



# **CREATING A CAREER IN CULTURAL AND CREATIVE INDUSTRIES**

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# INTRODUCTION

The main objective of this research is to analyse the impact of the investment and management in Valletta 2018 on employment within Malta's Cultural and Creative Industries. Such analysis will be based on statistical indicators in an effort to derive any changes in the employment structure in CCIs pre- and during Valletta 2018 [2014 – 2018].

## METHODOLOGY

The methodology that has been adopted during this research is primarily based on quantitative techniques. A statistical analysis of a number of employment indicators has been carried out. Such indicators include:

- Full-time employment in CCIs
- Part-time employment in CCIs
- Total employment in CCIs
- Notified vacancies to ETC (relating to CCIs)
- Registered jobseekers (searching for jobs relating to CCIs).

Employment statistics have also been segregated by gender in an effort to capture any changes in employment structure pre- and during Valletta 2018. For the purpose of this research, the pre-Valletta 2018 period will cover from 2014 to 2016 whilst the Valletta 2018 period will incorporate data from 2017 to 2018. Due to the number of events, (both on a large and small scale) involved in the years leading up to the Valletta 2018, a priori it is expected that employment in CCIs should experience gradual increases over the time period under observation.

All data relating to employment, vacancies and registered jobseekers has been extracted from the ETC database. It is being intended that all statistical figures are first analysed on a quarterly basis; subsequently an analysis on an annual basis should be conducted when the necessary observations become available. Since the research is aimed at analysing the impact on employment pre- and post Valletta 2018, the statistical analysis will run from 2014 up to 2018. In order to determine the NACE<sup>4</sup> codes which should be classified under the Cultural and Creative Industries, feedback was gathered from other public entities such as the National Statistics Office (NSO) and the Ministry for Finance (MFIN). Furthermore, reference was made to a number of reports which included guidelines on the NACEs and ISCO<sup>5</sup> codes which should be included under CCIs. A full list of NACE codes included under CCIs for the purpose of this research is included in Appendix A.

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<sup>4</sup> NACE or Nomenclature statistique des activités économiques dans la Communauté européennes is the statistical classification of Economic Activities in the EU.

<sup>5</sup> The International Standard Classification of Occupations (ISCO) is one of the main international classifications for which the International Labour Organisation is responsible. ISCO is a tool for organizing jobs into a clearly defined set of groups according to the tasks and duties undertaken in the job (ILO web portal).

Furthermore, ETC has been carrying out the development of an Employability Index. During 2015, an Employability Index Report was launched aimed at facilitating the transition from further and higher education to employment. The results relating to CCIs will also be extracted from this report so as to determine whether pre-Valletta 2018 period students furthering their education in the Creative Sector manage to find a job which requires the individual's level of education and one that matches the relevant area of study. The Employability Index Report launched in 2015 covered students who graduated in 2012 and 2013 from 3 main educational institutions; the University of Malta, the Malta College of Arts, Science and Technology and the Institute of Tourism Studies. Their individual areas of study were compared with their respective employment in the subsequent years 2012, 2013 and 2014 following their graduation year. Hopefully the Index Report will be updated in the near future in order to allow an inter-temporal comparison of results tied to CCIs. Such results could be further examined to determine whether Valletta being the European Capital of Culture has any impact on the type of jobs students pursuing studies in the Creative Sector find after completing higher education.

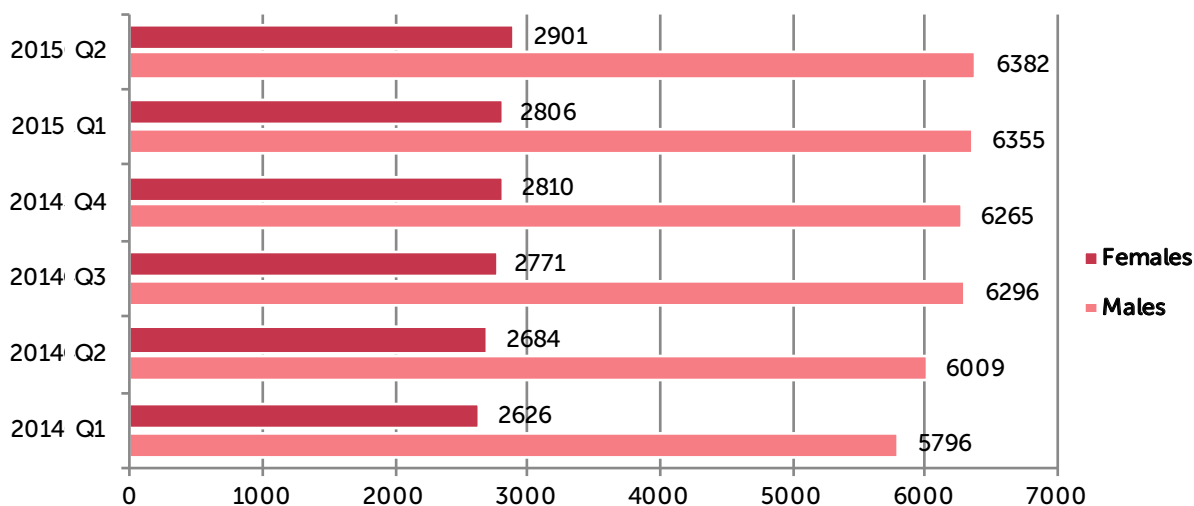
# FINDINGS

The main results of the research conducted during 2015 is displayed and described in detail below.

- Full-time Employment in CCI's

As can be viewed in Figure 1 below, total full-time employment in the Cultural and Creative Industries has increased from 8,422 in Quarter 1 of 2014 to 9,283 in Quarter 2 of 2015, equivalent to a 10.2% increase. This increase is equally reflected in both gender cohorts such that an additional 586 males and 275 females were engaged in gainful employment within the creative sector. Although the number of males employed in CCI's decreased slightly at the end of 2014, it gained pace once again during 2015. Similarly female employment in CCI's decreased marginally by 0.1% during the first quarter of 2015 however this fall did not overturn the positive changes that were experienced during the previous quarters under review. The majority of full-time employment in CCI's as at 2015 Q2 was in the private sector (93%) whilst the remaining 7% were employed in the public sector.

**Figure 1:** Full-time employment in CCI's



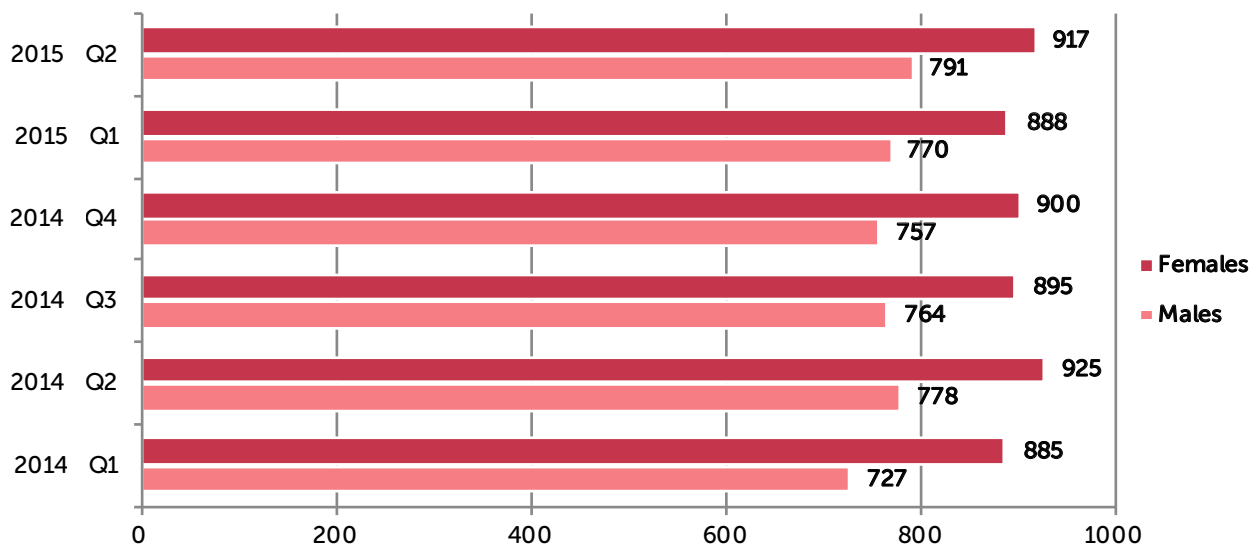
The top 5 NACEs contributing to Full-time employment in CCI's as at end of June 2015 (i.e. 2015 Q2), were:

1. 91.02 - Museums activities (19.36%)
2. 73.11 - Advertising agencies (12.68%)
3. 93.20 - Amusement and recreation services (10.68%)
4. 60.10 - Radio broadcasting (7.47%)
5. 18.10 - Printing and services activities related to printing (6.08%)

### Part-time Employment (as a primary job) in CCIs

Figure 2 below displays part-time employment in CCIs between 2014 Q1 and 2015 Q2. In general, total part-time employment in CCIs increased from 1,612 in 2014 Q1 to 1,708 in 2015 Q2, equivalent to a 5.96% increase. Part-time employment in CCIs was more volatile during the period in review as it increased significantly in the second quarter of 2014, decreased in 2014 Q3, and increased marginally in 2014 Q4 and 2015 Q1.

Figure 2:



### Total Employment in CCIs

Table 1 below provides an overview of the share of employment in CCIs as a percentage to total employment as at end of June 2015 (i.e. 2015 Q2). Full-time employment in CCIs amounts to 5.45% of total full-time employment, whilst part-time employment in CCIs contributes to 4.86% of total part-time (as a primary job) employment. Moreover, total employment (full-time + primary part-time employment) in CCIs as at end of June 2015 amounted to 10,991 pertaining to approximately 5.35% of employment in the total economy.

	CCIs	Total Economy	% of CCIs
Full-time Employment	9,283	170,322	5.45%
Part-time Employment	1,708	35,175	4.86%
<b>Total Employment</b>	<b>10,991</b>	<b>205,497</b>	<b>5.35%</b>

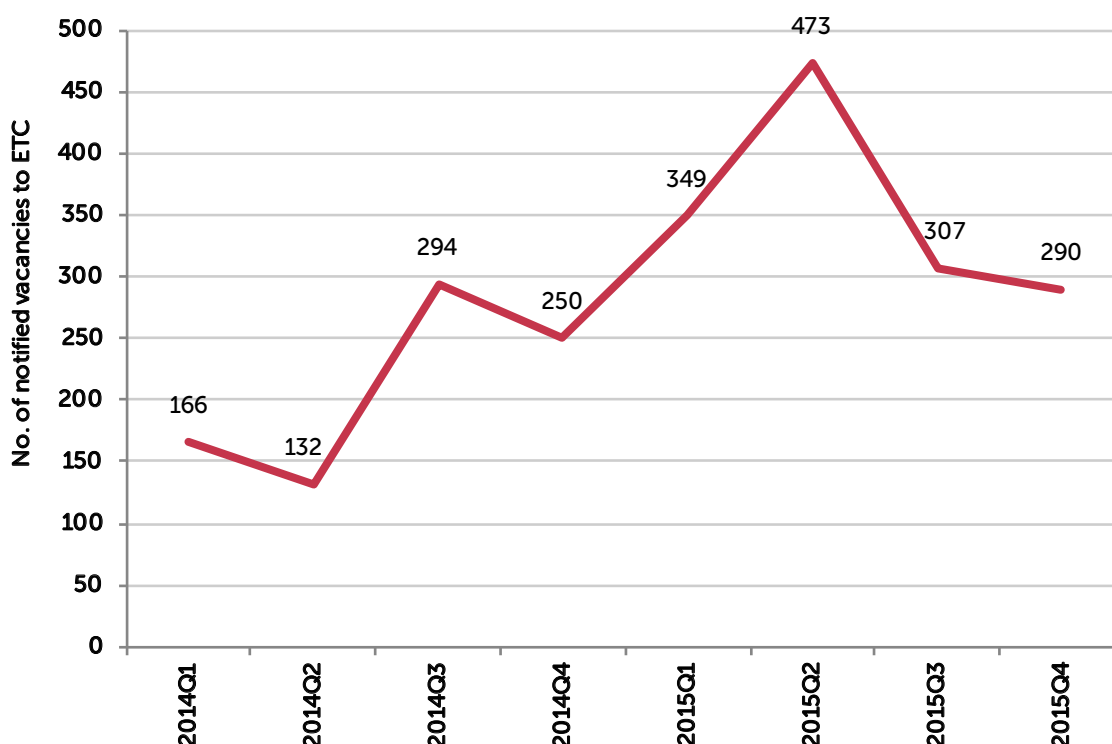
### Notified Vacancies to ETC (relating to CClIs)

The number of vacancies notified to ETC relating to CClIs has also been analysed. Overall the number of vacancies pertaining to occupations within the culture and creative sector has increased from 166 in 2014 Q1 to 290 in 2015 Q4. Notwithstanding this noticeable rise, vacancies relating to CClIs have been quite unstable as evidenced by fluctuations in Figure 3 overleaf. As at the end of December 2015, the number of vacancies notified to ETC relating to CClIs accounted for 5.58% of total vacancies notified to ETC. The top 5 occupations relating to CClIs which registered the highest number of vacancies between January and December of 2015, where:

1. Printers (ISCO – 7322)
2. Software Developers (ISCO – 2512)
3. Blacksmiths, hammer smiths and forging press workers (ISCO – 7221)
4. Web & Multimedia Developers (ISCO – 2513)
5. Draught persons (ISCO – 3118)

A word of caution is warranted: these statistics emanate from the ETC database which means that the figures do not capture the total vacancies across the Maltese labour market but rather only vacancies notified to ETC which to some degree represent a subset of the former. Furthermore, a double counting problem may also be at work, since if an unfilled vacancy is reissued at a point in time after the initial closing date by the same employer, this is classified as an entirely new vacancy as opposed to a recurrent one.

**Figure 3:** Vacancies notified to ETC, relating to CClIs



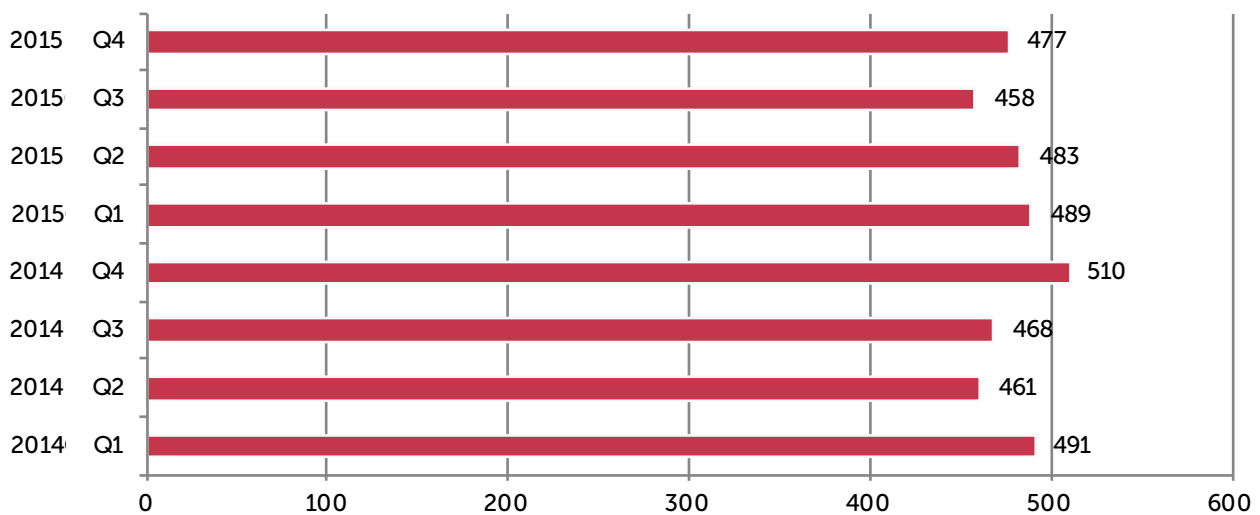
### Registered jobseekers (searching for jobs relating to CCIs)

The number of jobseekers looking for jobs in the creative sector remained more or less the same during the period analysed in figure 4 below. The most noticeable increase can be observed in 2014 Q4 where the number of jobseekers registering for jobs relating to CCIs increased to 510 compared to a (simple) mean of 473 in the previous 3 quarters. This increase was mainly pertinent to occupation "2654 – Film, stage related directors and producers", since a number of jobseekers started showing interest in occupations classified under this ISCO code.

As at end of December 2015, the top 5 occupations which registered jobseekers listed as their first preference of job, where:

1. Film, stage and related directors and producers (ISCO – 2654)
2. Printers (ISCO – 7322)
3. Visual artists (ISCO – 2651)
4. Graphic and Multimedia Designers (ISCO – 2166)
5. Translators, interpreters and other linguistics (ISCO – 2643)

**Figure 4:** Registered Jobseekers (searching for jobs in the CCIs)



# CONCLUSION & WAY FORWARD

With the research aimed at determining the effects of Valletta as a European Capital of Culture on employment, it is still too early to derive any concrete conclusions at this point in time. Ideally, the impact is observed over a number of years where one could compare pre- and post – Valletta 2018 periods, to better establish the change (if any) in employment.

Moreover, ideally such analysis would be linked with concrete measures and initiatives directly related to Valletta 2018 (such as marketing, events, festivals) to determine the actual impact of Valletta 2018 on employment. This is due to the fact that an increase in employment in CCIs may be registered but might be explained through other factors that are not related to Valletta 2018, such as a number of foreign film productions being filmed in Malta during specific periods.

- During the coming years it is envisaged that a continuous statistical analysis will continue up to 2020 on a quarterly basis and subsequently on an annual basis as well.
- Data can also be segregated further by Nationality to distinguish between Nationals, EU Citizens and Third Country Nationals working in CCIs. Furthermore, data regarding applications for work permits related to CCIs can also be analysed in an effort to possibly identify any shortages that employers may be facing with respect to the Creative Sector.
- Results relating to CCIs from the Employability Index Report, published in October 2015, will be analysed in detail during the first quarter of 2016.
- The National Council for Further and Higher Education, ETC and Malta Enterprise are currently developing a Skill Survey which should be launched in February 2016. Once the survey is conducted, the results relating to CCIs will also be extracted accordingly.