



CREATING A CAREER IN CULTURAL AND CREATIVE INDUSTRIES

JOBSPLUS

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INTRODUCTION

The main objective of Jobsplus' research and contribution is to analyse the impact of the investment and management in Valletta 2018 on employment within Malta's Cultural and Creative Industries. Such analyses are based on statistical indicators to establish changes in the employment structure in CCIs pre- and during the Valletta 2018.

METHODOLOGY

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

- Full-time employment in CCIs
- Part-time employment in CCIs
- Total employment in CCIs
- Registered jobseekers (searching for jobs relating to CCIs); and
- Vacancies notified to Jobsplus (relating to CCIs)

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

All data relating to employment, vacancies, and registered jobseekers was extracted from Jobsplus' database. This implies that any vacancies which were not notified to Jobsplus, and any individuals looking for a job through channels other than registering with Jobsplus, are excluded from the data. All statistical figures were 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 during Valletta 2018, the statistical analysis will run from 2014 up to 2018.

In order to determine the NACE¹ 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 ISCO² 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.

¹ NACE or Nomenclature statistique des activités économiques dans la Communauté européenne is the statistical classification of Economic Activities in the EU.

² 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 organising jobs into a clearly defined set of groups according to the tasks and duties undertaken in the job (ILO web portal).

Jobsplus carried out a number of other qualitative researches, which can be utilised and analysed in the context of CCIs at a broad level. 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 can also be extracted from this report to determine whether in the pre-Valletta 2018 period, students furthering their education in the Creative Sector managed to find a job that required the individual's level of education and one that matched the relevant area of study. The Employability Index Report launched in 2015 covered students who graduated in 2012 and 2013 from three 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 to their respective employment in the years subsequent to their graduation year (in this case 2012, 2013, and 2014). Should the Employability Index Report be updated in the near future, an inter-temporal comparison of results tied to CCIs could be carried out. Such results could be further examined to determine whether Valletta being the European Capital of Culture had any impact on the type of jobs found by students who pursued their studies in the Creative Sector, after completing higher education.

FINDINGS

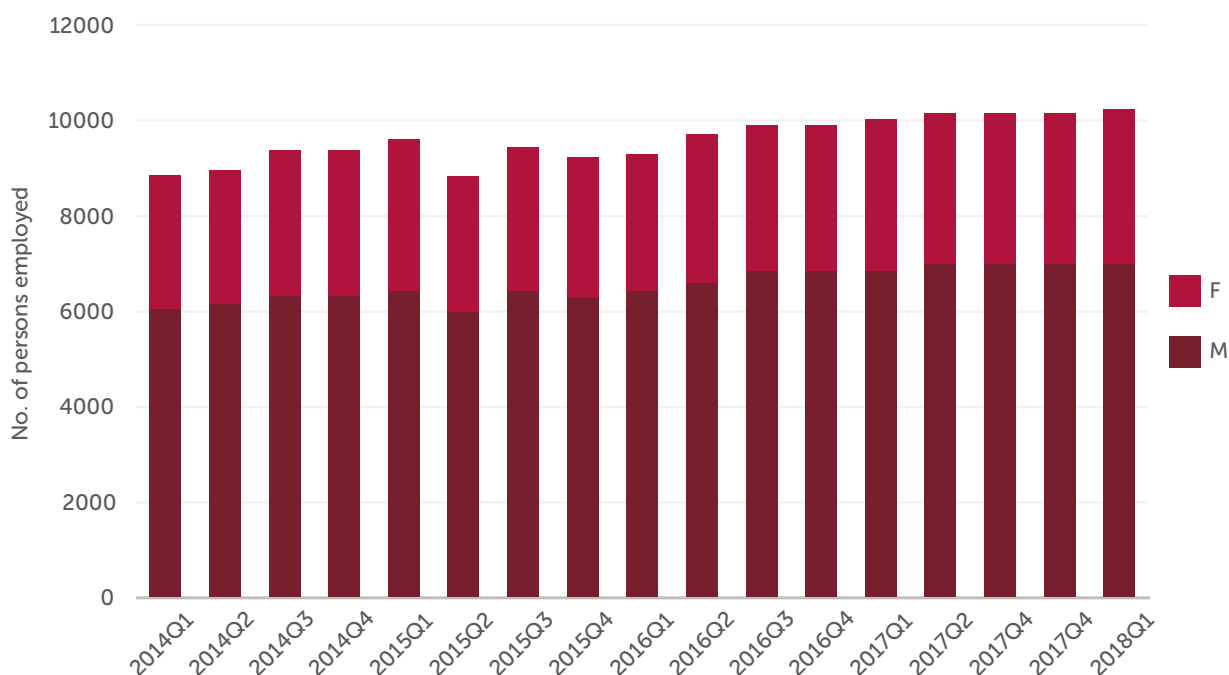
Statistical Analysis

The main results of the research conducted during 2018 are displayed and described in detail below.

Full time employment in the CCIs

As can be viewed in Chart 1 below, total full-time employment in the Cultural and Creative Industries has increased from 8,618 in Quarter 1 of 2014 to 10,357 in Quarter 1 of 2018, equivalent to a 20.2% increase over the four-year period. This increase is equally reflected in both gender cohorts, such that an additional 1,057 males and 682 females were engaged in gainful employment within the creative sector, corresponding to a 17.7% and 25.8% increase respectively. One should note that during the same period under review, total full-time employment in Malta also increased by approximately 25%. The majority of the 10,357 individuals or 93.6% of those employed on a full-time basis in CCIs were employed in the private sector, whilst the remaining 6.4% were employed in the public sector. Although the number of gainfully employed persons in CCIs decreased during Q2 of 2015, mainly due to a significant decrease in the number of persons employed in the *Television programming and broadcasting activities sector*, it gained pace in the subsequent quarters. Out of the 10,239 individuals gainfully employed in CCIs as at end of 2017, 72.4% were Maltese Nationals, 23.0% were EU Nationals, and 4.6% were Third Country Nationals. The number of foreigners employed in CCIs pertains to approximately 7.3% of the total number of foreign workers in gainful employment during the same period; of which, 64.6% were males whilst 35.4% were females.

Chart 1: Full-time employment in CCI



The top 5 NACEs contributing to full-time employment in CCI as at end of March 2018 (i.e. 2018 Q1), were:

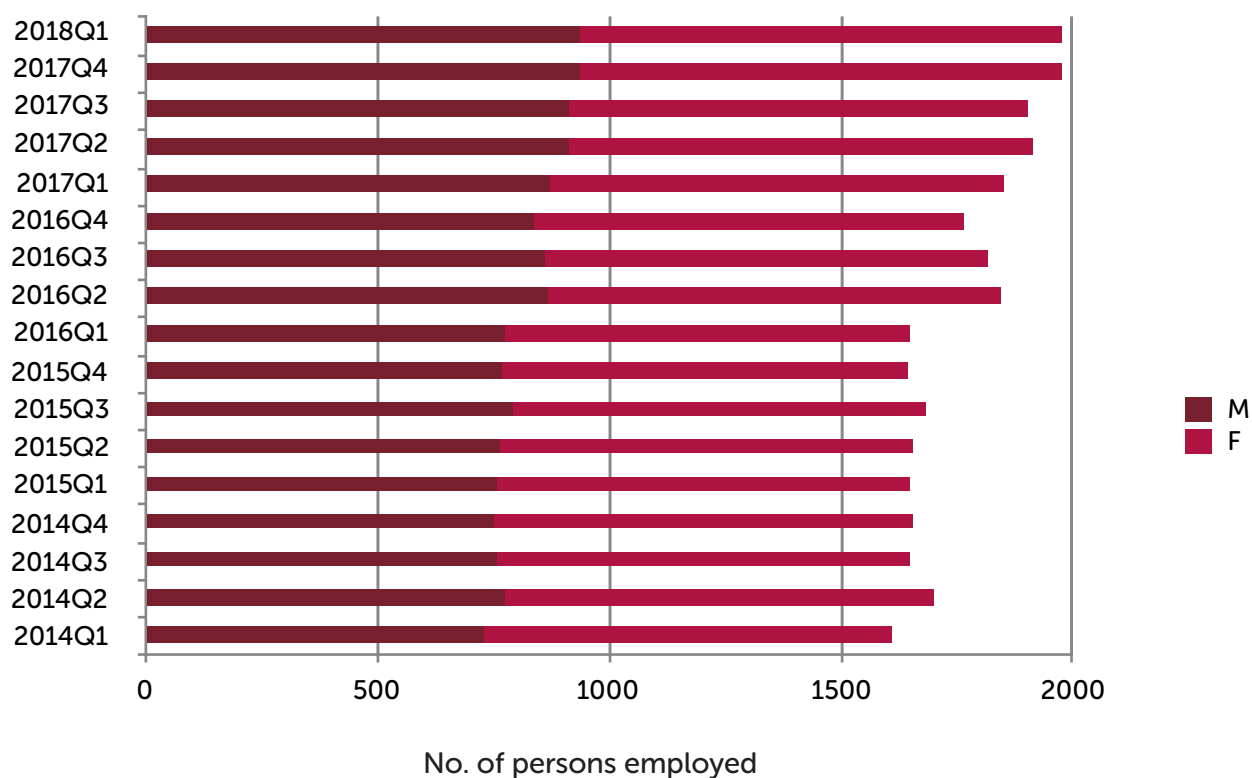
1. 62.01 – Computer Programming Activities
2. 18.12 – Other printing
3. 73.11 - Advertising Agencies
4. 71.11 – Architectural Activities, and
5. 71.12 – Engineering activities and related technical consultancy

20.2% of persons employed on a full-time basis in CCI were employed in *Computer Programming Activities* followed by *Other Printing* and *Advertising Agencies Activities* with 13.5% and 11.5% respectively.

Part-time Employment (as a primary job) in the CCI

Chart 2 below displays part-time employment (as a primary job) in CCI between Q1 of 2014 and Q1 of 2018. In general, total part-time employment in CCI increased over a four-year period from 1,612 in Q1 of 2014 to 1,966 in Q1 of 2018, equivalent to a 22% increase. Part-time employment in CCI was more volatile during the period under review. It increased in the second quarter of 2014, decreased for the subsequent three quarters and started increasing again thereafter, with a major rise in Q2 of 2016 due to an influx of workers in the *Activities of amusement parks and theme parks* and *Other amusement and recreation activities* industries. As at Q1 of 2018, both the number of females and the number of males in part-time employment had increased by 16.6% and 28.4% respectively compared to the first quarter of 2014. Similarly, the majority of part-time workers were employed in the private sector with only 2% employed in the public sector. As at end of December 2017, foreigners occupied approximately 20% of part-time employment in CCI; of which 94.8% were EU Nationals and 5.2% were Third Country Nationals.

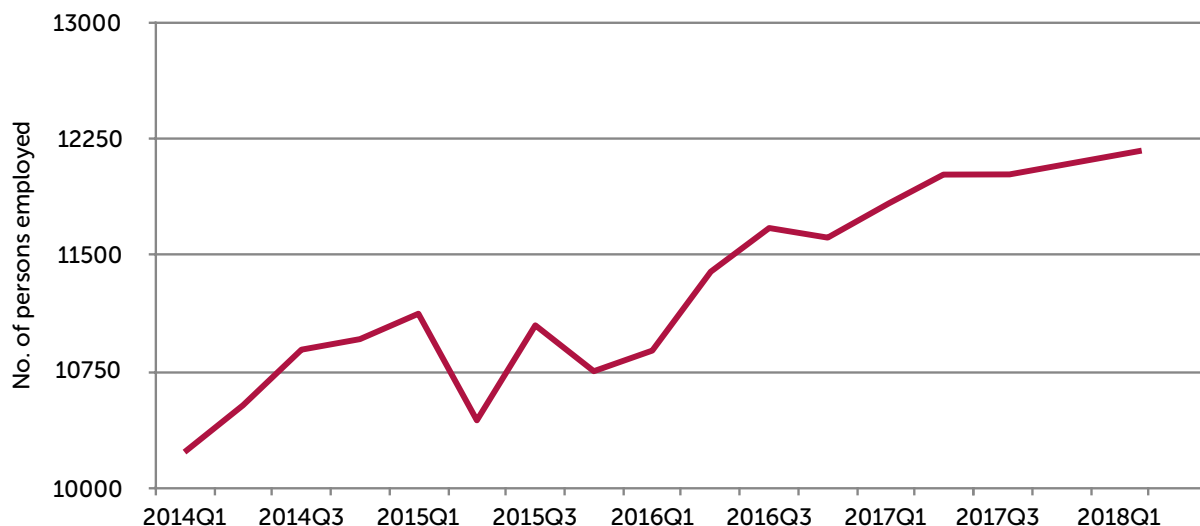
Chart 2: Part-time Employment in CCIs



Total Employment in CCIs

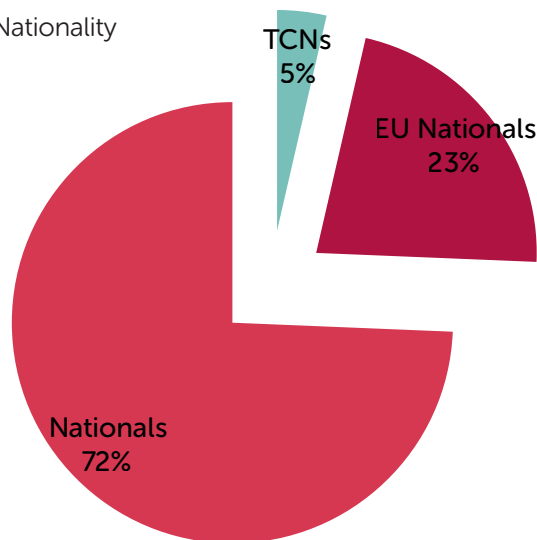
Chart 3 below portrays total employment (full-time + primary part-time employment) in CCIs for the period under review. Total employment in CCIs increased from 10,230 in Q1 of 2014 to 12,323 in Q1 of 2018; equivalent to a 20.5% increase over the four-year period. Whilst the share of full-time employment in CCIs as a proportion of total full-time employment stood at 5.2% in Q1 of 2018, the share of part-time employment in CCIs stood at 5.6%. Moreover, total employment (full-time + primary part-time employment) in CCIs as at end of March 2018, amounted to 12,323; approximately 5.3% of employment in the total economy.

Chart 3: Total employment in CCIs



Out of the total number of persons employed (full-time + primary part time employment) in CCI as at end of December 2017, 72% were Maltese nationals, 23% were EU nationals, and 5% were Third Country Nationals. Moreover, the total number of foreigners employed in CCI (full-time + primary part time employment) amounted to approximately 7.2% of total foreigners employed in the Maltese labour market; of which 61.5% were males whilst 38.5% were females.

Chart 4: Employment in CCI by Nationality



Notified Vacancies to Jobsplus (relating to CCI)

The number of vacancies notified to Jobsplus relating to CCI has also been analysed. Overall, in absolute terms, the number of vacancies pertaining to occupations within the culture and creative sector has increased from 166 in Q1 of 2014 to 230 in Q3 of 2018. Notwithstanding this rise, vacancies relating to CCI have been quite unstable over the period under review, as evidenced by the fluctuations in Chart 5; with vacancies reaching a peak in Q2 of 2016 with a total of 527 notified vacancies within the same quarter. On average, between 2014 and 2017, the highest number of notified vacancies during an entire year was registered in 2016, where nearly 7% of all vacancies notified to Jobsplus were related to CCI. As at end of September 2018, the number of vacancies notified to Jobsplus relating to CCI, accounted for approximately 4% of the total number of vacancies notified to Jobsplus between January and September of 2018.

Chart 5: Vacancies notified to Jobsplus relating to CCI

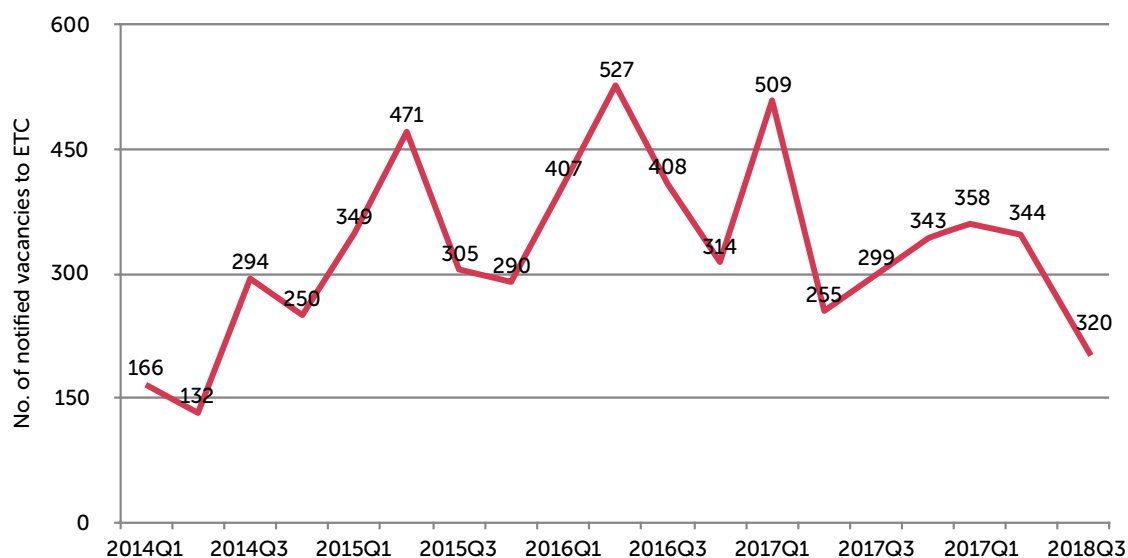
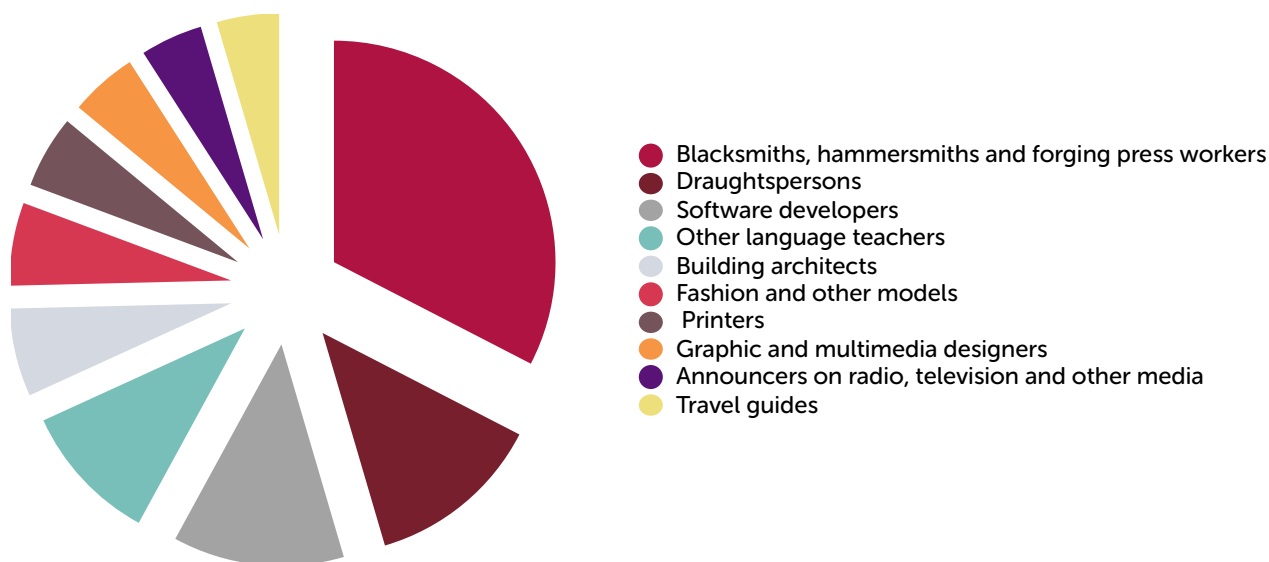


Chart 6 below represents the top 10 occupations relating to CCI which registered the highest number of vacancies during the first three quarters of 2018. The highest number of registered vacancies during 2018 pertained to *Blacksmiths, hammersmiths, and forging press workers*, which accounted for 16% of the total vacancies, followed by Travel Guides and Announcers on radio, television, and other media with 12% and 11% respectively.

Chart 6: Notified vacancies to Jobsplus relating to CCI - Top 10 occupation



A word of caution is warranted: these statistics emanate from Jobsplus' database which means that the figures do not capture the total vacancies across the Maltese labour market, but only vacancies notified to Jobsplus, which to some degree represent a subset of the former. Furthermore, a double counting problem may also be at work, because 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.

Registered Jobseekers (searching for jobs relating to CCI)

In general, the number of jobseekers looking for employment in the CCI decreased from 483 in Q1 of 2014 to 146 in Q3 of 2018. During the first two years under review (Q1 of 2014 to Q1 of 2016), the number of jobseekers looking for jobs in the creative sector remained stable, as depicted in Figure 6 below, with the exception of a noticeable decrease observed in Q1 of 2015. In the subsequent quarter, the number of jobseekers seeking employment in CCI increased to 483 and then decreased considerably thereafter. Notwithstanding, overall unemployment in the Maltese labour market has declined drastically throughout recent years, with the number of registered unemployed persons dropping from 7,789 in January 2014 to 1,813 in September 2018. The significant increases in Q2 and Q4 of 2015 were mainly pertinent to occupation 2654 – *Film, stage related directors and producers*, since a number of jobseekers had started to show an interest in occupations classified under this ISCO code.

The number of registered jobseekers looking for a job in the CCI, reflects only individuals registering on Part 1 and Part 2 of Jobsplus' unemployment register. Thus, individuals looking for an alternative employment or seeking temporary employment are not included in the figures quoted in this section.

Chart 7: Registered Jobseekers (searching for jobs in the CCIs)

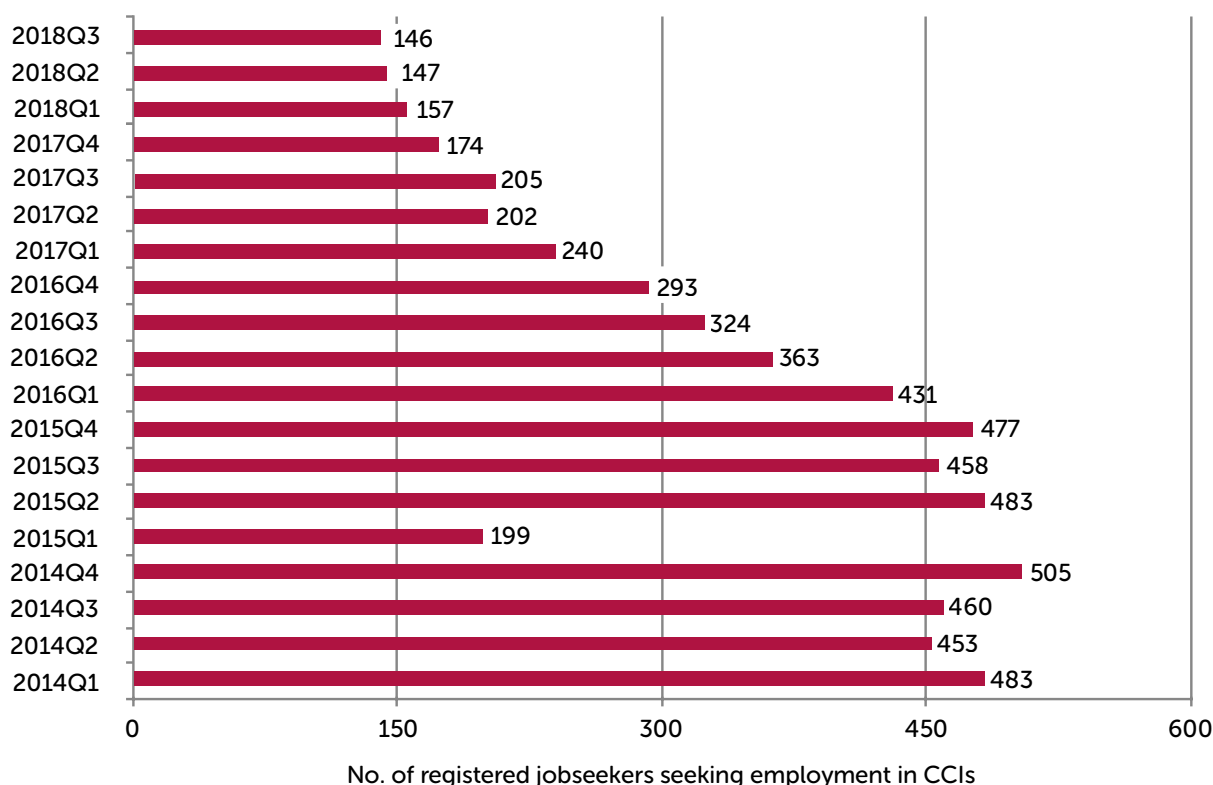
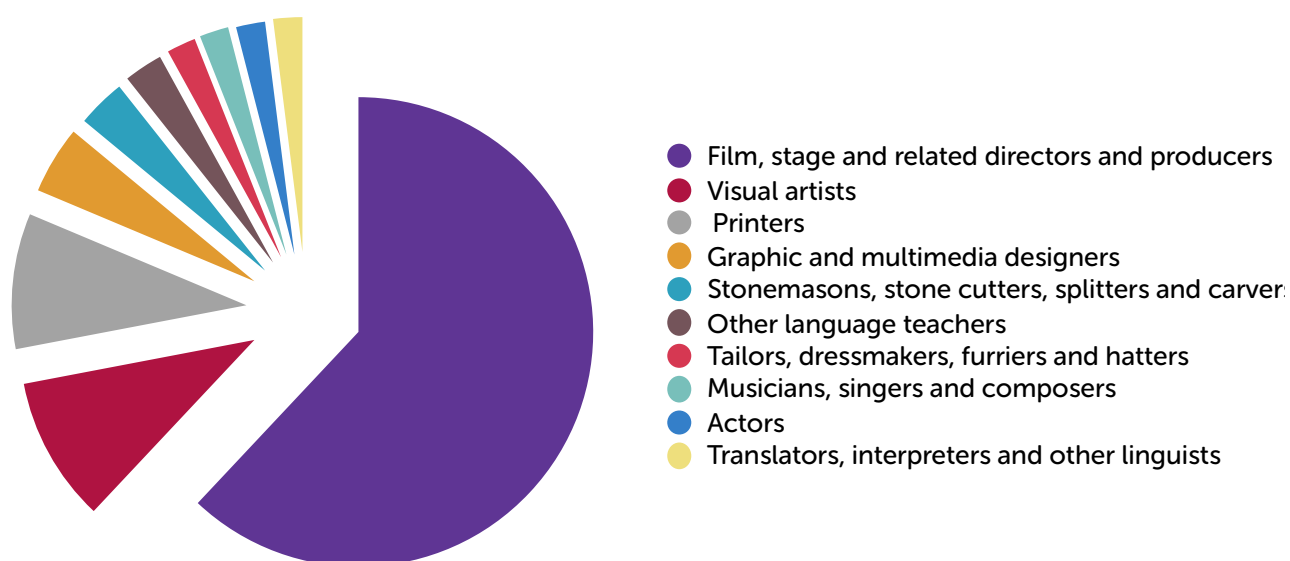


Chart 8 below depicts the top 10 occupations (relating to CCIs) which registered jobseekers listed as their first preference of job, as at end of September 2018. Around 52% of jobseekers revealed that their job preference was related to *Film, stage, and related directors and producers*, whereas 11% and 7% of jobseekers favoured occupations relating to *Visual Artists* and *Graphic and Multimedia Designers* respectively.

Chart 8: Registered Jobseekers - Top 10 Occupations (relating to CCIs)



CONCLUSIONS

While the research aimed to determine the effects of Valletta as a European Capital of Culture on employment, it is still too early to derive any concrete conclusions. Ideally, the impact is observed over a number of years, when one could compare pre- and post-Valletta 2018 periods to better establish the change (if any) in employment and the type of employment (e.g. short-term nature).

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. Changes in employment also need to be viewed through the lens of factors outside Valletta 2018, such as a number of film productions being filmed in Malta during specific periods.

WAY FORWARD

It is envisaged that a continuous statistical analysis will continue during the year 2018 on a quarterly basis, and subsequently, on an annual basis as well. It is suggested that Jobsplus' data is complemented with data relating to CCIs from other sources not incorporated in this analysis (such as vacancies which are not notified to Jobsplus).

The way forward following this analysis from a labour market perspective, is to research beyond the 2018 period, as it is only through research which covers different periods that an analysis can be more thoroughly conducted.

Following a number of qualitative research studies conducted by entities including Jobsplus, the Committee should focus on the results and try to gather more specific information on this economic industry.