

JOBSPUS

# Creating a Career in Cultural and Creative Industries

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Combined Report 2015-2018**



Keywords: Employment, Vacancies, Jobseekers

## Table of Contents

List of Abbreviations	3
List of Figures	3
Introduction	4
Methodology	5
Findings	7
<i>Statistical Analysis</i>	7
• Full-time Employment in CCIs	7
• Part-time Employment (As a primary job) in CCIs	8
• Total Employment in CCIs	9
• Notified Vacancies to Jobsplus (Relating to CCIs)	11
• Registered Jobseekers (Searching for jobs relating to CCIs)	13
Conclusion	15
Way Forward	15

## List of Abbreviations

CCI – Cultural and Creative Industries

ECoC–European Capital of Culture

EU – European Union

ISCO - International Standard Classification of Occupations

NCFHE - National Commission for Further and Higher Education

## List of Figures

Figure 1: Full-time employment in CCIs	7
Figure 2: Part-time Employment in CCIs	9
Figure 3: Total employment in CCIs	10
Figure 4: Employment in CCIs by Nationality	10
Figure 5: Vacancies notified to Jobsplus relating to CCIs	11
Figure 6: Notified vacancies to Jobsplus relating to CCIs - Top 10 occupations	12
Figure 7: Registered Jobseekers - Top 10 Occupations (relating to CCIs)	14

## **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 analysis is based on statistical indicators to establish changes in the employment structure in CCIs pre- and during 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 the employment structure during the period under review. Since the research is aimed at analysing the impact on employment pre- and during Valletta 2018, the statistical analysis will run from 2015 up to 2018. For the purpose of this research, the pre-Valletta 2018 period will cover 2015 and 2016 whilst the period incorporating data from 2017 to 2018 will be referred to as during Valetta 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. This implies that any vacancies, which are not notified to Jobsplus and any individuals looking for a job through channels other than registering with Jobsplus, are excluded from the data.

In order to determine the NACE<sup>1</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

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

included guidelines on the NACEs and ISCO<sup>2</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.

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 matches 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 students pursuing studies in the creative sector find after completing higher education.

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

# Findings

## Statistical Analysis

The main results of the research conducted between 2015 and 2018 are displayed and described in detail below.

- Full-Time Employment in CCIs

As depicted in Figure 1, full-time employment in CCIs has increased from 9,111 as at Q4 (December) of 2015 to 10,629 as at Q2 (June) of 2018, equivalent to a 16.7% increase over the three-year period, reflecting the situation of full-time employment across the Maltese economy. This increase is equally reflected in both gender cohorts with 12.5% more males and 22% more females engaged in gainful employment within the creative sector. The majority of the 10,629 individuals or 93.6% 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. Out of the individuals gainfully employed in CCIs as at the 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 and 35.4% were females.

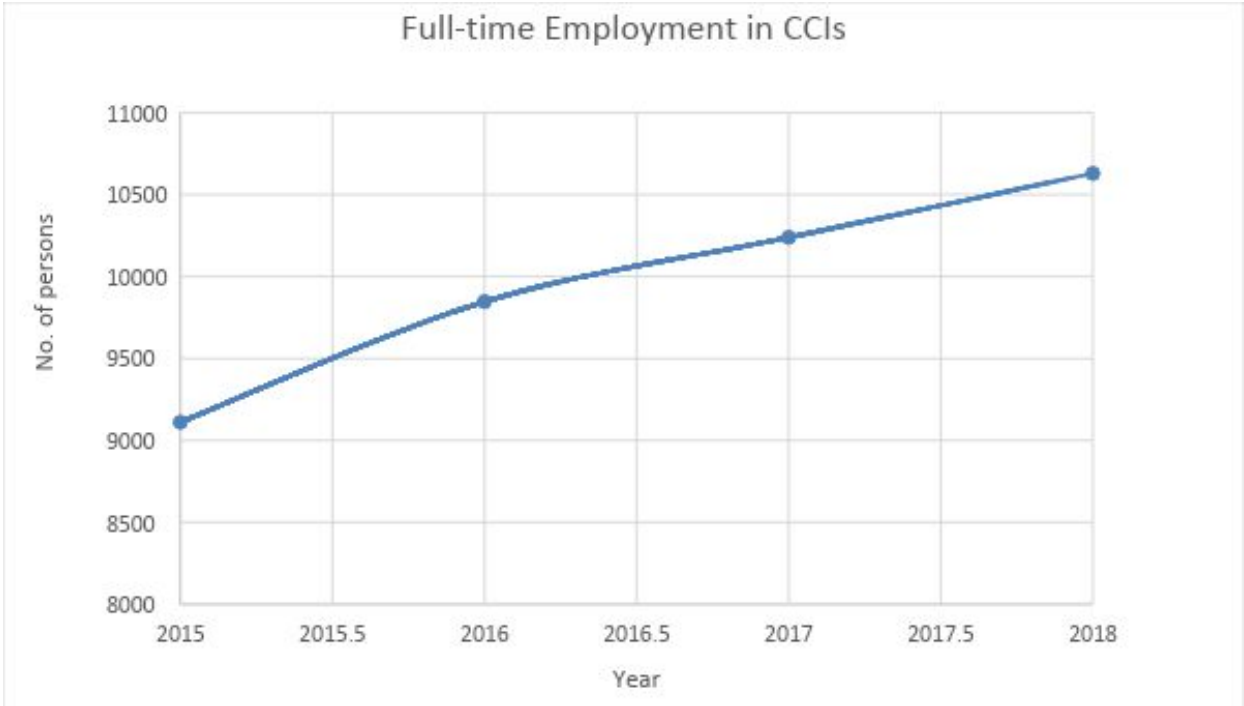


Figure 1: Full-time employment in CCI

The top 5 NACEs contributing to full-time employment in CCI as at the end of June 2018 (i.e. 2018 Q2), were:

1. 62.01 – Computer Programming Activities
2. 18.12 – Other Printing
3. 73.11 – Advertising Agencies
4. 71.11 – Architectural Activities
5. 71.12 – Engineering Activities and Related Technical Consultancy

19.5% 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 11.6% respectively. It is pertinent to point out that this list has been consistent over the years under review, with only minimal changes in the share of people engaged in full-time employment in each NACE.

#### ● Part-Time Employment in CCI

Figure 2 displays part-time employment (both part-time employment as a primary job and as a secondary job) in CCI between 2015 (Q4) and 2018 (Q2). In general, total part-time employment in CCI increased over the three-year period, from 3,073 as at the end of 2015 to 4,135 as at June of 2018, equivalent to a 34.6% increase in total part-time employment. This increase mainly pertains to secondary part-time employment (i.e. persons working a part-time job in CCI other than their gainful employment) which nearly doubled during the period under review. When compared to 2015, both the number of males and females in part-time employment as a primary job and as a secondary job increased significantly – with both cohorts increasing more than 34%. Major increases were mainly observed in part-time employment as a secondary job where the number of males in employment rose by approximately 40% compared to 57.6% increase in the number of females. Similarly, the majority of part-time workers were employed in the private sector with only 1.5% employed in the public sector. As at the 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.



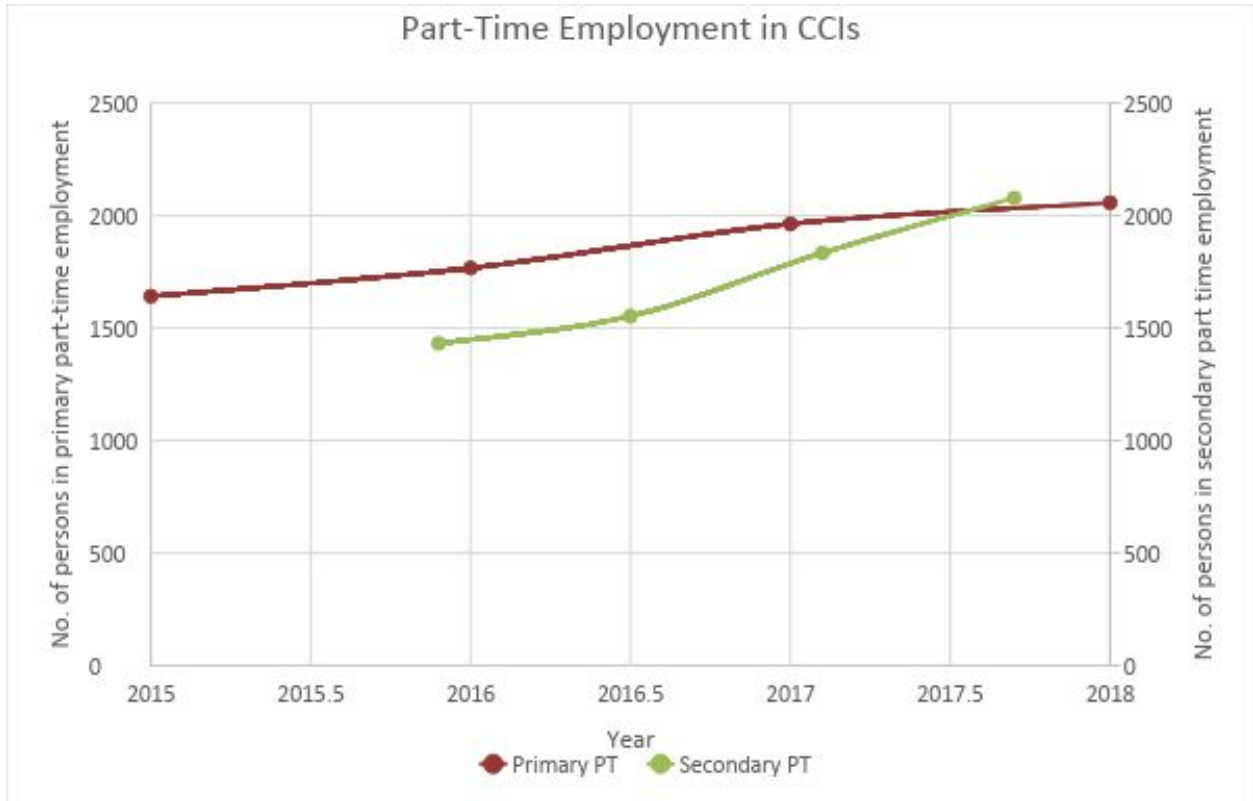


Figure 2: Part-time employment in CCIs

- Total Employment in CCIs

Figure 3 portrays total employment (including full-time + primary part-time employment) in CCIs for the period under review. Total employment in CCIs increased from 10,752 in Q4 of 2015 to 12,686 in Q2 of 2018; equivalent to an 18% increase over the three-year period. Whilst the share of full-time employment in CCIs as a proportion of total full-time employment stood at 5.2% in Q2 of 2018, the share of part-time employment in CCIs stood at 5.7%. Moreover, total employment (full-time + primary part-time employment) in CCIs as at the end of June 2018 amounted to 12,686, approximately 5.3% of employment in the total economy.

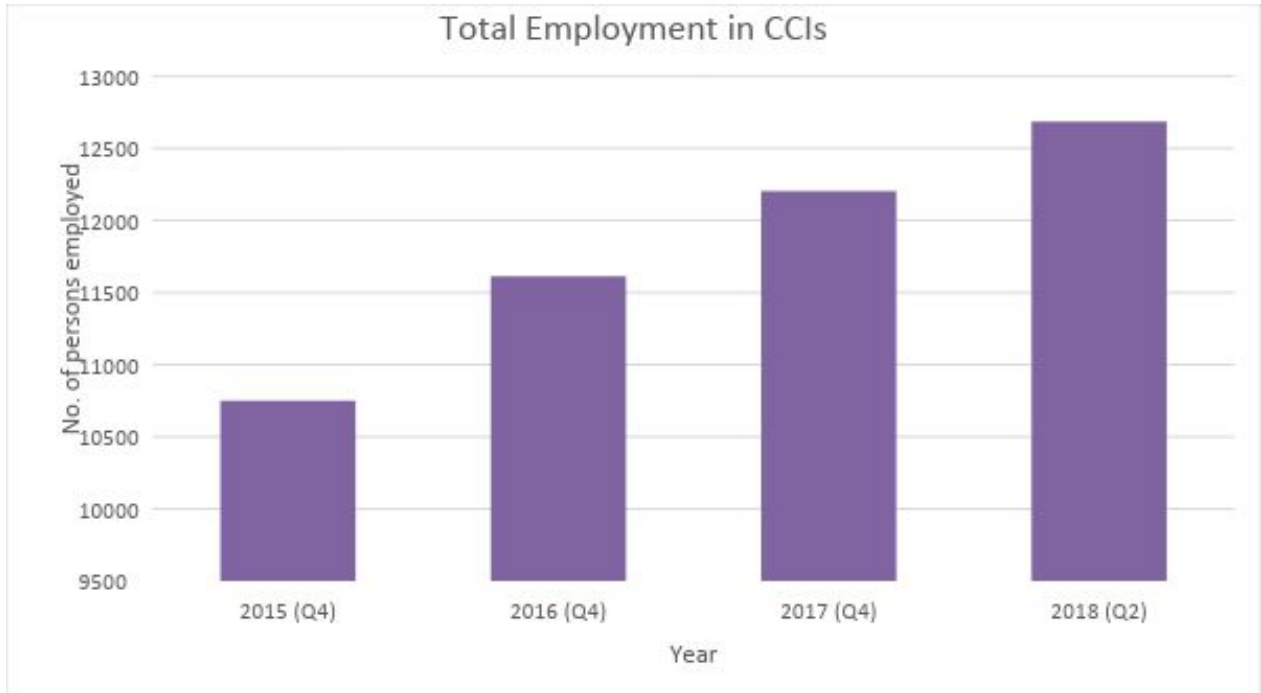


Figure 3: Total employment in CCIs

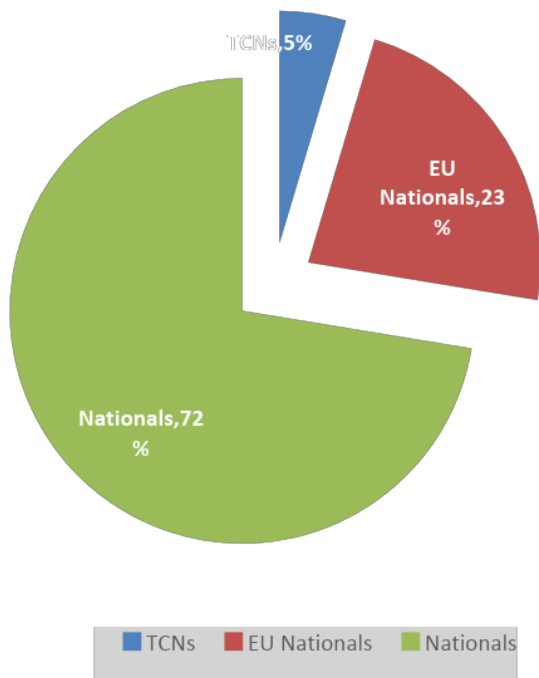


Figure SEQ Figure \\* ARABIC 4: Employment in CCIs by nationality

Out of the total number of persons employed (full-time + primary part-time employment) in CCIs as at the end of December 2017, 72% were Maltese nationals, 23% were EU nationals and 5% were third country nationals. Moreover, total foreigners employed in CCIs (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.

- Notified Vacancies to Jobsplus (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 decreased from 349 in 2015Q1 to 230 in 2018Q3. Notwithstanding this decline, vacancies relating to CCIs have been quite unstable over the period under review, as evidenced by fluctuations in Figure 5 with vacancies reaching a peak in 2016Q2 with a total of 527 notified vacancies within the same quarter. On average, between 2015 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 related to CCIs. As at the end of September 2018, the number of vacancies notified to Jobsplus, relating to CCIs, accounted for approximately 4% of the total number of vacancies notified to Jobsplus between January and September of 2018.

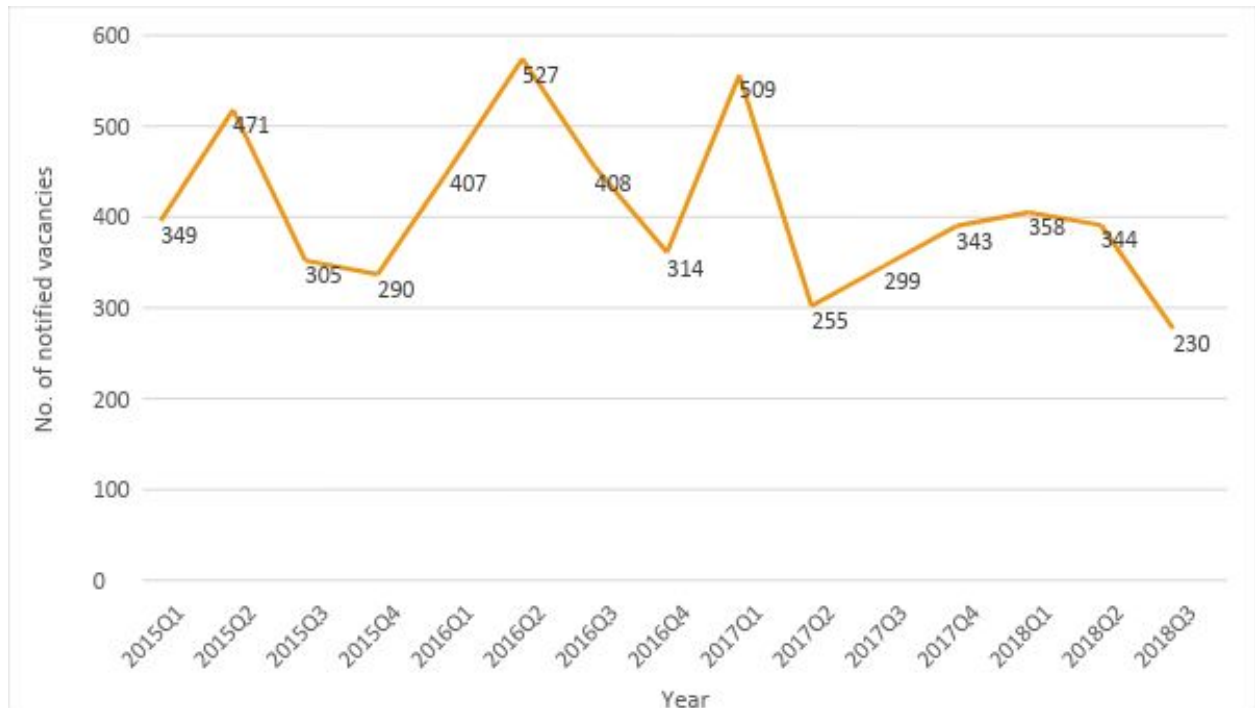


Figure 5: Vacancies notified to Jobsplus relating to CCIs

Figure 6 represents the top 10 occupations relating to CCIs 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 total vacancies, followed by travel guides and announcers on radio, television and other media with 12% and 11% respectively.

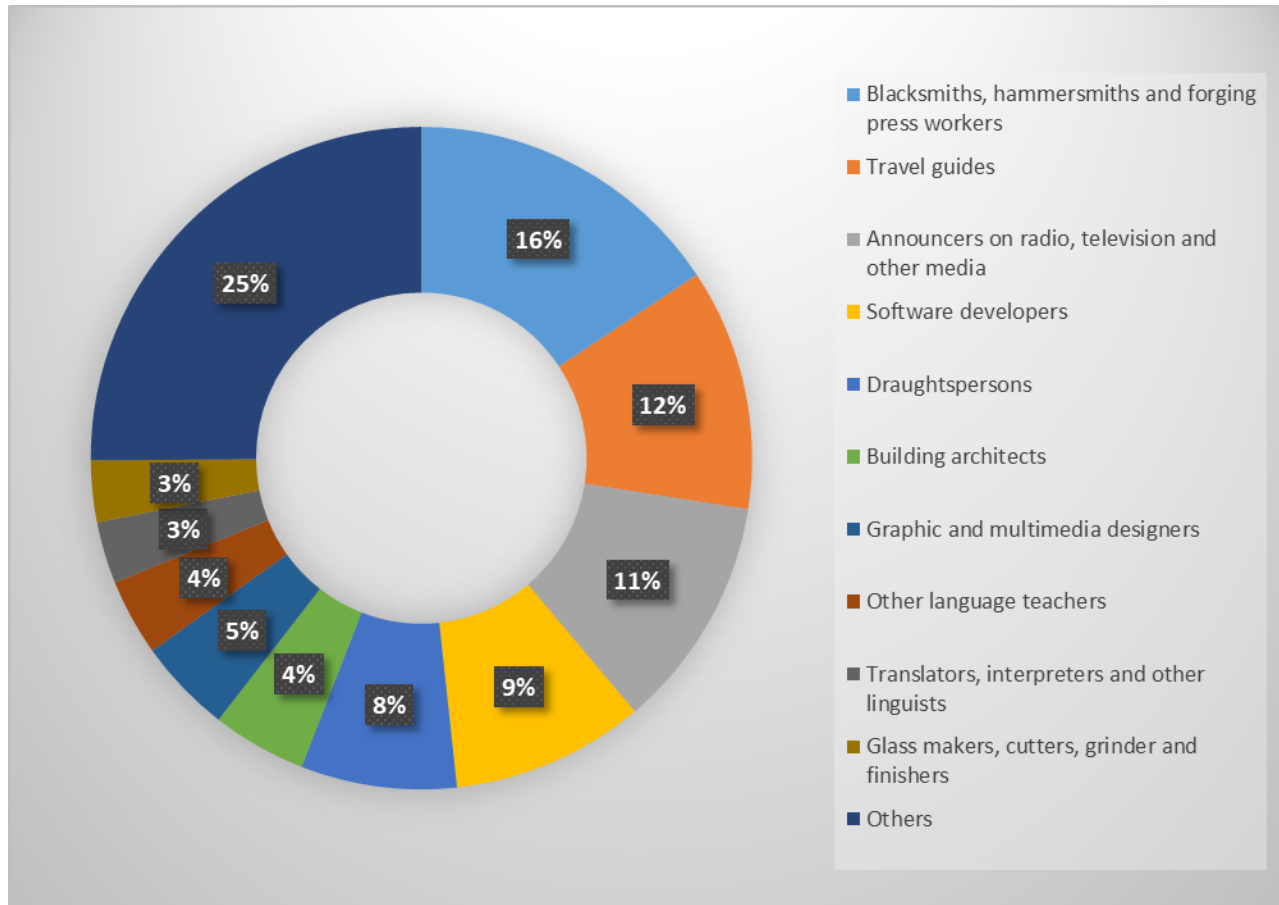


Figure 6: Notified vacancies to Jobsplus relating to CCIs - Top 10 occupations

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.

- [Registered Jobseekers \(searching for jobs relating to CCIs\)](#)

In absolute terms, the number of jobseekers looking for employment in the CCIs decreased from 199 in Quarter 1 of 2015 to 146 in Quarter 3 of 2018. During the years under review, one could instantaneously notice an increase in the number of jobseekers seeking employment in CCIs between 2015 Q1 and 2015 Q2 – where the number of jobseekers increased to 483. Thereafter, the number of individuals looking for employment in CCIs decreased gradually throughout the period in question. 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 started showing interest in occupations classified under this ISCO code.

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

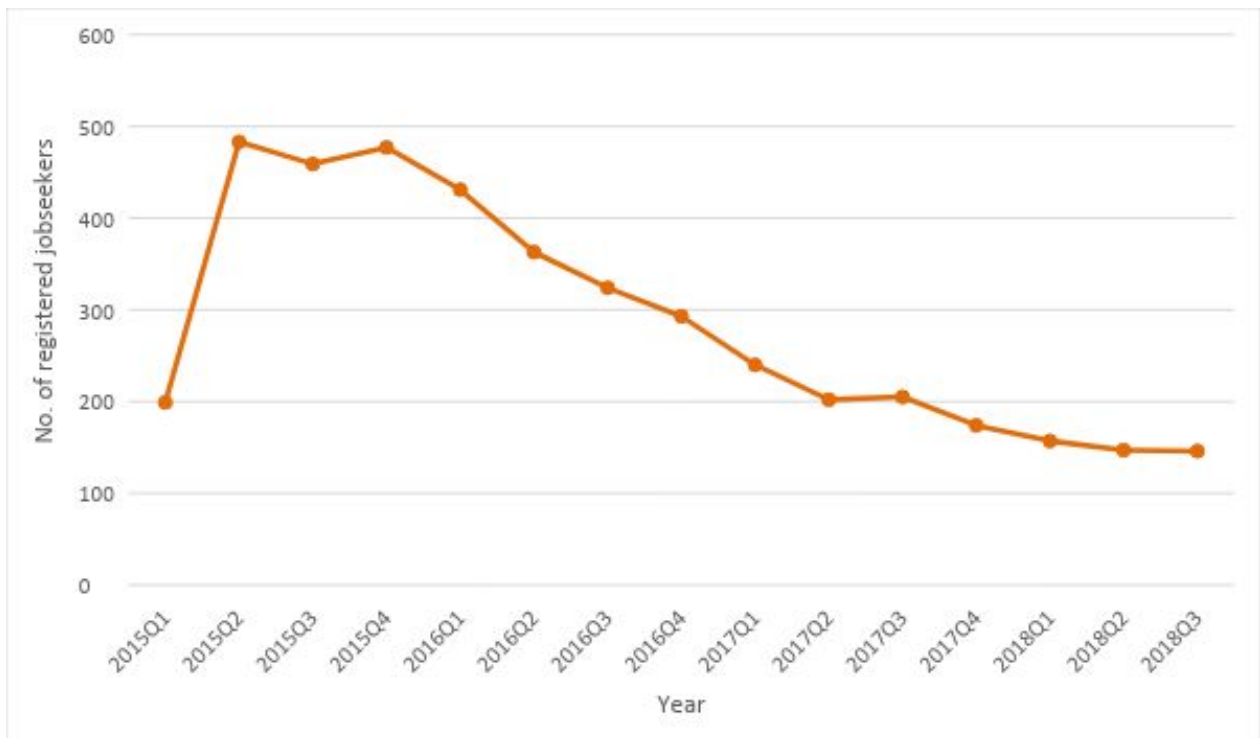


Figure 6: Registered jobseekers (Searching for jobs in the CCIs)

Figure 7 depicts the top 10 occupations (relating to CCIs) which registered jobseekers listed as their first preference of job, as at the end of September 2018. Around 52% of jobseekers revealed that their job preference 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.

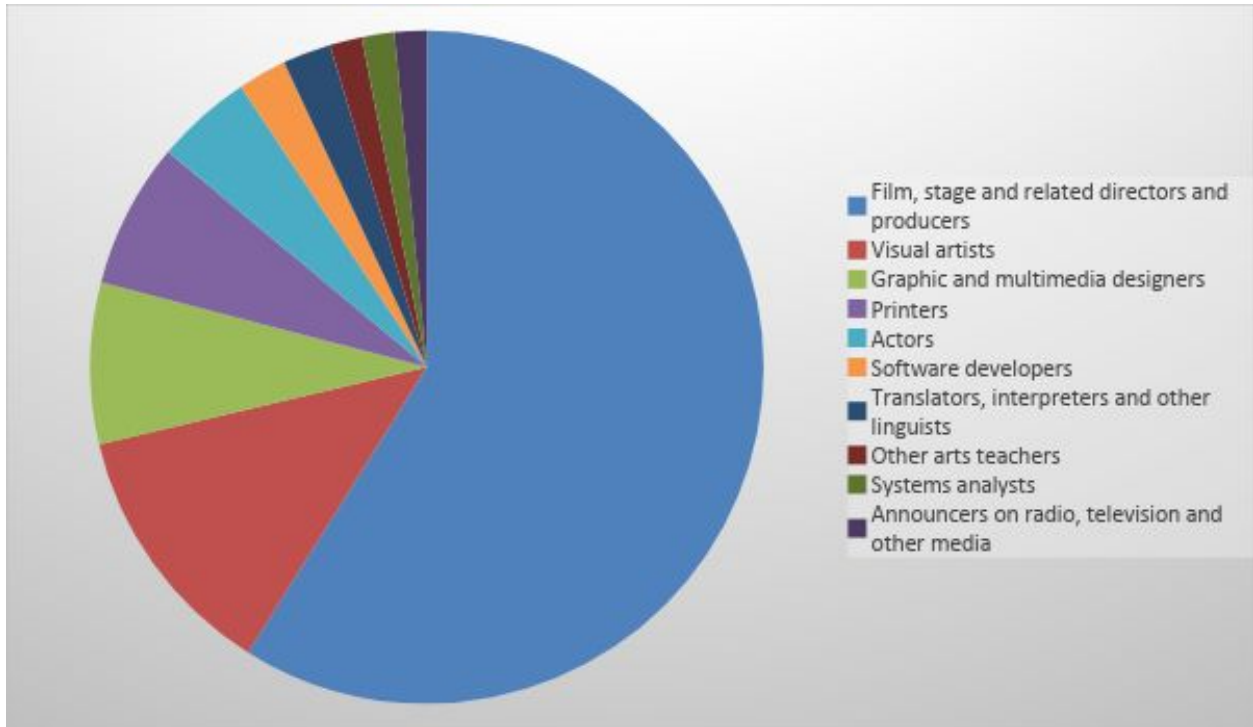


Figure 7: Registered jobseekers - Top 10 occupations (Relating to CCIs)

## Conclusion

Overall, total employment (full-time employment + part-time as a primary job) in CCIs increased by approximately 18% during the period under review. However, with the research mainly 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. 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 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 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 in the analysis from a labour market perspective is to have research beyond the 2018 period, as it is only through such research which covers different periods that an analysis can be 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.

It is only through the above recommendations that substantial conclusions can be made to complement the results at hand. Following such developments, policymakers can in turn react accordingly in an effort to boost the CCI.

## Appendix A

<b>NACE</b>	<b>Classification of NACE Codes</b>
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