual in that in June 2017 The Australian Bureau of Statistics released a report which showed that total income from the Australian games industry had jumped 24% to \$111.1 million from 2011-12 to 2015-16 (Walker 2017, p. 1). However, nobody from the Hunter Region was listed as a member of the Games Developers Association of Australia as at 7 October 2017 (GDAA 2017, online). There is still, nonetheless, a small enclave of traditional and digital games related activity In Newcastle’s West End. Run by Deitmar Leiderwasch Hunters for Collectors, a comic and pop culture shop, provides, in small part, access to board games that pre-existed the digital world. Just down the block Good Games is part of an international franchise which gives customers access to fantasy games such as *Dungeons and Dragons*, *Warhammer* and *Rune Wars*. These fantasy games have acted as precursors and models for what are called massive multiplayer online role-playing games or MMOs for short. They in turn have spawned the phenomenon of e-sports with businesses such as Gomaz v Pedro now operating further along Maitland Rd in Tighes Hill.

As reported in The Newcastle Herald (Green 2017, online) in March of 2017 Tom Cupitt and Josh Freinberger have used the names Gomaz and Pedro since they were teenagers playing electronic games in Warner’s Bay. The business they now run grew out of their interest in gaming. Cupitt owned and operated Cardiff Golf Driving Range and the pair ran occasional gaming tournaments as a fun sideline. The community they catered to grew exponentially and not having enough adequate internet connections at the golf range forced them to relocate this

aspect of their business. They now own and operate Gomaz Vs Pedro, an e-sports centre located in an old cinema in Tighes Hill. The location now functions as a games centre and internet café using FTB internet connections and they not only have multiple Nintendos and Playstations customers can access but, importantly, their business relies on 24 individual PCs. They charge for their use on an hourly basis and they also do ‘computer repairs and PC and console updates – it can download large files quickly compared to the multiple hours it would take to download at home’ (ibid). Significantly, the business hosts live tournaments that are streamed via Twitch ‘the world’s biggest video platform and community for gamers, creating advertising revenue in the process’ (ibid). These niche games are big business in the USA with tournaments filling stadiums where contestants, mainly teenagers, can earn seven figure incomes. After starting out, Cupitt and Frierberger have ambitions to franchise their business nationally and ‘create a gaming circuit where the best of the best compete ... we want to build it to the point that you can watch a tournament in the same way you can watch a professional sport’ (Cupitt in Green 2017, online).

Outlets such as this are a major nexus point for gamers in the region. Independent stores and franchised chains are all accessible in the region. These include DownForwardPunch, Highway Entertainment and Games Workshop as well as JB Hi Fi and Jaycar Electronics in Newcastle. In Lake Macquarie there is, once again, JB Hi-Fi, TimeZone, The Games Shop, Electronics Boutique, Unreal VR, Gamer Collect and NewXpress in Swansea. Maitland has Playhard Gaming, Sanity and Good Games. EB Games has outlets across the region. This multinational company which is headquartered in Texas in the USA, has 370 locations with 4,000 employees in Australia, is located in the region at malls such as those in Kotara, Charlestown, Jesmond, Maitland, Singleton, Muswellbrook, Forster, Raymond Terrace and Salamander Bay. As well as supplying games for PS4, Xbox One, Nintendo, Phones and PC, they also retail a wide variety of consoles and accessories. They trade games, refurbish and on-sell second-hand consoles and phones while maintaining a large community of gamers through their various events and promotions aimed at the consumers of games (EB Games 2018, online).

Cameron Baker is one of those in the region who has moved beyond the consumption end of games. He works ‘in game development. I’m a graduate in the field and work for a Sydney firm but from home in Newcastle’ (Baker i/v Nov 2016). For him working in the gaming industry in Australia means a variety of things. ‘It generally means any interactive technology. That can encompass anything from traditional games to mobile games and apps, to installations at museums and exhibitions – anything like that’ (Baker i/v Nov 2016). He feels that he has been fortunate in being able to work in his chosen field of gaming full-time, employed by a small but growing company with overseas and local quality clients. These clients include a major bank, a national museum and a range of American automotive shows. Despite that, he doesn’t feel secure in his employment as the company is fairly new and the competition is strong. He indicated that:

The industry in Australia isn’t there for big-budget games. So, I’m trying to push getting as much experience as I can – building up my portfolio and skill set to make me a more attractive recruit for an overseas company. Depending on whether you can get overseas – you can do independent game release in Australia which is more small-team work, more apps but you need financial support. And there’s no support for game development in Sydney or here – some in Melbourne but not in NSW. I got my job here through networking after University, but other people are still pulling coffees (Baker i/v Nov 2016).

Baker's partner, Emma Leggett, studied interactive entertainment but when she found work it was in a digital agency with multi-media marketing material. Here she was involved in website production, and creating videos and website assets, content for brands while working as a producer. 'I'm kind of management for the creatives' (Leggett i/v Nov 2016). Her own company 'works with large and varied clients, so we do a lot of print ads and develop web-sites for banks, luxury cars. We have recently done some work for a gaming publisher. My market is a bit more traditional' (ibid). She too knows people who are without work in the field some years after graduating. Emma remembers how stressful it was at that time:

Trying to find a job because despite the fact that there was a lot around, they wanted juniors with two or three years' experience. So, I applied for a lot of different sort of jobs but I didn't get many call-backs because I didn't have a lot of experience at that point. I got lucky because I know a lot of people from Uni who don't have a job in the industry but I do remember it being very stressful because I had a casual job at the time and there are a lot of bills to pay and if you are in a casual job like I was – it's that you have to think about being full time in retail while you are looking for another job because you just can't provide for yourself in a casual job. But I was lucky, I got my job. I have been holding onto this one. However, I don't think that there are very many games opportunities. If I have to live somewhere in Australia, I think I'd prefer Melbourne or something like that. There might be opportunities there to work in the games industry and not around here (Leggett i/v Nov 2016).

Since the interview, Leggett has pragmatically moved on from her desire to enter the games field and has taken up a new job working as a multi-media specialist with a major television network.

15.6.3 Software Applications in the Hunter

Technology convergence and digitisation, renders it increasingly difficult to analyse, differentiate and report on the integration and separation of the digital economy and the creative industries, especially in the related sub-sectors of software applications and interactive media. However, while the apps industry has grown phenomenally quickly on the back of the popularity of smartphones and tablet computers' (Goldsmith 2014, p. 344) there isn't a great deal of activity with apps in the region. Development is sporadic and there isn't a critical mass of developers. To foster further activity The Lunaticks Society hosts the NEWi Awards for Digital Creativity and attract entries from local, national and international companies. Some of the companies that were significant entries in 2016 and 2017 were Social Pinpoint and HaloSOS.

Social Pinpoint is an 'intuitive drag & drop mapping tool for engaging your community in projects and planning. Allowing community members to add categorised feedback to a live map gathering GIS information & stakeholder input' (SP 2017, online). It is a subscription-based, interactive tool, developed locally, extended into Canada, the US and New Zealand to be finally taken over by Consultation Manager having resolved hundreds of projects with hundreds of

thousands of responders. The local company representatives are now working out of a creative industry co-working space.

HaloSOS was designed to have an impact on student safety by helping first responders to reach people faster, reducing the opportunity for crime to occur or escalate. It enables people to raise an alarm without having to find and manually handle a phone at the time of an event, providing a practical duress solution that includes a voice activated smartphone app, which tracks both indoor and outdoor via GPS and BLE location updates. Aerial drone deployment can also be integrated. The team are tenants at Three76, Innovation hub.

A more fully established business CIBIS International is located in Hunter Street in Newcastle and has been 'designing, coding and managing business software solutions and digital platforms for almost two decades' (CIBIS 2018, online). They are 'a leading Australian developer of custom business software, web and mobile applications' (ibid) and they develop software from 'tiny IoT devices or mobile device applications ("apps") on both iOS and Android platforms, through typical desktop applications to web based business critical enterprise systems serving hundreds of users and processing thousands of transactions' (ibid). They are involved in 'business systems, hosting infrastructure, custom software, hardware and consulting service [for] corporate brands, universities, local councils and government clients' (ibid).

Futura Digital is located in Telford Street Newcastle and they build, among other things, websites and apps. They have worked with a number of organisations to 'complete a variety of online projects; from mobile app design and development for local startups, to app and eLearning development for the NSW Government' (Futura 2018, online). They deliver iOS, Android and web apps and their blog suggests that:

With the success of many apps such as Uber, Instagram and Snapchat many businesses decided it was their time to start releasing apps. Not many decided to also look at their web presence, however. Without a stand-up website, it is hard to compete online. Even though App Store Optimisation is important, without actually having a web presence it is hard for consumers to find your app. This is why Search Engine Optimisation (SEO) is still important very important in 2018. Trends such as Progressive Web Apps are becoming increasingly popular. Even though it is only supported on Android as of this post, more businesses are realising it is imperative to make websites optimised for mobile as well ... More and more apps are giving us services that can be requested on demand. Apps such as Uber and Lyft are good examples of this. The convenience and availability of nearby services make consumer and business lives a lot more convenient and easier. The next development of these apps will be location-based offers. Good examples of these options are Groupon and Scoopon, who are already offering the best deals based on your location, however, with the technological developments these options are becoming increasingly accessible to smaller businesses as well ... Compared to all other items on this list, AI is the most established already. AI has been popularised because of products such as Amazon Alexa, Google DeepMind (AI), Siri and Cortana. Google has recently unveiled their new AI voice called Tacotron 2 and it is very difficult to distinguish from any human voice. This is the voice that gets used in the popular product Google Home. The more human AI can be made the more consumers will start using it and communicating with the AI bot. Many of the processes we discussed here will also use AI in their Cybersecurity, Intelligent Apps and Virtual Private Assistants will all use AI to improve their services. Some of the ways that AI can improve services is by creating chatbots that will be

indistinguishable from humans, answering questions that users may have. However, AI is expected to do more than just be an assistant in the future. Being able to detect diseases, improving web design options and being an assistant is just the start of this trend (Futura 2018, online).

Headjam, located in Newcastle West, suggest that ‘mobile app development involves planning, designing and creating mobile software for use in a range of contexts. This process requires a careful execution of safe guards and systems that ensure your app is created to deadline and budget’ (Headjam 2018, online). This company, among many other services it offers, has ‘the ability to complete high-end mobile app development, and specialise in the latest software solutions to be used across all types of mobile devices, from mobile phones to tablets’ (ibid). They are skilled in getting these to market ‘creating apps for clients across a wide variety of contexts, but specializing in health and education’ (ibid). Their clients include the TINA festival, HUNTERhunter blog, Hunter TAFE and Mindframe.

15.6.4 Education for Software and Games in the Hunter

For education in software development and electronic games, the University of Newcastle offers the Bachelor of Information Technology degree program. The University claims that:

Our information technology majors are designed to meet industry's evolving IT needs. You can focus your courses around business technology, learning to design and manage complex software systems critical for big corporations and government. You'll be equipped to develop cloud-computing solutions or specialise in IT security. If your passion is media and entertainment you could learn to create exciting new games and 3D animations, devise new content delivery platforms or work for a digital media agency. Or, study systems development and learn to create apps and programs for just about any industry: manufacturing, healthcare, social enterprise, renewable energy, education (UON 2018d, online).

The core skills the degree focuses on include those used for ‘building software that uses complex databases and sophisticated web interfaces suitable for a whole range of applications – from the corporate office to the mobile phone’ (UON 2018d, online). The list of course related material includes ‘computing fundamentals, web technologies, programming, databases and information management, foundations of information systems, human computer interaction, systems analysis and design, systems and network administration, business analysis [and] project management’ (ibid). In the third year of their program many students ‘undertake a major industry-linked project’ (ibid).

The Hunter TAFE also offers certificate and diplomas in this area. For example, the Diploma of Digital and Interactive Games is focused at the career area of the Creative Industries as well as Media courses.

This qualification provides the skills and knowledge for an individual to be competent in a variety of skill areas within the digital and interactive games industry. It provides an opportunity to develop the design, graphic/digital media and programming skills required in the development of digital games briefs, either as a small independent specialist or as part of a larger team. The qualification also provides opportunities to work in new and emerging games genres, such as online game development, mobile device gaming, interactive internet and TV game development (HunterTAFE 2018, online).

15.7 Conclusion

Recent modelling by Price Waterhouse Coopers (2015) on economic opportunities created through digital change, identified that the small businesses in the Hunter and Newcastle Federal electorates could unlock \$897m of increased private sector output across the coming decade through improved access and use of mobile and internet technologies. The electronic games and interactive software sector is integrally linked to such opportunities.

The analysis of Australian Bureau of Statistics (ABS) data for the Hunter Region revealed 1,180 people who responded yes to representing the categories of 'Electronic Games and Interactive Content', 18.1% of the cohort characterised as belonging to the Creative Industries. However, as with all areas of the creative industries we found overlapping sectors. The ABS data calculated these figures from a range of sub-sectors with occupations included in the ABS data for this sector of the creative industries including web designers, developers, graphic designers and illustrators, multimedia designers and specialists, software and applications programmers, ICT Business Development Manager, software engineers and applications programmers, developer programmers, ICT business and systems analysts, analyst/programmers, technical writers and systems analyst. It is easily seen that even at the design level (without consideration of other elements of the related ecosystem) straightforward quantitative statistics find it challenging to capture the complexity of the field. What has emerged from our review of this relatively new sector is the distinctive and possibly unique characteristics of the scene in the Hunter, with significant elements reflecting the region's industrial history and collaborative culture, namely:

- The links to traditional sectors such as defence, mining and heritage interpretation through sophisticated simulations and VR.
- A regional support system that has emerged organically and is now being formalised to encourage ecosystem engagement and growth in creative digital start-ups, early-stage businesses and innovation within established companies.
- Support of new industry opportunities such as IOT and smart city and green technologies.

While the region demonstrates the popularity of the electronic games industry primarily through its retail outlets, we found little evidence of commercial game development for the leisure market or any considerable commercial development of software application. We do however note that such activity may be 'hidden' from general statistical or public domain information. It is of note that Newcastle City Council has taken on the notion of being a smart city. Smart cities are generally accepted as cities that use technology to improve community life which means a reliance on ICT. Smart cities' strategies broadly aim to enhance liveability, wellness, sustainability and efficiency and to support initiatives in the areas of community engagement, information sharing, environmental monitoring and personal welfare. This will open up opportunities in software development and interactivity in the future. The suggested outputs within the NSW ICT strategy are relevant to achieving the objectives and operations of smart cities while the development of data management systems and applications for business, civic and personal usage are central to work being undertaken locally, particularly in Newcastle and Lake Macquarie local government areas.

Creativity & Cultural Production in the Hunter

An applied ethnographic study of
new entrepreneurial systems in the
creative industries.



Final Report:
Hunter Creative Industries

Architecture

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16. ARCHITECTURE

16.1 Introduction

According to Hays (2017) architects can no longer be conceived as simply designers of function and beauty. He suggests that ‘today’s architect is also a designer of sustainability who must comply with increased legislation and codes, experiment with new materials and continuously advance their skills in the latest technology, all of which advances rapidly’ (Hays 2017, p. 1). For Philip Cox architecture can be divided into two broad categories:

The first, the product of the literate or professional, where architecture is a conscious, deliberate and intellectual process, usually practised by people of skill; the second category being popular architecture built relatively unconsciously by the public generally and within the building industry as a whole. For my purpose this latter area is called vernacular architecture. The former architecture is called High style and, throughout history these two streams have reacted and interacted with each other (Cox 1984, online).

In those interactions architects are the creative, innovative and skilled professionals who sit ‘at the centre of Australia’s built environment industry, a \$100 billion sector employing over a million people’. As such architecture, like visual arts, music, dance, publishing, television and radio, is a ‘mature’ exemplar of the creative industries. Perhaps, more than with most of the other forms, it had an ‘industry’ link early in that it, or its ancestral forebears, fulfilled an instrumental function from pre-historic times.

16.2 A Brief History of Architecture in Australia

There were villages and towns in Australia long before the Europeans arrived. These communities were possessed of sturdy dwellings designed to accommodate the climate and the geography of the regions they existed in. As Bruce Pascoe asserts, ‘design features had been developed to make harsh environments habitable’ (2014, p. 78). These buildings were strong, aesthetically pleasing and comfortable (ibid). ‘Building types varied according to the material available’ (Pascoe 2014, p. 88) and as a consequence there were open cane-roofed dwellings in the north, thatched-roof permanent dwellings further south, as well as strong houses in the south east and in the alps where stone was used as a basic building material. Some buildings were dome shaped with a consistent style and orientation of quite large buildings which also included smaller buildings attached to these to store food, where ‘yards attached to these storehouses were used as animal holding pens’ (Pascoe 2014, p. 79). Some of the domed constructions also had verandahs appended for shade. Gardens and wells were also part of these establishments and ‘about these areas glades and grasslands had been cultivated after water had been assured by industry ad innovation’ (ibid). In fact:

Large populations of Aboriginal people were manipulating the Australian environment and husbanding plants to produce surplus food of such great quantities that populations could lead more or less sedentary lives in the vicinity of their crops (Pascoe 2014, p. 78).

Much of their architecture was documented by explorers and surveyors and later ‘protectors’ but this evidence has not been given the cultural weight it deserves. The Europeans, largely

ignorant of the conditions they were sailing into, bought their own architectural designs with them.

When the First Fleet arrived in January 1788, there were two prefabricated buildings on board, destined to become Government House and the Government Store. They were timber and canvas constructions and fell apart almost immediately. As Governor Phillip complained in letters to his superiors, the roof of his 'home' leaked, vermin had free reign and it was excruciatingly hot in summer and freezing in winter. After a few weeks, he ordered one of the convicts, a man called James Bloodsworth, to start building a more permanent structure (van Teeseling 2018, online).

Bloodsworth worked with what he had to hand. He was by profession a master bricklayer and builder but the tools available to him were not quality ones. There also were no nails as there were no transported blacksmiths. Pressing on, Bloodsworth took some months with the help of convict labour to build a permanent European style building, one of the first to exist in the colony. It did not last too long. The bricks were made using an inferior process and the mortar was mud 'or lime made by burning oyster shells' (ibid). This latter resource was to prove important in opening up settlements on the Coal River, later to be renamed the Hunter. The buildings Bloodsworth was imitating and building were Georgian which was fortunate as this architectural style 'paid close attention to the human scale. It preferred simplicity and control as opposed to elaboration and decoration which came in with the Regency Style influences' (Rappoport 2011, online). This no-frills simplicity and symmetry 'made it relatively easy to build' (van Teeseling 2018, online). Many others in the colony observed what Bloodsworth was doing and convicts, soldiers and settlers all emulated him, if they had the money to do so. 'Brick was expensive and difficult to make, so most people opted for timber, and the wattle-and-daub construction' (ibid).

Four corner posts were put in the ground, with timber stakes to hold them together. Long rods of wattle (really Acacia, the floral emblem of Australia) were then interwoven and made more-or-less weatherproof with a mortar made of clay or loam with grass or horsehair. The roof was generally constructed of grass, reeds or bark, with a chimney of stones and turf and an earthen floor. If people had money and time (or access to convict labour), they would whitewash the outside and line the inside walls with painted hessian or newspaper. Because only very rich people could afford glass, most houses had small windows, with blinds made of oiled calico (van Teeseling 2018, online).

These first European buildings in Australia were related to the immediate needs of the colonies – prisons, hospitals, public buildings, lighthouses, forts, barracks and churches. Wealthy colonists such as John and Elizabeth Macarthur who were familiar with the British military building style that had been established in India, 'adapted that building style to the local circumstances' (ibid). Their buildings, which came to exemplify the colonial style, were comparatively large, single story with verandahs to cool the house in the summer heat and were made from sandstone which 'had to be quarried and then moved to site, which made it expensive' (ibid).

When Lachlan Macquarie arrived in 1810 he was insistent on ordering what had been perceived as an unruly colony and 'he set up a program of public works, consisting of building and widening roads and commissioning and constructing hospitals, banks, schools and churches' (ibid). He also left his mark in sandstone. Macquarie was fortunate to have at his disposal a bankrupt architect who had been transported as a forger. Francis Greenway built 'the lighthouse

at South Head, Hyde Park Barracks, St. James' Church, the Parramatta Female Factory and a new and improved version of Government House' (ibid). Macquarie also instituted stringent building regulations with dwellings now to be made of brick or timber. Of course the wealthy used the former and the latter became the architectural province of the poor. Weatherboard cottages soon became a staple of the Australian landscape.

The standard for everybody but the most affluent, was the weatherboard cottage. It was half the price of brick and most people could make it themselves. It had a simple design, with two rooms at the front, a door in the middle, a central hallway and two rooms at the back. Most weatherboard houses had a respectable, neat front garden and a working garden at the back, with a vegetable patch, a kitchen and a dunny (toilet). Over time, weatherboards would be extended and made more luxurious, but from halfway into the 19th century most of them had moulded skirtings and architraves inside, were clad with timber lining boards and had a veranda at the front and/or the back, to protect the walls from rain and sunshine (ibid).

Once corrugated and galvanised iron sheeting became readily available in 1837 most weatherboard cottages had their shingle rooves replaced with this durable and easily transported material.

In 1830, British builder John Manning constructed a portable wooden house for his son, who was getting ready to migrate to the Swan River (Perth). It was a simple timber-and-iron construction, packed in a crate and delivered at the docks. Soon Manning decided to market the idea as Manning's Portable Colonial Cottages, which was a great success. The building could be put on a bullock dray, taken to its site and erected in mere hours or days. Especially after mining started in the early 1840s, these prefab places caught on. In the 1850s, Manning got a competitor in Samuel Hemming, who even offered prefab churches, completely fashioned out of corrugated iron. Hemming's buildings were much cheaper and lighter than wood, and even easier to erect, but they were not very well insulated. Extremely cold in winter, almost unbearably hot in summer, the squatters, selectors, miners and farmers who ended up in them paid a high price for having a roof over their heads. But corrugated iron would remain the quintessential Australian building material (van Heeseling 2018, online).

With the Gold Rushes, and the influx of those from a diverse set of cultures seeking their fortune in Australia, came another form of architecture which began to dominate major urban areas. 'Between 1840 and 1890, Georgian architecture was out and Victorian (named after the new Queen) was in. Architects in Britain started to design in a different way, and as usual Australia followed. The simplicity of the Georgian buildings was replaced by the over-the-top style of the Gothic Revival' (ibid). The remnants of this can be seen in most older inner city urban suburbs and in some of the grander buildings from this period that still prominently exist in places like Bathurst, Bendigo, Ballarat and Melbourne. Apart from the rows of terraced housing the boom period saw large homes and public buildings that featured intricate brickwork and an extravagant style where they featured 'excess columns, balustrades and exaggerated entrances' (HOH 2017, online). Buildings in Melbourne in particular looked back to Europe with inspiration coming from forms of Italianate architecture and designs using a variety of sources such as French Renaissance-inspired architecture (VV 2018, online).

In the 1870s architects in Australia began to form themselves into Institutes or Associations. The New South Wales Institute of Architects was formed in Sydney in 1871 ... first named

‘The NSW Society for the Promotion of Architecture and Fine Art’ with an objective being ‘scientific knowledge and the promotion of friendly intercourse between its members’. With the formation of the rival ‘Academy of Arts’, the Society changed its name to the more formal name of the NSW Institute of Architects ... The Institute federated with other states and received its Royal Charter in 1929 (Reedman 2008, p. 15).

By the time Federation arrived designers were drawing on English Tudor styles and mixing these with other influences. As a result the period 1890 to 1915 saw buildings that featured elaborate verandas integrated into multi-faceted roofs, often double bricked, ‘stucco chimneys topped off with a terracotta chimney pot, timber framed windows with intricate leadlight [and] high ceilings with highly decorated plasterwork’ (ibid). These are still very popular and are sought out by restorers and renovators. Similarly for what is now known as the Queenslander.

As Peter Newell argues, the development of the Queenslander represents ‘the strongest regional identity in creation of a native indigenous style’ (1979, p. 1). With sawmilling being an important part of the local economy in the 1850s timber had become easily accessible. Along with the abundant supply of corrugated iron, and its use in a climate where heat and storms were dominant, these resources soon became the core of Queensland construction and design. Since timber was vulnerable to rot and termite attack stumps were used to raise the building off the ground. This gave the added benefit of providing much needed ventilation and ‘airflow was enhanced by numerous windows, louvers and fretwork fanlights. Verandahs proved popular in providing additional living space that was outdoors yet protected’ (QM 2018, online).

In the 1900s, the use of new materials and technology coincided with a flood of utopian ideas about what it meant to be modern. While physical function was seen as important, it also needed to be balanced by an emotional, spiritual and social sense, often influenced by the ideals of the Australian Arts and Crafts movement to reflect on something that was uniquely Australian (Australian Government 2017, p. 4).

During the period between the First and Second World Wars, a mix of Edwardian and California bungalow style became prominent in most Australian cities. The Californian bungalow looked back to the weatherboard cottages but was simpler and more elegant in conception.

The ceilings had come down, it was usually one level and very plain. The only ornamentations were two brick or metal columns holding up the front veranda, a picket fence and a gabled roof. If possible it would be built out of brick, but otherwise timber would have to do. If brick was the preference, but not within the budget, a choice would be made for what is now called brick-veneer: an inside structure made of wood, then an air cavity (an Australian invention), capped off by a non-structural outside layer of bricks. It was lightweight, thermally efficient, cheap and even non-professionals could put it up. Hundreds of thousands of Californian bungalows were built between 1916 and 1945, because they were especially suited to the soldiers who came back from WWI (van Heeseling 2018, online).

At the same time as ‘the pastoral boom of the 1950s caused a spate of homestead building, much of which was architect-designed’ (Newell 1979, p. 28), house building in the cities was growing apace with a growth in population. Modernism took hold and the suburbs became an expression of this movement with the advent of replicable fibro cottages which were described

by architect Robin Boyd as ‘Australia’s worst failing’ (Australian Government 2017, p. 1). In contrast the inner cities featured an array of styles.

As Sophie Hill from the University of Melbourne indicates, ‘architecture shapes our cities. It creates iconic skylines, signals great civilisations and builds must-see landmarks which define entire countries. Architecture has the power to capture imaginations hundreds, even thousands, of years after it was built. Less obviously, it guides and controls our way of living, the way we use space, navigate our cities and create communities’ (Hill 2018, online). Many of these ideas are captured in buildings such as The Academy of Science at the Australian National University in Canberra, or the Eddie Koiki Mabo Library at James Cook University or the Frank Gehry designed Dr Chau Chak Wing, colloquially known as the ‘Paper Bag’ building in Sydney, or any number of other famous architectural sites in the country. It is perhaps the internationally recognised Sydney Opera House, now a UNESCO World Heritage site, which encapsulates much of what Philip Cox described as the High style where architecture is largely ‘a conscious, deliberate and intellectual process’ (1979, online).

Jan Utzon’s Sydney Opera House was interesting in that it was a completely unique design for an activity (attending Operas) that was completely alien to most of the local population, but a design that seems to resonate so widely with the people that it became an icon. To some people, the Opera House reminded them of shells that they might find when walking along Sydney’s beaches. To others, the Opera House reminded them of the boats that sail in Sydney harbour (CC 2018, online).

While there was at times bitter disagreement about the design and what it was supposed to represent, eventually it came to be a firm part of the national identity, whatever that might be, and is easily one of the most recognisable pieces of architecture in Australia. It is now part of our dreaming.

The history and scope of Australian identity can be seen in the range of its buildings – from both the austere and also grand regent style colonial architecture through the practical minimalism of Australian modernism to a post-colonial world which incorporates the indigenous experience of the country (Australian Government 2017, p. 6).

From the early work of architects such as Greenway the range has become great, from the shearer’s shack to the mini-mansions of Point Piper, Toorak and the Balmoral Slopes, to the Queenslander, the wool shed, the beach house and the McMansion.

Today, following graduation, architects are well supported through professional associations such as the Institute of Architects (now representing some 12,000 members and similar to an employee group, providing services and professional development to members); The Australian Architecture Association which promotes architecture to the public; Professional Architects Australia; the Association of Consulting Architects (representing employers); the Architects Accreditation Council of Australia (2016, 2016a), State and Territory Architects’ Boards; and other specialist groups - Association of Architecture Schools of Australasia and Government Architects Network of Australia alongside a number of related groups in construction, design, building design and landscaping – all groups from the sectors recognised in ABS statistics. There is also a well-established system of industry awards and prizes that acknowledge achievement in the field.

16.3 Structure and Change in the Architectural Industry

Architecture differs from some other sectors, although not all, within the creative industries in that it is regulated by a formal Act of Parliament through the Architects Registration Bill NSW which from 1921 has protected the name ‘architect’ and has required architects to be registered subject to qualifications. Reedman notes that ‘the first NSW registration roll was published in 1923 and, out of 380 architects, 23, or 6%, were from the Hunter. In more recent times the proportion has steadily increased to a constant 10%’ (2008, p. 15).

Architectural practice is more fragmented than other professional services areas such as law or accounting with greater representation by small practices – perhaps reflecting the creative focus of the work, although there are some large companies and some people work directly for Government agencies. According to the ABS (and we note, that in all our statistical estimates, the figures from different sources, do not reconcile) in 2012-13 there were 7,027 non-employing businesses in the architecture sector, 6,147 businesses with 1-19 employees, 203 businesses with 20-199 employees, and only 14 businesses with 200 or greater employees (AACA 2016, p. 6).

According to the 2011 ABS Census reported by AACA (ibid, p. 3), of those nominating as ‘architect’:

- 60% were based in Sydney or Melbourne with only 11 per cent based outside capital cities;
- 80% were working full time and 52 per cent worked more than a 40-hour week;
- 37% were business owners or sole traders;
- 63% earned above average income (compared with 66 per cent of all professionals); and
- 27 were indigenous (0.002% compared with population parity of 3%).

In summary then, architectural practices tend to be small and located in large centres. Most architects work full time and many work more than 40 hours per week; most earn more than the average income, women are under-represented and very few are indigenous.

Major overseas-based companies are increasingly engaging with the Australian market through buy-outs of local firms; forming alliances with Australian companies (e.g. DWP of Thailand joined with top 10 Newcastle firm Suturs Architecture to form DWP Suturs); or opening their own Australian offices. Architectural services offered by companies such as GHD (Australia) also make them top tier providers (AACA 2016).

Conversely, Australian architects now export services to other countries, one example being China where growing economic strength means people can invest in such services and in green buildings and environmental sustainability and have done so across a range of categories including commercial, industrial, residential, retail/mixed use, tourism and leisure precincts, sporting facilities, education facilities, waterfront and marina, aged care, landscaping, interiors and urban transformation (Austrade 2017a). Architectureau (2000) also listed an extensive range of projects delivered overseas by Australian architectural firms – the US, London, France, Poland, Spain, Glasgow, Bangkok, Kuala Lumpur and others.

The AACA reported (2016, p. 7) that uncertain conditions in this sector would continue to be subject to change including a continuing ‘consolidation of mid-tier firms into large (often diversified) professional services companies, increased interest in strategic partnerships among architectural firms, and between architectural firms and other elements of the built environment sector’ (ibid) to help sustain business models with many firms seeking to broaden their revenue base by further consultancy work in addition to their building design work.

There is also a growing trend to purchase services from overseas companies to supplement capacity. As Hay indicates, ‘more and more companies are offshoring the labour-intensive aspect of their work to reduce costs – a trend that is having an impact on local jobs and in particular on training opportunities for young architects’ (2017, p. 1). In June of 2014 there were approximately 12,000 registered and practising architects in Australia, working in businesses with an income of \$6.4 billion in 2014-15, generating a profit of \$603 million - 3706 of those (2,804 men and 902 women employed in 1,337 registered companies) work in NSW (AACA, 2016). In 2011/12, the architecture segment contributed around 10% of total Industry Gross Product and 9% of total employment for the creative industries (CIIC, 2013: 11-12).

16.4 Business Models

Architecture is a fee-based, service industry and closely linked to cycles in the building industry which went into a sustained downturn in 2009 after which large architectural firms became dominant through their control of international work because in an unstable, risk-averse economy, clients with large and complicated projects also require capacity to manage litigation and long-timespan projects and specialists who can handle contingencies (Cuff, quoted in AACA 2016, p. 7).

IBISWorld notes that the business of architecture is changing and large architecture practices are growing – particularly at the expense of mid-tier firms – with many architects also now working in major engineering and project management companies such as GHD and AECOM where the focus of is on delivering whole projects at the lowest cost and design-related factors may not be the top priority (AACA 2016, p. 7). According to IBISWorld core pre-design, design and documentation work typically constitute around two thirds of work undertaken by architectural businesses. The architectural client base is split between residential building (36.3%), commercial/industrial building (37.3%), public works (18.8%) and non-building work (7.6%). An estimated 5 to 10 per cent of single residential homes are architect designed, while architects are involved in the majority of public buildings, commercial spaces and multi-unit developments. Architects face growing competition from building designers, building contractors, engineering concerns and industrial/ interior design firms (AACA 2016, p. 6).

16.5 Operational Methods and Important Personnel

Australian architects are registered by a state or territory Architects’ Registration Board after a minimum two years of professional practice, set log-book hours and further professional examinations. However, there are few professional services reserved for architects in Australia so that people who are not registered as architects can offer similar services as ‘building designers’ or related titles. Only a proportion of those who study architecture go on to registration with about half following related roles such as generalist management or other fields of design such as landscape architecture, interior design or urban planning where registration is not needed. There is a fast track registration process for experienced overseas-trained architects and there are reciprocal rights for Australian architects who wish to work overseas.

A typical architect operates within a common set of characteristics. For example, Connolly, in an analysis of the 2011 Australian Census, concluded that:

- Architects work long hours compared with other Australian professionals.

- Architecture is a demographically older profession.
- Architecture is characterised by higher numbers of owner/managers than Australian professionals generally, suggesting an industry with numerous smaller enterprises.
- Wage levels in architecture are broadly equivalent to other professionals in Australia.
- Women's participation reflects graduation rates until age 30, after which there is a steady decline in their representation despite increasing numbers across all age groups with women are more likely to work part-time and with wage discrepancies between men and women (Connolly 2014, p. 22).

Good architects are known for their design work and their ability to deliver on a client's wishes and preferences while still meeting the demands of planners and environmental regulations alongside national building codes, budgets and other constraints. AACA lists the following tasks that fit within the role (2016, p. 7).

- Pre-design, scoping and feasibility work
- Building design
- Documentation of building projects
- Procurement of building services
- Contract administration
- Oversight of building works
- Post-occupancy evaluation
- Other design services (e.g. interior design, urban design, landscape architecture)
- Consultancy work, including project management and strategic planning
- Training and education (e.g. adjunct and sessional university teaching)
- Service to the profession (e.g. boards, committees and juries).

Consequently, architects work with building contractors, engineers, lawyers, accountants, tradespeople, plant operators, drivers and many other occupations. Today, as before, architects work with a range of other professionals to deliver a client's project.

16.6 The Architectural Sector in the Hunter Region

16.6.1 Introduction

As Australia's first major colony outside Sydney, Newcastle and the region have long-standing links to practitioners of the built environment. Architectural historian Les Reedman's overview set out in his book *History of Architecture in the Hunter* (2008), reports on the region's growth through coal mining, manufacturing and heavy industry with Maitland assuming an early role to serve agriculture and valley settlement whilst, later, Newcastle became the export port. Both centres developed substantial buildings with Sydney architects designing most principal non-government buildings while local architects commissioned for some equally major projects. Reedman notes that Maitland and Stafford (1997) estimated that of the buildings of interest and quality in Greater Newcastle, with 127 being built between 1840 to 1940, half were designed by local architects suggesting that an effective local architectural profession was in operation in the region by then.

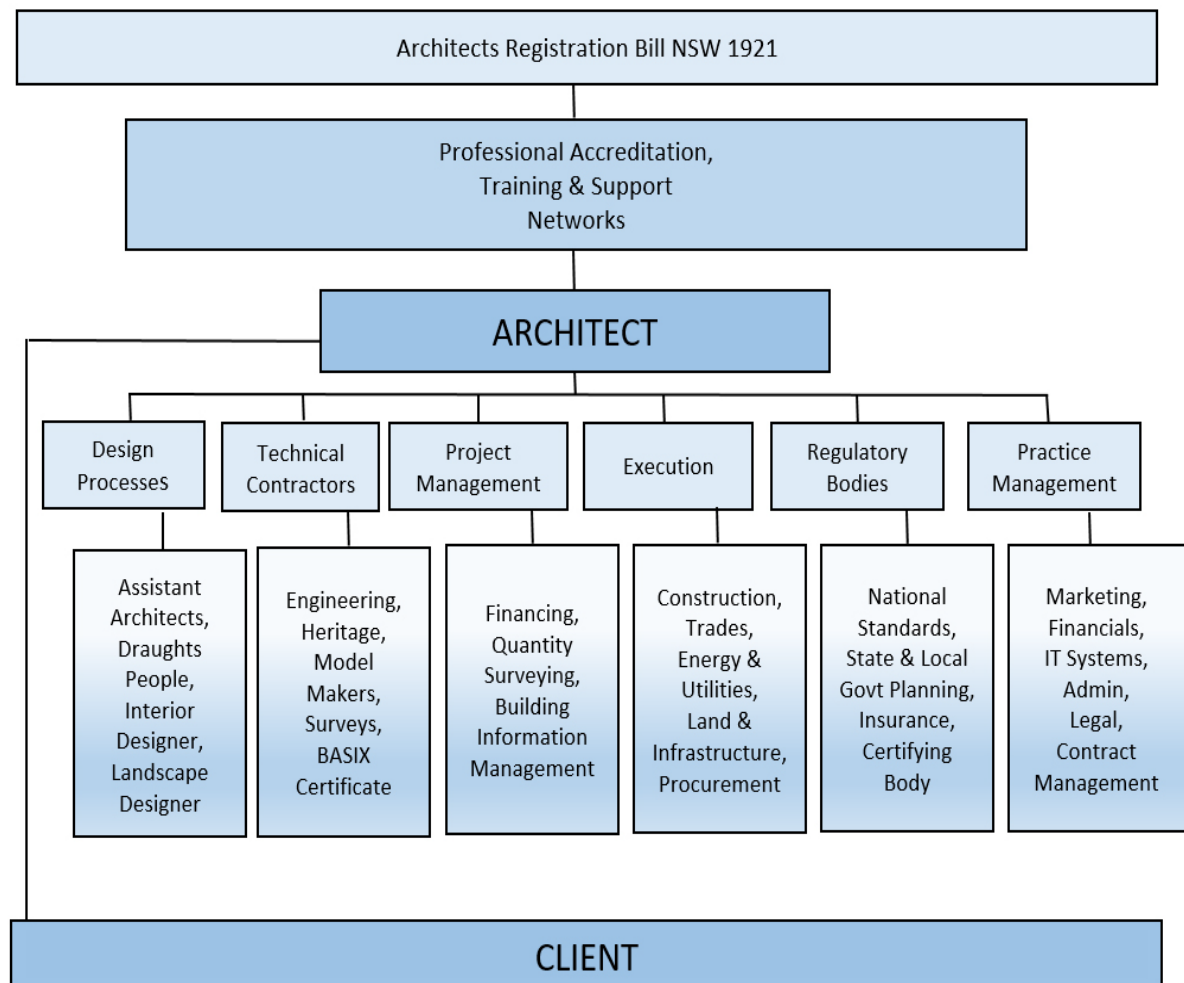


Figure 32 Architecture sectors

Reedman notes that the profession as it was then was replete with characters as he fleshes out some of their biographies. Among these, one architect was born at sea, en-route to Australia, another kept a diary of life, practice, weather and travels in 1873. Another went to gaol for a year having refused to pay 40 shillings slander damages plus 126 pounds court costs. One left the valley and went gold digging in the Yukon in 1898 at the age of 42. Yet another was a soldier who was Professor of Architecture at the ‘University of Changi’ and he held that position for three and a half years as a ‘guest’ of the Japanese Imperial Army. Another became a knighted Australian painter of some controversy. The many stories and practices of the architects Reedman explores in his history are interwoven with their historical contexts and in the process of illustrating achievements he also gives a succinct account of the early architectural processes they were involved in:

In early days architects drew everything by hand and produced what were often admirably precise and beautiful images – rather like early cartography. Today architects employ 3-D CAD and rarely draw anything! This is not neutral as some would have it – the means we use to visualise architecture affects how we see and evaluate ideas and hence impacts on the character of the architecture that is the result. Since many computer operators know little about actual construction their

digital drawings are truly ‘virtual’ without much ‘reality’ – ethereal or belonging properly to the air and hence tenuous.

The architect in the 19th century was influenced by what he could draw and, in this connection, his drawing instruments placed definite limits on his imagination. Culture is always the determining factor, whether it is in the way a community is organised, its skills, or limits to its vision of what is possible, acceptable and proper to society.

The new unconstrained freedom in architecture in the 21st Century is mostly illusionary; in the 19th Century, T-squares, French curves, brass compasses, Indian ink, pens and ebony scale rules were handled with great delicacy to render the plans and elevations of the new architecture. These are now invaluable historical documents as well as evidence of what buildings were intended to be like. What could be imagined was, to an extent, limited by the means used to express the forms: hand drawn for an architecture based on hand made craft details and manual work. These days architecture has an impersonal quality untouched by hands.

Newcastle architects were also constrained by what they knew or thought architecture should be, by custom and by fashion – in a word by location. Fashion derived from Sydney and, wider afield, from London and Europe. Increasingly, as the century matured, sources were drawn from the USA as a growing commercial power. The First & Second World Wars took architects beyond their provincial limits, opened their minds to new international influences and to new technical possibilities (Reedman 2008, p. x).

In addition to this account, the Suters *Heritage Study of Newcastle* (1997) thematically portrays the growth of a city, clearly outlining the close links between social, industrial and economic drivers, local materials and the purpose and nature of buildings. This study asserts that Newcastle set an example for the rest of the state in its attempts at planning and improving the urban environment with the example of its Newcastle Betterment Board. However, the mining and industrial backdrop where a standard miner’s hut was a distinctive feature of the cityscape around 1900, was largely ignored by architects who appear to have reacted against its presence, instead of seeing it as a source of innovation and new opportunities which was preparing the way for modern architecture (Reedman 2008, p. x).

Charlton’s thesis (1961) on the history of architecture in High Street Maitland, documents a tale of government, commercial, industrial and residential buildings along with banks, Post Offices, churches, community assets, bridges and other amenities from colonial days where the names of the Colonial and District Architects are prominent alongside stories of Hunter River flooding, the use of local stone, brick and timber, and corrugated iron. Also documented are stories of whole buildings being imported from England, however, the increasingly important role of local architects is noted. High Street is a part of West Maitland so Charlton’s history regrettably does not record the 1848 Gaol and Courthouse of East Maitland or historic, riverside Morpeth, the original extension of the Port of Newcastle which was too marshy for good navigation.

Cessnock City Council’s web-published history focusses on owners and sometimes builders in its description of the built environment but does not note architects (Cessnock City Council 2018, online). While miners’ cottages in this area may not have merited an architect’s touch, it is sure that government buildings, churches, pubs and vineyards did so. In fact right across the

valley, as Reedman attests, the most ‘notable omissions are the builders ... a tribute must be paid to the skills of the reliable builders, who took the financial and physical risks, had hands on knowledge of construction and organisation, negotiated with unions and suppliers and often got architects out of trouble’ (2008, p. x).

16.6.2 Structure of the Profession in the Hunter

Data from the Australian Bureau of Statistics indicates that architecture is the third largest sector within the Hunter Region’s creative industries (13.4%) with 876 people attesting to membership of the sector with the great majority working in Newcastle (361) and the adjacent area of Lake Macquarie (252) followed by Maitland (79). However, occupations covered in this ABS categorisation included Architect, Landscape Architects, Architectural Draughtsperson; Designers, Planners and Surveyors; Urban and Regional planners; Architectural, Building and Surveying Technicians and Naval Architects. There is a significant discrepancy between these figures and those published by the AACA (current) which lists architects registered to practice in the region as Newcastle (123); Lake Macquarie (26); Maitland (5); Cessnock/Scone(2); Nelson Bay(4) and Great Lakes (5), highlighting the tension around qualifications and registration and the capacity of non-registered people to perform many architectural services. This data also points to the number of support and embedded workers that help facilitate the practices of those who are registered to practice as architects.

The distribution of the regional architectural practices as outlined above by the AACA reflects the national pattern of concentration within major regional markets. Distribution in the Hunter centres largely on the geographic area termed in NSW Government planning documents as either Hunter City or Greater Newcastle, that is, the area circumscribed by Newcastle, the ‘Inner West’, the Maitland/New England Corridor, Northern Gateways and Northern Lake Macquarie (NSW Planning and Environment, 2015). There is also a sizeable concentration of architects in the Cessnock and Scone areas of the Upper Hunter with the Great Lakes and Nelson Bay exhibiting larger portions respectively than the Upper Hunter.

Debra McKendry also reported statistics that suggested that most registered architects in NSW work within an hour and a half of Sydney – placing Newcastle and Lake Macquarie at the outer edge of that ring. She asserted that, ‘the Registration Board tells us 98% of registered architects in NSW work within ninety minutes of Sydney. It’s amazing how many are in Newcastle - I think maybe 15 or 20 practices’ (McKendry i/v May 2015).

The relatively large numbers of architects, compared with population, is credited to the strong collaborative networks created by the University’s approach to training which builds connections between students and the profession resulting in young architects wanting to stay in the city to work.

16.6.3 How Business Works for Architects from the Hunter

Debra McKendry noted that:

We’re lucky in Australia that we have the Architects Act. It’s a legally protected title and you can’t use it unless you have qualifications and a registration number. There are certain building types in NSW that can only be done by an architect. The State government introduced a State Environment Planning Policy (SEPP 65) whereby any building more than 3 stories or about 5 or 6 dwellings must be designed and certified by a registered architect, which has been outstanding for the quality of the built environment ... It is really difficult for architects who have

7 years of training to have someone say, 'well I'm just going to do the same things you do' as a building designer (i/v May 2015).

Most architects in the Hunter earned income from fees, although many are also engaged in small developments, or renovations of their own. While others seem to focus on the design side of the field and others on the structural and construction issues, the need for post-graduate qualifications in fields such as Urban Design, and in one case a PhD focused on 'housing systems', indicates trends and future priorities. For example, like many other local architects, Debra McKendry works as a sole practitioner after years working in a large practice. She has some support staff and close links to other professionals who collaborate to achieve essential certifications. She also asserts that local, state or national policies which set up the frameworks within which people have to work mean that planning legislation appears to 'becoming more and more unworkable and unreasonable' (ibid). At the same time these appear to enable the profession because certain types of buildings can only be designed by an architect.

There are a lot of guides for architects – development control plans for every Council and State – LEP and the local ones; and then the Building Code of Australia which is a legal requirement and then the Australian Standards which is about safe design. So then architecture becomes more collaborative as in most projects what happens is you get it through the approval process and then the client brings in a project manager to actually oversee the construction process. At that point, you lose control over it. The beauty of having an architect seeing it through from beginning to end becomes eroded and it becomes difficult (McKendry i/v May 2015).

At the same time, McKendry notes that 'being paid what you are worth' (ibid) is an ongoing challenge. 'There is now an award in place that was achieved through some unrest in the industry and with new software – financial and planning, you can print out reports quite easily about how much projects are costing you and work it out from that' (ibid). Additionally, necessary insurances have become problematic. With professional liability, for example, it is expensive and liability never ceases as architects are responsible if people are hurt during the life of the building, that is, while it is being built, while it is being used, and when it is being demolished. As a result architects in Australia have to have Professional Indemnity Insurance. It is mandatory. They must also undertake appropriate CDP and 'the Architects Registration Board does an audit to check that is the case' (ibid). Edward Duc, a long-term architect in the region, declares - 'God knows why we keep doing what we are doing!' (Duc i/v March 2014). His own move into the profession was serendipitous:

My father insisted that I become an architect. Fortunately I love it and I think I'm good at it. At the same time I regard myself as being unemployable. That's why I have my own practice. In terms of training, I started at Newcastle University, or University College as it was then, at Tighes Hill. I very quickly realised that hanging around Newcastle wasn't going to get me anywhere, so I pulled up sticks and transferred to NSW University which you could do then because the College was part of the Uni and I did the course part-time because I didn't really have enough money to do it otherwise. And of course as soon as you start working you can't get a scholarship, so it's a Catch 22. But that was great because I got to work with some of the best architects in Australia as a student. And fortunately when things got a bit slow in one office, there was another one opening or had opened so I had time with Allen Jack + Cottier, and Harry Seidler and because we were part-time we had a really good group of people and some of those I've worked

with are now really famous architects in Australia and internationally (Duc i/v March 2014).

On graduation Duc spent some time in England.

I was over there for five years – I graduated and got a full scholarship to travel, so off I went. And I came across the people who designed the Pompidou Centre –and other architects who did similar buildings. Richard Rogers who was involved in the Pompidou, Foster who had done a lot of similar work that I was aware of. And more importantly, a guy who was involved in long-life, loose fit, low energy buildings and I really clicked with that philosophy. And what it means is that buildings are a resource, the use for buildings changes. You need to be able to re-use the building for other purposes. Or if you need to pull the building apart you need to be able to keep the resources that you put into it. And it goes further than that to say that during its operation it needs to use as little energy as possible. That was a philosophy in the 70's which I pulled out and used. That's a pretty good background to why I do what I do (Duc i/v March 2014).

As a working professional Duc was often faced with engaging with Councils. As a result he took up a Masters in Urban Design 'because it interested me greatly. When I had an argument with people on Councils, I wanted to have some knowledge, some qualifications that I could argue over' (ibid). Now, with a strong interest in cities he is doing a PhD in housing systems believing there are problems in the construction industry with productivity, quality and cost. Notably, he is committed to a career model where people are employed on a permanent basis, not casualised.

As an architect in practice my role used to be what I would call a 'Marchitect'. It would be my job to find the work, to find the client. Sometimes you would see a project that had legs and put a bit of work into that and take it to an entrepreneur ... So I employed people, instructed them, trained them, produced designs, documentation, watched them being built and had a good time (Duc i/v March 2014).

This is a different approach to the current one where many people are not employed full-time but are contracted in for specific jobs. 'I tended not to do that. I tended to employ people on a permanent basis. That way you have loyalty, I got reliable people and people who understood what I was about' (ibid). Duc's role as the Chair of Newcastle Now, an organisation more formally known as Newcastle Business Improvement Association, resulted from his deep interest in urban design and a desire to give back to the community that has nurtured him.

Cities are really interesting places and Newcastle is really a very interesting city. We suffer hugely because of Sydney – a huge metropolis, the seat of government. Larger businesses are there. We just get second best all the time. And I suppose, what I am trying to do is get a better deal for the city and to make a place where kids are happy to stay around ... one of the reasons I left Newcastle in the early days, was that the good work went to Sydney architects. They are perceived as being better. That's not so much the case now. There are still some remnants but, and it's not always for good reasons. There are some developers in Newcastle who want to do a job as cheaply as possible and Newcastle architects are often more affordable than Sydney architects so that is one reason developers would choose a Newcastle architect. But nevertheless it means they are doing the big jobs and that is a good thing ... In fact, Newcastle architects are influencing other

places – designing buildings in Sydney. And Melbourne. And internationally. And the good thing is they have developed their skills here ... The place is small enough that you can achieve what you want to achieve. If you go to some of the bigger places, like Sydney or Melbourne you have to be more established before you can have an effect. And I think the city is a lot easier going than a lot of places. So you can do your work over there and a bit of art over there. So you can be a lot more flexible (Duc i/v March 2014).

While he is increasingly focussed on the development of factory-made sustainable housing Duc is also fortunate in being able to undertake small residential developments. This latter method of sustaining an income is an increasingly common practice for many architects.

This is the case for Cassie Stronach. She is another sole trader working in architecture, building design, interior design and art, and as of May 2015 had ‘one more exam to be a registered architect’ (Stronach i/v May 2015). She has been operating a small building she owns as a co-working space for other young professionals in related fields. For her:

Development gives a better financial return because architecture is a service industry and we usually quote a lump sum. Whereas with development, the cleverer you are with it – the better you set it up, the better the quality of the product you are delivering out there – well you set up the competition, don’t you? (Stronach i/v May 2015).

While she is currently designing interiors, because of the long-lead times necessary for bigger projects, and the impact that has on cash flow when young professionals like her are starting out, one of the problems she and many other architects face is a resistance to the payment of the architectural component of a project. Clients appear happy to pay for the structural engineering report but many do not understand the architect’s role in project management or in the architect’s need to be rewarded for innovation or for their flexibility as changes are called for.

On the other end of the scale, Suturs Architects in Newcastle employ 170 staff across 5 offices located in Sydney, Melbourne, Brisbane and Cairns (Architects of Australia 2017). The company announced in January 2013 that it would be collaborating with the international company DWP to ‘operate together as a fully integrated design solution - DWP/Suturs.’ (Architecture and Design 2013, p. 1). The collaboration would:

Incorporate a larger range of capabilities to both local and international clients in four portfolios: community, lifestyle, work and infrastructure and would offer our clients greater insights into international trends, proven innovation and a greatly expanded resource network right across Australia, Asia and the Middle East, with the focus on hospitality, residential and corporate design delivered through local teams (Architecture and Design 2013, p. 1).

The business model adopted by DWP has been to work with ‘local team leaders, familiar with local planning regulations and the historical, cultural and environmental context (who) will provide the key point of contact for clients for the life of each project’ (ibid). The benefit, they say is that ‘our multicultural professionals will be working together to deliver projects via teams of highly focused specialists, offering diversity, flexibility and creativity over a broad spectrum of project types’ (ibid). This collaboration was confirmed in 2017 when Suturs was fully acquired by the Bangkok-based DWP (Bleby 2017, online).

This model addresses some of the issues identified by Debra McKendry who commented that Suturs had started in Newcastle and was now based all over the country, but that even a

company as big as that had been affected by the downturn in the industry since 2008 with local staff reduced by about 75% at one point, with staff dispersed to other locations across the country (McKendry i/v May 2015).

The DWP Suters model also addresses the issue of having draughts people working overseas where, apart from the issues around the off-shoring of what are deemed to be Australian jobs, quality can become problematic for something that is done thousands and thousands of kilometres away in a different country with language barriers, and different construction codes. In McKendry's view:

I just can't imagine how that would work. I think there must be so much that is lost in translation. Plus I think it is cost driven but some people see it as cost-efficient – it is cheaper so it must be better. I think ultimately it can only be detrimental. This has been a gradual thing. 20 years ago, each Council employed their own in-house architects to basically, not to do design of everything, but to do their toilet blocks and community centres. But over time there came to be no architects in Newcastle Council and those that are there are basically project managers because it is a different type of role. To me that reflects through the quality because they use consultants. And that consultant could be using staff from who knows where. They are all tendered and so they are cost driven. I understand that they are cost-driven and have to get good value for rate payers but, in the end where does that leave us? We have to get quality and value for money (McKendry i/v May 2015).

GHD Newcastle is also part of an integrated global network that 'engages in a vast array of projects at all scales, linking multiple disciplines to provide design solutions to private, commercial, community and government groups' (GHD 2017, p. 1). They employ a 'design management approach that analyses and synthesises constraints and opportunities to realise new possibility [through] a global network of designers, planners and engineers ... with technical knowledge and resources' (ibid) and a focus on 'creative thinking; research, modelling, pursuit of broad alternatives and the testing of innovative solutions' (ibid). They work across 'a range of markets, focussing on the community infrastructure, workplace and lifestyle, defence and security, resource, and industrial sectors' (GHD 2017, p. 1) This is a local reflection of the global trend for big engineering and project companies to integrate architectural services within other sectors and employ operational methods that are global in their implications.

16.6.4 Technological Processes

Debra McKendry pointed out that in her practice, which is largely residential or smaller projects such as child care facilities, people ask whether she does 'the whole thing from start to finish? They want the whole job done from concept design, through to oversight of the construction, through inspection and on through to completion' (i/v May 2015). For her, completion of a post-graduate Diploma in Architectural Management was essential to her business but some tasks such as bookkeeping are better outsourced which is conveniently done given the affordances of the internet. She commented that the number of architectural practices in Newcastle are technology-driven.

... 10 or 12 years ago the big practices would tell you they did the big projects because they had the resources to do it. But now, if you have a decent website and you've got the software and the hardware and skills to run it then big projects can

come out of small practices. I couldn't take on a multi-storey building without that back-up, that technology. Previously that sort of project would only have gone to a big practice. The technology has enabled that change. But now it is becoming fragmented ... the skills are spread all over the profession instead of being concentrated in one or two big practices ... I think it does lead to innovation because when people are in smaller practices they have more control over how they work, and what they produce. You will always get innovation then because you feel you have more freedom to do what you want whereas in a bigger practice you are a bit more constrained (McKendry i/v May 2015).

Commenting further on the role of technology, she noted that

There are practices in Newcastle that have 8-10 employees that have done buildings in Abu Dhabi, Mauritius – these far-flung places from here because they have been able to market themselves to the world through global advertising with technology. Things like that just wouldn't have been possible without technology even 10 years ago (McKendry i/v May 2015).

Technology now plays a major role in the way architects work. ArchiCAD for design, REVIT Design Software and Building Information Management (BIM) have become *de rigueur* for all architects. BIM is a powerful tool that has revolutionised and streamlined processes to allow complex collaborative work things to be done quickly and easily.

Edward Duc also noted that there are significant challenges in the construction industry world-wide that are proving to be intractable where cost is indeterminate and government creates another set of barriers whereby rules are made that appear nonsensical to those who have to abide by them. The use of the assessment tool BASIX (which is to do with water use, greenhouse gas emissions and thermal comfort) is one example. He argues, as someone who has worked with sustainable building design for 30 years, that designing to satisfy a specific software tool puts constraints into the mix where other solutions may in fact offer better outcomes (Duc i/v March 2017). However, as McKendry points out:

As much as technology has revolutionized the industry there is still a long way to go. For instance, engineers traditionally use AutoCAD and Architects use ArchiCAD and while the 2 programs do sort of talk to each other, ultimately if everyone was using the same platform or integrated software it would make it so much easier to exchange drawings or deal with documentation issues (i/v, May 2015). As such there is an expectation that all architectural professionals need to be familiar with computers, cloud storage, website marketing, 3D printing for model making, websites through which clients can search for things they like and share with the architect, as well as specialist software to share with clients so they could 'test' early designs to see how they worked although most clients tend to come by personal referral (McKendry i/v May 2015).

Young architect Cassie Stronach notes that as a start-out professional she does everything. She acts as her own business manager, marketer and cleaner but she outsources her accounting and IT support. She finds social media, such as Facebook and Instagram, has been helpful and she is currently collaborating on a documentary which sets out to de-mystify what architects do.

It was however instructive that several architects listed in the Yellow Pages, HOUZZ or other directories, as being based in this region, do not appear to have easily accessible websites or have a simple landing page with basic contact details.

16.6.5 Specialisations and Variety of Services across the Hunter

With about 70% of architects being sole practitioners, many work with other sole practitioner consultants like construction engineers although many have a multi-disciplinary practice including geo-tech engineers, construction engineers, civil engineers, and others who have to work together. Quantity surveyors are important too as well as joiners and landscape architects. Other occupations become important to these professionals and in a region where many architectural firms are small, specialisation is essential.

As an example, EJE Architecture in Newcastle is a local company formed in 1976 and now employing 50 staff with offices in Newcastle, Sydney and the Gold Coast. It sees itself as 'a multi-disciplinary design practice providing creative solutions for the built environment', and offering professional services in architecture, heritage architecture, interior design and urban planning (EJE 2017, online). EJE is locally recognised as having significant capability in heritage architecture and its specialist staff include people who can undertake historic research, give heritage advice, who can deliver heritage studies and assessment or advice on conservation management, heritage planning and interpretation, archival recording, adaptive reuses, statements of significance, or investigating heritage fabrics and significant environments. As a result, their team includes historians, heritage architects and historic landscape specialists.

On the other hand, GHD has a scope that is broad and largely deals with major projects. It has its Hunter Region office in Newcastle. They are, in their own words, 'one of the world's leading professional services companies operating in the global markets of water, energy and resources, environment, property and buildings, and transportation ... We provide engineering, architecture, environmental and construction services to private and public sector clients' (2017a, p. 1). Locally they offer 'architectural design, design management, integrated design, Building Information Modelling (BIM), master-planning and strategic facility planning, sustainability, advanced building physics and modelling, interior design, computer visualisation, simulation and animation, condition audits, adaptation, re-living and retrofitting, greening existing buildings and project management (ibid).

SHAC Architects at Islington are also very clear about their specialisations which are in Education and Performing Arts (they are proud of their research into educational environments); Health (based on systems understanding); Regional Airports and Marinas (mainly in NSW); Industrial (with major clients such as Ausgrid, RMS, Regional Council Depots and Ports) where efficiency, property functional relationships are the main need; along with residential services and masterplanning. They list key operations as including sketches, conversations, 'boots on soil', laser-cut models and 3D animation.

In Lake Macquarie, CoAssociates of Charlestown offer heritage services. In addition to that and to their general architectural work, CoAssociates offer staff to assist other companies in CAD and general drafting, building and site models, CAD training: 2D and 3D, CAD, Microstation, Sketchup, Visual CAD, AutoCAD as well as contract drafting, government contracting and building surveys. They have become a solution for smaller practices that need to outsource some technical tasks or scale up for busy periods. As McKendry explained, there are times when you need to outsource the repetitive tasks so you can concentrate on the creativity and innovation.

Another small Lake Macquarie business, Lewis and Zwart, highlighted their values as being integrity, quality and creativity addressing social and environmental responsibility and economic value in residential, multi-unit, education, institutional, medical and community buildings (2017). Mason Architects at Coal Point specialise in aged care, residential,

community, retail, commercial and industrial, while Towndrow at Eleebana emphasise their contemporary design and Seaside Homes Design are strictly building designers.

While the website HOUZZ states that there are 79 architects in Port Stephens, almost all the companies listed are based in Newcastle, Lake Macquarie or Maitland. Port Stephens company, Sorensen Design and Planning (2017, online) represents the sector that offers services alternative to that of a full architectural approach although they do advertise architectural services from single dwellings to high-rise. Having 3 offices in Port Stephens, Newcastle and in the Upper Hunter at Singleton, they term their offering as ‘professional building design’ rather than architecture, delivering drafting, designing and town planning services. Their other professional services include Statements of Environmental Effects, BASIX reports (building sustainability) including reports on bushfires, complying development, rezoning, site feasibility and visual impact, shadow diagrams and master-planning. Similar ‘Building Design’ services, rather than architectural services, are offered by Port Stephens Design who do, however, note that staff include graduates of architecture and engineering. Sole practitioner, Brooke Holdsworth, who is also based in Port Stephens, operates across the region and has particular interest in healthcare, tourism and urban design. MJW Architecture, operating in Newcastle and the Sutherland Shire adds aged care, religious buildings and furniture design to the more generalised offerings, while GPN architects of Shoal Bay and Sydney particularly notes services in quality control, tender evaluation, contract management, scope of works documentation and assistance in marketing developments after completion.

In the Maitland area, despite directory listings as ‘architect’, most firms with a Maitland business address offered building design, property development and services such as BASIX, 3D imagery, small scale building services, feasibility studies and in one case, town planning. These were companies such as Advantage Building Design, Vickers Home Improvements, Cants Building, Transpire, Verte and HDB Planning and Design, although this latter company appeared to be an English firm.

There did not appear to be any architectural companies in Cessnock. In the area covered by the Mid-Coast Council, two architects, Austin McFarlan and Charles Rose, are listed together with building design, drafting and interior design services. Basic services such as BASIX, Bushfire, Environmental services and so on are offered by companies in the Foster area such as Pride of Pace, Riordan Designs Services, Ausline and Neil Ryan.

All of these architects, by necessity, work as a team with other professionals, depending on the project. The occupations that are often overlooked in relation to architecture, as is often the case with support worker in all the creative industries, are the multitude of builders and other subcontractors they rely on. Without them architects would find it difficult to bring their creative ideas to fruition.

16.6.6 The Role of Creativity for Architectural Professionals

Erica McWilliams, a researcher deeply connected to the Centre for Creative Industries and Innovation (CCII) located at QUT, points out that ‘recent scholarship has sought to unhook creativity from “artiness”, individual genius and idiosyncrasy’ (2009, p. 282). While most laypeople in the West still adhere to this commonsensical view, it is a largely unexamined or doxical (Bourdieu 1977, p. 80, 164) approach to understanding this activity. However, as Beth Hennessy and Teresa Amabile point out, most researchers around the world now ‘agree that creativity involves the development of a novel product, idea, or problem solution that is of value to the individual and/or the larger social group’ (2010, p. 572). Some of these ideas surface in

the Hunter Region's architects' views of their own creative practice. For example, Mark Lawler who practices in Lake Macquarie, indicates that 'architectural design is a process of creative problem solving. This requires analytical skills to firstly define the problems to be solved. Then, we use our design skills to propose creative solutions to address the identified problems. The design process is open-ended and is a path of discovery for all involved' (Lawler 2017, p. 1). Lawler's practice in Lake Macquarie prides itself on experience and innovation, having been in business there for 30 years and providing services in the region as well as into Sydney and Canberra for residential and large scale commercial and office buildings (ibid).

Importantly, the issue of copyright applies to architecture, as it does to many other creative industries, but in terms of attributing the creative element supposedly remunerated through copyright, there is the principal question of moral rights to be considered. Moral rights are designed to protect the creative reputation of the 'author' of the work. These principles are embedded in a Code of Conduct which sets out how to deal with other architects who take over a job from the original designer and indicating how to acknowledge the work of the previous architect. This code is necessary as changes of architect occur frequently with the refurbishment of big buildings, particularly if it has been a building that has received awards for its creative contributions. For McKendry, the old architectural adage that form follows function is true for her own creative output.

I do think that there is a strong form of reasoning that comes from looking at the functional diagrammatic relationship and then looking at the built form of it. From an aesthetic point of view but also allowing the function to drive it. But it is always going to be affected by fashion. Personally, I always try to go for a classic approach (i/v May 2015).

On the other hand, she admits to 'getting a bit antsy, a bit irritated if I haven't got a design project going – something in the design phase. Something about the hand-to-eye thing where you can just sit and sketch and work something out' (ibid).

Stronach has a passion for the 'art' end of the spectrum, believing that 'architects are on the cusp of science and art' (i/v Mat 2015). For her, 'creativity is one of the biggest pressures in our industry, because creativity is not on tap' (ibid). She asserts that she is 'both an architect and an arts professional' (ibid). For her it is necessary to be able to showcase her art works as it 'shows that we are in the art of architecture – quite artful, beautiful spaces' (ibid). That appears to be a significant benefit to the clients she is attracting now – hospitality, cafes, personal services facilities in particular – where the character of the space is important to the service provided.

Duc, on the other hand, emphasises the problem-solving aspect of his creative approach. His 'philosophy of design is very pragmatic. I like working with structure and services and new materials and techniques as distinct from the traditional which sometimes surprises people' (Duc i/v March 2014). He suggests that 'every project is different, so every solution is different' (ibid). His focus is on technical buildings, 'ambulances, fire stations, factories, the fish co-op, and an apartment building' (ibid). For him:

They aren't cookie cutter things, whereas houses can be cookie cutter, although they shouldn't be – houses need character. They need to be themselves and not borrow a lot from other houses ... Buildings change over time because people's usage changes over time – they need to be flexible' (Duc i/v March 2015).

While it is up to the architect to get the brief out of the client and to work out what is feasible for the money available, Duc insists that architects have to find out what the ‘real question is; and seek an answer to the real question’ (i/v March 2014).

16.6.7 Architectural Education in the Hunter

Education and competition are two areas of emerging challenge for the profession in the Hunter Valley. Architecture training is generally completed over five years at Masters level followed by two years’ experience and a competency assessment process. Sub-skills include design and documentation, architectural theory, history and philosophy; building science, materials and technology; communication, visual representation and information technology; professional practice and building law; urban planning and environmental sustainability; and construction project management (AACA, 2016). The work therefore encompasses scientific, technical and legal perspectives alongside the essential creativity architects need to operationalise in their ongoing and dynamic businesses.

The changing role of architects is increasingly mirrored in the educational field through lower demand and a changing approach to curriculum. As explained by Keniger, Australian students have the advantage of being involved in ‘the design of buildings they will see built and from an early point of their careers they will be involved in the creation of built environments, which gives their education a tangible purpose and outcome’ (2016, p. 1) with further advantages derived from a coherent nationwide system. However, as there is an ongoing battle for funds, space and staffing in Universities with supplementary funding and academic career progression increasingly tied to research achievement, teaching contact is ‘more and more dependent on the contribution of tutors drawn from practice on a sessional basis’ (ibid).

The University of Newcastle is one of eighteen Australian universities offering qualifications in architecture and is proud of being rated within the top 45 according to the QS World University Rankings by Subject. It is recognised for being a pioneer in problem-based learning and offers architecture, building and industrial design, construction management, disaster risk reduction, preparedness and reconstruction, project management and property.

Locally, however, the changing role of architecture and the competition from allied professionals has led to a diminished call for architects and these circumstances have been reflected at the University. As of 2017, the Newcastle Herald reported, the University’s Architecture staffing would be restructured as ‘architecture is in decline [and] twice as many construction students means change is needed’ (Connell 2017, online). Connell quotes Professor Brett Ninness as stating that ‘technological advances have changed the role of architects’ (ibid), creating a need to keep the degree ‘relevant and future-orientated ... The nature of architecture is changing’ (ibid). In a further interview for the website *Architectureau*, Ninness is quoted as suggesting that aspects of the way the program had been run was not benefiting students since ‘we’ve had a focus on certain research that has taken away from teaching’ (Harris 2017, online).

Not all architects follow the classic school-university-registration path. Local architect Darren Shearer began his working life in the police force before moving to landscape gardening and then at 51 returning to University to complete a traditional architecture degree, where he found ‘similarities between the careers, particularly in regards to problem solving’ (Morris 2017a). However Debra McKendry, a principal architect with McKendry Hunt based in Newcastle, raised concerns about some aspects of current professional training.

I think we should be bringing out graduates who are proficient in the task of producing buildings - that's what we do. These days it's a two-degree process. The first degree is a science-based architecture degree. That's when you focus on the materials science and the building structure. Then the second degree is more about looking at large scale projects and design as a process and writing a thesis. If we are going to combine those two things together – the technical and the more esoteric and creative stuff – it's important that graduates be taught both. If you don't have that particular understanding of engineering structures and things like that, it makes me wonder how you can collaborate with others in the industry for the process. If you don't know the fundamental language about the structure and what makes a building stand up, how does that translate to the industry? It is incredibly important in building design to get the structure and services like the air conditioning, the plumbing the electricals – whatever – to actually integrate seamlessly and there are certain tools that we can use within our BIM modelling to make that happen but if the people we are working with are not using that same software or we are using something that is incompatible, then it is almost useless (McKendry i/v May 2015).

Gender is an issue in this region as it is elsewhere with very low retention and registration rates for female graduates (Wake & Stead 2013). For Debra McKendry family connections were seen as a strong factor in the decision to follow architecture as a profession in the Hunter. Fathers have followed grandfathers and great-grandfathers into Architecture. For her:

There is often a strong lineage – third generations even, and also strong collaborative networks. Nurturing young women coming into the profession is a challenge. The participation rate is low ... There is a lack of flexibility and the early workloads are unworkable. It is difficult for women with a caring role (McKendry i/v May 2015).

To redress this imbalance McKendry also indicated that the Institute of Architects has set up a mentoring program, originally as an incubator for new graduates to better their involvement in the profession, and which has now broadened into a general mentoring program, particularly for those who are looking for experience as they sit for the Registration exam. The Institute, through their Champions for Change program, she says, is trying to reinforce the number of women participating. McKendry argues that, 'while there might be up to 50% representation at University, it translates to less than 30% in practice and even less than that ever become a registered architect' (i/v May 2015), with people who exit the profession mostly going into more female-friendly fields, like interior design or interior decorating.

The role of the architect has changed significantly over the past 20 years in that it has been eroded by other professionals taking over roles that have traditionally been done by an architect. Like Interior Design – you can now do a 4-year Interior Architecture degree. The difference is that as an interior architect you don't look at any of the issues of the building shell. So, it's simpler in a way in that you don't have to look at the building structure or what's holding it up, the planning constraints or having to get it through Council (ibid).

McKendry feels that architects need to reinforce their position because of the eroding market share, giving the example of a Construction Management degree where the science of building, how to manage contracts and construction are concentrated on and graduates of this program now become project managers and to a large extent have taken over what architects have traditionally done to oversee construction.

16.7 Conclusion

Several issues emerged from this ethnographic investigation of architecture in the Hunter. The first of these revolves around the notion of competition. Most architects working in the region face growing competition from building designers, building contractors, engineering concerns and industrial/ interior design firms. These firms and professionals are not as well educationally qualified as architects are required, indeed regulated to be, yet they are undertaking similar functions in the marketplace. This situation has had an effect on the educational sphere where changes in role and demand for architects is now becoming mirrored in the educational field through lower demand and a changing approach to curriculum.

In terms of regional representation, it is of note that there are low numbers of architects in rural areas, reflecting a general difficulty experienced by all professions in attracting suitable people and providing sufficient work, thus making it difficult to prepare for registration or link to other professionals. This inadequate representation is mirrored in both gender and ethnicity representation in the Hunter. While those females working in the architectural sector is represented by this study's statistical analysis at 45.5% of all people working in all rated occupations in this sector, female and indigenous people actually working as architects themselves appear to be relatively few in number. While women have comprised over 40 per cent of architecture students for many years, female participation in the profession drops sharply after graduation. It continues to drop, apparently due to long hours, relatively low pay and scarce mentoring options pre-registration. All of these factors also lead to difficulty in accommodating family responsibilities.

There are also structural changes to consider as many architects face a progressive emptying out of the middle tier of business. Most architects in the region now work as sole traders or for large firms increasingly moving toward multinational agglomeration, using cost saving processes such as off-shoring and casualising what were once in-house positions. The process of digitisation, globalisation and the political-economic reality of neoliberalism has driven a local reaction to these global imperatives.

Creativity & Cultural Production in the Hunter

An applied ethnographic study of
new entrepreneurial systems in the
creative industries.



Final Report:
Hunter Creative Industries

Support Organisations, Education and Training

Associate Professor Phillip McIntyre
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17. SUPPORT ORGANIZATIONS, EDUCATION AND TRAINING

17.1 Background

Entrepreneurial systems are multifactorial in origin and in effect. Gone are the days when individuals alone could do all that is necessary to be innovative and bring complex creative works into being, if that was indeed ever the case. All entrepreneurs need support of some sort, whether it be financial, technological, administrative, legal, political, social, cultural or educational, in order to bring new and innovative products to market.

17.2 Education and Training

Mihalyi Csikszentmihalyi contends that ‘a person who wants to make a creative contribution not only must work within a creative system but must also reproduce that system within his or her mind. In other words, the person must learn the rules and the content of the domain, as well as the criteria of selection, the preferences of the field’ (1997, p. 47). In order to adopt an entrepreneurial approach to the creative industries, anyone wishing to do this must be socialised or enculturated into the system they will eventually take an active part in. Thus learning to be part of the creative industries is most often a process of being educated into it. Education, according to Haralambos and Holbern (1995), is simply one particular aspect of socialisation which is specifically concerned with the acquisition of knowledge and the learning of skills. This process of acquisition may take many forms but for our purposes we can supply two categories, that is, either formal or informal. While informal socialisation into the field and enculturation into the domain may take the form of mentoring, familial immersion or various degrees of auto-didacticism, formal approaches to education certainly in Australia, are predominantly the function of state-based institutions.

17.2.1 University Education

Formal education and training in creative industries fields at the University level is concentrated in the lower Hunter and is primarily on offer within the regional hub in Newcastle.

Since its inception, the University of Newcastle (UoN) has been best known for its strengths in engineering, medicine, science and architecture but in recent years has given a greater recognition to the role and potential of the creative industries as signified by the construction of new buildings in the city centre and the transfer there of related teaching programs.

There are well over 3,000 students undertaking courses at the UoN in fields that are classified as part of the creative industries. These fields include Drama, Visual and Performing Arts, Film, Media and Cultural Studies and Creative Writing, Architecture and Industrial Design, Graphic Design, Animation, Journalism, Public Relations, Television, Radio, Sound Production, Multimedia, Web Design, IT, Software Application and Interactive Content Development. Many of the programs that focus on these areas are taught by creative industry professionals and are guided by a number of established External Advisory Boards comprised of current highly successful creative industries operatives. The University has now established a School of Creative Industries whose administrative offices and much of its teaching are located in the city campus which is centred around the NewSpace building and its accompanying facilities. This school was inaugurated in 2017 with its initial Head being a former BBC filmmaker with a background in television and digital media production ‘which he hopes will help him craft radical new multimedia platforms’ (Egglesstone 2017, online). Professor Paul Egglesstone was

previously the Director of Research and Innovation in the College of Culture and the Creative Industries at the University of Central Lancashire, UK. He stated at the time that he was:

Interested in working with emerging technologies to craft new niche experiences with media, things that don't exist yet such as new experiences for content, music and film. We use and engage with creative content in a very different way now than we did thirty years ago, so the question is what are the next disruptions in these industries?' (ibid).

From this perspective Prof. Egglestone champions 'collaboration, connecting communities, technologists and content creators to help identify and address real world problems' (ibid). His objective is to have the new School of Creative Industries 'getting involved with industry, doing very, very practical things, collaborating with industry that will help them develop and grow their business, which in turn will help employ our graduates' (ibid).

17.2.2 Vocational Education and Training

NSW TAFE - Hunter and Central Coast in its online communications characterises the region as a 'hotbed of creative talent'. TAFE has a strong record in education in the creative arts and media providing programs at Certificate, Diploma and Advanced Diploma level. At the time of writing, the TAFE offered courses in Creative Industries, Fashion and Media including acting, digital media and communications, fashion, interior design and decoration, graphic arts and design, the music industry, product design and photography. For those engaged in fine art, TAFE also houses an intensive training facility, Newcastle Art School, which 'specialises in studio-based, fine arts training, taught by locally, nationally and internationally recognised artists' (TAFE 2018, online). Design Centre Hunter is an important part of TAFE's creative industries offerings. It is:

A connected, collaborative hub that inspires and supports students, teachers and industry in design related disciplines to work together in new and innovative ways. These disciplines include, though are not exclusive to Architecture, Graphic Design, Interior Design, Fashion, Floristry, Industrial and Kitchen Design as well as Furniture Making, Performing Arts, Signage, Hair & Beauty, Digital Media and Fine Arts (TAFE 2018, online).

The exhibition space that is attached to the Design Centre opened in 2016, giving design students a dedicated venue to present their work. More broadly TAFE is recognised as the major vocational education and training provider in the region. Practical experience is also highlighted through other vocational providers such as the Regional Institute of Performing Arts and the Regional Music Institute.

17.2.3 Specialty Schools

The Hunter School of the Performing Arts (HSPA) is the only fully selective, years 3-12 performing arts school in NSW. Several schools in the region participate in the NSW Schools Spectacular in areas such as Aboriginal dance, choir, dance and production including, along with HSP, Gloucester, Kurri Kurri, Metford, Murrurundi, Nulkaba, Floraville and Callaghan College. The Hunter Valley Grammar School in the Maitland area also highlights its achievements in the creative arts. Callaghan College, with a number of campuses in the lower Hunter, including Waratah, Jesmond and Wallsend, offers high school students a chance to move beyond their traditional education and take up, among many other offerings, classes in

Computing and IT and also Electrotechnology. The NSW high school system does not offer specific course in communication and media as part of their state-based curriculum although many schools do offer media studies options. Located inside the regional Catholic education system St. Francis Xavier's College in Hamilton is one of these schools.

17.2.3 Other Training and Learning Centres

The region is rich in private training options. This includes both the development of the 'content' skills and for the business skills that creatives need to join the 'industry' and earn a living. The Business Centre, Hunter is perhaps the largest of these. Headquartered in Newcastle, but with outreach centres on the Central Coast and Mid North Coast, and with a Business Innovation Centre in Newcastle, it is a business assistance organisation providing professional services to micro, small and medium businesses. It is closely involved with local projects for innovation and the creative industries. Similarly, the Hunter Region Business Hub is a Business Enterprise Centre providing practical assistance in business planning, advice on marketing, budgeting and cash flow and provides those services to the creative industries practitioners in its areas as does Lake Macquarie's Business Growth Centre. These centres are partly funded by government contracts but provide other services on a fee-for-service basis.

WEA Hunter also provides business courses but in addition delivers qualifications in subject areas such as musical theatre, and lifestyle and community courses in a range of special interests including computing, creative arts, writing and illustrating, acting, dance, magic, drumming, singing, painting and photography.

Other private training options are widely available. Art Mania Studio at Wallsend, for example, provides community learning opportunities in a wide variety of creative arts. Hunter Design School is an RTO, providing training in graphic design, interior design and colour consultancy for design stylists. The Pump House School in Newcastle provides training in design, commercial software, media production, digital photography and social media.

17.3 Support Organisations, Groups and Businesses

The creative industries, like all other industries, do not act in a vacuum. Very few people succeed entirely on their own. There are a series of contextual factors which impact and affect all operatives in these industries. Some of these factors are well beyond the control of individual creatives. As a result, various organisations have been established in the region to advise, encourage and support the actions of creative industries personnel and to help catalyze the generation of business opportunities for these industries. These organisations range from smaller cases of what could be called self-help collective processes through to larger, usually government-funded, agencies and organisations.

17.3.1 Industry Development Organisations

I2N, the Integrated Innovation Network, is led by the University of Newcastle and has four locations in the region. They are the Dantia Smart Hub co-working space in Lake Macquarie which specialises in supporting SMEs; Three76 Newcastle co-working space which focusses on research-grounded innovation; the Innovation Defence Hub at Williamstown with a focus on applications in commercial aerospace and defence and, particularly, in cyberspace, control systems, autonomous vehicles, simulation modelling and energy; and the Upper Hunter Innovation Lab located in Muswellbrook which provides co-located offices, teaching and lab

spaces. They all conduct skill development training and host community workshops, provide support for SMEs and link to research where relevant.

Hunter iF Limited is a project-based peak support organisation established in 2018 following a comprehensive planning and research process. Its core collaborating organisations include the University of Newcastle, Newcastle City and Lake Macquarie Councils, Newcastle Now, The Business Centre, Hunter Founders Forum, Eighteen04, Lunaticks Society, Hunter DiGiT, CSIRO, Business Growth Centre, DANTIA and a broader group of project-based collaborators. This is an impressive group of organisations who have indicated their willingness to collaborate on projects for the greater good. Among the organisation's objectives is included an intent to 'encourage, facilitate, advance and support innovation in the Hunter region of New South Wales, Australia and adjoining regions with a focus on creating quality jobs and opportunities and increasing productivity, investment and economic growth for the public benefit' (IF 2017). While the Hunter iF Limited project is focused more broadly at the region's entire innovation ecosystem, by the very nature of its views on innovation, enterprises within the creative industries are being drawn into its strategies which are focussed on targets shown below. It was granted seed funding in 2018 in order to kickstart its program.

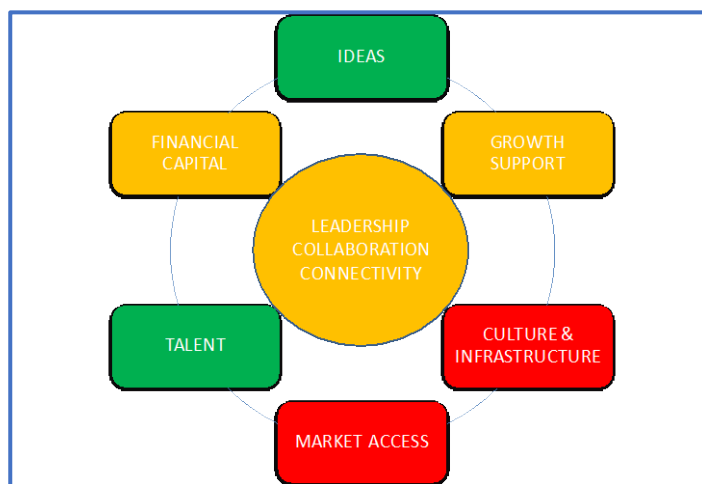


Figure 33 Strategy Focus of the iF Project

Renew Newcastle, on the other hand is focused at stimulating the activity of individual agents operating within smaller communities. It aims to find artists, cultural projects and community groups to use and maintain empty buildings until they become commercially viable or are redeveloped.

Since 2008, Renew Newcastle has been connecting people with vacant spaces, supporting a community of creative entrepreneurs who bring life, interest and activity into under utilised neighbourhoods. Partnering with those who share the vision of giving back to their community. Filling these empty spaces has created a series of flow on effects. Reducing crime, graffiti, vandalism and giving a significant economic and social value back to the community that has attracted business and residential interest in the city (Renew 2018, online).

In fulfilling these aims Renew Newcastle negotiates rolling 30-day agreements with owners of neglected properties and artists, designers, photographers and craftspeople are invited to set up temporary galleries, studios and offices in empty buildings.

The organisation was founded in 2008 by Marcus Westbury along with Marni Jackson and Rod Smith, a lawyer. As Westbury admits, 'Renew Newcastle would not have happened if it wasn't for social media' (Westbury i/v June 2015). Having set up a Facebook page which acquired 3,500 members within a few weeks, Westbury indicates that 'I had raised the expectations of a whole bunch of people so I had to keep going' (ibid). As he suggests 'small-scale cultural production can now thrive because it's connected to global markets and audiences are networks of support, which wasn't possible 5, 10 or 15 years ago' (ibid). Westbury's primary interest is in:

Small-scale creativity basically like whether that's record labels, computer game designers or makers or craftspeople. I'm really interested in that really small-scale layer, the layer that doesn't really figure on the radar of sort of policymakers and big institutions ... I come out of that culture of the open source, sharing, Creative Commons idea that the whole is greater than the sum of its parts and by bringing together lots of small-scale things that can add up to something bigger (Westbury i/v June 2015).

From its early days Renew Newcastle has gone on to complete 256 projects in 81 properties and in July 2017 they had 15 active properties with 34 active projects. For some years it was managed by Marni Jackson and is now managed by Christopher Saunders.

Saunders trained in theatre at Curtin University in Western Australia before going to work for 25 years as a freelance actor in WA, Sydney and Melbourne. He also worked with a company called Big hART which uses the arts and narrative to tell stories from the fringes of Australia, and bring those stories to the mainstream. He moved with his family to Newcastle in 2011. He worked as the project manager for the restoration of the Regal Cinema in Birmingham Gardens which was officially re-opened in early 2014. He also Chaired Tantrum Youth Arts. He has been General Manager of Renew since 2014. Saunders believes that 'there's an enormous opportunity for creative people to play a part in shaping the future of this city' and that Renew is playing an important role in this as 'an enabler'. He says 'there's a history in the world of creatives coming in when a place has fallen into disrepair ... I think that creatives are very good at taking advantage of opportunities and bringing something new to a place and I think that's what's happened in Newcastle' (Saunders i/v June 2015). He also suggests that the emphasis he sees on the gift economy is highly problematic:

In the arts we're our own worst enemies at devaluing ourselves in many ways because we're constantly saying we'll do stuff for nothing, we always do stuff for nothing, and that's a great mistake. We should up our prices. I always believe that people should continue to do things for altruistic purposes, but we need to stop devaluing ourselves, and I think the use of the term 'creative industries' adds value from that perspective. That's the positive for it ... I think it's useful to move away from the expression 'the arts', which I think has had such negative connotations and been derided as being the freeloaders who don't really add any value. Of course, I would argue very strongly against that. But I think by rebadging it as 'creative industries', to have the word 'industry' there indicates that we are economically contributing, which we are (Saunders i/v June 2015).

Saunders indicates that Renew's annual budget is approx. \$250,000 per year. Newcastle Now (Business Improvement Association) provided the first funding for Renew and continues to provide funding but on an application process. They had funding from the state government but that ended in late 2014. Around the same time Arts NSW changed the criteria and that excluded Renew from funding. Newcastle City Council has recently come on board with a commitment of \$30,000 a year. In 2015 Urban Growth NSW also committed to one year of funding. HDC – Hunter Development Corporation has renewed their triennial funding agreement with Renew but reduced it from \$50,000 a year to \$30,000. Renew now encourages and supports individual tenants to apply for funding and generates income through the 'participation fee' charged to tenants, currently \$25 a week which totals \$70,000 to \$80,000 a year.

Shanti Mission's aims are different. It is an organisation based in Lake Macquarie and is dedicated to 'empowering higher consciousness'. The organisation through its network of Harmony Centres has extended its reach across Australia and into America and India. Art, writing, film and music are central to its work. Key to its growth in the region has been a philosophy of helping people to develop their own practice and from that practice to generate sustainable income.

HunterNet, on the other hand, is a long-standing organisation established to support the manufacturing industry at a time of regional downturn.

Formed as a non-trading, not for profit co-operative, it involves over 200 companies, active in national and international infrastructure and asset management, energy and resources, defence and advanced manufacturing supply chains. HunterNet provides members numerous support programs covering areas such as: business development, business systems and processes, WHS and training, marketing and communications, innovation, business improvement; and government advocacy. The network provides member companies with the opportunity to take part in activities previously out of reach of smaller enterprises including training and development, networking, joint marketing initiatives, joint project bids, focused task forces, trade missions and tendering. Further, through its subsidiary (HunterNet Group Training Company) HunterNet manages the training and development program for apprentices and trainees across a diverse range of disciplines on behalf of its member host companies. Relationships with key bodies such as Industry and Investment NSW, Regional Development Australia – Hunter, AusTrade and the University of Newcastle provide the network with additional support, services and weight in the political and business arena (HunterNet 2018, online).

The group now recognises the role of the creative industries in the manufacturing and engineering sectors and supports their further development. HunterNet aims to bring together smaller business collaboration and networking so that their skills and expertise can be combined to secure larger contracts.

17.3.2 Business Enablers, Consultants and Other Support Organisations.

Gunilla Burrowes is a founding member of Rights House, a Hunter angel investment organisation, and she chairs Eighteen04, an industry incubator focused on clean tech and smart city innovations. She is actively involved in regional economic strategy. She is an electrical engineer who initially worked in the renewable energy field. Her experience in starting up a

technical company led her toward angel investing for technically orientated start-ups and scale-ups. She is committed to working through networks, such as Rights House, as an investor because of the advantages it brings from the diversity of ideas and experience. These advantages are also gained for start-ups and entrepreneurs through co-working spaces such as Eighteen04. She asserts that:

Community networks are also important for the innovative ecosystem to grow and this is where the contribution of the creative industries is so important for technical based start-ups. Whether you are investing in a start-up or starting a business, it is so important to have input from a diversity of people who can together create the best solutions (Burrowes i/v Jan 2017).

Burrowes experience has shown her that IP issues can be problematic.

We've not tended to go down the IP side so much. It's an expensive legal field for start-ups. It's more about being first to market. That's where branding becomes important. You need the genius creatives to come up with the brand and get it to market – that's as important as the IP. It's one of the problems we have in Australia – the IP fixation. How precious are ideas? Well, they are no good on the shelf! We rank very low on the global innovation index because people won't release IP. We need to encourage, support and motivate researchers to go on the commercialisation journey (Burrowes i/v Jan 2017).

For Burrowes it seems that there is a belief that having idea, even if it is brilliant, is all that it takes. However, she asserts that 'you're not going to get rich if your idea is sitting on a shelf'. Commercialisation, she believes, means taking risks.

Steph Hinds, the Director of Growthwise Business Consultants, is no stranger to risk. She is the Joint Convenor of Digfest and also a member of the Lunaticks Society. She also sits on a number of advisory panels, globally for XERO, as well for other national organisations. She trained in accounting and business and 'liked reading about technology and start-ups and that developed as an interest' (Hinds i/v March 2017). When she started his consultancy company:

We didn't have any focus on who we wanted to work with. We just wanted to change the life of small business. My view is that small business drives the entire Australian economy. Therefore, small business shapes how Australia looks, how it is perceived in the rest of the world. About 12 months in, we decided that focus was something we needed just because the big, bad world of small business is just so big. So, the creative industries [sector] was something that personally I had an interest in and there seemed to be a lot in Newcastle. So, I delved into the questions of how to work with the creative industries. How can we get them ingrained into business in the same way they are into their creativity (Hinds i/v March 2017)?

The further Hinds investigated the matter the more it became apparent that:

For most people in the creative industries from web, all the way to artists and to theatre – they were all exceptionally talented at what they did, but most of them had no want or desire or hadn't done any training in relation to business. So, I thought what a brilliant opportunity to impart our knowledge into an entire industry that is actually a big part of everyday life but a big part of the economy as well. Because

one of the things we found was that a lot of them were only around for a couple of years. A lot of them would embark on this nice, next new step and then they would realise that there might not be enough money in it, and they would move on or go back to their original jobs and I found that terrible. Our question became ‘how could we help what we do to be a continuation of their business and get them to make profit at the same time?’ (Hinds i/v March 2017).

Hinds knows that to run a business you have to have business skills.

That’s a big part of the missing puzzle. And nowhere do you get that help. You just go on line and get an ABN and you are in business. It’s terrifying. For me that’s terrifying because how can anyone be expected to know everything about even the simple things like GST? Or about employing people? Let alone about running a business. What we try and do for creatives is if they are really creative people we try to bring that down into a business sense. What are your aspirations? Where do you want to go? Do you want to be selling it at the markets in Newcastle every weekend? Do you want more than that? Do you want a presence in Newcastle? Do you want to be known Australia wide? Worldwide? Where’s the best market for you? And really bring that vision to life. And everything in between. How are we going to get from point A to point B? What are the steps you have to take? Letting their creativity come in along the way and then reeling them back into reality. And I think the biggest thing we provide is discipline. And keeping people accountable. The biggest problem most creative people have is that they don’t understand profitability from the point of time or manufacturing or that process of, if you’re going to be invoicing, what is your time worth? What is this product worth? And we can certainly help in that sort of thing as well (Hinds i/v March 2017).

The Growthwise business consultancy run by Hinds focuses on the creative industries:

Because I think that it’s in the creative industries that I see the biggest potential. For so many people as well. That’s part of why we were drawn to those industries in this business. As an example, the trades are generally location based. Someone might have a humungous business with branches all over the place, but it is still location based. Whereas you look at the best creative people they will be doing film, or web-based, or design projects all over the world. I have seen some great creatives who are building or designing products to sell, and they are selling them to the rest of the world. That’s very exciting (Hinds i/v March 2017).

Hinds also suggests that getting to know who is doing what in the region is vitally important.

The biggest thing we try to get people to do is that networking thing - getting involved with things that are outside your own business and the norm for what you are trying to do. People need to collaborate in partnership with other businesses - that could really make sure they are sustainable for the long term. A lot of people are happy to pay for advice. It’s the rest of support that is missing. We have too many fragmented groups and networks. We need some overarching approach for networking and advice. How does one know what is happening? We literally search for it, but unless you have resources to do that, how can you know? That was part of getting Newie Start-ups and the web site going – so if you are around Newcastle, this is what is going on – where is the networking? who is getting awards? who is

working overseas? The big question is ‘who will help this happen?’ And I think that’s what is missing - that’s where other organisations could come in to support - There’s not enough collaboration. People still think of themselves as competitors here in Newcastle and not collaborators and I think that is a very big thing. If we want to continue to grow, there needs to be a lot more collaborations (Hinds i/v March 2017).

Operatives like Christina Gerakiteys are in interesting positions since the advisory, consulting and advising part of her business, Ideation at Work, coincides with her own experiences working in the creative industries. Speaking to Penelope Green from the Newcastle Herald, Gerakiteys outlined her work and early career:

I studied Law. I found it too constricting and left to study performance music at the Conservatorium and drama at University. From uni, I went into television, ran a production company, worked on the news, worked as a creative director in advertising, studied and practised herbal medicine and sang in a band. All these experiences contribute to what I do today. I ended up at TAFE with a strong commitment to experiential learning. My colleagues and I created Newcastle Music Week which ran for 10 years. I headed the Film and Television school and had students involved in Fat As Butter and formed an in-house production company. Neville Sawyer AM, a champion of innovation in our region, was the force behind Create and Innovate, an innovation program I created (Green 2018, online).

Gerakiteys took all of those experiences and started her own business:

Ideation is in the business of inspiring hearts and minds to possibility. I work with clients to identify passions and strengths. We work on creating and growing ventures. I work with organisations to identify purpose and intent, to identify the impact they want to have on the world. Then we work on how that shows itself day to day. Increased productivity and contribution increase the bottom line. We offer one-on-one sessions with entrepreneurs; education and consultation with small and medium companies; workplace culture facilitation; workshops in Design Thinking and Start With Why; keynote speaking; and innovation program creation and facilitation. It’s discovering what’s uniquely needed, what the particular end objectives are, and then digging into the tool box to create programs that deliver identified needs. Organising entrepreneurial events like Top Shots and creativity and innovation retreats are specialist offerings. I also produce the Hunter Innovation Festival (Green 2018, online).

Gerakiteys’ wide set of experiences have been useful to her:

I’m a sole operator. I contract myself out to other people and I contract other people to work with me. So, if I’m making a video for example, then I might be contracted in as the producer and then I will contract other people in as I need. So, I will get the camera person and the audio. I might know how to set something as a tonal quality but I prefer to get an expert in. I have to be creative about my administration. I don’t enjoy it and I don’t like it and I’m sure other people don’t either. But I guess you either must be disciplined about it or outsource it. What I often say in my role as an advisor to creative industries – pick the things you don’t like and outsource them if you can (Gerakiteys i/v March 2017).

For Gerakiteys this approach lends her some very transferable skills:

I guess I am in some commercial relationships because of my brainstorming ability and my skill sets which are quite broad. I was telling someone the other day that I was quite upset because I used to consider myself a Jill-of-All-Trades-Master of None. But the more I read of the creative industries, the more I realise that is a good thing. I wish I had realised that years ago when I was beating myself up about not mastering in one area. But now I realise that it is the whole creative industries experience that has allowed me to work with a whole lot of different people in a whole lot of different ways. I don't think we own (that mindset) exclusively in the creative industries but perhaps we are used to it more. We are used to coming up with different ideas and coming out with different concepts – whether it's for a video or an architectural design or designing a new shirt or a new fabric or a new pattern. I think we are used to coming up with new ideas. We get a buzz out of that achievement. And we get a buzz out of helping other people come up with different ideas. It's problem solving. In the creative industries, it's often problem-solving. You are always trying to solve a problem for someone (Gerakiteys i/v March 2017).

Seeking the same ends RDA Hunter (Regional Development Australia Hunter) is a key regional body which has recognised the creative industries as one of seven areas of 'smart specialization' for the region. They have noted the role they can play in sustainable economic diversification. For example, in their submission to the NSW Government's proposed Creative Industries Taskforce in 2013 they claimed that the 'creative industries will drive economic growth, exports, productivity, innovation and competitiveness for the Nation, the State of NSW and the Hunter region' (RDA Hunter 2018, online). As an instance of their activities in this direction they released, as part of their 'Smart Happens Here' series, a video promoting the Hunter's creative industries nationally and internationally (see RDA Hunter on Youtube at <https://youtu.be/OILubMWQhrs>). Up until 2017 Todd Williams was the CEO of RDA. He argues that:

The creative industries sector is of key importance as an enabler of growth through design thinking and a creative approach to problem solving. In terms of having to tap into overseas markets, you need IT to help you with that. I think that focusing on areas that are more willing to accept change is probably the way to go. However, the weakest is the IT. Area. The Hunter is possibly the worst region in the country. We need to fix that. There was a report in the paper 2 weeks ago about digital – not sure what the title was, but the Hunter was the worst region in Australia for digital – 3 measures – one was accessibility; one was pricing and the third was 'do you know what to do with IT?' And the Hunter was the lowest in Australia. Newcastle was all right if you took that in isolation. So, in terms of digital literacy there's a long way to go. The strength of I.T. is that if you know what to do with it, you could live here and work elsewhere but most people choose to go to a bigger centre – the urbanization that is happening globally – to get jobs. That's the game that Newcastle and the Hunter is in – global talent issues – how to attract and retain talent. And IT is a part of that, but you've got to start a critical mass somehow. It's an interesting quandary (Williams i/v March 2017).

In the meantime, Williams suggests that there are other connections to be made:

In a perfect world I would like to build better links between manufacturing and creative industries certainly. And I think, medicine and education – from the perspective of economic development – high value jobs and growth. The creative industries really put the after-burners on something like that. Defence. Agriculture. I am thinking of a story I was told about a corn picker. There was a farmer in the Upper Hunter who bought a half million-dollar corn picker. And then proceeded to cut it apart and put it back together again. It picks 40% more corn. He doesn't want to do anything with it. He just wants to pick corn better. It's how to use things a bit differently. Also, new markets. So, it's new markets and tailor-making the products to market. For that, you maybe need a design-thinking type of person and maybe a plain-speaking technology person. That would really help. To help introduce people to the world of technology (Williams i/v March 2017).

On a more localised scale, Newcastle Now, the Business Improvement Association for inner city Newcastle, has taken a long-standing focus on the role of the creative industries in city and economic revitalisation, supporting through sponsorships and grants a range of organisations, events and projects that link the creative industries to skill development, business activation and placemaking. CEO of Newcastle Now, Michael Neilson, was originally trained in industrial relations and human resources undertaking a business degree with a major in IR/HR. He started his career as an Industrial Relations Officer and then moved into strategic HR with local government. His involvement in an internal review of the services sector of the Council gave him a broad overview of what Councils did. At the same time, he became involved in his own businesses beginning in 2009. He has been exposed to local government while balancing that out 'with some private enterprise thinking as well as small business operator experience' (Neilson i/v Nov 2016). When he first took up the role of CEO of Newcastle Now, Neilson, like many others was aware of that the city was populated with a significant number of artists and musicians with limited incomes. He admits his view of the creative industries was also limited:

I probably had a pretty ignorant view – the basket-weaving model so to speak. So, I probably didn't give it the respect that it deserved. But then my eyes were opened to what the creative industries were, and are – a new understanding of the sector. And I realised that it is big, that it opens up a whole range of sectors that are emerging opportunities. So my thought was that we can build on the strengths we have established here and take things to another level through the creative industries. I guess it is a point of difference to other cities that haven't built their change around creative industries. I know there are other sectors – professional services, but creative industries have the potential to cut across all of them (Neilson i/v Nov 2016).

Neilson indicates there are policy and strategy documents that guide this organisation's programs in relation to the creative industries.

We work as closely as we can with Council and with Government agencies. Collaboration and close strategic alignment help us all achieve our goals. For example, with the live music sector, where we want it to come back strongly to support the night-time economy, we will work hard to help resolve the legitimate challenges that Council has to work through to let this happen. That will draw us into working with their goals for the night-time economy as well as their goals to meet resident concerns and for compliance with noise standards. We work with

similar policies and strategies when we work with events, placemaking, development projects such as Nobbys lighthouse, the smart cities strategy – we are guided in everything we do. It doesn't matter if it operates as a constraint – we have to work within them (Neilson i/v, Nov 2016).

Apart from working pragmatically with the situation as it stands, Newcastle Now has also invested in research, including supporting this project, as well as exploring opportunities such as the night-time economy and creative placemaking using these to address social challenges. They also invest in longer time frame projects such as the Hunter Innovation and iF Projects. It is worth noting here the significance of major projects, of the type Newcastle Now is involved in, to act as catalysts for the generation of business opportunities for the creative industries. As this study has reached its final stages, several projects have arisen which are dependent on the creative sector and which have the potential to create new jobs and businesses. The Hunter Innovation Project (HIP) is a collaborative project between University of Newcastle, the City of Newcastle, Newcastle Now and Hunter DiGiT to support an innovation hub and digital smart-city infrastructure. Alongside the smart city infrastructure, and derived from it, are projects to develop policies in open data, digital applications to support parking control, foot traffic management, environmental monitoring and many more applications. At first glance, these seem unrelated to the creative industries but gamers, virtual reality programmers and promotional activity is beginning to cluster around the project. Also linked to HIP is I2N, a system of regional innovation hubs with four sites and four industry priorities – Newcastle, Lake Macquarie, Muswellbrook and Port Stephens (Williamstown). Outputs from these hubs are already gaining recognition through digital events such as CEBIT and start-up events where interest is growing in considering the Hunter for relocation of small businesses. Night Time Spaces is a collaborative project of Newcastle Now, Newcastle Council, University of Newcastle, Hamilton Chamber of Commerce and Hunter Development Corporation which is using interactive design in public spaces to counter problems in high-crime hot spots while newer projects will use sensor-based technology to drive 'smart-play' interactive areas in the public domain. Neilson suggests that:

If we provide the infrastructure, and in particular Open Source Data, then there are unlimited opportunities to what we could do here. So capturing that data and opening it up to the developers – I don't know where it could end. My thoughts are that we need to create that infrastructure for it to happen. In the activation and placemaking – again using smart technology to take those sorts of activation activities to another level. Instead of the traditional outdoor chess set, let's have an interactive, visual outdoor chess set. By having the infrastructure let's take it to another whole other level. The whole interactive space, there's an opportunity for us to make a name for ourselves. The biggest issue and opportunity I think lies in the role that the creative industries can play in enabling innovation across many other sectors – health, manufacturing, professional services, tourism – the other sectors we need to be healthy in this city ... I think one of the big issues we have to understand more about is the changing nature of the work place. Coming from an IR background makes you realise that the workforce of the future is going to be greatly different. The creative industries, in some areas in particular, are uniquely positioned to move seamlessly into that new era – many of them already work within the newer models (Neilson i/v Nov 2016).

Neilson asserts that Newcastle Now's 'primary purpose is that things do the job they are designed to do. Creativity and innovation are often a key element' (Neilson i/v Nov 2016).

While organisations such as Newcastle Now, and the projects they stimulate, are enablers of the broader creative industries there are other organisations that focus at enabling specific sectors within the creative industries. One of these is the Australian Institute of Architects (AIA). Through its Newcastle Division, servicing the Greater Hunter Region, the AIA delivers professional development, awards and prizes, events, policy and advocacy and noting significant architecture. It also provides a range of services to members including HR assistance, benchmarking, Australian Standards, insurance and a 'Find an Architect' service.

In the Upper Hunter, Arts Upper Hunter aims to provide support and promote opportunities for people to participate creatively in their communities. Mark Reedman is the Executive Director with Arts Upper Hunter. He trained initially as a high school drama/English teacher, taught for a number of years, worked in theatre education as actor and musician, moved into community theatre for a decade as well as working in youth circus before another decade in youth theatre before starting work with the New South Wales Regional Arts Network eventually moving to Arts Upper Hunter.

Arts Upper Hunter is supported by the local councils of the Upper Hunter region and it supports projects, promotes artists and galleries, museums and historical societies, coordinates creative workshops and maintains a directory of art and cultural groups. It is also a strong supporter of indigenous arts and culture. As Reedman indicates, changes in the political landscape have altered the underpinning constitution of this support organisation:

We had five councils in our region who contributed on a per capita amount depending on the population of each local government area. We had Gloucester but we lost it because they have amalgamated with Greater Taree and Great Lakes. We've still got Dungog but it will amalgamate with either Maitland or Port Stephens. Gloucester went to one of our sister regional arts boards, Arts Mid North Coast. Dungog will not go to any other regional arts board because neither Port Stephens nor Maitland are in the regional arts network since they're kind of considered to be not sort of regional. It's had quite a significant effect on our funding but we still have Singleton, Muswellbrook and the Upper Hunter Shire. The board's constitution currently is someone nominated by a contributing council. In the past that's been five councillors. A year or two ago that changed and one of the councils nominated a staff member which is fine. It's anyone the council nominates plus a community representative whom we advertise for from each of the LGAs, and from time to time the board co-opts. Having said that we signed, just by the way, a three-year agreement with Arts New South Wales. Arts New South Wales want all the regional arts boards to move to a skill-based model and so we're kind of all in the process of figuring out exactly how that's going to happen. Rather than being representative it means, just for the sake of argument, having someone who's got financial skills perhaps, someone who's got perhaps public relations/marketing skills, someone who's got HR skills, someone who's got perhaps legal skills, that sort of approach. It's just a lot of artists aren't any good at the business side of things. I mean, some are, some aren't. It's a bit of a changing world because of the internet (Reedman i/v Aug 2015).

Other arts support organisations in the Upper Hunter such as Scone Arts and Crafts Inc. also aim to enthuse, practice and demonstrate all branches of the arts. Others such as the Singleton Arts and Music Society present orchestral concerts, chamber recitals, opera concerts and plays.

Further down the valley in Newcastle, the Newcastle Community Arts Centre supports the development of community-focussed arts activities by individual, groups and organisations providing space and skills development and promoting events, while the Octapod Association aims to inspire new ideas in arts and media and support a creative and diverse arts sector. Octapod has supported the development of artists through programs such as the This Is Not Art Festival, culturehunter.org and Podspace Gallery. TINA, known as This is not Art, is an annual festival of experimental and emerging arts. It attracts artists and visits from across the country. One of its highlights is a Young Writers Award. The Dungog Festival is an arts festival which highlights art in many genres and includes film, workshops, sculpture on the Farm, music in a street party and lots of family entertainment.

Apart from a focus on the arts, publishing and film communities, the digital sector has also had its supporters and enablers. Hunter Digit, for example, is a non-profit organisation committed to establishing the Hunter Region as a leading digital economy with a global reputation by 2020. Leaders of the group have been closely involved with the Hunter Innovation and iF Projects which are delivering these outcomes. Closely linked to Hunter DiGiT is Eighteen04 which provides an incubator and co-working space for smart cities and green technology. It runs start-up events and hackathons and provides mentoring and skills development.

The Lunaticks Society is a not-for-profit association of digital and creative enthusiasts and related professionals and entrepreneurs who are engaged in the digital economy and want to network and promote their ideas and achievements to others. Gordon Whitehead is its Chair and founder. Whitehead's background was as a Royal Air Force technician. He then moved into IT Services and from there into Business Development Management. He has a Masters Degree in Marketing. Whitehead's own business is a marketing consultancy but he was recently offered the opportunity to work within a business advisory capacity. This situation:

Also gives me a role in regional planning in the sphere of innovation. It brings together my experience and training but also my passion to make a difference ... I have come to the view that the methodologies of business development are wrong – archaic. So, I started to look at one-to-one marketing, databases and so on because the traditional marketing agency model was broken. There are new models, new revenue models. What I used to do for businesses isn't useful any more. Now I work as a business advisor and can use all of that experience to help others (Whitehead i/v Sept 2016).

As Whitehead explains:

I helped form the Lunaticks Society - named after the Lunar Society of Birmingham - which is dedicated to digital innovation and new ideas in Regional Australia. One program is the annual Newie Awards for digital creativity based on a whole range of technologies – social media, new technology solutions, agency work, start-ups, solutions for government and tourism. It has been running for five years now and has become a significant event – entries from around Australia, even overseas. We've run Coffee Mornings and evening sessions where we talk about creative topics. We are trying out a more TV-style program approach with our goal to do

more consumable programs. It's all about collaboration – agencies, suppliers, clients. At Lunatics – it's everyone who is involved. Stop the competitive stuff. Collectively we can lift the bar ... My goal is to generate optimism. It's an exciting time. We are in an age of experimentation and innovation we have never seen before. The big issue is the transition from traditional businesses on the street corner to the new services, as well as the new industries and the businesses that support them (Whitehead i/v Sept 2016).

Among the growing complex of privately-run co-working spaces that specialise in clusters of related creatives are the INNX Hub which provides co-working space, studios, meeting spaces and hot desks for creatives such as filmmakers, architects, designers, photographers and The Production Hub which is a co-working space in Newcastle for film-makers, 3D artists, animators, graphic designers, UX designers and web developers.

Harry Balding is the Community Manager for the DASH co-working space. After studying communications, he worked in marketing, sales and business development for a manufacturer before taking up his role with DASH. He indicates that his:

Interest lies in tech start-ups so being able to tie my interest into my employment is ridiculously good. Here, we've got media producers, website designers, graphic designers – quite a few working in the creative sector but that's not our sole client group. Within the Hunter you've got the Roost, Production Hub, and INNX, Newcleus. So there are plenty of options specifically for the creative sector ... Dantia, the vehicle for Lake Macquarie's economic development strategy, is DASH's parent company. We thought to set up a place for people in the knowledge economy to thrive and to meet, and to collaborate and connect. We also feature in Council's smart cities and ecosystem management strategies ... Newie Start-ups is a meet-up group that has just grown. For each event we have held, there have been more attendees. We did a pitch event last October and had 85 people come and 8 start-ups pitched. The University provided the prizes. It's one of a whole lot of innovative meet-up groups in Newcastle – Agile Newcastle, Newcastle Intracoders; Newcastle Ruby Developers, Hunter Young Professionals; UON Bizcom; UON Computing Society and others. Within Newie Start-ups and DASH there is now lots of informal and social mentoring around (Balding i/v Jan 2017).

For the film world Screen Hunter, the regional film office, supports production in the Hunter region. This office is funded by Hunter Councils and its aim is to capitalise on the unique qualities of the region by increasing film production and fostering and driving the development of a creative and sustainable film industry in the region. As discussed previously it has been successful in attracting film projects to the region and with them the flow-on jobs to local film workers and actors.

The visual arts community is supported and enabled in its activities right across the region. As an economic booster for micro enterprise, it is strongly evident through opportunities such as the Gloucester Arts Trail and the highly successful Olive Tree, Hand Made in the Hunter, Singleton Farmers and Craft, Wollombi Village, Maitland, Laguna, Wine Country and Hunt and Gather Markets as well as the many smaller markets that present throughout the region. Similarly, it seems that almost every town across the region has a small gallery, arts-based retail outlet or annual art show where local creative is given the promotion and support it needs. Several societies are actively engaged in providing a broad creative impetus. These include the

Artisan Collective Port Stephens; the Australian Decorative and Fine Arts Society Scone – which promotes education in the study of the decorative and fine arts; the Gloucester Arts and Cultural Council which is a not-for-profit that operates a gallery and provides workshops and activities; Dungog Arts Society which aims to provide a focal point for fostering creative activities in their community; the Lake Macquarie Art Gallery Society and the Newcastle Art Society. Delivering a broad approach, Murrurundi Arts and Crafts Council is a not-for-profit volunteer-based arts council which runs workshops and ArtStart lessons and hosts the annual Murrurundi Art Prize, photographic Prize and biennial Opera Murrurundi, while the Hunter Arts Network is a non-profit group of artisans that strives to facilitate opportunities of promotion of members and their work through an art bazaar and promotional activities. Port Stephens Community Arts Centre provides facilities for community arts and craft activities and a gallery as does the Muswellbrook Regional Arts Centre while Newcastle Printmakers Workshop is a dedicated space run by volunteers and available to artists. Ceramics is a strong interest with groups such as Newcastle Studio Potters, Scone Ceramic Group and the Pot House at Muswellbrook all having active ceramics groups, with shared studio spaces for creating ceramics and there are also private teaching studios such as the one at Adamstown. Textiles and fibre arts is a consistent interest with an apparently growing commercial market, locally moving out of functional items and into fine arts. From more traditional crafts such as represented by the Knitters Guild, Fibreholics Clarence Town focusses on spinning and knitting crafts and Daughters on Dowling is a networking and skill development group working with textiles in Dungog. In Newcastle, Creative Embroiders and Textile Artists work with fibres, textiles, quilting and jewellery while Timeless Textiles is a gallery store and open studio featuring textile arts and providing workshops and visiting artists programs.

All Councils in the Hunter Region also actively support indigenous cultural programs through their gallery spaces and events programs. Indigenous art is represented in many galleries including the dedicated Free Spirit Aboriginal Gallery, Outback Art and Red Ochre Workshops – all in Newcastle. The Wollombi Valley Arts Council supports an Aboriginal arts and culture group; while the Hunter Valley Visitors Centre and Cessnock Art Gallery also highlight indigenous arts. Tobwabba Art, based a little to the north in Forster, represents 22 artists but is an internet-based business – successfully linking the traditional to contemporary markets and crossing regional boundaries. Speaking in Colour is a business delivering Aboriginal art workshops and education resources across the region.

Writers' support groups are also evident throughout the region and focus on both appreciation and skills development. Gloucester Writers Centre, for example, delivers readings, classes, lectures, films, writers-in-residence and community events. The Hunter Writers Centre is a not-for-profit organisation devoted to both aspiring and established writers and delivers courses, conducts competitions and awards, and (differently from other groups) provides writing services. The Lake Macquarie Branch of the Fellowship of Australian Writers meets monthly as do the Raymond Terrace, Maitland and Singleton Writers Groups which provide a range of writing workshops and meetups. Writers Festivals are very popular. The National Young Writers Festival is the country's largest gathering of young and innovative writers working in both traditional and new forms including zines, comics, blogging, screenwriting, poetry, journalism, comedy and prose. It presents panels, discussions, workshops, performances and many forms. The Newcastle Writers Festival is relatively new but has quickly become a well-established event attracting a broad audience and successful writers. The Scone Literary Festival aims to 'maintain the page' in this digital age, promoting books and a love of literature.

For the performing arts sector, individual facilitators like Shane Bransdon are essential. He has been a practitioner in acting, singing and dancing since he was five years old. His interest in the performing arts is broad and active but he sees himself primarily as a facilitator. Until recently his paid position was as an educator where he was Vice-Principal at Waratah Public School until 2018 when he began a drama business with Daniel Stoddart called OzTheatre. Bransdon has also lectured at The University of Newcastle Drama Department. Importantly he devotes a great deal of his time to the theatre. He is a judge of the City of Newcastle Drama Awards (CONDAS) which entailed, for example, seeing 60 shows in 2013. He was Chair of the Newcastle Performing Arts Taskforce from 2012 until 2015. He is the drama rep on the arts funding body for the NSW Department of Education which in 2014 disbursed approximately \$230,000 in the region. He is also currently undertaking research into performing arts for his PhD at The University of Newcastle. Bransdon's commitment to being a facilitator may be linked to his comments on the lack of support for performing arts:

Whether it is infrastructure, huge issues with rehearsal spaces, performance spaces and storage spaces, workshop spaces to build things, that's a significant area that has popped up with my work. Support in terms of grants that either lend towards that or support other organisations such as Tantrum and not-for-profit things. Also within the media the support is minimal. I think the media is an important element within our ecosystem because we can't get audiences without getting the message out there (Bransdon i/v Dec 2014).

Bransdon also identifies a need for systems to support professional development:

People do generally operate on a sole trader basis however we do have theatre companies like NTC (Newcastle Theatre Company) that do have the potential to say 'We have all of these shows coming up this year, we have 6, 7, 8 directors, let's send them to do some professional learning'. This just doesn't seem to happen. We all know in every other industry that professional learning is a significant ongoing part of being able to keep with the times, produce quality work economically. That is another area I feel is lacking (Bransdon i/v Dec 2014).

Theatre companies in Newcastle, according to Bransdon, are using social media, and whatever form of communication that entails embedding into their posts, to promote their shows:

I've looked elsewhere in Australia and they are not doing it but Newcastle theatre companies are producing film trailers in an effort to promote their shows. Stooged Theatre is a wonderful example of companies that go to a lot of effort to stage elements of their show for film ... We do have a wonderful community in Newcastle theatre everybody is linked into social media, regardless of age ... Being able to tag people, share the experience. People are able to instantly access five or six hundred of their friends by making a single post. I am the coordinator of the CONDA Facebook page and I am able to see using data how many people are exposed to our posts. When I posted about the CONDA winners it was in the vicinity of 900 people that that post reached, just by typing in a sentence and adding an attachment and clicking post. Stooged Theatre have in particular - and I'm not sure if it is entirely social media but I believe that is a significant factor - been able to access an entirely new young audience that nobody else has been able to capture. It is also because they are doing 21st century plays but they are definitely bringing in new audiences (Bransdon i/v Dec 2014).

For Bransdon collaboration remains central:

It's really important because a lot of us are individuals who look after our own craft, whether it's development or seeking employment, creating work for ourselves, collaboration has to happen ... Every show that you do creates a little family of people who have to collaborate. The wonderful director Julie Black [from Metropolitan Players] always describes it to me as a jigsaw puzzle. She says to me 'I treat the ushers the same as I do my lead actors because we are all pieces in the jigsaw puzzle. Without all the jigsaw pieces we are not complete' (Bransdon i/v Dec 2014).

17.4 Conclusion

The creative industries, like all others, do not exist in a vacuum. Once operatives within these industries acquire enough knowledge to become contributors to help complete the jigsaw puzzle, they are part of their own sector and also, increasingly, across sectors, they need support to access information, finance, advice and support as they make their way through an increasingly complex world. Educational opportunities at all levels are available in the Hunter Region with many courses on offer focused specifically at the creative industries. Local, State and Federal instrumentalities have been set up to ensure that the viability of these and other industries serves to benefit the region. The business world also recognises the need to help budding entrepreneurs realise their objectives and at the same time provide research and project support where possible. A number of businesses are focused at this exact task training, advising, consulting, encouraging and, at times, financing those willing to take risks in the creative industries.

20. APPENDICES

20.1 Appendix 1: Short Films

‘Creativity and Cultural Production in the Hunter’ ‘Creativity and Cultural Production’

(Dir: Samuel Hutchinson, Prod: Susan Kerrigan 4 minutes)



This short promotional film explains the research behind the ARC Linkage project being conducted in the Hunter Region by Associate Professor Phillip McIntyre, Professor Mark Balnaves, Dr Susan Kerrigan, Evelyn King and Claire Williams.

Check out on Vimeo - <https://vimeo.com/78486145>

‘Creative Newcastle’

(Dir: Samuel Hutchinson, Producer: Susan Kerrigan 14 minutes)



This film is a visual case study of creative industry practitioners who work in Newcastle, it covers film, media, design and fashion industries and looks at creative business strategies used in Newcastle. Creative Newcastle highlights creative industry practitioner’s hopes for their future in Newcastle.

Check out on Vimeo - <https://vimeo.com/78486285>

20.2 Appendix 2: CI Businesses and Practitioner Interviewee list

Architecture

Edward Duc, Duc Associates
Cassie Stronach, Group D Creative
Debra McKendry Hunt, McKendry Hunt Architects

Advertising

Gavin Banks and Olivia Olley, Good Eye Dear
Kristie Ferguson, Newcastle Now
Jamie Lewis, OOTS
Kara Sullivan, Guts Creative
Craig Wilson, Sticky Advertising
Kent Woodcock, Woodcock Creative solutions

Public Relations and Events

Paul Tibbles, Cultural Events
Melanie James, PR/Communication University of Newcastle
Heidi Pollard, UQ Power

Design

Liz Anelli, Children's Book Illustrator
Donna Burrell, Hunter Design School
Trevor Dickinson, Muralist and Designer
Tina Elliott, The House of Elliott
Sophia Emmett, Designer/maker
Jono Everett, Designer/Maker
Jeff Julian, Pendulum
Mario Minichiello, Professor of Design, University of Newcastle
Shannon Roman, Crackler
Graham Wilson, Designer

Electronic Games and Interactive Content

Cameron Baker, Interactive Games Developer
Karen Blackmore, IT, University of Newcastle
Tim Davidson, Virtual Perspective/VR and 3D Animator
Ivan Demidov, Virtual Perspective & Demidov Innovations/VR and 3D animator
Matthew Farrelly, NSW Mines Rescue Services
Emma Leggett, Digital Marketer/Web developer
James Vidler, DiGiT

Fashion

Kevin Coffey, Jean Bass and 144: A Style Collective
Angela Foong, High Tea with Mrs Woo
Rowena Foong, High Tea with Mrs Woo
Angela Hailey, Studio Melt
Lara Lupish, Creative Director

Visual Arts

John Bradley, Landscape Artist
Peter Carlin, Haydon Hall Art Gallery
Kerrie Coles, Artist
Andrew Davis, Artist
Brad Franks, Muswellbrook Regional Art Gallery
Peter Lankas, Artist
John Lechner, Photographer
Rachel Milne, Artist
Jo O'Toole, Artist
Trevor Richards, Morpeth Investment Art Gallery
Gilleen Shaw, Art Gallery Director
Roger Skinner, Photographer
Catherine Strutt, Bespoke and Lightweight Funky Jewellery
Jennifer Strutt, Bespoke and Lightweight Funky Jewellery
Meredith Woolnough, Textile Artist

Performing Arts

Julie Black, Metropolitan Players
Graeme Black, Metropolitan Players
Shane Bransdon, Judge, educator and performer
Carl Caulfield, Playwright/director/actor
Sarah Coffee, Paper Cut Theatre Company
Tamara Gazzard, Paper Cut Theatre Company
Timothy Gordon, Dancer
Amy Hardingham, Tantrum Youth Arts
Lucy Shepherd, Paper Cut Theatre Company
Mat Lee, Stooged Theatre
Daniel Stoddard, Hunter Drama

Music

Morgan Evans, Country Music Performer
David Fitzgerald, Musical Director and Audio Engineer
Capree Gaul, Live Music Producer
Philip Matthias, Composer, University of Newcastle
Tim McPhee, Musician
Frank Millward, Musician
Steven Pickett, Music Entrepreneur

Publishing

Simone Bailey, Writer
Marilyn Collins, Magazine Publisher
Phil Collins, Magazine Publisher
Mark McLean, Publisher, Writer and Editor
Rosemary Milsom, Writer/Journalist

Radio

Phillip Adams, Public Intellectual

Phil Ashley-Brown, National Radio Manager ABC
Sean Ison, Radio Entrepreneur
Anthony Scully, Multi-Media Producer, ABC
Wayne Stamm, 2NURFM

Film and Television

Vanessa Alexander, Film and TV Writer/Director
Gavin Banks, Good Eye Deer
Karl Brandstater, Storyhaus
Ian Hamilton, Limelight Creative Media
Annette Hubber, Screen Hunter
Anna Kelly, Limelight Creative Media
Brendan McCormick, Bar TV
Josh Mason, Bar TV
NBN Television
One80
Olivia Olley, Good Eye Deer

Sector Enablers

Liz Burcham, Cultural Director, Newcastle City Council
Gunilla Burrowes, Electrical Engineer
Christina Gerakiteys, Ideation
Steph Hinds, Growthwise
Harry Balding, Dash Co-working spaces
Nuatali Nelmes, Lord Mayor Newcastle
Michael Neilson, Newcastle Now
Mark Reedman, Arts Upper Hunter
Christopher Saunders, Renew Newcastle
Marcus Westbury, Cultural Entrepreneur
Gordon Whitehead, The Business Centre
Todd Williams, Regional Development Authority – Hunter

Creativity & Cultural Production in the Hunter

An applied ethnographic study of
new entrepreneurial systems in the
creative industries.



Final Report:

Bibliography and Acknowledgements

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Professor Mark Balnaves

Associate Professor Susan Kerrigan

Evelyn King

Claire Williams

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