

THEME 2 GOVERNANCE & FINANCE

EVALUATION & MONITORING
Research Findings 2016

CONTENTS

INTRODUCTORY NOTE	3
GOVERNANCE & FINANCE	4
CREATIVE ECONOMY REPORT: 2016 UPDATE	5
CREATING A CAREER IN CULTURAL AND CREATIVE INDUSTRIES	17

INTRODUCTORY NOTE

The Valletta 2018 Evaluation & Monitoring process is a means through which the Valletta 2018 Foundation gains a deeper insight into the various impacts of the European Capital of Culture (ECoC) title on different spheres of cultural, social and economic life. The goal of this process is twofold (i) To understand the changes brought about by the ECoC title, and (ii) To address any shortcomings and challenges faced by the Valletta 2018 Cultural Programme throughout its implementation.

This process comprises a series of longitudinal studies commencing in January 2015, three full years before the European Capital of Culture year, and running through the ECoC, with results presented in 2019, thereby capturing data before, during, and in the immediate aftermath of Valletta holding the ECoC title.

This process is divided into five themes:

- 1. Cultural & Territorial Vibrancy**
- 2. Governance & Finance**
- 3. Community Inclusion & Space**
- 4. The Tourist Experience**
- 5. The Valletta Brand**

This research is a collaborative, mixed-methods process, involving a number of public entities, collecting and analysing data primarily of a quantitative nature, together with independent researchers working with data that is predominantly qualitative. These entities and researchers constitute the Valletta 2018 Evaluation & Monitoring Steering Committee, that was set up to manage and implement this research process.

The public entities forming part of the Steering Committee are:

- National Statistics Office
- Malta Tourism Authority
- Jobsplus
- Economic Policy Department within the Ministry of Finance

The independent researchers participating within this process were selected according to their area of expertise. The areas covered are:

- Cultural Programme
- Branding
- Sociology
- Built Environment
- European Identity

Although each of these researchers, and their respective teams, are carrying out data collection and analysis specifically within their respective fields, various points of intersection and collaboration across the various areas have been established so far. The data being collected throughout each study is being shared with the Steering Committee in order to create synergies between the different fields being analysed.

The research methods adopted throughout the various studies that comprise this process vary greatly, ranging from quantitative surveys to in-depth interviews, focus groups and real-time experience tracking.



GOVERNANCE & FINANCE

THEME 2

Issues related to governance and economic impacts of culture represent a central consideration in the development of the cultural sector, shaping policy decisions and ensuring the sustainable growth of the sector. The research carried out under this theme attempts to address these issues by identifying the broader impact of cultural activity through an analysis of its return on financial investment, and by understanding changes in employment and educational opportunities within the creative industries.

The first of the studies within this theme is carried out by the Economic Policy Department (EPD) within the Ministry for Finance. This consists of a quantitative analysis of the cultural and creative industries in Malta, investigating the economic impact of various cultural activities and identifying the obstacles that hamper further growth within the sector. This study places particular emphasis on the design sector and the relationship between creative design and manufacturing.

Supplementing this analysis is the research carried out by Jobsplus, which looks into changes in employment statistics within the cultural and creative industries, identifying relevant trends and employment patterns in the private and public sectors alike. This study intends to provide a detailed understanding of how employment opportunities are changing in the light of the significant developments taking place within the cultural sector, foremost amongst them the European Capital of Culture.



CREATIVE ECONOMY REPORT: 2016 UPDATE

ECONOMIC POLICY DEPARTMENT

**Kevin Vella with
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ABSTRACT

This report updates the Culture and Creative Industry (CCI) Report published in 2014 by the Economic Policy Department and contains an update of the economic evaluation. This update is however based on internal estimates carried out on the basis of national accounts data rather than the more detailed raw data from the SBS at 4-digit level. As a result, the data used in this report, particularly the sub-sectoral data, contains more estimates and hence can be less reliable than previous data prior to 2010. Nevertheless, the national accounts data still permits a broad analysis of the performance of the CCIs between 2010 and 2015. The CCIs over this period have outperformed the rest of the economy and in 2015 accounted for 7% of total gross value added and 6% of gainful employment. The high productivity of the CCIs has been maintained and labour productivity has actually increased during the period under review. The CCIs benefitted from a strong increase in turnover and profit margins have been sustained.

Keywords: Culture and Creative Industries; Gross Value Added; Profitability; Employment; Productivity

INTRODUCTION

In 2015 the Culture and Creative Industries accounted for 7% of the total Gross Value Added (GVA) created by the Maltese economy, up from 6% in 2010 as indicated in the last update of this report. To put this into perspective, this exceeds the direct contribution of the construction and civil engineering sector (4% of GVA) or the accommodation and food services sector (5% of GVA). The CCI's continued to grow at an average of 9% per annum between 2010 and 2015, almost matching the performance recorded in 2005 and 2010.

In 2015 the CCI's also accounted for 6% of total full time and part time gainful employment. Because there is a predominance of part-time employment in the traditional arts sector of the CCI's, employment in full time equivalent terms is estimated at 5% of total employment. Job creation in the CCI's almost tripled in the latter 5-year period. The CCI's created 2,800 new jobs between 2010 and 2015, compared to an increase of 1,100 new jobs between 2005 and 2010. Employment in the CCI's increased by a significant rate of 5% average annual growth between 2010 and 2015.

Overall gross value added per person employed in the CCI's is estimated at €37,900 which is currently higher than what is on average generated in either manufacturing (€32,100) or services (€34,100).

These indicators all point to the growing importance of the CCI's in Malta. They show a dynamic industry which generates growth and jobs. Nevertheless, there is scope to strengthen further the indirect contribution of the CCI's, particularly the linkages with the various other industries in Malta. Research carried out earlier by the Economic Policy Department suggest that in general (excluding the arts which were not covered by the study) and with a few exceptions, the CCI's display relatively weak GVA multipliers compared to other sectors of the economy. Such multiplier effects are not captured by the direct contribution as measured in this report.

The aim of this report, which is an update of the 2014 report, is to highlight the most recent trends observed in the CCI's. Unfortunately, some of the detailed data utilised in the 2014 report is no longer available and thus an element of estimation had to be carried out. This is described in more detail in the methodology section. This has constrained the analysis of the CCI's at the level of detail presented in the earlier report, particularly at sub-sectoral level.

METHODOLOGY

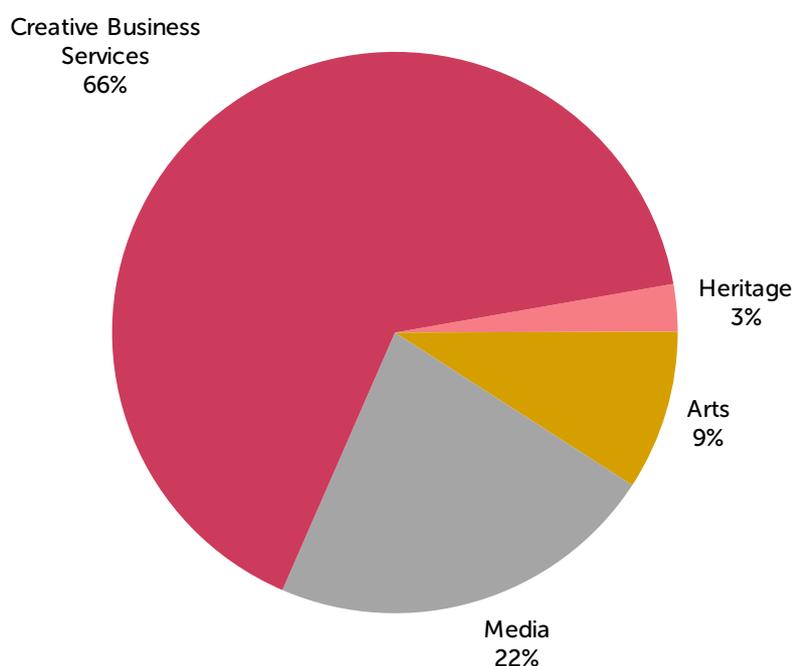
The study uses the 2014 Report data as a base. This data was in turn based on detailed information at 4-digit level available from the SBS. Unfortunately, the current SBS no longer contains detailed sectoral data at 4-digit level. Therefore, to complete this update the aggregate data at 2-digit level from (unpublished) national accounts, made available by NSO, was used to update the figures. Overall the CCI figures for 2010 reported in the 2014 report (based at 4-digit NACE) represent around 70% of the total value added of the sectors selected from national accounts excluding education (based at 2-digit NACE) indicating the level of overrepresentation resulting from the lack of more disaggregated SBS data. The data was scaled down to the 2014 Report data with 2010 acting as the common base year. The problem of overrepresentation is most acute in the business services category and in the crafts sector which are overrepresented by 1.7 times and 30 times respectively. The media sector at the selected 2-digit NACE is roughly equivalent to the 4-digit SBS whilst the Arts are underrepresented by 0.6 times. It is assumed that despite these over/under representations the evolution of the CCI sub-sectors over time follows closely the evolution of the selected national accounts data at 2-digit level. This is deemed to be a relatively benign assumption in most cases. The major constraint is actually deemed to be in the underrepresentation of the arts which are predominantly based on NACE 90 (Creative Arts and Entertainment Activities) and do not therefore allow an accurate distinction between the annual performance of visual arts, performing arts and music. Cultural education is assumed to move in line with the overall growth in total education activities in Malta. The significantly high representation of the crafts sector by NACE 23 (manufacture of non-metallic minerals) may also be a notable limitation. In this context the detailed results at a sub-sector level should be viewed with more caution.

FINDINGS

In 2015 the Culture and Creative Industries accounted for 7% of the total gross value added created by the Maltese economy, up from 6% in 2010 as indicated in the last update of this report. The composition of the CCIs is shown in Figure 1. Since 2010 the Media sector has lost its share in the CCIs (from 28% in 2010) as this was overtaken by the growing share of the creative business services (62% in 2010) and the arts (7% in 2010). Heritage maintained its overall share in the CCIs though it remains the smallest component. A more detailed composition is provided in Figure 2 which shows the various sub-sectors making up the CCIs.

Over the course of the last fifteen years the CCIs have seen their direct share of the Maltese economy grow by 2.4 percentage points indicating that over this period the CCIs have outperformed the rest of the economy. This followed a period of relative decline in performance up to 2007, after which the CCIs almost consistently outperformed the rest of the economy. Figure 3 shows the share of the CCIs since 2001. All the sub-sectors registered positive growth rates in gross value added¹ including a recovery in the heritage sector which increased by 9% whilst the Arts and the Creative Business Services continued to register double-digit growth rates. On the other hand, the Media sub-sector continued to slow down further reflecting the lack of growth in the printing and publishing sub-sector. (Table 1)

Figure 1: Composition of the CCIs in 2015



¹ Note that gross value added excludes other subsidies on production (D39) consist of subsidies except subsidies on products which resident producer units may receive as a consequence of engaging in production.

Figure 2: Detailed Composition of the CCIs in 2015

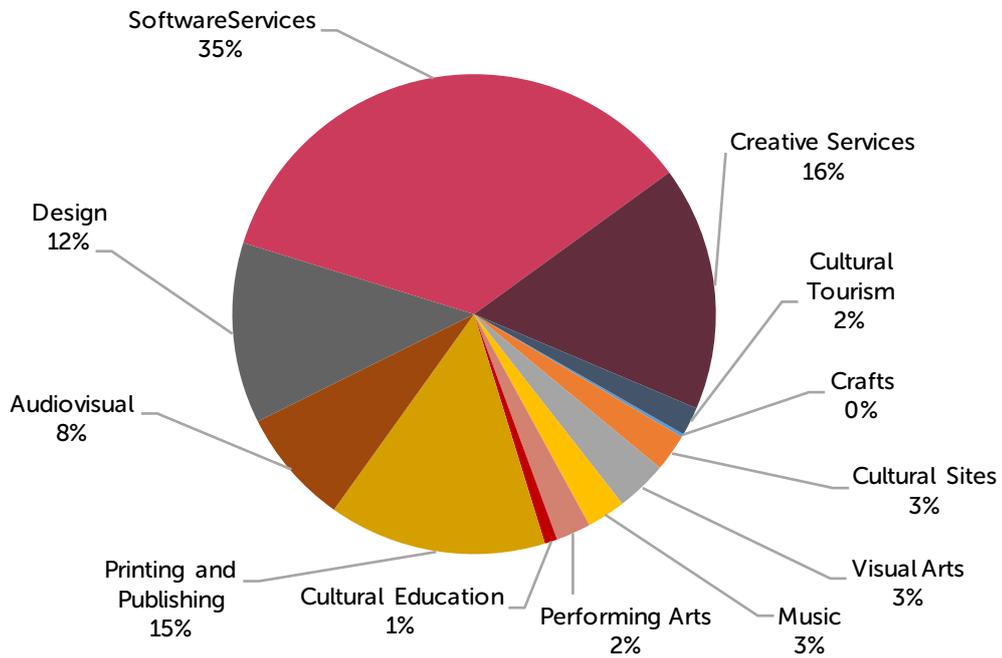


Figure 3: The CCIs as a share of GVA



Table 1: Average Annual Growth in Gross Value Added

Average Annual Growth in Gross Value Added (%)			
	2000/05	2005/10	2010/15
Crafts	-0.9	-10.9	5.9
Cultural Sites	-	-2.6	9.3
Heritage	47.1	-3.6	9.0
Visual Arts	24.2	11.6	-
Music	0.1	30.9	-
Performing Arts	-4.1	7.3	-
Cultural Education	-	-	-
Arts	5.0	17.6	15.4
Printing and Publishing	0.4	4.0	0.9
Audio-visual	0.0	7.0	10.9
Media	0.3	4.7	3.8
Design	-	2.1	5.0
Software Services	32.1	19.3	9.5
Creative Services	145.5	7.3	18.2
Cultural Tourism	-	-	2.8
Creative Business Services	57.6	12.2	10.1
CCI	17.3	9.4	8.8

The employment performance was also relatively strong though it generally lagged the growth in gross value added as a result of labour productivity gains. The CCIs created 2,800 new jobs between 2010 and 2015, compared to an increase of 1,100 new jobs between 2005 and 2010. Employment in the CCIs increased by a significant rate of 5% average annual growth between 2010 and 2015. This compares favourably with the 2% growth recorded in the earlier five-year period. The strongest employment growth was registered in the creative business services which registered an average growth of 8.3% per annum followed by the arts which registered an average growth of 6% per annum between 2010 and 2015. The heritage sector maintained a relatively stable employment level whilst the decline evident in printing and publishing activity was followed by a decline in employment. Further details are provided in Figure 4.

Figure 4: Average Annual Growth in Employment

Average Annual Growth in Employment (%)			
	2000/05	2005/10	2010/15
Crafts	-2.7	1.6	-3.7
Cultural Sites	:	-7.8	1.7
Heritage	42.5	-6.1	0.6
Visual Arts	16.3	8.7	-
Music	2.6	17.6	-
Performing Arts	-1.1	-6.8	-
Cultural Education	-	-	1.9
Arts	3.8	5.5	6.0
Printing and Publishing	2.2	3.9	-1.5
Audio-visual	2.8	-4.1	0.4
Media	2.4	1.2	-1.0
Design	:	-2.1	5.9
Software Services	11.2	8.0	11.8
Creative Services	75.3	1.3	9.4
Cultural Tourism	:	:	-1.2
Creative Business Services	44.3	2.6	8.3
CCI	13.6	2.1	4.7

Productivity in the CCIs is relatively high relative to the other sectors of the Maltese economy. Every person employed in the CCIs generates on average €37,900 which is currently higher than what is on average generated in either manufacturing (€32,100) or services (€34,100). The performance varies significantly by sub-sector as shown in Figure 5. The strong performance is mainly attributable to the creative and software services. The media sector displays similar productivity levels as the rest of the economy. The more traditional arts and heritage sub-sectors display low GVA per person employed though this mostly reflects the predominance of part-time employment in the arts.

Indeed, the figures used above, which are consistent with the 2014 Report, tend to underestimate labour productivity when there is a predominance of part-time employment. The advantage of using national accounts data is that data for employment converted in full time equivalent is available upon request from NSO. Based on this information it is possible to get a better idea of labour productivity. Internal estimates based on these unpublished figures suggests that labour productivity in the crafts, the arts, and in printing and publishing is much higher than previously suggested whereas productivity in the creative services, the audio-visual and in cultural education is overvalued when full-time equivalent employment is not used. The remaining sub-sectors record relatively minor differences.

As indicated earlier, the 2010/15 period was characterised by further improvements in labour productivity (measured in GVA per person employed). However, the Design and the Software-Services sub-sector registered an annual average decline in productivity over the latter five-year period under analysis. Both sub-sectors have grown strongly during this period suggesting that the sector could have experienced some bottlenecks. It is also however worth noting that the software services generate in excess of €70,000 per person employed which is more than double the economy's average. Table 2 indicates the productivity trends in the various sub-sectors of the CCI.

Figure 5: Productivity (GVA Per Person Employed)

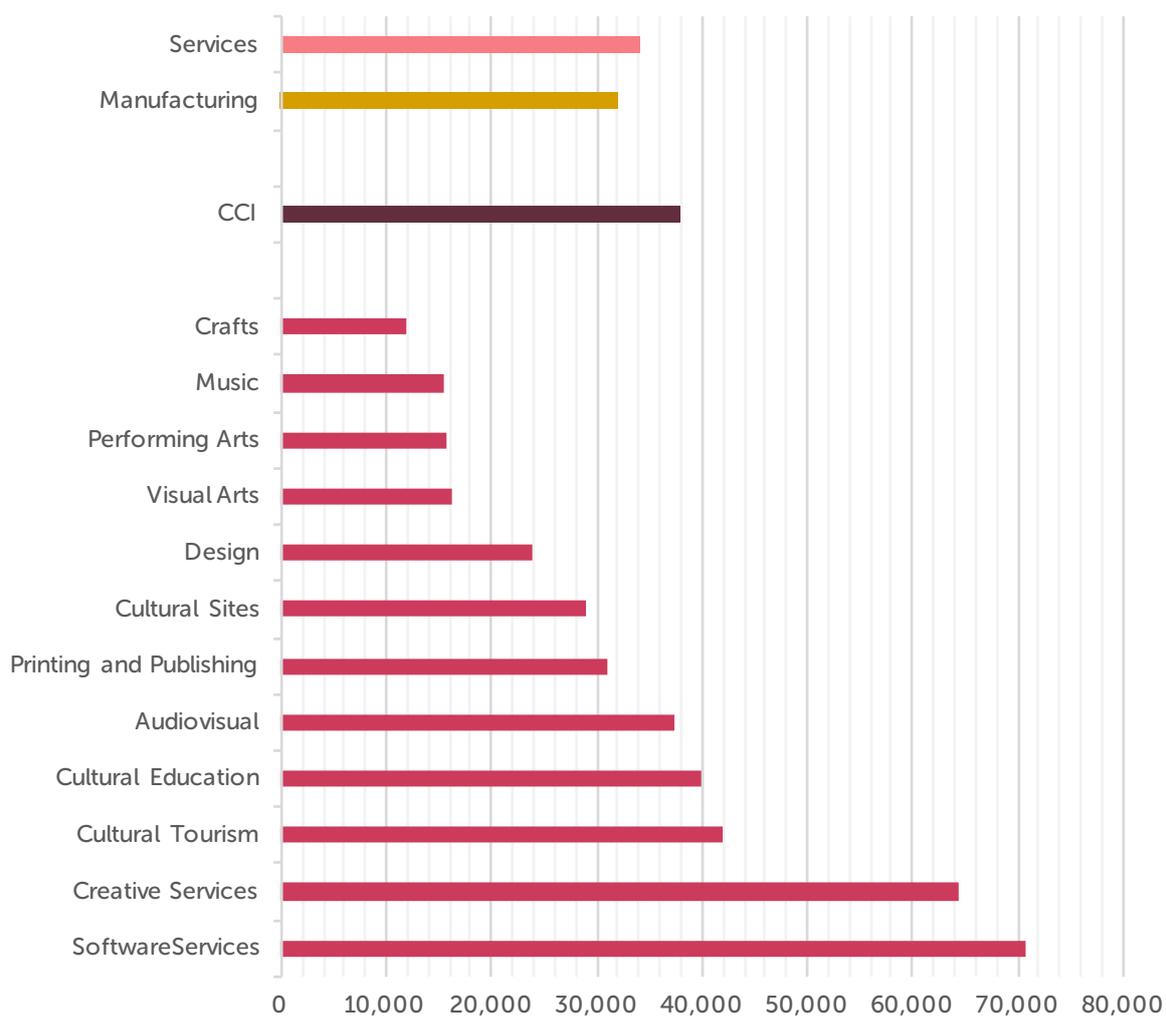


Table 2: Average Annual Growth in GVA per Person Employed

Average Annual Growth in GVA per Person Employed (%)			
	2000/05	2005/10	2010/15
Crafts	1.9	-12.3	9.9
Cultural Sites	-	5.6	7.4
Heritage	3.2	2.7	8.3
Visual Arts	6.8	2.6	-
Music	-2.4	11.3	-
Performing Arts	-3.1	15.0	-
Cultural Education	-	-	4.7
Arts	1.2	11.5	8.8
Printing and Publishing	-1.8	0.1	2.5
Audio-visual	-2.7	11.6	10.5
Media	-2.1	3.5	4.8
Design	:	4.3	-0.9
Software Services	18.8	10.5	-2.0
Creative Services	40.1	5.9	8.0
Cultural Tourism	:	:	4.0
Creative Business Services	9.2	9.4	1.6
CCI	3.3	7.2	4.0

In Figure 6 the 45-degree line represents points on which growth in turnover and GVA moved together. Most sub-sector performance was very close to this 45-degree line. This suggests that the overall growth in value added by sub-sector generally followed closely the growth in turnover registered during the 2010/15 period suggesting that the improvement in demand conditions or gains in market shares were the main factors contributing to the growth in GVA. The major exception is the cultural tourism sector which has registered an increase in GVA despite the fall in average annual growth in turnover. In this case intermediate costs of production have declined more strongly than the decline in registered turnover such that value added still registered a positive growth.

Meanwhile the growth in compensation of employees has also, by and large, matched the growth in turnover such that in general profit margins have been maintained between 2010 and 2015. It is interesting to note that the downward trend in profitability in the heritage sector has been halted but the sector continues to register very low or negative profitability. The Arts have largely maintained the high levels of profitability following the trend increase between 2004 and 2011, thus consolidating their position. The high profitability in this sector is indicative of the potential for further entrants in this sub-sector. The profitability in the media and creative business services stayed close to the 20% margin and is indicative of a fairly stable and possibly mature sector. (Figure 7)

Figure 6: Average Annual Growth in Turnover and Value Added (%) 2010/15

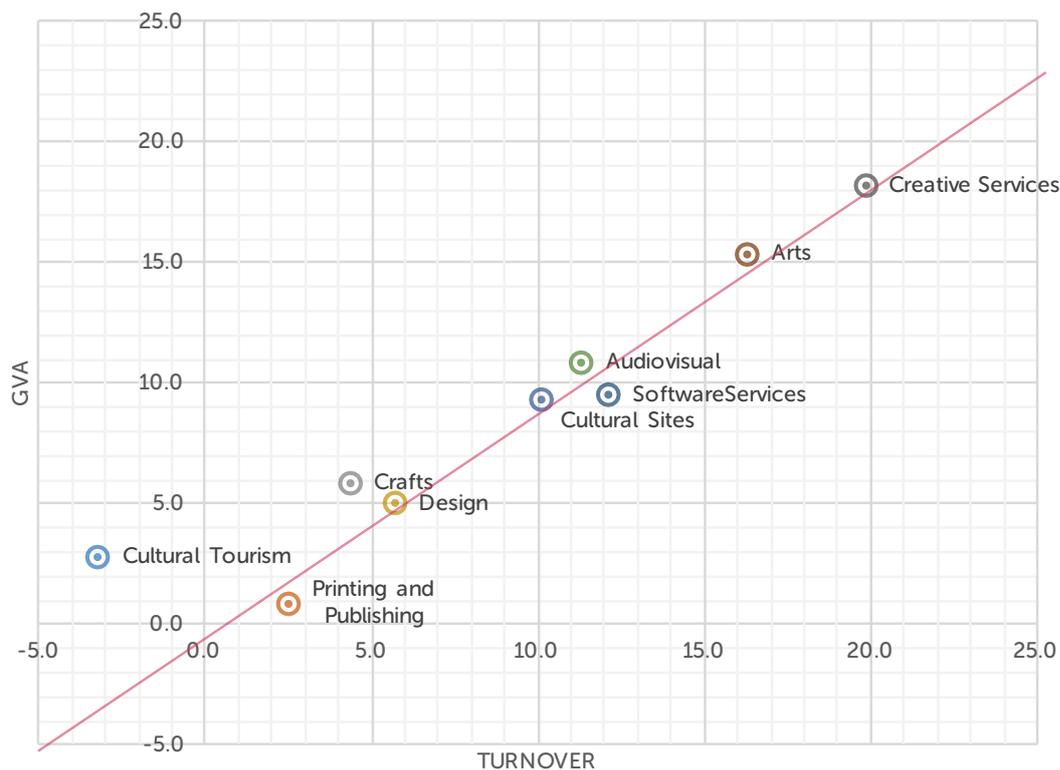
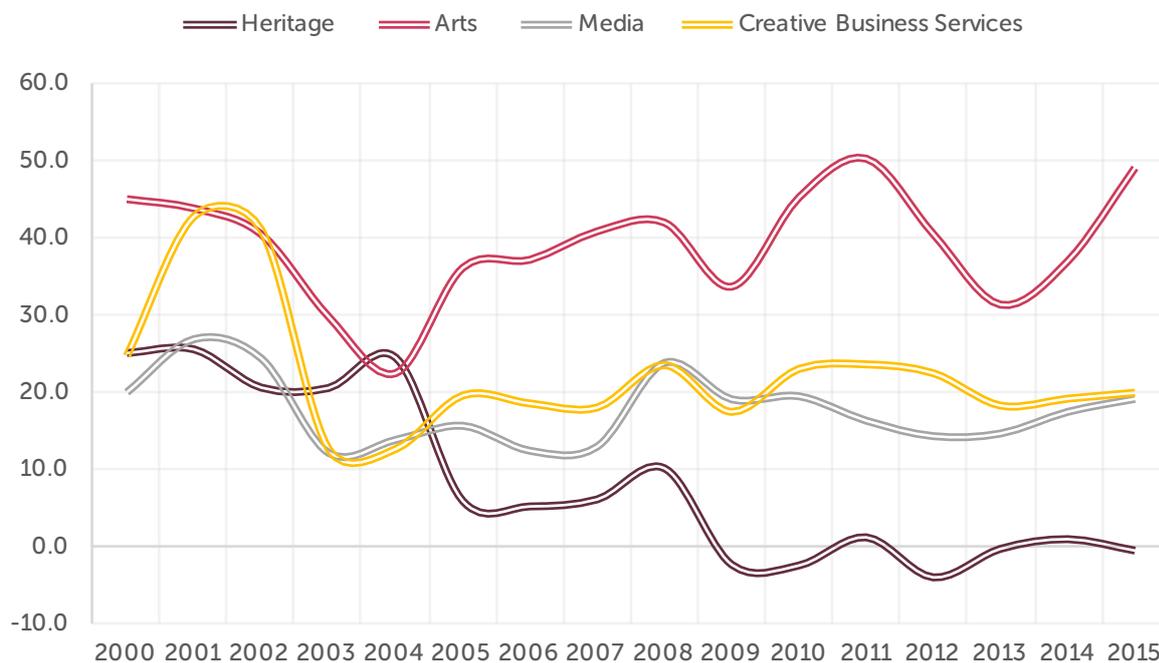


Figure 7: Profit Margins





CONCLUSIONS & WAY FORWARD

This report provides an overview of the evolution of the CCIs since 2010, thus updating the analysis of the sector provided in the CCI Report published in 2014. During the five-year period up to 2015 the CCIs have outperformed the rest of the economy and have now reached 7% of total Gross Value Added. The CCIs benefitted from a strong growth in turnover and managed to maintain its relatively high profit margins during this period. Labour productivity also improved during this period. Nevertheless, the sector still generated an average employment growth of almost 5% per annum. The positive performance of the CCIs continued to be characterised by double-digit growth in the Arts and the Creative Business Services whilst a recovery in Heritage was recorded following previous declines. Nevertheless, the performance in the Media sub-sector remained relatively weak, particularly in the printing and publishing industries. Overall however this report indicates a strong and growing sector.

As noted in the methodology, the absence of detailed SBS data at 4-digit level somewhat limits the accuracy and reliability of this analysis and improvements in the underlying data is necessary for a deeper and richer economic analysis.



CREATING A CAREER IN CULTURAL AND CREATIVE INDUSTRIES

JOBSPLUS

Adonia Sammut

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 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
- Registered jobseekers (searching for jobs relating to CCIs)
- Vacancies notified to Jobsplus (relating to CCIs)

Employment statistics have also been segregated by gender and nationality in an effort to capture any changes in 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 the Valletta 2018, a priori it is expected that employment in CCIs should experience gradual increases over time during the period under observation.

All data relating to employment, vacancies and registered jobseekers has been extracted from Jobsplus' 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 during Valletta 2018, the statistical analysis will run from 2014 up to 2018. In order to determine the NACE 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 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.

Furthermore, Jobsplus carried out a number of other qualitative researches which can be analysed in the context of CCIs at a very 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 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 to their respective employment in the years subsequent to their graduation year (in this case 2012, 2013 and 2014). 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.

Moreover, in 2016, The National Commission for Further and Higher Education (NCFHE), in partnership with Jobsplus and Malta Enterprise (ME) launched an Employee Skills Gap Survey. The objective was to gauge the extent of the existing skills gap, to contribute effectively to improvements in the educational system in Malta to make it more responsive to the needs of the labour market and to provide policy makers with the information necessary to identify the potential shortcomings of the Maltese labour market that could be hindering companies from finding employees with adequate skills. This exercise was deemed particularly important in light of the relatively strong and sustained growth recorded by the Maltese economy over recent years which requires an increasingly diversified set of skills to enable companies to meet market demand. Once the final findings are launched, the results relating to CCIs will also be extracted accordingly.

FINDINGS

The main results of the research conducted during 2016 is displayed and described in detail below.

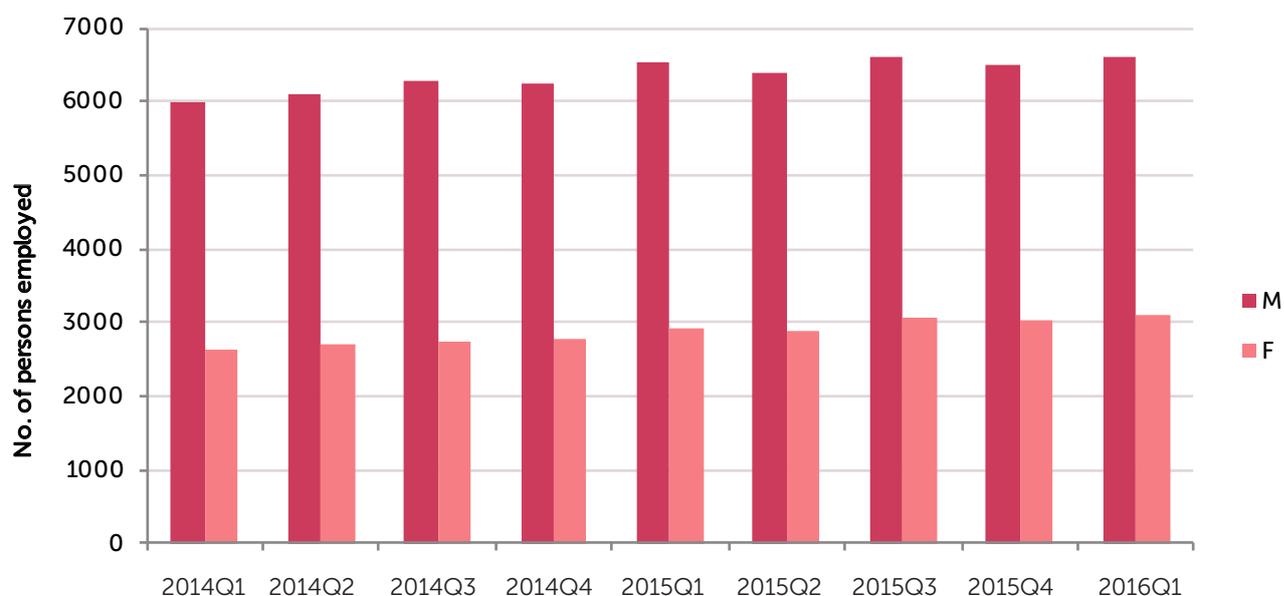
Full-time Employment in CCIs

As can be viewed in Figure 1 below, total full-time employment in the Cultural and Creative Industries has increased from 8,618 in Quarter 1 of 2014 to 9,476 in Quarter 1 of 2015 to 9,685 in Quarter 1 of 2016, equivalent to a 12.38% increase over a two-year period. This increase is equally reflected in both gender cohorts such that an additional 619 males and 448 females were engaged in gainful employment within the creative sector. Although the number of gainfully employed persons in CCIs decreased slightly during Quarter 2 of 2015, it gained pace in the subsequent Quarters. 23.1% of those in gainful employment in CCIs in Quarter 1 of 2016 were foreigners, of which 63.4% were men whilst 36.6% were females. The majority of such foreigners are EU Nationals, approximately 86.1%, whilst the remaining 13.9% are Third Country Nationals.

The top 5 NACEs contributing to Full-time employment in CCIs as at end of March 2016 (i.e. Quarter 1 of 2016), were:

1. 62.01 – Computer Programming Activities (22.0%)
2. 18.12 – Other printing (10.9%)
3. 73.11 - Advertising Agencies (10.2%)
4. 71.11 – Architectural Activities (7.7%)
5. 71.12 – Engineering activities and related technical consultancy (6.1%)

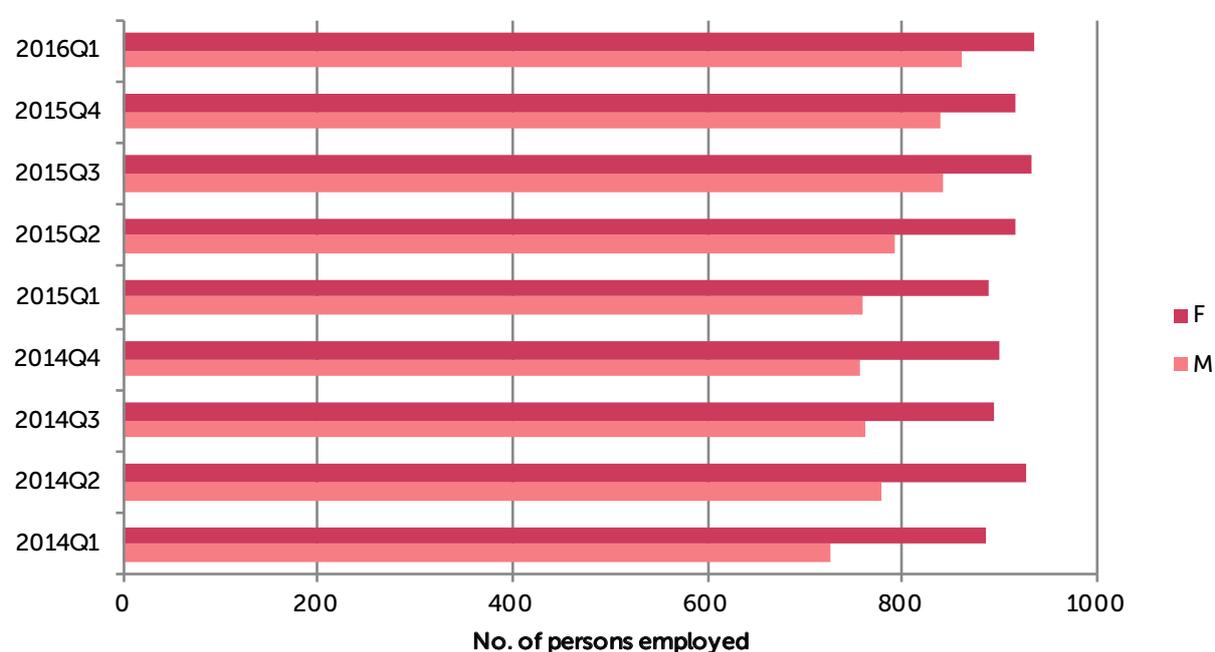
Figure 1: Total full time employment in the CCIs



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

Figure 2 below displays part-time employment in CCIs between Quarter 1 of 2014 and Quarter 1 of 2016. In general, total part-time employment in CCIs increased over a two-year period from 1,612 in Quarter 1 of 2014 to 1,798 in Quarter 1 of 2016, equivalent to a 10.3% increase. During the first year (i.e. from Quarter 1 of 2014 to Quarter 1 of 2015), part-time employment increased by 2.17% and increased by 9.17% during the second year (i.e. from Quarter 1 of 2015 to Quarter 1 of 2016). Part-time employment in CCIs was more volatile during the period under review as it increased in the second Quarter of 2014, decreased for the subsequent three quarters and starting increasing again thereafter. As at quarter 1 of 2016 both female and male part-time employment had increased by 5.8% and 18.6% respectively compared to the same quarter in 2014. Similarly, foreigners occupy 17.8% of such part-time employment in CCIs; of which 94.7% are EU Nationals and 5.5% are Third Country Nationals.

Figure 2: Total part time employment in the CCIs

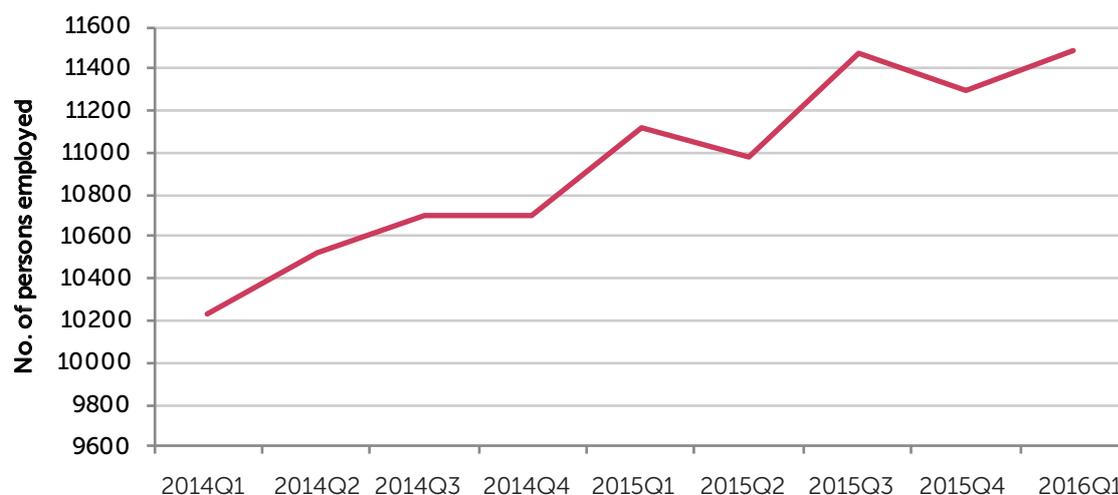


Total Employment in CCIs

Figure 3 portrays total employment (full-time + primary part-time employment) in CCIs for the period under review. Full-time employment in CCIs amounts to 5.53% of total full-time employment, whilst part-time employment in CCIs contributes to 5.17% of total part-time (as a primary job) employment. Moreover, total employment (full-time + primary part-time employment) in CCIs as at end of March 2016 amounted to 11,483 pertaining to approximately 5.47% of employment in the total economy. Moreover, total foreigners employed in CCIs (full-time + primary part time employment) amount to approximately 8.5% of total foreigners employed in the Maltese labour market.

Total employment in CCIs increased from 10,230 in Quarter 1 of 2014 to 11,123 in Quarter 1 of 2015 to 11,483 in Quarter 1 of 2016; equivalent to a 12.2% increase over the two-year period. Overall, employment in CCIs amounted to 5.33% and 5.53% of total employment as at end of March of 2014 and 2015 respectively.

Figure 3: Total employment in the CCIs



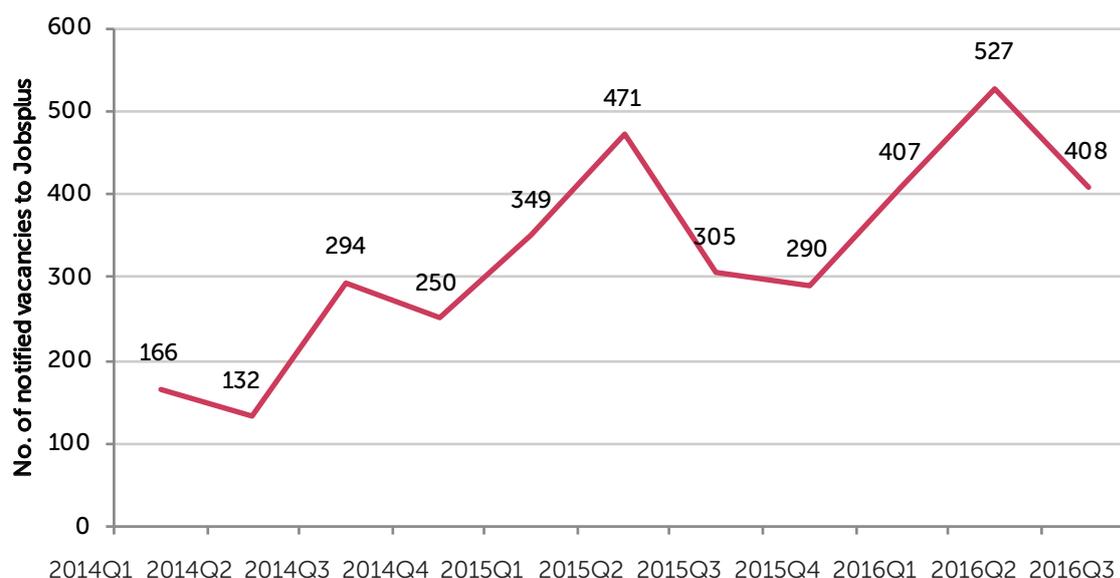
Notified Vacancies to ETC (relating to CCIs)

The number of vacancies notified to Jobsplus relating to CCIs has also been analysed. Overall the number of vacancies pertaining to occupations within the culture and creative sector has increased from 166 in Quarter 1 of 2014 to 408 in Quarter 1 of 2016. Notwithstanding this noticeable rise, vacancies relating to CCIs have been quite unstable as evidenced by fluctuations in Figure 4 overleaf, with vacancies rising to 471 in 2015Q2 dropping to 290 in the succeeding two quarters and rising again to 527 in Quarter 1 of 2016. As at the end of September 2016, the number of vacancies notified to Jobsplus relating to CCIs accounted for 7.98% of total number of vacancies notified to Jobsplus. The top 5 occupations relating to CCIs which registered the highest number of vacancies between January and September of 2016, were:

1. Printers (ISCO – 7322)
2. Announcers on radio, television and other media (ISCO – 2656)
3. Blacksmiths, hammer smiths and forging press workers (ISCO – 7221)
4. Web & Multimedia Developers (ISCO – 2513)
5. Software Developers (ISCO – 2512)

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 rather 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, 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 4: Vacancies in the CCIs



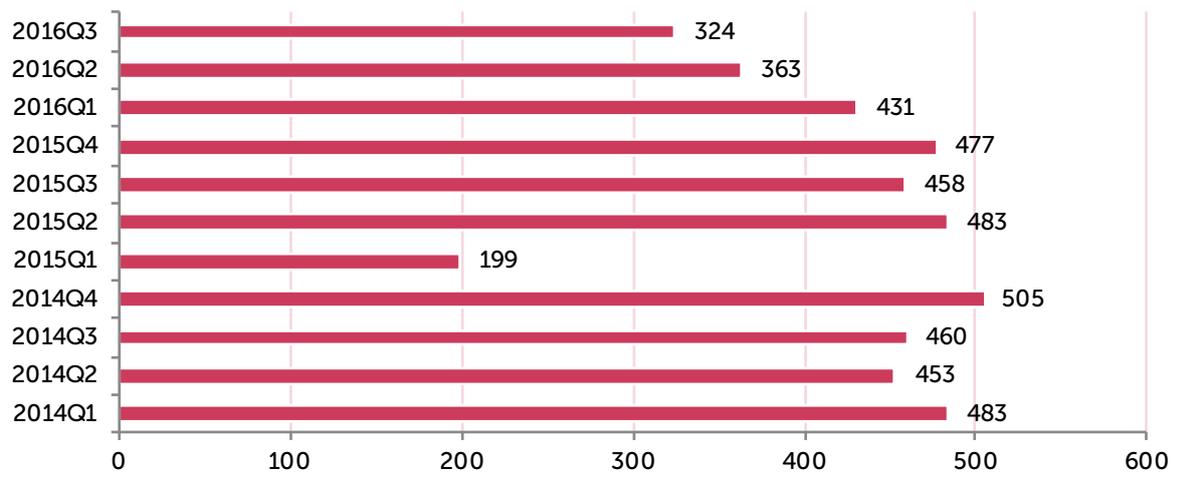
Registered jobseekers (searching for jobs relating to CCIs)

In general, the number of jobseekers looking for employment in the CCIs decreased from 483 in Quarter 1 of 2014 to 324 in Quarter 3 of 2016. During the period under review, the number of jobseekers looking for jobs in the creative sector during 2014 and 2015 remained more or less the same as depicted in Figure 5. The most noticeable decrease can be observed in Quarter 1 of 2015 where the number of jobseekers registering for jobs relating to CCIs decreased to 199 compared to a (simple) mean of 475 in the previous four quarters. The significant increases in Quarter 2 and Quarter 3 of 2015 were 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. During 2016, (i.e. the last 3 quarters in figure 5) the number of jobseekers also fell however one should note that overall unemployment in the Maltese labour market has declined drastically during the past 2 years.

As at end of September 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. Musicians, singers and composers (ISCO – 2652)

Figure 5: Number of jobseekers looking for employment in the CCIs





CONCLUSIONS & 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. 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 of time.

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. Results emanating from the Employability Index Report and the Skills Survey will be analysed in due course in an effort to possibly identify any shortages that employers may be facing with respect to the Creative Sector.

APPENDIX

NACE	Classification of NACE Codes
18.10	Printing and services activities related to printing
18.11	Printing of newspapers
18.12	Other printing
18.13	Pre-press and pre-media services
18.14	Binding and related services
18.20	Reproduction of recorded media
23.13	Manufacture of hollow glass
23.41	Manufacture of ceramic household & ornamental articles
47.61	Retail sale of books in specialised stores
47.62	Retail sale of newspapers and stationery in specialised stores
47.63	Retail sale of music and video recordings in specialised stores
58.10	Publishing of books, periodicals and other publishing activities
58.11	Book publishing
58.13	Publishing of newspapers
58.14	Publishing of journals and periodicals
58.19	Other publishing activities
58/20	Software publishing
58.21	Publishing of computer games
58.29	Other software publishing
59.00	Motion picture, video and television programme production, sound recording and music publishing activities
59.10	Motion picture, video and television programme activities
59.11	Motion picture, video and television programme production activities

59.12	Motion picture, video and television programme post-production activities
59.13	Motion picture, video and television programme distribution activities
59.14	Motion picture projection activities
59.20	Sound recording and music publishing activities
60.10	Radio broadcasting
60.20	Television programming and broadcasting activities
62.01	Computer programming activities
63.91	News agency activities
71.11	Architectural activities
71.12	Engineering activities and related technical consultancy
73.11	Advertising agencies
73.12	Media representation
74.10	Specialised design activities
74.20	Photographic activities
79.12	Tour operator activities
85.52	Cultural Education
90.00	Creative, arts and entertainment services
90.01	Performing arts
90.02	Support activities to performing arts
90.03	Artistic creation
90.04	Operation of arts facilities
91.00	Library, archive, museum and other cultural services
91.01	Library and archives activities
91.02	Museums activities
91.03	Operation of historical sites and buildings and similar visitor attractions

91.04	Botanical and zoological gardens and nature reserves activities
93.20	Amusement and recreation services
93.21	Activities of amusement parks and theme parks
93.29	Other amusement and recreation activities



CONCLUDING REMARKS

Economic indicators, such as those discussed throughout this report, always serve as an important benchmark through which to evaluate the progress of a large scale project (as is the European Capital of Culture title). This is particularly pertinent within the cultural sector, which both depends upon and constructs synergies with different sectors of the local economy.

These indicators allow for the a greater understanding into the ways in which Valletta 2018 extends beyond its immediate Cultural Programme into the broader cultural sector and other areas of social and economic activity. By quantitatively tracing changes in employment and economic growth within the creative industries, a clearer picture of the long-term impact of Valletta 2018 emerges, whereby the extent to which cultural activity acts as a central aspect of economic life (as opposed to a non-professional or temporary activity) can be correctly viewed.

Through the analyses within this report, one can see that the creative industries are experiencing a noteworthy growth, both in terms of employment (both part and full time), as well as in terms of economic return on investment. The creatives industries are an increasingly influential player in the Maltese economic landscape, delivering strong results that augur well for the long-term legacy of the sector in Malta, particularly in the post-2018 years.

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