

A Report on the Creative Industries in the G21 Region

Consultant's Report | April 2021

Updated | January 2023



30 April 2021

**To the G21 Regional Alliance, Committee for Geelong
and other partners,**

I have pleasure in submitting this Report on the Review of the Creative Industries in the G21 Region.

It has been a privilege for the consulting team – Peter Morton, Kitty Walker and myself – to work on this project and engage with so many committed and passionate individuals and organisations in the G21 community.

The Report – *Making Change* – outlines a plan and range of actions that will develop a platform to enable change and new opportunities for the G21 Region.

This project falls into three parts:

- This major **Report** on the creative industries in the G21 region
- A five-year creative industries **Strategy** *Making Change*
- A **Case for Support**, *Creating the Opportunity* for investing in the creative industries in the G21 region

The three documents are interdependent and will need strong endorsement and leadership across the G21 community to fully succeed.

This Report makes 22 recommendations. We believe that accepting and implementing these recommendations in a timely manner will provide a sound framework to enable the creative industries sector across the G21 region to thrive.

We acknowledge and thank you for your leadership in commissioning a review and development of a Creative Industries Strategy for your region.

Yours sincerely,

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**TONY
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and Associates

Acknowledgement of Country

Aboriginal people have made and continue to make a unique and irreplaceable contribution to the G21 Region.

We acknowledge and respect First Nations people as the region's first people and nation and recognise Wadawurrung and Eastern Maar people as Traditional Owners and occupants of the G21 lands and waters.

The consultants acknowledge that the spiritual, social, cultural and economic practices of Aboriginal people come from their traditional lands and waters, and that the Aboriginal people maintain cultural and heritage beliefs, languages and laws, which are of ongoing importance today.

Acknowledgement of Community

We acknowledge and recognise that the voice and contribution of people and communities with diverse lived experience of disability, both past and present, are essential in realising an inclusive society.

Disclaimer – This Report was developed for the Project Steering Committee formed as a collaboration between the Committee for Geelong (Chair), G21 Geelong Region Alliance, the Geelong Regional Libraries Corporation, Geelong Art Gallery, Back to Back Theatre, Creative Geelong Inc, Geelong Arts Centre and Platform Arts, and undertaken by external consultants. Regional Development Victoria via the Regional Development Australia Barwon South West committee also contributed funds to the Creative sector plan set to inform post-COVID future – Committee for Geelong.

It draws on information, opinions and views provided by many people in the community.

This Report does not necessarily reflect the views of the organisations who commissioned this project or indicate its commitment to a particular course of action.



A Report on the Creative Industries in the G21 Region

TABLE OF CONTENTS —

1.	EXECUTIVE SUMMARY	4
	SUMMARY OF RECOMMENDATIONS	7
2.	INTRODUCTION	10
3.	HOW WE DESCRIBE THE CREATIVE INDUSTRIES	10
4.	A TIME OF CREATIVE OPPORTUNITY	12
4.1	A dynamic part of the Victorian and G21 economy	12
4.2	COVID-19	16
4.3	The policy context	17
4.4	Regional planning	17
4.5	State-wide planning	18
4.6	Other state and national planning	19
4.7	International examples	19
5.	CORE PRINCIPLES	21
6.	CORE PRINCIPLE ONE	22
6.1	SUSTAINABLE CREATIVE INDUSTRIES FOR THE REGION	22
6.1.1	Accountable and influential governance framework	22
6.1.2	Celebrating diversity across communities of practice, culture, skills and demographics	23
6.1.3	Industry development	24
6.1.4	Skills development framework – primary, secondary, tertiary and lifelong learning	25
6.1.5	Skills development framework – business skills for the creative industries sector	27
6.1.6	Digital inclusion	27
6.1.7	Co-design	28
6.1.8	Liveability - an environment to attract and retain workers	29
7.	CORE PRINCIPLE TWO	31
7.1	COLLABORATIVE CREATIVE INDUSTRIES FOR THE REGION	31
7.1.2	Alignment with Australian Government strategies	31
7.1.3	Alignment with Victorian Government strategies	31
7.1.4	Alignment with Local Government strategies	32
7.1.5	Alignment with Local Government council plans	32
7.1.6	Partnerships with state cultural institutions	32
7.1.7	The potential for the creation of a unique cultural tourism offering	33
7.1.8	Partnership with regional tourism offices	33
7.1.9	Partnerships with UNESCO City of Design office	35
Appendices		
	Appendix A – Consultations	37
	Appendix B – Creative Industries' Strategy for the G21 Region, Project Brief	39
	Appendix C – Summary of reviews, studies and other documents with reference to the creative industries	43
	Appendix D – City of Greater Geelong – UNESCO City of Design update report	49
	Appendix E – Cultural events in the G21 Region	53
	Appendix F – Biographies	54

1. EXECUTIVE SUMMARY —

This is a most timely review. This is the first Creative Industries Strategy for the G21 region, which includes five municipalities: Colac Otway, Golden Plains, Greater Geelong, Queenscliffe and Surf Coast. The G21 region has a population of over 340,000 people and covers 8972 sq km. The region's population is the fastest growing in Victoria, outside of the Melbourne metropolitan area.

The objective of the Creative Industry Strategy for the G21 region is to provide a framework for a more strategic and coordinated approach between the public, private and not for profit sectors for the development of the region's creative industries. The Strategy aims to inform and guide government and industry priorities, investments and initiatives to achieve sector development, economic growth and employment and to contribute to the prosperity and liveability of the G21 region.

This Strategy aligns with the designation of the *International Year of the Creative Economy for Sustainable Development* by the United Nations. In identifying this focus for 2021, the UN's Council for Trade and Development recognised the need to promote sustained and inclusive economic growth, foster innovation and provide opportunities, benefits and empowerment for all.

It also identified the ongoing need to support countries with economies in transition by diversifying production and exports, in new sustainable growth areas, including the creative industries.

The trend for cities and regions to identify the creative industries as part of a framework to transition from a reliance on heavy industry and other forms of labour-intensive production is now well established.

From the Blair Labor Government's lead in the 1990s, which sought to reimagine Britain's industrial heartlands, an even more competitive landscape has emerged. Across the world, communities increasingly seek to attract major international corporations, particularly those with a digital focus, or seek to nurture and support local start-up enterprises or locally based artist and maker communities to nurture a more creative and collaborative culture.

Across Australia, every state and some regions have established creative industries strategies. The competition to build sustainable economies based on the 'knowledge economy' is real. This is particularly the case in 'transition' regions like Geelong, where responding to a decline in manufacturing and heavy industries is a key focus. The knowledge economy is a principal driver of the creative industries.

The G21 region has an exciting opportunity to highlight unique aspects of its communities that are the enablers and attractors for those contributing to this rapidly emerging economy.

The experience of other regions has demonstrated the importance of the 'liveability' of a city or region in attracting and retaining the community of skills required for the sustainability of the creative economy.

The Geelong region possesses many of the attributes that contribute to liveability. A region of natural beauty, it has the benefit of proximity to a major capital city, has efficient air, rail, road and port access, is blessed with great leisure facilities and impressive cultural infrastructure along with a fine health system, all supported by excellent education and skills development centres. The cost of living, when compared to adjacent Melbourne, is a further, powerful attractor.

The region has experienced a long period of transition and change and in so doing has demonstrated impressive resilience and adaptability, as the industries that fuelled its growth over the 20th century adapted to radical shifts in the global economy.

The past decades have been marked by a desire to better understand this changing landscape, and to take advantage of the region's attributes to benefit from the emerging knowledge economy, resulting in an impressive body of research reports and analysis which provide guidance on opportunities for the region's further development.

The past decades have also seen dramatic changes in cultural expression. We are witnessing the democratisation of cultural expression, enabled by digital technologies. Art is now for everybody, and everybody can be a part of making art. Our cultural and creative institutions are increasingly inviting audiences to collaborate in the creative process.

The G21 region presents an extraordinary community of creative industry practitioners and creative hubs. In recent years the sector has been boosted by a large influx of creative migrants from Melbourne. They work across a range of disciplines, to an incredibly high standard – and their passion draws communities together to participate in creative experiences outside of Melbourne.

This trend to nurture a more participatory creative culture is central to supporting the skills required for the region's emerging economy – the ability to innovate, to think anew and respond to the opportunities presented by new technologies.

The strength of this participatory culture is also evidenced by the numerous advocacy and representation bodies that have been established across the region. The G21 Alliance and the Committee for Geelong are powerful examples of this community advocacy.

A benefit of this long-standing activity is a body of studies, research and related reports that provide the framework to leverage the region's assets to build on opportunity and deliver a more coordinated and confident roadmap for development over the next five years.

There is goodwill to create change.

The challenge, but also the opportunity that we face, is how to most effectively marshal that goodwill to draw on the learning of the past decades and to achieve broad community ownership to enable the region to evolve as a smart, connected and bold knowledge economy.

A theme that informs many of the recommendations across the two Core Principles of this Report is collaboration. The evolution of a vibrant collaborative culture, both across the sector and across government and industry could set the G21 region apart and establish its point of difference.

One recommendation is to propose a governance and implementation framework that enables the sustainable growth of the sector over the next five years. The framework acknowledges the diversity of communities, cultures, capabilities and institutions which contribute to this collaborative creative culture.

A further principle is to enable the understanding of the education and skills development resources so they can be effectively directed to nurture the '21st century skills' required for the knowledge economy; for the understanding of the tourism landscape to be framed to foster a vibrant cultural tourism sector; and for an understanding of the wider creative industries sector to enable the identification of priority growth opportunities for the region.

Another is to propose the evolution of a more connected and collaborative culture across the creative industries community in the region. This recognises the rich vein of research and knowledge of the local cultural ecology to date and seeks to join up those learnings to maximise their impact.

The 22 recommendations seek to provide a holistic approach to support the diverse factors which collectively create the environment which drives opportunity and initiative, and where creativity is supported by connectivity.

The recommendations complement the outcomes of the Barwon Regional Partnerships, particularly in the areas of Liveability, Business and Innovation, Education and Tourism.

The Recommendations have also been clustered under the following themes:

- Governance and Delivery
- Design
- Skills Development
- Cultural Tourism
- Cultural Planning

And colour coded accordingly

This Report has been undertaken at an unprecedented time, as nations and people respond to the impact of the COVID-19 pandemic. A survey of the region's creative community undertaken as part of this project highlights the adaptability and resilience of the region, but also demonstrates opportunities to support the skills required to sustain creative practice in a changed environment.

Whilst the timeliness of the United Nations International Year of the Creative Economy is noted, the local environment represents a unique and equally timely moment for this project's public-facing Strategy and Case for Support to be developed in conjunction with this Report. These align with an Australian Government review of the sector, due for release in mid 2021; the Victorian Government's next iteration of Creative State, also due for release in mid 2021; the finalisation of the City of Greater Geelong's Arts and Culture Plan, and the development of local government Council Plans and Community Visions, also due for completion in mid 2021.

The project provides three interdependent documents:

- This Report
- A five-year Strategy, and
- A Case for Support.

The three documents respond to the Terms of Reference provided by the commissioning partners. Collectively, their objective is to assist the region's leadership to advocate and secure the sector's growth.

ADDENDUM UPDATE

Three significant announcements since the completion of the Creative Industries Strategy for the G21 Region in April 2021 provide opportunities for alignment with and enhancement of the Report's Recommendations.

New opportunities for alignment include:

- THE 2026 COMMONWEALTH GAMES HOST REGION RESPONSIBILITIES
- THE GEELONG CONVENTION AND EXHIBITION CENTRE DEVELOPMENT
- THE BARWON LOCAL JOBS PLAN

The announcement that Victoria will host the 2026 Commonwealth Games and adopt an innovative regional host venue model that will see activities located in four cities and regions – Geelong and the G21 region, Bendigo, Ballarat and Gippsland, offers unique opportunities.

The Games and the associated Cultural Program offer opportunities to represent history, culture and commerce to a national and international audience.

The Commonwealth Games Federation website noted:

Not only will the Games deliver new economic opportunities through event infrastructure – it will deliver the double benefit of creating local jobs and housing as well as world-class sports facilities.

This will leave a legacy of affordable housing for the regions and state-of-the art sports infrastructure to attract future major events. The Games will also drive participation in sports, at both a community and professional level, throughout the State.

Beyond the field of play, Victoria 2026 will feature a program of cultural and business engagement experiences that bring to life the Commonwealth Games values of humanity, equality and destiny, and embrace the State's diversity and rich cultural history.

The Victorian Government has appointed a Minister for Games Delivery and a Minister for Commonwealth Games Legacy to lead government initiatives, in partnership with the Commonwealth Games Organising Committee. The decision to proceed with the Geelong Convention and Exhibition Centre, announced in January 2022 aims to create Victoria's premium regional convention, exhibition and events destination. When completed in 2026 it will offer a 1,000-seat plenary facility along with 3,500 sqm multi-purpose space to host large and small events. The facility is projected to support 270 ongoing jobs.

As part of supporting Australia's economic recovery from the COVID-19 pandemic, the Australian Government's Local Jobs Program, released in February 2022 brings together expertise, resources and access to funding at the local level to accelerate reskilling, upskilling and employment pathways in 51 Employment Regions.

The Barwon Local Jobs Plan identifies opportunities within the G21 region. Whilst the Plan recognises '*growth in innovative creative and cultural activities*' and references the G21 Creative Industries Strategy, it does not capture any of its recommendations or significantly address the employment potential the sector represents for the region.

The following Report references relevant Recommendations of the G21 Creative Industries Report and identifies ways to extend their scope and impact by taking account of the potential to align with Commonwealth Games activities, the completion of the Geelong Convention and Exhibition Centre and the Barwon Local Jobs Plan.

SUMMARY OF RECOMMENDATIONS —

-  Governance and Delivery
-  Design
-  Skills Development
-  Cultural Tourism
-  Cultural Planning

Recommendation 1



That the Committee for Geelong commissions an update of the Environmental Scan of the Creative Industries for the G21 region with the most current REMPLAN and Census data, to ensure its currency and a foundation for advocacy to support investment in the Creative Industries sector.

Recommendation 2



That a collaborative Governance Framework be developed to implement the Creative Industries Strategy. This should capitalise on the strengths of the region's advocacy bodies including the Committee for Geelong and the G21 Regional Alliance.

This framework should have due regard for the diversity of creative industries practice across the region and respect and embed its principles in the creative culture of the region.

Recommendation 3



That a dialogue is established to create a partnership with the Wadawurrung Traditional Owners Aboriginal Corporation and the Eastern Maar Aboriginal Corporation to ensure the voice of Traditional Owners is central to the creative industries and opportunities in areas such as design, visual arts, cultural tourism and music are optimised.

Recommendation 4



That Regional Development Victoria's Barwon office enhances its advocacy of the creative industries and design community, aligned to Deakin University's research institutes that contribute to innovation in the creative industries sector.

Recommendation 5



That the region's education providers at both secondary and tertiary levels provide skill development pathways to support the current and emerging requirements of the creative industries sector.

Recommendation 6



That the Gordon Institute, or a registered training provider, explores the establishment of a regional creative industries business skills initiative, to support the business sustainability of the sector across the region.

Recommendation 7

That priority be given to the implementation of the Barwon Digital Plan, and that the creative industries be identified as a 'key industry' aligned to the Plan's roll-out.

Recommendation 8



That the recommended Creative Industries Governance Framework explore the potential to establish a unique Co-Design Lab. This would bring together artists and makers, the education sector and government to develop innovative solutions to issues and opportunities in the G21 region.

Recommendation 9



That the Geelong based cultural institutions explore the application of co-design principles in the development of a program of regional cultural activity, as outlined at Recommendation 15.

Recommendation 10

That the recommended Creative Industries Governance Framework, in partnership with the City of Greater Geelong, establish a Design Excellence framework for public housing, and advocate for inclusion in the Victorian Government's public housing initiative.

Recommendation 11

That the recommended Creative Industries Governance Framework review the recommendations of the Australian Government's Review of the Creative and Cultural Institutions and Industries and explore opportunities for collaboration and alignment.

Recommendation 12

That the recommended Creative Industries Governance Framework review the recommendations of the Victorian Government's Creative State 2021-2026, and explore opportunities for collaboration and alignment.

Recommendation 13

That the recommended Creative Industries Governance Framework make priority representations to Creative Victoria to be nominated as the region for the proposed neighbourhood pilot program.

Recommendation 14

That the recommended Creative Industries Governance Framework review the City of Greater Geelong's Arts and Cultural Strategy and plans in development by the Golden Plains and Surf Coast Shires, and explore opportunities for collaboration and alignment.

Recommendation 15

That the G21 region local government authorities review the recommendations of the Creative Industries Strategy, and consider the inclusion of initiatives to support their creative economies and cultural tourism.

Recommendation 16

That the recommended Creative Industries Governance Framework explore the establishment of a regional cultural programming initiative, to extend the reach and impact of the Geelong based cultural institutions.

Recommendation 17

That the recommended Creative Industries Governance Framework encourages new business partnerships and private investment to create unique places that support the creative sector and promote cultural tourism for regional Victoria. Options could reference successful international examples including teamLab Tokyo, Meow Wolf, or Two Bit Circus.

Recommendation 18

That the recommended Creative Industries Governance Framework partner with regional tourism bodies to develop a cultural tourism strategy which includes the regional cultural programming initiative as outlined in Recommendation 16.

Recommendation 19

That the review of the Greater Geelong and Bellarine Tourism Strategic Plan to be undertaken in 2021 includes a focus on the cultural and heritage tourism offerings of the region.

Recommendation 20

That the City of Greater Geelong's UNESCO City of Design Framework Plan is delivered collaboratively with the Office of Urban Design and Heritage, Arts and Culture and other related departments, and that the Plan is communicated widely to the creative industries sector across the G21 region.

Recommendation 21

That the City of Greater Geelong consider the review and enhancement of planning, development and heritage codes and controls, to enhance a commitment to design excellence and to preserve examples of design heritage.

Recommendation 22

That the development of the Greater Geelong and Bellarine Tourism Strategic Plan for 2021-25 incorporates strategies to enhance awareness of the City's UNESCO designation.

ADDENDUM UPDATE

Recommendation 23

That priority be given to the development of a First Peoples cultural program for inclusion in the Commonwealth Games program, led by the Wadawurrung Traditional Owners Aboriginal Corporation and the Eastern Maar Aboriginal Corporation.

Recommendation 24

The opportunity to develop a certificate level Live Production and Technical Services course in partnership with the Gordon Institute be explored.

Recommendation 25

The opportunity to develop enhanced Communications and Creative Learning degree courses in partnership with Deakin University be explored.

Recommendation 26

That initiatives to support the skills required to develop digitally based content be explored, and based on successful programs established elsewhere.

Recommendation 27

Representations are made to the Barwon Region Local Jobs Facilitator to include relevant recommendations of the G21 Creative Industries Strategy as initiatives of the Local Jobs and Skills program.

Recommendation 28

That priority be given to a significant enhancement of digital infrastructure, based on projected capacity requirements of the Commonwealth Games program.

Recommendation 29

Recognising Geelong's designation as a UNESCO Creative City of design, representations are made to Commonwealth Games organisers to advocate for 'design excellence' principles to be incorporated as key requirements for games infrastructure and public domain works to be undertaken in the G21 region.

Recommendation 30

That the Greater Geelong and The Bellarine Tourism Strategic Plan and the Brand Geelong Greater Geelong initiative be updated to incorporate Goals and Actions to maximise cultural tourism opportunities associated with the Commonwealth Games.

Recommendation 31

The Geelong Exhibition and Convention Centre collaborates with state, regional and local tourism organisations to integrate cultural tourism opportunities within convention and event programs offered by the Centre.

Recommendation 32

That the Creative Industries Taskforce, in partnership with City of Greater Geelong and regional artists, arts organisations and communities, contribute to the planning for locally commissioned cultural experiences which introduce the region's history, culture and identity to Commonwealth Games audiences.

2. INTRODUCTION —

The development of a Creative Industries Strategy was commissioned by a consortium of G21 partners in November 2020.

The objective of the Creative Industry Strategy for the G21 region is to provide a framework for a more strategic and coordinated approach between the public, private and not for profit sectors for the development of the region's creative industries. The Strategy aims to inform and guide government and industry priorities, investments and initiatives to achieve sector development, economic growth and employment and to contribute to the prosperity and liveability of the G21 region.

The project provides three interdependent documents – a Report (this document), a Strategy 2021-26, and a Case for Support. The three documents respond to the Terms of Reference provided by the commissioning partners. Collectively, their objective is to assist the region's leadership to advocate and secure the sector's growth.

It is proposed that this Report, along with the Creative Industries Strategy 2021-26 and the Case for Support be widely disseminated as public documents.

This Report provides the evidence base to underpin the 2021-26 Strategy and Case for Support. It is cast in two sections – the first provides an overview of the creative industries landscape in the region and draws extensively from the body of research and reports made available to the consultants. The second section builds on that understanding of the local ecology, providing a series of recommendations that are designed to better connect the sector's strengths, and the enablers that are vital for its future success.

The 22 recommendations are framed around two focus areas – *Sustainability* and *Collaboration*. The consultants believe that the acceptance and implementation of these recommendations in a timely manner will provide a sound framework to enable the creative industries in the G21 region to thrive.

This Report was developed over a four-month period. The first stage involved a desk-top scan of relevant reports, reviews, data and information. This provided a rich body of material, demonstrating the commitment and depth of interest in making change in the region. The documents reviewed are summarised in the Appendices.

The Terms of Reference are included in the Appendices.

The consultants met with key stakeholders across the

community over the span of the project. The consultation included individual meetings (on Zoom, via phone, and in person), stakeholder round tables and an online survey. A list of individual consultations undertaken is provided in the Appendices.

Tony Grybowski and Associates was selected through an EOI process to undertake this work in November 2020. The project commenced in December 2020 and concluded in April 2021. The project was overseen by a Project Steering Committee which was Chaired by the CEO of the Committee for Geelong Jennifer Cromarty. The G21 Arts and Culture Pillar acted as a reference group. The Team was led by Tony Grybowski and included Peter Morton and Kitty Walker. Biographies of the consulting team are included in the Appendices.

3. HOW WE DESCRIBE THE CREATIVE INDUSTRIES —

The term 'creative industries' is now widely recognised but regularly misunderstood. A key objective of this work is to create a greater awareness of the scale and nature of the creative industries across stakeholders and the broader community. Increasing awareness and understanding of the sector will help realise its potential and application across the G21 region.

'Creative industries add the 10% that defines a region. It can be great at producing dairy, timber, beef, mining, financial services, football stars - but it's the 10% on top that conveys those stories and local culture which drives that region's appeal.' (survey response)

Creative Victoria uses the following description to inform policy development and delivery. This definition has been adopted for the purposes of defining the scope of this Report.

Creative industries are an evolving mix of sectors spanning arts, culture, screen, design, publishing and advertising. They cover disciplines as diverse as game development and graphic design, fashion and filmmaking, performing arts and publishing, architecture and advertising, media and music, comedy and craft. They include activities that are commercially driven and community based, experimental and export-intense.

Across all disciplines, Victoria's creative industries are driven by a powerhouse of small organisations, micro businesses and sole practitioners, comprising the vast majority of the sector.

They operate within a creative ecosystem that extends from iconic cultural organisations and global businesses

to educational institutions, government bodies and community groups.

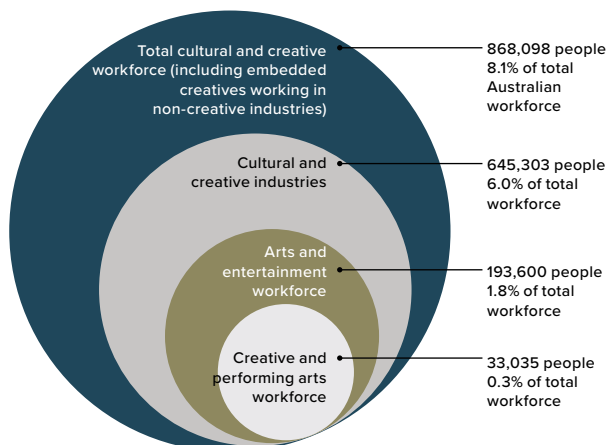
AusTrade provides an international perspective on the contribution of Australia's creative industries:

Contemporary Australia is home to a wide range of creative arts and industries, from world-class films, visual and performing arts, to publishing and the games industry. Australia has a vibrant arts, culture and entertainment community which is known internationally for its unique cultural style and enriched Indigenous history. Australia also plays a key role in the education, training and development of future leaders across all arts and creative industries.

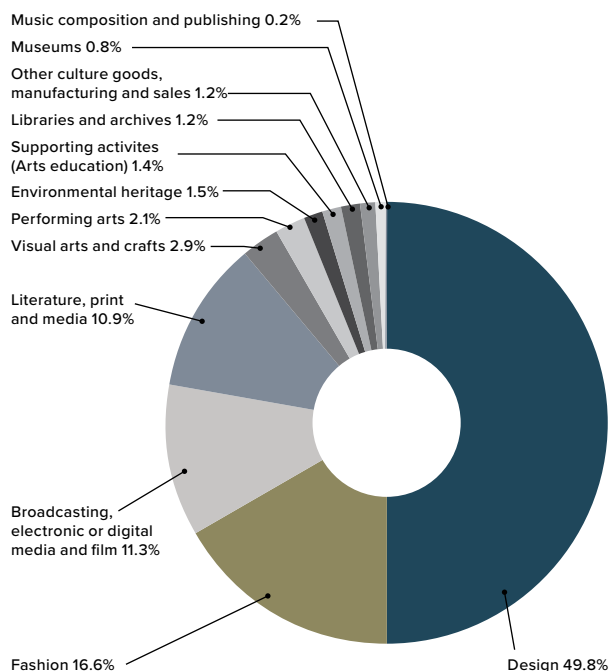
The Australian government recognises that a creative economy contributes to cultural diversity, social inclusion, environmental sustainability and technological advancement. Creativity is key to innovation, driving sustainability and prosperity. Creativity and innovation play an important role in Australia's resilience to recent global economic challenges.

The arts and creative industries are integral to contemporary Australian values, self-expression, confidence and engagement with the world.

A New Approach, an independent think tank championing effective investment and return in Australian arts and culture published a valuable review of the sector in June 2020. *Australia's Cultural and Creative Economy: A 21st Century Guide* provides an in-depth assessment of the sector's composition in Australia and is consistent with that adopted by Creative Victoria to define its composition across the state.



The review provides a detailed breakdown of the component parts of the sector.



While arts and culture are a critical element of the creative industries, they only represent approximately 29% overall. Design in its various dimensions represents 50%. The sector as a whole has grown over recent years, further demonstrating the importance and role of the creative industries to local and national economies.

The scale and extent of the 'design' component of the creative industries is important to recognise and understand in some detail to enable its full potential. In addition, the 'design' component has many sub categories and some working within them may not identify as being a significant element of such a critical 'industry'. Here lies an opportunity to really clarify the definition of 'design' and amplify the role it plays and the pathway for new collaborations, partnerships and research across the sector.

The G21 region has many components of a vibrant creative industries community that have grown at a greater level than those in other comparable regions. This is identified in section 4.1 of this Review.

4. A TIME OF CREATIVE OPPORTUNITY —

4.1 A dynamic part of the Victorian and G21 economy

Over time, the region has demonstrated an impressive ability to adapt in response to shifts in manufacturing processes, consumer demand and the world and local economic movements. This has been well summarised in *Resilient Geelong: Reasons for success and challenges for a post COVID-19 future*, a research study undertaken by Deakin University which was commissioned and published by the Committee for Geelong in November 2020, which has been extensively referenced in the following overview.

Like many Western countries, Greater Geelong's economy has shifted over time from a manufacturing-orientated economy to one that is service-orientated. For much of the twentieth century, Greater Geelong was a booming regional centre, boasting diverse industrial operations that included the Ford Motor Company, as well as a significant textile and clothing industry including Godfrey Hirst. Greater Geelong's textile industry was first established in the 1860s but expanded in the 1920s and 1930s, and during World War 2 production boomed across seven woollen mills to supply the war effort. The textile output was on par with the centre of woollen and worsted cloth production in Bradford, Yorkshire, earning Geelong the title of 'Bradford of Australia'. International Harvester, a manufacturer of agricultural machinery, opened its Geelong plant in 1939, and went on to employ over 2,500 people by 1966, out of a total of 4,500 Australia-wide. This was followed by a third wave of manufacturing opportunities in the 1950s with the opening of the Shell Oil refinery and Alcoa aluminium smelter.

The mid-century population growth, from 11,368 in 1921 to more than 120,000 by 1971, was primarily linked to this industrial sector strength. The mid-20th century was a period of peak optimism for Greater Geelong's manufacturing sector. Approximately 30 percent of Geelong workers were employed in manufacturing in 1933, rising to 43 per cent in 1947, peaking at 46 per cent in the mid-1950s. On the back of a century of agricultural processing and forty years of protectionism, the region was an industrial powerhouse, especially in car and truck production, textiles and footwear, aluminium smelting and oil refining.

The 1970s oil shocks and a new wave of globalisation led to trade liberalisation. The opening up of the Australian economy in the 1980s and 1990s, and the associated economic restructuring, significantly impacted manufacturing activity as the Australian dollar was floated internationally and domestic production was

exposed to global competition. This culminated in waves of manufacturing job losses in the textile, clothing and footwear industry and the closure of International Harvester in 1982.

By the 1990s Ford began its wind down and retrenched 850 local jobs. The 1990 collapse of a group of Geelong based Building Societies left thousands of local depositors and shareholders out of pocket adding to the economic stress.

In response, Geelong began a process of adapting and re-inventing itself, planning for a future in which it would be less economically dependent on traditional manufacturing. This led to a reorientation of the local economy with an emphasis on professional services, education and healthcare. Deakin University was formally established in 1974 as the first regional Victorian university with a specific mandate to teach nationally using distance education. Improved road and rail transport links enabled Geelong to benefit from its proximity to Melbourne, further supporting economic growth. Population growth coupled with public and private investment also supported the gradual transformation of the economic structure of Greater Geelong.

The Geelong Cultural Precinct, located in the City's CBD, is a key hub of cultural activity in the G21 region. It is home to the Geelong Library and Heritage Centre, Geelong Arts Centre, the Geelong Gallery, Platform Youth Arts and Back to Back Theatre. Other important cultural activities take place at the National Wool Museum, and Potato Shed Multi-arts Centre on the Bellarine, the Pivot City Innovation Precinct, a hub for design and tech start-ups in the north, Boom Gallery/Big Boom +, Fyansford paper mills and Creative Geelong's Makers Hub at Centrepoint Arcade – sites which provide opportunities for artists and creative professionals to establish their practice. Geelong has repurposed decommissioned industrial sites as co-working hubs, connecting the city's 'maker spirit' with entrepreneurship, innovation and fabrication. These hubs are supported by a network of broader arts and cultural activity across the region.

The region's coastal and regional communities have also transformed over this period. From small hamlets and towns primarily providing summer holiday homes and a haven for retirees, to farming and primary production, this has shifted significantly to include a far broader demographic of permanent residents, many young families, who are choosing to call the region home. This trend has been hastened in very recent times as technology enables people to work far more flexibly. The area is now well populated by artists and other makers and creative practitioners.

Regionally, the three Shires and one Borough that surround the City of Greater Geelong have a vibrant creative industries scene, ripe for investment and opportunity.

The Surf Coast Shire, for example, annually hosts the World Surf League's Rip Curl Pro at Bells Beach, an international surfing competition attracting tens of thousands of visitors to the area and generating up to \$8M to Torquay's local economy. The Shire sits on an incredible opportunity to introduce cultural programming to complement this sporting event, showcasing a vast catalogue of talented local creatives whilst attracting a different demographic of tourists to this international event.

As the smallest LGA in Victoria, the Borough of Queenscliffe presents an impressive array of major events driven by grassroots volunteers – annual music, film, literary and 'winter' festivals across Queenscliff and Point Lonsdale. The high-quality nature of this output presents untapped cultural tourism potential that the entire G21 could collaborate with to capitalise on.

The Golden Plains Shire hosts two major, annual music festivals – Meredith and Golden Plains – attracting 13,550 and 12,100 attendees respectively. Held on private farmland near the town of Meredith, these two events are a true partnership between the community and event organisers resulting in direct economic benefits to the Shire.

At the other end of the scale, the towns of Anglesea (Surf Coast Shire) and Point Lonsdale (Borough of Queenscliffe) have seen a recent emergence of new, grassroots local creatives coming together to create experiences for their respective communities – transforming existing spaces into thriving live performance venues that attract first-class international and Australian acts whilst fostering local creatives to create and present works in their hometowns. The community cohesion that Anglesea's Sound Doctor Presents and Point Lonsdale's Lighthouse Arts Collective create are recognised, but burnout of local volunteers is an increasing risk.

Like many shires with a diverse geographical spread, Colac Otway Shire has a huge task to support the differing requirements of its community – from the rural city of Colac to small coastal towns of Apollo Bay and Wye River. The creative needs of the community are vastly different and extend beyond the reach of the shire-operated Colac Otway Performing Arts and Cultural Centre.

Major renewable energy generation in a number of shires in the G21 region (i.e., Golden Plains and Surf Coast) also present an exciting opportunity for investment in the creative industries sector with the capacity for LGAs to utilise 'community funding' coming from the corporations investing in these major renewable energy projects.

In 2018 visitor expenditure in Greater Geelong, estimated at \$1.1 billion, generated substantial economic benefits for the region including an economic output of \$2.2 billion and supported 11,264 jobs. This was projected to increase by over 50% by 2027, based on pre-pandemic trends. The projected increase in visitation to the area offers significant opportunities for cultural tourism, which is increasingly recognised as a vital tool for place-based regeneration.

By combining the creative and tourism sectors' expertise through targeted support, the Geelong region can offer high-quality, world-class visitor experiences, with the potential to increase visitor spend and stays, and inspire the next generation of creative businesses. Finding ways to create authentic experiences will also be critical for the success of the city and the wider region's cultural tourism strategy.

Recent arts and cultural mapping of the region identified over 670 public arts and cultural sites across Greater Geelong, 130 of which are located within the CBD. Mapping also identified 257 individual artists and groups registered with private addresses within the region.

Australian Cultural and Creative Activity: A Population and Hotspot Analysis was an Australian Research Council Linkage project undertaken by the Queensland University of Technology and the University of Newcastle, in partnership with Arts Queensland, Create NSW, Creative Victoria, Arts South Australia and the Western Australian Department of Local Government, Sport and Cultural Industries.

The project undertook qualitative fieldwork in twenty 'creative hotspots' with institutions and practitioners, with the aim of understanding what makes each hotspot 'hot', and the commonalities and differences between the regions. Geelong and the Surf Coast, Ballarat and Bendigo were part of the twenty regions surveyed.

The following provides a summary of the numbers of people engaged in creative industry activity (in 2016) across eight sector groupings.

(The data does not permit separation of the Surf Coast component from the overall Greater Geelong statistics. Despite this, the summary provides a useful indication of comparative regional strengths.)

Australian Cultural and Creative Activity: A population hot spot analysis

	Greater Geelong	Bendigo	Ballarat
Software and digital	735	281	618
Architecture and design	636	219	225
Visual and performing arts	380	127	375
Publishing	362	155	238
Advertising and marketing	116	41	61
Film/tv/radio	90	91	117
Creative industries	2,314	915	1635
Other industries	92,743	44,139	44,16

The growth of the creative industries within Geelong during the past five years is clearly visible, with design the largest sector.

These businesses range from sole traders – by far the largest sector, with more than 5,000 businesses in this category – to proprietary limited companies, other limited companies, trusts and partnerships.

The following table provides a breakdown of growth (or declines) across eight sector groupings across Greater Geelong, Ballarat and Bendigo in the period 2011 to 2016.

Percentage Growth 2011-16

	Greater Geelong	Bendigo	Ballarat
Software and digital	9.68	7.58	-3.09
Architecture and design	4.23	6.48	7.19
Visual and performing arts	9.44	7.13	6.87
Publishing	-2.22	-3.37	0.43
Advertising and marketing	4.75	-9.62	5.35
Film/tv/radio	-2.47	-2.82	0.00
Creative industries	4.98	2.80	1.00
Other industries	3.70	3.53	3.35

The report highlights the following strategic opportunities:

- The Surf Coast Shire has high levels of specialist employment in design. In 2016, 490 people earned their primary income in the creative industries, an average increase of 3.47% each year since 2011.
- Greater Geelong has a vision to become clever and creative by encouraging an economic transformation that embraces creative industries, to help the region move away from heavy manufacturing to a more mature-mixed economy.
- Co-working spaces, collective practices and entrepreneurial activities are evident throughout the region.
- Creative migrants are flowing from Melbourne into Geelong and the Surf Coast because G21 is big enough to accommodate global and aspirational businesses yet small enough for an interconnected ecosystem.
- The Victorian Government has a range of programs to support business, and programs and policies to specifically support the creative industries, such as Creative State, a policy of Creative Victoria.

The Report makes a series of further recommendations which complement those of this Report:

- Ensure that wider Victoria understands that the digital infrastructure offered in Geelong is known to accelerate the ongoing diversification of the broader economy through the creative industries.
- Celebrate the cultural diversity in Geelong and the Surf Coast and amplify this through the creative industries.
- The City of Greater Geelong and the Surf Coast Shire need to create focused creative industries strategic plans to harness its economic development opportunities.
- Geelong's CBD needs further redevelopment, as central Geelong has struggled for decades to have a vibrant retail street offering.
- Creative migration is occurring in both the Surf Coast Shire and Greater Geelong, and both Councils need to maintain their awareness of the importance of career development pathways for their communities.

According to REMPLAN, a provider of region-specific economic and demographic data, the total output estimate for the G21 Region in 2017 was \$35.051,041 billion (up from \$29.609,251 billion in 2015, an increase of 18.4%). The creative industries sectors contributed \$2.1 billion (5.9%) to the region's overall output.

Over 1,200 jobs in the creative industries were created in the G21 region between 2015 and 2017, and there was a 16.4% increase in creative industries jobs in 2017.

The REMPLAN data included in the *Enhancing the viability of Victoria's creative communities*, the *Environmental Scan of the Creative Industries in the G21 region – 2018* report (published by Creative Geelong Inc in collaboration with the Geelong Region Local Learning Employment Network) is the most recent available data. This is a critical foundation document that assists in the greater understanding of the sector and its change and evolution.

Recommendation 1

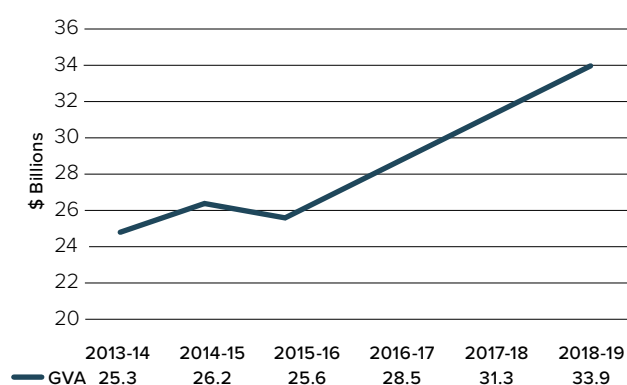
That the Committee for Geelong commissions an update of the Environmental Scan of the Creative Industries for the G21 region with the most current REMPLAN and Census data, to ensure its currency and a foundation for advocacy to support investment in the Creative Industries sector.

The Victorian economy

The following graph and table provide estimated Gross Value Add for the Victorian economy by year and the share of the creative and cultural economy.

The sector is currently valued at \$33.9 billion for 2018-19, comprising 7.6% of the total Victorian economy.

Gross value add (GVA) of the Creative and Cultural Economy



The table above provides estimated Gross Value Add for the Victorian economy by year and the share of the creative and cultural economy in comparison to other industry sectors.

It is important to note that the total Victorian GVA is not the total of all sectors. Industry sectors should not be added or multiplied to each other. This is because sectors have been calculated with their own individual methodologies and could include double counting across other sectors, for example the creative and cultural economy may include industries captured in the manufacturing sector.

Agriculture, Forestry and Fishing	10,398	10,325	10,590	9,112	9,637	9,680	8,108
Mining	5,152	5,087	5,194	5,148	4,961	5,459	5,238
Manufacturing	30,512	30,659	30,763	29,923	30,187	30,572	30,559
Construction	26,608	26,788	28,500	30,246	31,078	33,202	34,767
Creative/Cultural	25,604	25,345	26,232	25,584	28,450	31,337	33,905
Total Victoria GVA	370,232	378,812	389,391	402,564	418,885	432,993	446,079
Creative/Cultural % Share	6.9%	6.7%	6.7%	6.4%	6.8%	7.2%	7.6%

4.2 COVID-19

This report has been undertaken during the COVID-19 pandemic. The full impacts and consequences and its effect on the policy and economic context is yet to be fully realised. However, governments and communities have responded in a range of ways, which are summarised below.

Regional members of the G21 moved quickly to support their communities to connect through cultural experiences in line with imposed restrictions – be it through the swift transition of major arts trail events to online formats (Surf Coast) through to the support of transitioning major music festivals to bespoke outdoor dining and live music events (Queenscliffe). The extent to which initiatives will continue to inform future programming and event presentation in a post-COVID environment is yet to be seen, but the current expectation is that adaptation techniques will continue to add value to the way the region participates in creative experiences (rather than replace) well into the future.

The City of Greater Geelong was quick to establish the Geelong COVID-19 Arts Recovery Panel (GCAR), a panel of 21 local arts sector representatives drawn from a pool of 60 who expressed interest. The panel confirmed that mental health and wellbeing, financial hardship, the closure and collapse of associated industries, and the absence of the necessary skills, resources and capacity to adapt and survive were the key challenges being faced by artists in the City of Greater Geelong.

In response, the panel recommended urgent and longer term needs to rebuild the arts, creative, entertainment, cultural and heritage sectors in Geelong. These included industry skills and training; increased profiling of the arts; grants and funding support to create, enabling deeper collaboration and connection including cross industry partnership and employment opportunities; and the establishment of an ongoing arts industry advisory mechanism.

As part of the consultation process for this Report, 131 people working across the creative industries in the G21 region completed a survey to measure the impact of the COVID-19 pandemic on their work or practice and their wider thoughts on the strengths and challenges the sector faces across the region. The survey highlighted the resilience of the local sector and its ability to embrace adaptation to survive.

The survey found:

- COVID-19 has had a significant impact on those working or practicing in the creative industries across the G21 region with 55% measuring the impact as 'significant'; 23% as 'medium'; 17% as 'mild' and just 5% noting 'no change'.
- 47% of the sector moved to delivering activities or products online, and these changes are likely to be permanent.
- 42% experienced a significant reduction in business or creative practice activity.
- The majority of respondents moved quickly to adapt by implementing significant changes to business models and creative practice, looking for new opportunities within the creative industries, and investing in retraining or new skills.
- 72% agreed that the pandemic has forced the G21 creative industries sector to think differently about how it will operate in the future.
- 45% of respondents forged new partnerships as a consequence of COVID-19.
- Only 38% of respondents applied for, or received, government funding due to the impacts of COVID-19.
- 33% of respondents were unsure if their work or practice would return to 'normal' within the next 12 months. 34% said yes, things would return to normal. 29% said no.
- 46% of respondents were hopeful that their work or practice would return to 'normal' at some stage in the future. 31% were unsure. 20% said no.
- Respondents were positive about the sector's strengths: the power to connect communities; the number of creative practitioners working across a small region and the high level of talent; the sector's diversity; and its resilience and adaptability.
- However, respondents were concerned about the challenges, including: burnout; lack of funding; lack of collaboration; the lack of understanding of the value of the creative industries; access to audiences; the lack of appetite for contemporary works; local cultural institutions not supporting talent from the region; lack of council support; and the effort to rebuild post-COVID.

The survey responses outlined above indicate that almost half of the respondents adjusted their practice to focus on online delivery. There is opportunity to support this transition through the development and delivery of training and skills enhancement programs that focus on the business planning, marketing and management skills required to sustain an online business practice.

4.3 The policy context

Overview of existing policies and reports

The review of regional planning and research reports and documents, along with the consultations undertaken, demonstrate a high level of engagement with the potential to transform the region. We have been impressed by the willingness to embrace change, and enthusiasm to realise the ambitions for the region, first articulated in the City of Greater Geelong's *Clever and Creative* vision, published in 2018.

'We volunteer, we gather the community together, we produce magic out of nothing – but we can't keep doing so without support from all levels of government.' (survey response)

The challenge now is to achieve the coordinated and connected implementation of the many reviews and reports that have been commissioned in recent years. There is considerable cross-over and interconnectedness in findings and recommendations. For example, reports relating to skills development and lifelong learning have implications for the development of the capabilities required to sustain the creative industries in the region, whilst regional tourism strategies have the potential to support the recognition of Geelong as a UNESCO Creative City of Design, and support cultural tourism across the broader region.

Not all of the reviews and reports include recommendations regarding implementation of findings or a review mechanism, enabled by an appropriate governance framework. It was beyond the scope of this consultation to assess the overall impact of the numerous regional studies undertaken in recent years, in driving policy development and implementation.

There exists a great diversity of interests with the potential to support the development of the creative industries in the region. These range from individual artists and makers, major state-funded arts institutions in Geelong's cultural precinct, complemented by impressive research and development teams at both public and private institutions. Underpinning these capabilities is a framework to sustain school education, skill development and lifelong learning

to ensure the maintenance of the capabilities to enable the region to transition to changing economic environments.

The challenge is to develop a strategy that addresses the interests and priorities of the individual or community based creative community, alongside the capabilities and interests of large scale, publicly funded institutions.

This highlights the importance of an appropriate governance framework to ensure the recommendations of the Creative Industries Strategy can be 'owned' by such a diverse stakeholder community, and successfully implemented and evaluated over time. This is of particular relevance, given the five-year implementation framework, proposed for the adoption of recommendations in this Report.

4.4 Regional planning

The following provides a summary of arts and culture strategic planning underway across the region. Whilst most planning is focussed exclusively on the 'arts and culture' sector, there is opportunity for this Report, and the accompanying Creative Industries Strategy, to inform the refinement and enhancement of current plans, and those currently in development, to include alignment with the wider creative industries sector.

Both The Australian Local Government Association and Municipal Association of Victoria have recent position statements in relation to arts and culture and with alignment to the Creative Industries.

The City of Greater Geelong is close to finalising its first *Arts and Cultural Strategy* since 2003 following significant stakeholder consultations. This process, on track to be endorsed by Council by July 2021, provides a timely opportunity for the Strategy to align with the wider objectives of the Creative Industries Strategy for the G21 region and Creative Victoria's *Creative State 2*. The City of Greater Geelong's draft strategy includes the following high-level principles which will frame the city's work across the arts and cultural sector:

- Build a strong relationship and partnership with Aboriginal and Torres Strait Islander Peoples
- Advance the role of artists
- Nurture our local identity and heritage, and connect to our stories
- Connect to our natural environment, our urban city and neighbourhoods

- Activate our places and spaces
- Focus on diversity, equality of access and inclusion, and
- Collaborate across industries and the sector to develop creative networks.

Three of the four regional G21 councils have undertaken some level of arts and culture planning. Surf Coast, Golden Plains and Colac Otway each have current arts and culture strategies, with Golden Plains and Surf Coast beginning the consultation process for new plans in the first half of 2021.

While the Borough of Queenscliff does not have an arts and culture strategy and has no plans to develop one, Council staff are confident the community will speak for the importance of the creative industries in the next round of council planning consultations.

Across the regional councils, the scope and maturity of this planning is constrained by available resources, and the limited recognition of the value of arts and culture and the creative industries within the wider council operating context.

Section 125 of the Victorian Local Government Act (LGA) requires a council to prepare and approve a Council Plan by June 30 following a general election. The Council Plan is the feature document in a council's suite of strategic planning documents, formulated to guide the work of councils over the following four-year period. Local Government elections were held in November 2020 and new Plans are now being developed for approval by 30 June 2021.

An analysis of all current Council Plans of the G21 member councils shows a common thread of key priorities that the creative industries can help to deliver, but the City of Greater Geelong is the only council to mark arts and culture as a strategic priority in its own right. To varying degrees, each council acknowledges the role arts and culture can play in building social cohesion, connected communities and strong local economies but, with the exception of the City of Greater Geelong, the references are fleeting. This project's Strategy has the potential to enable member councils to implement actions that directly help them to deliver on these priorities.

Given the timing of the current council planning cycle, the development of the Creative Industries Strategy for the G21 region is well placed to directly inform each Council Plan in the G21 Region, provided clear buy-in is obtained from senior leadership teams across the G21 member councils.

4.5 State-wide planning

Victoria is the only state government to have nominated Ministerial responsibility for the creative industries. NSW, Queensland, South and Western Australia have nominated Ministerial responsibility for the broader area of 'Innovation'.

In April 2016, Victoria's first creative industries strategy *Creative State 2016-2020* was released. Since the strategy was launched, this national leadership has seen the economic impact of the creative industries grow by 23 percent to \$31 billion. 260,000 Victorians are now employed in the creative industries, up 15 per cent, and cultural tourism is worth \$2 billion, up 88 per cent.

The *Creative State* policy was due for review in late 2019. This has been deferred, as a consequence of the pandemic. The intention is to update and release a *Creative State 2*, strategy to span the years 2021-2026 in May 2021.

It is understood that evaluation of the first *Creative State* strategy found that much work had been achieved through the first strategy's implementation and supporting government initiatives, investments and work of the sector and community. It also found there was a need for a greater understanding of the creative industries and its potential evolution and its impact at a local and broader social and economic level.

The Victorian government has already completed the initial work to determine which of Australia's industries and occupations are cultural and creative. Its *Creative State 2016-20* strategy provided national leadership in providing a policy framework to support the sector. This groundwork puts Victoria and the Geelong region in a strong position to take the next steps, to prioritise the opportunities for innovation that occur at the interface between the various cultural and creative industries and occupations and to identify and leverage the region's areas of comparative advantage.

It is understood that the *Creative State 2* Strategy will continue a focus on supporting and developing the sector in a post-pandemic environment to ensure it is equipped with the necessary skills and business acumen and to encourage greater cross-sector support and collaboration.

Critical to the success of the creative industries in Victoria will be the development and support of new creative spaces, products and experiences. The impact of these investments and focus will be the creation of new job pathways, industry growth and an ecosystem that is resilient – achieved through a new level of cooperation, co-design and collaboration.

4.6 Other state and national planning

Federal, state and local governments across Australia have recognised the opportunities the Creative Industries provide to build economies and support the transition from a manufacturing focus to one reliant on creative capacity.

In August 2020 the Minister for Communications announced a review of Australia's Creative and Cultural Institutions and Industries. The Terms of Reference for the review include consideration of the direct and indirect economic benefits and employment opportunities and how to recognise, measure and grow the sector, along with consideration of the non-economic benefits that enhance community, social wellbeing and promote national identity. Importantly, the review will consider ways to ensure cooperation and delivery between layers of government. The review is expected to be released in May or June 2021.

A New Approach's (ANA) recent report into the Creative Industries notes that most Australian states and territories are currently employing cultural and creative industries approaches, with the goal to diversify their economic base and social and cultural opportunities.

The ANA's report also noted South Australia released its strategy in November 2020, setting an ambitious target of 5% growth per annum in the years to 2030. Tasmania has identified these industries as 'drivers of state growth, based on Tasmania's growing reputation as an innovative and creative community and as a cultural destination'. Western Australia's *Diversify WA Economic Development Framework* released in 2019 identifies its cultural and creative industries as a 'priority sector', using them to capitalise on the state's unique identity and contribute to the 'vibrancy and liveability' of the region.

Co-developed by the Chamber of Commerce, NT Government and the creative industries sector, the *Creative Industries Strategy 2020 - 2024* was released in June 2020. As the Territory's first co-led strategy, the five-year framework supports the vision of an innovative sector that celebrates the Territory's cultural distinctiveness, while enhancing liveability, attracting visitors and growing the economy.

4.7 International examples

A similar competitive environment exists internationally.

Between 2002 and 2015, the global creative economy more than doubled in size, increasing annual revenues from US\$208 billion to US\$509 billion. United Nations economic data shows the creative sub-sectors driving that worldwide growth were design, fashion and film, with game development and digital animation identified as 'on the rise'. Many of our neighbours and trading partners have seen this potential and responded with national strategies for cultural and creative industries — from India to New Zealand, South Africa to Singapore, Indonesia to China. Their efforts are building on a well-established evidence base for the benefits of this approach, such as the United Kingdom's initiatives since the 1990s which by 2018 had seen the creative industries sector growing more than five times faster than the national economy, up 7.4% on the previous year.

Similarly, in the early 1990s, the South Korean government began committing a minimum 1% of the national budget to supporting the cultural and creative industries, with the intention to build its international reputation. In 2019, the initiative provided an estimated US \$12.3 billion boost to the South Korean economy and has transformed its global influence.

The Dutch Government released a national Creative Industries Plan in 2020, led by CLICK.NL, a network for knowledge and innovation in the creative industries. Businesses, research and educational institutions, and government are working together on a joint strategic research and innovation agenda, with approximately 15 million euros earmarked for research carried out on behalf of and in cooperation with the creative industries. 13% of the Dutch workforce are now engaged in the creative industries sector.

The contemporary Creative Industries Policy Framework in place in the United Kingdom includes structures and activities which may have relevance to the development of policies within the G21 region.

Governance is provided by a Creative Industries Council, a joint forum between the creative industries and government. Set up to be a voice for creative industries, the council focuses on areas where there are barriers to growth facing the sector, such as access to finance, skills, export markets, regulation, intellectual property (IP) and infrastructure.

Council members are leaders drawn from across the creative and digital industries including television and film, advertising, architecture, design, video games, fashion, music, arts and culture, and publishing.

Recent policy initiatives of relevance include the establishment of a UK Immersive Projects Fund. A total of £18 million in government and industry funding has been awarded to projects developing the next generation of immersive experiences. Using virtual reality, augmented reality and mixed reality, the projects will create cutting-edge immersive experiences which will be tested at scale on real audiences. They include:

- The Future Demonstrators Program – funding industry-led consortia in the creative industries to create new immersive experiences and test them with large audiences. There are four areas of focus, including Performance, Visitor Experience, Sports Entertainment and Media.
- The Design Foundations Fund – over 30 projects have been awarded a share of the £1m Audience of the Future: Design Foundations Fund. Each project focuses on human-centred design, to create new immersive experiences, products and services.
- Production Innovation for Immersive Content Fund – 21 projects have received a share of £12 million to create faster, more efficient immersive content. These include a project led by the Royal Shakespeare Company for a consortium of 15 specialist organisations from the theatre, music, video production, gaming and research industries to create a live performance unbound by location. Audiences will use mobile phones, extended reality headsets and live streams to experience live performance. A second project led by immersive VR studio, Maze Theory, will develop a new VR drama game based on the BAFTA-award winning series *Peaky Blinders*. The game will use artificial intelligence to enable characters to respond to players' gestures, movement, voice, sound and body language.
- Also of interest is the Creative Careers Drive, which provides students with placements in creative industry workplaces, complemented by a program of presentations about the nature of work for the creative industries practitioner to secondary school groups.

5. CORE PRINCIPLES —

Introduction

These two Focus Areas are the 'heart' of this project. This section provides detailed, practical recommendations to build a robust creative industries sector for the G21 region over the next five years.

There is significant complexity attached to the ecology of this sector. The creative industries embrace a wide diversity of practice – from gaming design to fashion design, to performance art and the visual arts. Addressing the diversity of requirements to support growth across the sector will require flexibility and nimbleness in policy development and implementation.

The region comprises diverse communities of interest, including wide differences in access to resources and audiences, a combination of community-based and professional activity and socio-economic and ethnic differences across the five council regions.

This is a region that is open to change, as evidenced by the spirit of good will and collaboration that has characterised the consultations undertaken for the Review.

This openness to change is built on solid foundations, including well established community arts organisations, respected professional institutions and impressive secondary and tertiary skills and learning frameworks.

A further strength is the potential for the creative industries sector to draw on the creative capacities represented in the various advanced manufacturing research centres at Deakin University. This represents a 'point of difference' for the region, with the opportunity to explore activities that extend the boundaries of our current understanding of the creative industries, as is now the emerging practice in the United Kingdom.

The Focus Areas seek to connect key learnings from the extensive published profile of the region, combined with the observations and insights gained through extensive one-on-one consultations and a series of sector and leadership roundtables.

What is evident is the complementary nature of many of the learnings and observations, and their potential interdependence. Given that multiple agencies have been responsible for their development, the potential for collaborative implementation has been more dependent on the existence of informal relationships than on a connected governance framework that would enable their interconnection. A connected governance framework will therefore be critical to the implementation of the detailed Recommendations

of this Report, and the priorities of the five-year Creative Industries Strategy and the associated Case for Support.

The connected governance framework will require high-level 'ownership' and leadership across the five local government regions, complemented by the capacity to represent the region's interests to the leadership at a state government level. This will require the capacity to engage with key Victorian Government Ministries including Creative Victoria, the Department of Jobs, Precincts and Regions and the Department of Education and Training.

6. CORE PRINCIPLE ONE

6.1 Sustainable creative industries for the region

To establish a robust environment that supports the development of the sector to sustain it with the people, skills and practices that enable creativity to flourish.

Recognising and respecting diversity in all its forms will be central to achieving this goal.

Success will depend on implementation that provides leadership in priority setting with a focus on increasing employment and participation across the creative industries. Alignment with broader government objectives and advocacy across local, state and national governments will allow targeted, sector-specific initiatives to be delivered. This focus on increasing participation will be complemented by initiatives to enhance skills, both for those entering the workforce and those managing a sustainable creative practice.

Affordable living and working spaces are key to sustaining a creative community and the retention of skills to enable the sector to build on success.

The region's research and development capabilities are a powerful attractor and potential engine-room for growth across the sector.

'It would be great if we were thinking of projects that we could be doing collaboratively. Instead of bringing in external curators for initiatives like Geelong After Dark could we – as a collective, cultural, creative precinct, work as the curators together? It would be great to work really collaboratively on something like that.'
(consultation response)

The opportunities to achieve this include:

6.1.1 Accountable and influential governance framework

We have given consideration to an appropriate governance framework for ensuring successful implementation of the Strategy and Case for Support.

One option is that the G21 Alliance, through the G21 Board, lead the implementation of the Strategy and advocate the Case for Support to governments, industry and other key stakeholders.

The G21 Alliance has to date demonstrated that leadership through the commissioning of a body of research studies, culminating in the collaboration to commission the Creative Industries Strategy.

The G21 Alliance is currently structured under the following Pillars:

- Arts, Heritage & Culture
- Economic Development
- Education & Training
- Environment
- Health & Wellbeing
- Planning & Services
- Sport & Recreation
- Transport

The current structure has been in place since 2002, when the G21 Alliance was established. The structure reflects a sectoral approach to industry development and planning current at that time.

Over the past 20 years the nature and operation of industries has changed significantly, with technologies, supply chains and work practices contributing to more integrated and interdependent structures. The creative industries reflect this trend.

Given the nature of the creative industries sector, and the opportunity to develop a culture of collaboration across a diversity of interests, a less siloed governance and implementation structure may be more appropriate.

The Committee for Geelong represents the other key cross-sectoral agency of influence across the region. Founded in 2001, this membership-based organisation provides strategic leadership, advocacy and influence to support the economic and social prosperity of the city-region. Its current 140 members represent a wide cross section of thought leadership.

The Committee's influence on policy development is demonstrated through the establishment of the Gateway Cities Alliance in 2019 and more recently the publication, in partnership with Deakin University, of the Resilient Geelong: Reasons for success and challenges for a post-COVID-19 future research report.

A collaborative governance and implementation structure, drawing on the strengths of both the G21 Alliance and the Committee for Geelong may be considered appropriate to enable the Strategy's delivery over a five-year period.

Consideration has also been given to the range of governance frameworks in place across Australian states and territories to implement creative industries strategies.

The South Australian Government, through the Ministry for Innovation and Skills will establish and monitor annual operational action plans to respond to the 2020 industry's recommendations. The Northern Territory has established a

Creative Industries Representative Body to lead, coordinate and represent industry in response to its 2019 report.

The United Kingdom has established the Creative Industries Council which provides a decision making and advocacy framework drawing on both industry and government expertise.

Noting the multiplicity of industry and advocacy bodies currently operating across the region and taking account of observations concerning the resources and time devoted to meetings and consultation, there is a reluctance to propose the establishment of a new body to be established and charged with responsibility for the governance, advocacy and implementation of this strategy.

The preference is for an implementation framework that builds on existing resources within the region. It is acknowledged that decisions about the most effective arrangements to implement the 2012-26 Strategy, the Case for Support and the Recommendations of this Review are appropriately to be determined by the Project Steering Committee.

Recommendation 2

That a collaborative governance framework be developed to implement the Creative industries Strategy. This should capitalise on the strengths of the region's advocacy bodies including the Committee for Geelong and the G21 Regional Alliance.

This framework should have due regard for the diversity of creative industries practice across the region and respect and embed its principles in the creative culture of the region.

6.1.2 Celebrating diversity across communities of practice, culture, skills and demographics

To support a sustainable creative industries sector across the G21 region, governance structures must recognise the diversity of interests and expectations across the region and ensure a plurality of voices are represented in decision making forums.

The region's extraordinary First Nations cultural heritage must be celebrated, elevated and supported. Wadawurrung and Eastern Maar Traditional Owners must be closely listened to and learned from. The region's arts and cultural leaders are best placed to strengthen these relationships.

Recommendation 3

That a dialogue is created to establish a partnership with the Wadawurrung Traditional Owners Aboriginal Corporation and the Eastern Maar Aboriginal Corporation to ensure the voice of the Traditional Owners is central to the creative industries and opportunities in areas such as design, visual arts, cultural tourism and music are optimised.

The region's history of celebrating its rich cultural diversity, representation and inclusion of people of colour through arts practice and major annual events such as Pako Festa must continue to be elevated and supported.

The region's vastly contrasting socio-economic profiles – from communities with intergenerational wealth cycles, to those experiencing endemic poverty – must be acknowledged and connected through creative collaboration and partnerships with institutions such as Barwon Health and the NDIS.

A dramatic shift in the evolving demographic of residents in the regions following major shifts in work practice and the relocation of workers from capital cities to regional centres brings new audiences, new skill sets and energy that must be harnessed and celebrated.

The challenge will be in achieving flexibility and sensitivity in the way in which the creative industries sector evolves across the region, reflecting the unique strengths that each community demonstrates.

Success will depend on the capacity to tailor the development and delivery of initiatives to reflect the diversity of capabilities, opportunities and expectations across the communities that make up the creative economy of the region.

While the City of Greater Geelong hosts significant cultural infrastructure, training and skills capability and research and development network, it is important to balance this dynamic with initiatives that recognise and enhance the often-smaller scale, community-based activity that is the creative fibre of many regional communities.

While investment in cultural infrastructure is beginning to occur in regional centres, the creative disconnect between 'the City' and communities on the fringes of the G21 boundaries – such as Apollo Bay, Colac and small towns the western edges of Golden Plains – is a reality.

ADDENDUM UPDATE

The Commonwealth Games represents a unique opportunity to optimise partnerships to share culture and history through design, visual arts, dance, music and cultural tourism. In order to progress Recommendation 3, priority should be given to progress planning, led by the Wadawurrung Traditional Owners Aboriginal Corporation in order to achieve a bold and ambitious program of events for inclusion in the Games cultural program.

In late August 2022 the State Minister for Commonwealth Games Legacy, Shaun Leane, flagged We want Traditional Owners and First Peoples to be central to the design of infrastructure and cultural programming – this investment will give Traditional Owner Corporations the support and skills that will leave a lasting legacy for generations to come.

Gunaikurnai Land and Waters Aboriginal Corporation (LaTrobe), Wadawurrung Traditional Owners Aboriginal Corporation (Geelong and Ballarat), and Dja Dja Wurrung Clans Aboriginal Corporation (Bendigo) will be instrumental in the design, management and legacy of the Commonwealth Games across regional communities and will guide self-determination in the Games delivery.

Consultation with the First Peoples Directions Circle, established as part of Creative State 2025 is also recommended. An ambitious program is likely to require additional funding to support the creation of new work.

The Addendum recommendation is:

Recommendation 23

That priority be given to the development of a First Peoples cultural program for inclusion in the Commonwealth Games program, led by the Wadawurrung Traditional Owners Aboriginal Corporation.

6.1.3 Industry development

The Geelong Technology precinct, established at the Waurin Ponds Campus of Deakin University hosts a number of research centres whose work has potential application to the creative industries sector.

The uptake of Industry 4.0 – the unfolding fourth industrial revolution, or the digitisation of production processes – will be integral to creating a resilient manufacturing sector in a post-COVID-19 world. In a 2018 report, Australia's Advanced Manufacturing Growth Centre frames Industry 4.0 as a way to reshore some production to Australia and bring jobs back to regional areas, including Geelong. The Geelong Manufacturing Council believes the city is well-placed to help stage a revival in regional manufacturing, with the capacity to be big enough to be home to a diverse range of manufacturing companies, yet small enough to foster a healthy ecosystem built on networking, knowledge exchange and cooperation.

Also known as advanced manufacturing, Industry 4.0 production relies on robotics, automated production, artificial intelligence, machine learning, 3D printing, smart factories and microcomputer networks. These technologies require a workforce that is skilled, innovative, creative, and engaged in ongoing learning and knowledge development. Key workforce skills for Industry 4.0 include digital literacy, critical thinking and intelligent data analytics. There will be a need for high-quality education and training, including regular reskilling and upskilling.

The digitisation of production processes has potential significant application for the creative industries. Noting opportunities for the Geelong region's manufacturing sector to respond to this revival, the development of new products and processes, particularly those aligned to the design sector of the creative industries, could establish a 'point of difference' for its development across the G21 region.

Deakin University's research strengths and industry connections are another advantage.

MInD Lab is a practice-based research group based in the School of Architecture and Built Environment which operates at the intersection of built environment, information technology and design innovation. The group explores the potential of information technology, intelligent data, computation and digital media to create more agile and adaptive solutions for socially, environmentally and economically viable built environments.

The *Institute for Frontier Materials* is Australia's largest materials science research institute, addressing materials

challenges in areas including fibres textiles and carbon fibres and composites. Its research on the circular economy acts as a catalyst for redesigning materials to facilitate re-purposing, recycling and reuse.

The Institute's design and product realisation spaces allow researchers to test and turn digital designs and concepts into physical objects for prototyping, visualisation or end-use.

The *Applied Artificial Intelligence Institute* is leading product development in diverse fields, including health care, advanced manufacturing and security.

Recommendation 4

That Regional Development Victoria's Barwon office enhances its advocacy of the creative industries and design community, aligned to Deakin University's research institutes that contribute to innovation in the creative industries sector.

The Geelong Arts Centre established its Creative Engine co-working space in October 2019. The facility includes a purpose-built studio, and provides an environment for professional development, workshops, networking, events and funding opportunities.

The Barwon office of Regional Development Victoria provides specialist support for investment in manufacturing in the region. This includes promotion of the research capabilities at Deakin University. There is potential for further consideration of the potential for this research capacity to enable innovation in the creative industries sector.

Recommendation 5

That the region's education providers at both secondary and tertiary levels, provide skill development pathways to support the current and emerging requirements of the creative industries sector.

6.1.4 Skills development framework – primary, secondary, tertiary and lifelong learning

There is widespread recognition in the region of the importance of skills development to support the transition from a heavy industries-based economy to a more diverse, knowledge-based and services orientation.

Significant work has been undertaken since 2011 to support this transition. To date the skills development focus and workforce development profile has not given priority to the requirements of the creative industries sector.

Established in 1887, The Gordon was originally a mechanics institute and night school for tradespeople seeking technical training and to meet the local needs of the new industrial era. Today, The Gordon is one of the largest regional TAFEs in Victoria, operating as a public education and training organisation under Victorian Government legislation.

There are no specific accredited Vocational Education and Training Packages that are relevant to the Creative Industries sector as specific parts of the sector fall within different industry categories, and therefore different Training Packages. There are a large number of VET qualifications which are relevant for creative occupations, and many of these are offered through The Gordon.

In 2017 the State Government invested \$128 million to establish 10 high-tech centres of learning across Victoria. Hosted by The Gordon, the Geelong Tech School opened in 2018, establishing a leading-edge technology and discovery centre that provided thousands of local secondary school students with the skills they need to 'flourish in the global economy'. Students remain at their regular schools and attend the Geelong Tech School for free industry-led programs designed to inspire their interest in STEM and develop skills including critical thinking, communication, collaborative working and technology use.

Across 2019, over 6,100 students and teachers participated in programs exploring new and emerging technologies including computer applications, 3-D printers and laser cutting machines, virtual reality, robotics, design and electronics. The \$10 million facility provides Geelong students, teachers and industry with access to state-of-the-art technology and learning spaces and provides essential educational support, training and course advice, study support, counselling and careers advice.

There is also valuable recognition across the primary, secondary and tertiary education sectors of the importance of these 21st-century skills in the curricula and courses offered by each of the institutions. This has been recognised

in a Future of Work forum undertaken in October 2019 and referenced in the literature review provided as an Appendix to this report.

Skilling the Bay is a unique regional initiative established to support the economic and workforce transition of Geelong from a reliance on declining traditional manufacturing to a more diverse, knowledge-based economy. Led by The Gordon and delivered in partnership with Deakin University and the Victorian Government, the project brings together education providers, community organisations and industry to grow Geelong's future workforce and provide tangible outcomes for participants and stakeholders.

Over its three stages of delivery since 2011, it has delivered a number of integrated projects to improve education, employment and skills outcomes, and has fulfilled its aims to support people of all ages to participate in education and training, particularly the vulnerable and those experiencing disadvantage.

The Creative Industries Strategy for the G21 region presents an exciting opportunity to collaborate with the formal education and learning institutions to align their curricula and programs to enable the skills required to nurture creativity.

As noted elsewhere in this Strategy, there is value in supporting formal structures with a broader, formal and informal life-long learning framework, as referenced in the attached Appendices.

The opportunity supports the Barwon Regional Partnerships priority for 'Education – stronger education futures for young people' which notes the importance of strengthening connections between education and industry.

Recommendation 6

That the Gordon Institute, or a registered training provider, explores the establishment of a regional creative industries business skills initiative, to support the business sustainability of the sector across the region.

ADDENDUM UPDATE

Developments since the completion of the Creative Industries strategy represent significant employment opportunities, enabled by training and skill development initiatives. It is estimated the Convention and Exhibition Centre will employ 270 ongoing staff, whilst the much-expanded Geelong Arts Centre will also require an expanded workforce. Contingent on the nature and scope of the Commonwealth Games cultural program to be delivered in the G21 region, it is reasonable to expect a significant 'one-off' requirement for a creative workforce.

An area of identified need is for live production and technical skills. It is recommended that opportunities for course development and delivery commence with the Gordon Institute to address this skill requirement. A course delivery model may take account of the Certificate 3 course currently delivered by Canberra TAFE and Canberra Institute of Technology in partnership with the Canberra Theatre Centre. <https://canberratheatrecentre.com.au/education/vocational-education-and-training/>. This represents a significant potential employment opportunity.

Opportunities for the Deakin University School of Communication and Creative Arts to explore learning partnerships with the Geelong Arts Centre, Geelong Art Gallery and the Convention and Exhibition Centre are worthy of exploration, with the potential to build on the modest program currently in place with the Arts Centre and Gallery.

Consideration might also be given to an initiative to commission and showcase student creativity from the region as an element in the program offered by the Commonwealth Games cultural program.

Based on the cultural programs presented at previous Commonwealth Games, it is likely that the 2026 program will include a significant proportion of outdoor events, along with experiences built on digital platforms. The Creative Industries Strategy (at page 18) provides details of the UK Immersive Projects Fund, an initiative to support capability development and the creation of new experiences across four areas of focus, including Performance, Visitor Experience, Sports Entertainment and Media. The Fund may provide example for a similar, if more modest, scheme to be established to support creative immersive content development for the Games.

It is regrettable that the Barwon Jobs Plan makes only passing reference to the opportunities for creative industries employment, and does not incorporate any of the recommendations of the G21 Creative Industries

Strategy. This is a significant omission. It is recommended that representations are made to the program's Local Employment Facilitator to address this shortcoming, and that access to its National Priority Funding Pool be explored.

The Addendum recommendations are:

Recommendation 24

The opportunity to develop a certificate level Live Production and Technical Services course in partnership with the Gordon Institute be explored.

Recommendation 25

The opportunity to develop enhanced Communications and Creative Learning degree courses in partnership with Deakin University be explored.

Recommendation 26

That initiatives to support the skills required to develop digitally based content be explored, and based on successful programs established elsewhere.

Recommendation 27

Representations are made to the Barwon Region Local Jobs Facilitator to include relevant recommendations of the G21 Creative Industries Strategy as initiatives of the Local Jobs and Skills program.

6.1.5 Skills development framework – business skills for the creative industries sector

The survey undertaken as part of this Review has highlighted the degree to which creative industries practitioners have adjusted their business model in response to the pandemic. For many, this has required new skills – a new business model, a revised marketing strategy or the reconsideration of product alignment in a changed environment.

The Creative Industries Strategy for the G21 region provides a key opportunity to establish a business skills initiative to be accessible across the region to support the commercial sustainability of creative arts practitioners.

'Too many creatives before the pandemic were poor and subsidised by various grants and opportunities. They sank. They needed to pivot to commercialise their creative IP, and only those with business acumen will survive. Those who survive will thrive. I believe G21 needs to focus on teaching commercial skills to creative industries.' (survey response)

Since 2017, Arts Centre Melbourne and PwC have developed a partnership of innovation based on principles of shared values, co-creation, working in a highly collaborative way with an objective to solve complex problems together. The partnership has a focus on identifying capacity and capability relevant to Arts Centre Melbourne and solutions and initiatives to benefit the sector. Areas of focus have included digital transformation, enterprise development, production skills and training, broadcasting business development, and scalable mental health and wellbeing initiatives.

6.1.6 Digital inclusion

The transition to online delivery of creative industry products and services has highlighted the importance of efficient and reliable digital connectivity. Accessibility is of significance to current practitioners and equally important to those considering the relocation of their practice from another region, in response to the shift in working arrangements in a post pandemic world.

The 2020 report of the Australian Digital Inclusion Index provides a national breakdown of access to digital services. It uses an index score to provide comparative data. Melbourne's overall 2020 score is 64.4, compared to the City of Greater Geelong's score of 61.7. The overall score for regional Victoria is 57.8, with the large Western region rated as the most digitally inclusive region in Victoria, with its score rising by 4.5 points over the past year.

A more nuanced assessment is provided by the Barwon Region Digital Plan, prepared by Regional Development Victoria. Spanning the City of Greater Geelong, the Surf Coast Shire Council, the Colac and Otway Shire Council and the Borough of Queenscliff, its findings were based on an analysis of 16 significant places in the region.

I'm not sure if I want to go back to how it was... there are new possibilities' (survey response)

The findings revealed a widespread need for business broadband to be further considered and addressed, and that adequate mobile coverage was available in major population centres, but with the potential 5G network roll-out that smaller regional centres risk being left further behind. It found LP-WAN IoT service to be reasonably good based on current demand, but anticipated growth over the next five years is expected to grow strongly and closer attention is required to monitor network development.

Key priorities for the future were identified as prioritising digital skills and connectivity for education and better connectivity for industry.

The results of the survey of creative practitioners undertaken to assess the impact of the COVID-19 pandemic demonstrate a significant shift to on-line delivery for those living and working in the G21 region.

This highlights the importance of ensuring equity of access and reliability of service across the region to enable on-line creative practice to thrive.

Recommendation 7

That priority be given to the implementation of the Barwon Digital Plan, and that the creative industries be identified as a 'key industry' aligned to the Plan's roll-out.

ADDENDUM UPDATE

The Report identified key priorities for the future as digital skills and connectivity for education and better connectivity for industry, aligned to the implementation of the Barwon Digital Plan.

The Commonwealth Games announcement provides added impetus and urgency to the implementation of this Plan.

Based on the experience of previous Games, significant digital capacity enhancements will be required to meet Games delivery, broadcast and reporting and visitor participation through streaming and social media.

The inadequacies of existing infrastructure to satisfy the requirements of a rapidly expanding population have been well documented. Priority needs to be given to a dramatic enhancement of digital infrastructure to meet Games requirements. We note the Barwon Regional Partnership has engaged consultants to address this, as part of the Barwon Digital Discovery project. The cultural program is likely to place significant demands on digital production and delivery, based on the expectation that significant content will be built and delivered on digital platforms.

The Addendum recommendation is:

Recommendation 28

That priority be given to a significant enhancement of digital infrastructure, based on projected capacity requirements of the Commonwealth Games program.

6.1.7 Co-design

The Victorian Government defines the 'co-design' as:

Co-design brings citizens and stakeholders together to design new products, services and policies. The overall objective and purpose is to explore both problems and solutions collaboratively. Co-design connects stakeholders with citizen groups in a meaningful way, to design solutions that are grounded in both community need and government constraints and to open up a project's goals and outcomes to citizen input.

The overall benefit is the development of a 'fit for purpose' program, policy or service. The strengths of such an approach include 'building confidence, consensus, ownership, leadership and accountability within a stakeholder group. A Co-design approach aims to produce 'community-led' products, services or policies.

Another model of interest is the Auckland Co-Design Lab. Auckland Co Design. The Auckland Lab 'provides a neutral space to safely experiment with new ideas and ways of working. We help people to learn by experiencing user-centred tools and processes that they can apply to other projects.

The lab's aim is 'to work with partners to apply co-design principles and a systems lens to complex social issues. Important aspects of our approach include adopting a strengths-based mindset, building new capabilities and creating reciprocal relationships with the people we work with'.

The Auckland Lab's work with local and central government and communities focuses on four main areas:

- Developing and delivering co-design projects
- Growing co-design capability through workshops and coaching
- Providing advice about co-design practice and the conditions for success
- Sharing learnings about public sector labs and innovation teams

The Victorian definition and Auckland case study provide a framework to bring together parts of the community from across the creative industries and government, to develop ideas, concepts, collaborations and creative and innovative solutions to issues and opportunities in the G21 region.

Consultations with artists and practitioners identified opportunities to establish 'creative hubs' across the region to promote ideas exchange, experimentation and new forms of collaboration.

There is opportunity to explore the application of co-design principles in the development of the recommended program of regional cultural activity, referenced at Recommendation 16.

The recommendation supports the Regional Partnerships Barwon priority for 'Business and Innovation – a flourishing culture of entrepreneurship, innovation and growth'.

Recommendation 8

That the recommended Creative Industries Governance Framework explore the potential to establish a unique Co-Design Lab. This would bring together artists and makers, the education sector and government to develop innovative solutions to issues and opportunities in the G21 region.

Recommendation 9

That the Geelong based cultural institutions explore the application of co-design principles in the development of a program of regional cultural activity, as outlined at Recommendation 16.

6.1.8 Liveability – an environment to attract and retain workers

Liveable cities support the health, wellbeing and the quality of life of people who live and work in them. The physical characteristics that contribute to the liveability of cities include land use, built form, quality and conservation of public spaces and natural environments, efficiency of transport networks, accessibility to work, education, health and community services and social and recreational opportunities.

Less tangible to city liveability are broader societal and cultural characteristics of places and communities within cities. The cultural characteristics of cities reflect both historical and contemporary ways of living, the values and meaning attached to places, objects, activities and events, the application of technologies and the interaction with the natural environment in which cities are located.

The social aspects of cities include social capital and social cohesion that contribute to a sense of trust and inclusion.

While the physical, social and cultural characteristics of cities are what define and distinguish them, there is a growing consensus about indicators of positive social outcomes that can be used to measure liveability.

'There is now less stigma around living in a regional area and choosing to work remotely rather than travel to the major cities for work.' (survey response)

In November 2020, the Victorian Government announced a \$5.3 billion commitment to construct 12,000 public housing dwellings over the next four years.

Housing affordability is a key factor in deciding where creative practitioners choose to live. There is opportunity for the G21 region to advocate for inclusion in this strategy, taking account of the current and projected population increases, the high levels of social disadvantage in some areas, and the opportunity for the initiative to be available to creative workers.

The initiative offers the potential to align with the City of Geelong's designation as a UNESCO Creative City of Design. The scale of the government initiative invites opportunity for it to be framed around 'design excellence' principles to establish a high standard of low-cost sustainable residential design that could provide a benchmark in residential design for the state and the nation. This could provide a practical example of the City's commitment to realise the opportunities afforded by the UNESCO designation. It would also support the architecture and design community based in the region.

The Geelong based Form Flow housing concept, developed in partnership with Deakin University, provides an example of the potential to provide affordable residential architecture that represents design excellence.

The recommendation supports the Barwon Regional Partnerships priority for 'Liveability – vibrant, liveable cities and towns', and its objectives to support urban design and infrastructure planning and to support the creation of digitally enabled Smart Cities and Towns and improve digital coverage in regional communities.

Recommendation 10

That the recommended Creative Industries Governance Framework, in partnership with the City of Greater Geelong, establish a Design Excellence framework for public housing, and advocate for inclusion in the Victorian Government's public housing initiative.

ADDENDUM UPDATE

The Report noted the November 2020 Victorian Government decision to commit \$5.3 billion to construct 12,000 public housing dwellings over the next four years. It recognised housing affordability is a key factor in deciding where creative practitioners choose to live, and advocated for the G21 region to lobby for inclusion in the strategy. The initiative offers the potential to align with the City of Geelong's designation as a UNESCO Creative City of Design, framed around 'design excellence' principles to establish a high standard of low-cost sustainable residential design that could provide a benchmark in residential design for the state and the nation.

There is opportunity for 'design excellence' principles to be applied to any athlete accommodation to be constructed for the Games.

Of greater appeal is the potential for any venues or performance facilities constructed to gain recognition for the quality and significance of their design. This represents a unique opportunity to demonstrate very public evidence of Geelong's commitment to its UNESCO designation.

A similar opportunity exists in relation to design enhancements for the public domain. Excellence in landscape architecture and streetscape design should also demonstrate commitment to the UNESCO classification.

It is recommended that partnerships with the Australian Institute of Architects and the Institute of Landscape Architects be initiated to effectively realise these ambitions.

The Addendum recommendation is:

Recommendation 29

Recognising Geelong's designation as a UNESCO Creative City of design, representations are made to Commonwealth Games organisers to advocate for 'design excellence' principles to be incorporated as key requirements for games infrastructure and public domain works to be undertaken in the G21 region.

7. CORE PRINCIPLE TWO —

7.1 Collaborative creative industries for the region

To establish and sustain relationships with the framework of support for employment in the creative industries sector, and to draw on the creative capabilities across the state and the region to deliver outcomes which are ‘more than the sum of the parts.’

Success will depend on effective alignment with state and local government industry, employment and cultural development initiatives. This will call for advocacy and collaboration to ‘link-up’ opportunities that can deliver meaningful outcomes for the region.

The region’s rich cultural infrastructure can be enhanced by the development of innovative, content development partnerships with the state’s cultural institutions and network of visual and performing arts organisations.

These initiatives provide the framework to build the region’s cultural ‘brand’ and deliver a cultural tourism collaboration that transforms perceptions and further enhances the liveability of the region.

The opportunities to achieve this include:

7.1.2 Alignment with Australian Government strategies

It is anticipated the Australian Government review of the Creative and Cultural Economy and Institutions, announced in August 2020, will be released in May or June 2021.

Following its release, opportunities for alignment with the national policy framework should be explored for the G21 region.

Recommendation 11

That the recommended Creative Industries Governance Framework review the recommendations of the Australian Government’s Review of the Creative and Cultural Institutions and Industries and explore opportunities for collaboration and alignment.

7.1.3 Alignment with Victorian Government strategies

The government completed a review of Victoria’s first creative industries strategy *Creative State 2016-2020* in late 2019. It is anticipated *Creative State 2021-26* will be released to coincide with the State Budget in May 2021. Following its release, opportunities for alignment with the state policy framework should be explored for the G21 region.

Recommendation 12

That the recommended Creative Industries Governance Framework review the recommendations of the Victorian Government’s *Creative State 2021-2026*, and explore opportunities for collaboration and alignment.

Participation in the Creative Neighbourhoods Pilot Program

The Creative Neighbourhoods report prepared for Creative Victoria in May 2020 includes, as one of its recommendations, a proposal to develop a Creative Neighbourhood Pilot Project modelled on the lessons learnt from the Creative Enterprise Zone project in London. This would progress the creation of innovative new tools through a ‘bottom-up’ and place-specific process.

A competitive process should target Local Government Areas in which a high number of creative spaces are clustered. Based on the findings of the pilot project, a broader program could be introduced.

To maximise the potential success of the pilot, this program should be delivered in partnership with a working group of local creative practitioners that have equal decision-making powers and are paid for their time.

There is an opportunity for the G21 Region, identified in the Report as a ‘creative hotspot’ to become the pilot region to implement this recommendation of the Creative Victoria report.

Recommendation 13

That the recommended Creative Industries Governance Framework make priority representations to Creative Victoria to be nominated as the region for the proposed Creative Neighbourhood Pilot Program.

7.1.4 Alignment with Local Government strategies

The City of Geelong's Arts and Cultural Strategy, its first since 2003, is on track to be endorsed by Council in July 2021. It is framed around four strategic areas of focus:

- *Growing the Arts* – arts investment
- *Caring for Culture* – cultural preservation, regeneration and development
- *Creative Partnerships* – collaboration and connection
- *Leading and Communicating Culture* – advocacy and leadership

The plan also outlines a series of commitments. Of relevance to the wider regional creative industries strategy is the recognition of the 'benefit of strategic partnerships with both government and non-government entities, supporting hubs and networks of activity, bringing together cross-sector arts engagement and supporting industry collaborations.'

Following its endorsement in mid 2021, opportunities for alignment with the City's *Arts and Cultural Strategy* should be explored for the wider G21 region.

In addition, close attention should be paid to arts and culture strategies currently being developed by Golden Plains Shire and Surf Coast Shire. Colac Otway Shire will be due to update its strategy in 2022.

Recommendation 14

That the recommended Creative Industries Governance Framework review the City of Greater Geelong's *Arts and Cultural Strategy* and plans in development by the Golden Plains and Surf Coast Shires, and explore opportunities for collaboration and alignment.

7.1.5 Alignment with Local Government council plans

Following local government elections in November 2020, regional councils are required to approve a four-year Council Plan by 30 June 2021. The scope and maturity of cultural planning has to date been constrained by available resources, and the limited recognition of the value of arts and culture and the creative industries within the wider council operating context.

There is an exciting opportunity to reflect recommendations of the region's Creative Industries strategy in the plans currently being prepared by regional councils. There is additional opportunity for the plans to reference

the suite of relevant reports prepared by the Victorian Government and other authorities, including *Creative Neighbourhoods: Enhancing the viability of Victoria's creative communities*, the *Environmental Scan of the Creative Industries in the G21 region – 2018* and the *Australian Cultural and Creative Activity: A Population and Hotspot Analysis* report.

Recommendation 15

That the G21 region local government authorities review the recommendations of the Creative Industries Strategy, and consider the inclusion of initiatives to support their creative economies and cultural tourism.

7.1.6 Partnerships with state cultural institutions

There is opportunity for cultural venues in Geelong and the wider G21 region to establish a unique regional programming partnership, which would enable the programming strengths of key cultural institutions – the Geelong Art Gallery, the Geelong Arts Centre, the Geelong Regional Library, Back to Back Theatre, Platform Arts and the office of the UNESCO Creative City of Design – to partner with regional local governments and extensive networks of volunteer organisations to establish an annual calendar of programs and events to be presented across the region.

The program may include presentations by artists exhibiting at the Geelong Gallery, playwrights and actors whose work is in development or production at the Geelong Arts Centre, or the showcase of significant design projects underway in the region. The program may extend to showcasing works or parts of works from the Geelong Arts Centre, Geelong Regional Library or Back to Back Theatre programs. It may include workshops or professional development programs offered by Platform Arts. The existing, extensive Geelong Regional Library public programs and its associated Heritage Centre may be complemented by that of Melbourne's Wheeler Centre to create forums for the exploration of books and ideas.

These partnerships may also include many other regional entities and areas including the Potato Shed on the Bellarine Peninsula, Golden Plains, the Colac Otway Performing Arts Centre and the soon to be opened Torquay Multi Arts Centre (The MAC). There is also the opportunity to collaborate across other regional centres including Ballarat, Bendigo and Mildura.

A focus should be on the exploration of the creative process, to simultaneously create understanding of the work of creative practitioners and to offer inspiration and encouragement to those who may wish to explore this creative pathway.

Such a model could act as a pilot for the potential development of collaborative regional cultural programming, linked to the rich collections and expertise of the institutions in other major Victorian centres.

'We need to be a bit innovative, to get other performers into the area to stimulate, create that interest, give the community the opportunity to see some performers or shows that might not actually come here. Like a Melbourne Fringe' (consultation response)

It is recommended the initiative be complemented by a program to enhance the business skills of current and future creative industries practitioners in the region, and by a cultural tourism strategy that references the breadth of cultural programming activity across the region. This would provide a suite of interconnected initiatives that would enhance capacity and profile for the G21 region.

Recommendation 16

That the recommended Creative Industries Governance Framework explore the establishment of a regional cultural programming initiative, to extend the reach and impact of the Geelong based cultural institutions.

7.1.7 The potential for the creation of a unique cultural tourism offering

It is understood consideration has previously been given to the establishment of a bold initiative that might take advantage of the large former industrial sites available in Geelong. An example referenced was the potential to establish an experience based on the Meow Wolf venue in Santa Fe, to be located at the former Ford production facility at Norlane.

There is evidence of the potential for cutting edge, digitally based experiences to become powerful visitor attractors. The concept of such a centre in Geelong has the potential to align with the City's Clever and Creative 'brand' and complement the digital research strengths of Deakin University. It would have the potential to position the region at the leading edge of the creative industries sector.

A powerful example of immersive digital experiences to attract visitors is the work of the Tokyo based teamLab.

teamLab is a collective interdisciplinary group of ultratechnologists whose collaborative practice seeks to navigate the confluence of art, science, technology, design and the natural world.

Various specialists such as artists, programmers, engineers, CG animators, mathematicians and architects make up teamLab.

The group has been commissioned to create digital experiences for cultural institutions across the world, including the Art Gallery of NSW, the National Gallery of Victoria and the Art Gallery of South Australia.

Its first dedicated digital museum opened in Tokyo in 2018, and in its inaugural year recorded 2.3 million visitors, making it the world's most visited single artist museum.

A digital museum, potentially based on content licenced from teamLab Tokyo, and housed in one of the city's disused industrial spaces, would be unique in Australia.

It is noted that the owners of the former Ford facility propose to retrofit the existing infrastructure to accommodate manufacturing and innovative technologies. An alternative, should the internal architecture permit, is the impressive Brutalist State Government Offices on Malop Street, adjacent to the cultural precinct.

Recommendation 17

That the recommended Creative Industries Governance Framework encourages new business partnerships and private investment to create unique places that support the creative sector and promote cultural tourism for regional Victoria. Options could reference successful international examples including teamLab Tokyo, Meow Wolf, or Two Bit Circus.

7.1.8 Partnership with regional tourism offices

There is increasing worldwide recognition of the potential for cultural and heritage experiences to influence both domestic and international tourism decisions.

The statistics reveal that cultural tourism visitors spend more and visit locations for longer periods.

43% of international visitors to Australia in 2019 participated in cultural activity, whilst 34% experienced aspects of our heritage. The cultural tourism segment grew by 7.5% annually over the period 2014-19, whilst heritage tourism increased by 11.2% over the same period.

It is acknowledged that in the immediate term, the impact of the COVID-19 pandemic has been dramatic for tourism operators dependent on overseas visitation. Taking a longer-term view, there is benefit in planning to capitalise on the reopening of Australia's borders, and building a framework that acknowledges the opportunities cultural and heritage tourism offers.

In 2018 the 53,000 international overnight visitors to Geelong and the Bellarine spent an average of 16.1 nights in the region, which is higher than many other regions, and spent a total of \$98 million. On average, this equated to a spend of \$115 per night and \$1,854 per trip in the region.

Alongside the Great Ocean Road, the City of Greater Geelong experienced the highest international visitor spend per night of Victoria's regions. International students have been an important source of visitation for the region, particularly to Geelong with Deakin University's Waterfront and Waurin Ponds campuses.

In 2018 visitor expenditure in Greater Geelong, estimated at \$1.1 billion, generated substantial economic benefits for the region including an economic output of \$2.2 billion and supported 11,264 jobs. Based on projected growth in visitation (7.5 million visitors) to the region by 2027, and corresponding growth in visitor expenditure (\$1.7 billion), the economic output of tourism was expected to increase to \$3.3 billion, inclusive of the flow-on indirect effects. Employment was also predicted to increase to 17,256 jobs by 2027, an increase of almost 6,000 jobs (53 per cent). Greater Geelong is one of two national regions where local conditions contribute the most to tourism job generation (546 and 260 jobs respectively), independent of national and industry employment trends.

These projections will require review, acknowledging the impact of the absence of international visitors in the immediate term.

Creative Victoria's Festivals Review found that more than half the creative festivals in Victoria began in the last 10 years. The growth in rural festivals can also be partly attributed to a 14% increase (between 2014 and 2018) in the number of Australians willing to take arts and culture-related day trips.

'It's about grabbing hold of cultural tourism. And that means finding the resources to work collaboratively and culturally in culturally aware ways with both Eastern Maar and Waddawurrung so that we can really be working with them to highlight stories and places that have been left by the wayside for so long... we're really vibrant creatively. We have so many creatives, but it's not visual. It's not obvious.'

(consultation response)

Existing tourism strategies for the G21 region do not give significant focus to creative activity. The 'greater than' brand provides the framework for tailored marketing across the region, which focuses on nature-based and food and wine attractions.

Other regional communities in Victoria, and in other Australian states have recognised the value of cultural tourism and have supported its growth through a range of targeted initiatives.

The projected growth in both domestic and regional tourism across the five local government areas has potential to reference the 'linked-up' program of cultural activities recommended elsewhere in this Report. These activities align with visitors attracted to food and wine experiences, or who may be aware of an existing festival or event available in the region.

The Greater Geelong and The Bellarine Tourism Strategic Plan will be reviewed in 2021. The review, and development of the next 4-year plan provides an opportunity to develop a focus on cultural tourism and heritage-based experiences. A focus on cultural tourism would also strengthen recognition of the city's membership of the UNESCO Creative Cities Network.

This recommendation supports the Regional Partnerships priority for 'Tourism – a sustainable tourism economy'.

Recommendation 18

That the recommended Creative Industries Governance Framework partner with regional tourism bodies to develop a cultural tourism strategy which includes the regional cultural programming initiative as outlined in Recommendation 16.

ADDENDUM UPDATE

The Commonwealth Games represents a 'once in a lifetime' moment to showcase the region's history and culture to a local and international audience. Priority should be given to updating the Greater Geelong and The Bellarine Tourism Strategic Plan to capitalise on the opportunity. Whilst a focus will naturally be on creating awareness of the Games cultural program, the Plan should equally address cultural tourism linked to the Wadawurrung and the Eastern Maar Peoples history and culture and aim to extend the duration of stay for Games visitors, linked to awareness of the wider region's attractions.

The completion of the Convention and Exhibition Centre provides a valuable opportunity to integrate cultural tourism activities as part of the visitor experience offered to convention and event visitors.

The, Addendum recommendations are:

Recommendation 30

That the Greater Geelong and The Bellarine Tourism Strategic Plan and the Brand Geelong Greater Geelong initiative be updated to incorporate Goals and Actions to maximise cultural tourism opportunities associated with the Commonwealth Games.

Recommendation 31

The Geelong Exhibition and Convention Centre collaborates with state, regional and local tourism organisations to integrate cultural tourism opportunities within convention and event programs offered by the Centre.

CREATIVE AND CULTURAL CONTENT DEVELOPMENT

Priority should now be given to adapting the proposed regional programming framework to enable planning for the Commonwealth Games program to maximise the creative capacities of each of the key cultural institutions and of the many volunteer cultural organisations that are a strength of the G21 region.

The represents a further unique opportunity, to identify the narratives and themes that may introduce the history and identity of the region to new audiences, just as Birmingham sought to do, and to explore how this might be achieved in a co-ordinated and connected way across art forms and agencies.

This in turn will provide the catalyst for funding submissions to support the commissioning of new work, which should aim to become highlight events of the cultural program.

The Addendum recommendation is:

Recommendation 32

That the Creative Industries Taskforce, in partnership with City of Greater Geelong and regional artists, arts organisations and communities, contribute to the planning for locally commissioned cultural experiences which introduce the region's history, culture and identity to Commonwealth Games audiences.

Recommendation 19

That the review of the Greater Geelong and Bellarine Tourism Strategic Plan to be undertaken in 2021 includes a focus on the cultural and heritage tourism offerings of the region.

7.1.9 Partnerships with UNESCO City of Design office

The City of Greater Geelong joined the UNESCO Creative Cities Network and was designated a UNESCO Creative City of Design in 2017. Since then, the City has presented a range of events and programs to establish its position as a City of Design. A summary of activities, provided by the City of Greater Geelong, is provided in the Appendices.

The summary notes that a City of Design Framework Plan was planned for development in 2020 but delayed due to COVID-19 restrictions. The lack of an overall strategy for the implementation of the UNESCO designation has limited an understanding of how the activities undertaken to date contribute to an articulated positioning of Geelong as a City of Design.

The completion of the Framework Plan commenced whilst this Report was being prepared. Its completion should facilitate coordinated planning, the development of collaborative relationships both within Geelong and across Victoria, and build Geelong's 'brand' as a creative city.

It is recommended the Framework Plan be delivered in close collaboration with the recently appointed City Design Champion and Manager of Urban Design and Heritage for the City of Greater Geelong. The opportunity for planning controls, to include a commitment to design excellence, along with consistent codes to protect the rich built heritage of the region, will be critical to establishing the City's status as a City of Design.

It is also recommended that the Framework Plan seeks to leverage collaborative relationships with the range of established agencies and professional bodies within Victoria which have as their purpose the support for and public recognition of the value and importance of design.

Recommendation 20

That the City of Greater Geelong's UNESCO City of Design Framework Plan is delivered collaboratively with the Office of Urban Design and Heritage, Arts and Culture and other related departments, and that the Plan is communicated widely to the creative industries sector across the G21 region.

There is opportunity for the UNESCO designation to be embedded in other parts of the City of Greater Geelong's activities. The City's planning and development codes, along with its heritage protection framework provide opportunities to strengthen urban design standards and to enhance the protection of the City's rich design heritage. The City of Sydney's 'design excellence' framework provides a potential reference.

Recommendation 21

That the City of Greater Geelong consider the review and enhancement of planning, development and heritage codes and controls, to enhance a commitment to design excellence and to preserve examples of design heritage.

City of Design marketing

There is currently no focus in the City of Greater Geelong and Bellarine tourism strategy to reference the City's UNESCO status, and to promote this to identified market segments. The opportunity to align with the recommended cultural tourism strategy should be explored.

Recommendation 22

That the development of the Greater Geelong and Bellarine Tourism Strategic Plan for 2021-25 incorporates strategies to enhance awareness of the City's UNESCO designation.

APPENDICES —

Appendix A – Consultations

City of Greater Geelong

Dr Jonathan Daly
*Manager Urban Design and Heritage
and UNESCO Design City Champion*

Tim Ellis
*Manager Economic Development
and Events*

Brett Ince
*Head of Tourism Greater Geelong
and Bellarine*

Martin Paten
Manager Arts and Culture

Sahn Cramer
Cultural Planner

Matthew Szymczak
Senior Lead, Smart City

Chris Silvestroni
*Acting Manager Economic
Development and Events*

G21 Regional Member Councils

Kim Biggs
*Arts and Culture Advisor, Golden
Plains*

Shannon Di Lizio
*Economic and Community
Development Program, Borough of
Queenscliffe*

Leanne Stein
Arts Officer, Borough of Queenscliffe

Harriet Gaffney
*Arts Development Officer, Surf Coast
Shire*

Julie Kiernan
*Acting Colac Otway Performing Arts
& Cultural Centre Manager*

Jennifer Cromarty
CEO, Committee for Geelong

Deakin University

Professor Tuba
Kocaturk *Professor of Integral
Design, School of Architecture
and Built Environment and Director
MinDLab*

Professor Matthew Barnett
*Director Institute for Frontier
Materials*
Professor Matthew Delbridge
*Head of School Communication
and Creative Arts, Professor of
Performance Studies*

Cora Trevarthen
Adviser to the Vice-Chancellor

Regional Development Victoria

Kerri Erler
*Director Regional Operations,
Barwon South West*

Lisa Pitre
*Investment and Trade Specialist -
Manufacturing*

Regional Arts Victoria

Jo Grant
*Creative Arts Facilitator, South West
Victoria*

Joe Toohey
Executive Director

Arts and Culture

Joel McGuinness
Chief Executive, Geelong Arts Centre

Jason Smith
Director, Geelong Gallery

Dr Fiona Lee
President, Creative Geelong

Ilana Russell
Executive Director, Platform Arts

Deb Sansom
*Executive Manager Cultural
Development and Community
Engagement, Geelong Regional Library*

Survey responses from 131 creative
practitioners from across the region,
and workshop attendees.

Victorian Government

Jane Crawley
Director Arts Investment

Sue Doyle
*Regional Development Manager
Creative Victoria*

Stuart Koop
*Senior Manager International
Creative Victoria*

Lung Ong

Will Maley
*Regional Tourism Executive Visit
Victoria*

Other Stakeholders

Benadette O'Connor
*Chief Executive Management
Governance Australia*

UNESCO Cities of Design

Robin Jutzen
*Head of Partnerships and Promotion
City of Capetown*

Annies Marrs
Dundee

G21 Arts and Culture Pillar Roundtable – 25 Feb 2021

Jason Smith
Chair and Director, Geelong Gallery

Joel McGuinness
*Deputy Chair and Chief Executive,
Geelong Arts Centre*

APPENDICES —

Appendix A – Consultations

Giulia Baggio
CEO, G21

Ilana Russell
Executive Director,
Platform Youth Arts

Jennifer Cromarty
CEO, Committee for Geelong

Harriet Gaffney
Arts Development Officer,
Surf Coast Shire

Padraic Fisher
Director, National Wool Museum

Katherine Branch
Director of Marketing and
Development, Back to Back Theatre

Fiona Lee
President, Creative Geelong

Cr Libby Stapleton
Mayor, Surf Coast Shire

Cr Trent Sullivan
Councillor, City of Greater Geelong

Susan Allsop
Secretary, Osbourne Park

Damian Waight
Manager Community Relations,
Surf Coast Shire

Julie Kiernan
Colac Otway Performing Arts
and Culture Centre

Cr Kate Hanson
Mayor, Colac Otway Shire

Committee for Geelong Industry Roundtable - 25 Feb 2021

Jennifer Cromarty
CEO, Committee for Geelong

Kirsten Kilpatrick
Novo Planning

Samantha Ramsey
Ramsey Property Group

Mike Beck
Fluid

Wayne Elliott
Geelong Region Local Learning
Employment Network

Paul Kelly
Paul Kelly Creative

Peter Clark
Arthur St Digital

Nat Anson
Urbis

Artists and Creative Practitioner Roundtable – 23 March 2021

Luke Adams

Wayne Elliott

Pippa Griffiths

Miranda Jarvis

Sarah Walker

Suzie Wyllie
Lighthouse Arts Collective

The following attended the G21 Board Meeting and took part in a Roundtable on 26 Feb at the Borough of Queenscliffe.

Giulia Baggio
CEO G21 – Geelong Region Alliance

Cr Stephanie Asher
G21 Chair and Mayor City of Greater
Geelong

Martin Cutter
CEO City of Greater Geelong

Cr Ross Ebbels
Mayor Borough of Queenscliffe

Martin Gill
CEO Borough of Queenscliffe

Cr Kate Hanson
Mayor Colac Otway Shire

Peter Brown
CEO Colac Otway Shire

Cr Helena Kirby
Mayor Golden Plains Shire

Eric Braslis
CEO Golden Plains Shire

Cr Libby Stapleton
Mayor Surf Coast Shire

Anne Howard
Acting CEO Surf Coast Shire

Keith Baillie
CEO Gforce Employment Solutions

Rowena Clift
CEO Western Victoria Primary Health
Network

Kean Selway
Chief Operating Officer – Deakin
University

Brett Winter
CEO GeelongPort (via phone)

Others Consulted:

Paul Davis
CEO – Wadawurrung Traditional
Owners Aboriginal Corporation.

Kate Fielding
CEO, A New Approach (ANA)
Australia's leading arts and culture
think tank.

Magdalena Moreno Mujica
Executive Director, International
Federation of Arts Councils and
Culture Agencies

Hugo T Armstrong
Director, Bay City Events

APPENDICES —

Appendix B – Creative Industries' Strategy for the G21 Region, Project Brief



CREATIVE INDUSTRIES' STRATEGY FOR THE G21 REGION

PROJECT BRIEF

INTRODUCTION

A collaboration between G21 - Geelong Region Alliance, the Committee for Geelong, the Geelong Region Library and Heritage Centre, the Geelong Arts Centre, Geelong Gallery, Back to Back Theatre, Creative Geelong and Platform Arts, this project aims to develop a Creative Industries Strategy for the G21 region incorporating recommendations to assist our region economically recover following COVID-19.

It is funded by a grant from Regional Development Victoria plus contributions from collaboration partners.

This project seeks to capture information, identify priorities and provide a road- map for growth in awareness, participation and investment in the creative industries sector and address opportunities for the sector to 'reboot' from the COVID-19 shutdown.

The development of a Creative Industries Strategy will consolidate and productively expand collaborative efforts from local creative industries organisations, stakeholders, representatives from local government areas and State Government.

RATIONALE

The G21 Region comprises five local government areas: City of Greater Geelong, Surf Coast Shire, Colac Otway Shire, Golden Plains Shire and Borough of Queenscliffe, and is fast expanding. According to Regional Development Victoria, the Surf Coast and Bellarine Peninsula are Victoria's fastest growing areas outside of Greater Melbourne. The City of Greater Geelong is currently growing at 2.7 percent per annum which is faster than Melbourne.

With such population growth, there is a need to provide updated, modern arts and cultural facilities, community development, professional sector opportunities, skills development and opportunities for collaboration that provide both economic and social benefits for the creative industries sector and the region.

Creative Industries in the Geelong region are in midst of growth. Creative Geelong Inc and the Geelong Region Local Learning Employment Network published an Environmental Scan of the Creative Industries in the G21 region in 2018.

In 2017, the Creative Industries sectors in the G21 region contributed:

- \$2.085,393 billion, or 5.9% (compared to 5.0% in 2015) to the overall regional output;
 - \$213,406 million or 2.7% (up from \$150.579 million or 1.7% in 2015) to the overall regional export estimate;
 - 9,127 jobs (a 16.4% increase from 2015), or 7.3% of total employment;
 - \$629,364 million or 7.5% (up from \$488.419 million) to overall regional wages and salaries.
- (SOURCE: http://creativegeelong.com.au/CreativeGeelong_Enviroscan.pdf)

From an infrastructure perspective, there continues to be significant investments to creative industries buildings. This includes the redevelopment of the Geelong Library and Heritage Centre, Old Courthouse Building and Geelong Arts Centre (ongoing). On the horizon is also the expansion of Geelong Gallery and massive growth across the sector in all G21 areas.

Leveraging and supporting this growth and investment is vital as Geelong continues to offer lifestyles choices to people moving to Victoria's largest regional city. Having a strong, inclusive creative industries sector is a vital pillar for social and cultural experiences.

This work is even more important as the creative industries sector is facing a significant challenge with COVID-19 forcing many creatives to shut doors, cease live performances and have a reduction in consumer spend on creative outputs.

PROJECT OUTLINE

Developing a Creative Industries Strategy for the G21 region involves two parts - scoping and developing a priority plan.

Part A: Scoping

Gaining an understanding of the current landscape is imperative to the development of an inclusive, engaging and community-focused Creative Industries strategy.

The consultant will undertake an audit including the following activities as part of the scoping phase:

- Review of the impact of COVID-19 shutdown on the creative industries and consider a strategic approach to how the sector can respond and adapt.
- Audit of the current Geelong and G21 creative/cultural ecosystem by region and shire of the G21 Member Councils.
- Audit the G21 Member Councils' relevant strategic and cultural Plans, priorities, themes and focus areas across the Creative Industries and identify commonalities and areas of potential collaboration, as well as what is missing that could be addressed. This includes:
 - Cultural Tourism
 - Arts
 - Economic Development
 - Digital/Smart City
 - Community Development.
- Specifically look at the UNESCO City of Design designation and City of Greater Geelong's 'Clever and Creative' vision, and outline opportunities with regards to strengthening the creative industries sector, brand offering and regional identity (cross reference with the work of Brand Geelong project).
- Examine local planning and growth opportunities, including population growth, infrastructure projects. Further to this, utilise existing documents for review, including:
 - Revitalising Central Geelong
 - Committee for Geelong's Australia's Gateway Cities report and Strategic Framework 2019-2022
 - G21 Regional Plan (and other relevant studies)
 - G21 2019 Regional Profile report
 - Geelong City Deal Implementation Plan.
- Scan and consider Creative State Strategy and current State Government priorities through Creative Victoria with regards to opportunities and focus areas to leverage for the G21 region, (including the next iteration of City Deal?)

- Scan and consider Federal Government Priorities through Australia Council Strategic Plan and also scan relevant Federal Departmental plans for focus areas and key themes - this includes any new policies or funding streams related to the impact of COVID-19 on the creative sector.
- Develop a map of local major cultural events across the G21 region, looking for opportunities, events, and visitation data.

Part B: Priority Setting

Following information audited and collated in the Scoping phase, the consultant will hold a one-day workshop (potentially held via Zoom in the COVID-19 environment) with the Project Steering Group to present an executive summary and draft recommendations for future steps. As a result, the final report should:

- Recommend actions to support the creative industries sector in the G21 region as it faces significant challenges as a result of COVID-19 shutdowns and physical distancing regulations.
- Profile and recommend potential growth opportunities for the Creative Industries Sector in the G21 region including skills development required.
- Investigate the role of cultural infrastructure and opportunities to support and collaborate with the small to medium, and independent sectors across the G21 region.
- Provide a recommend list of short, medium and long-term actions for implementation.
- Include identification of opportunities for collaborations across the G21 region.

GOVERNANCE

The Committee for Geelong, G21 - Geelong Region Alliance, the Geelong Region Library and Heritage Centre, the Geelong Arts Centre and Geelong Gallery along with the G21 Arts, Culture and Heritage Pillar are supporters and contributors to the development of this project.

All contributors listed below have expressed an interest in working with the consultants who will be engaged to complete the work and provide access to data and information.

The Project Steering Group will provide guidance and set objectives for the project. Representing key local leaders within the industry and the G21 region, currently this involves:

- Jennifer Cromarty - Committee for Geelong CEO
- Elaine Carbines - G21 - Geelong Region Alliance CEO
- Joel McGuinness - Geelong Arts Centre CEO
- Deb Sansom - Geelong Region Library & Heritage Centre
- Jason Smith -G21 Arts and Cultural Pillar Chair, CEO and Director of Geelong Gallery
- Stephen Ryan - RDV
- Ilana Russell - Platform Arts.
- Wadawurrung Traditional Owner Group
- Creative Geelong Inc
- Back to Back Theatre

The Project Reference Group for consultation regarding the Creative Industries Strategy will be the members of the G21 Arts, Heritage and Cultural Pillar.

DELIVERABLES

A report of key findings of the audit and recommendations for future steps addressing the need for:

- A new approach to skills development in the future of work.
- A coherent approach to the emerging creative industries sector in the region and its economic and social impact (leveraging existing and planned, related work) - and in particular some recommendations in light of the impacts created by COVID-19.
- An investment prospectus for business to understand the opportunities presented by creative industries (i.e. entertainment, cultural tourism).
- A clear summation of the cortical pathways towards the resolution of existing G21 priority projects, such that provides space for necessary new priority projects.

A creative presentation of the final report should include a small print run (50+ copies).

BUDGET

The budget for the Creative Industries Strategy for the G21 Region is \$70,000 plus GST.

EXPRESSIONS OF INTEREST

We are committed to using local businesses where possible. Local providers are given an equal opportunity to quote and tender. When a local provider can match or better other providers on price, quality and availability, preference will be given to the local provider.

This is a closed expression of interest process. Consultants are asked to submit an expression of interest which includes:

1 Reference to key selection criteria as follows:

- Demonstrated experience of similar projects
- Ability to meet the timeline
- Ability to provide a narrative report for each topic
- Value for money.

2 Project appreciation including:

- Break down of key tasks
- Budget breakdown
- Outline of all members of the team; their roles, tasks and estimated time allocation to the task.

3 Referees:

- Contact details for at least two referees who can be contacted regarding similar complete work.

COMMUNICATION AND AUTHORITY

All questions regarding this brief are to be directed to either Elaine Carbines or Jennifer Cromarty via email at:

ecarbines@g21.com.au 52274000

Jennifer.cromarty@committeeforgeelong.com.au 52278075

Please submit a written quotation to Elaine Carbines via email at ecarbines@g21.com.au by 5.00pm on Friday 23rd October.

APPENDICES —

Appendix C – Summary of reviews, studies and other documents with reference to the creative industries

Resilient Geelong: Reasons for success and challenges for a post-COVID-19 future

Commissioned by the Committee for Geelong, and undertaken by Deakin University, the research report was published in November 2020.

The research paper presents historical and comparative analysis and offers a set of recommendations for consideration in four parts:

Part 1 examines the economic transformation and resilience of the Greater Geelong economy over time and reviews the diversified specialisation of key sectors including manufacturing, retail, health, education, tourism, public administration, professional and scientific services, construction, energy, and creative industries.

Part 2 considers the enablers that facilitate this resilience, in particular the role of population growth, government policy and community leadership.

Part 3 examines COVID-19 responses from governments and others around the world in the context of other shocks to regions, such as the Global Financial Crisis (2007 to 2009), as well as Australian initiatives and possibilities that are emerging from the current crisis. These include the rise of online working, the potential move of larger populations from metropolitan areas to the regions, creating a circular economy, progressing social inclusion and revitalising manufacturing.

Part 4 revisits the national and state economic trends, and considers Greater Geelong before and after COVID-19. Drawing on the preceding historical analysis and international exemplars, it then explores the implications for Greater Geelong and considers how the Committee for Geelong might collaborate and capitalise on emergent opportunities to ensure ongoing regional resilience. Priority recommendations are provided for key sectors, the community and for critical enablers of regional resilience in Greater Geelong.

City of Greater Geelong – Clever and Creative Future

Published in 2017, the policy framework for the city-region was the result of consultation with over 16,000 community members in 2016 and 2017. A community aspiration is for creativity to drive culture, enabled by the attraction of start-ups and innovative businesses, supported by events and festivals and partnerships between educators and industry. The plan supports the creative re-use of heritage assets complemented by design excellence in new buildings and public spaces.

A measure of success will be to be included in the top 200 cities within the Global Innovative Cities Index. In 2019 Geelong was ranked 313 on the Index. By comparison, Melbourne was listed as 16 in this international ranking.

The Clever and Creative strategy will be supported by the release of Geelong's first Arts and Culture Plan in early 2021.

UNESCO City of Design application – City of Greater Geelong

Summary of Activities provided by City of Greater Geelong's UNESCO Creative Cities Network office.

The application submitted in 2017 noted Geelong's historical parallels with other UNESCO Cities of Design. Similar to Detroit, Geelong has an industrial design heritage, evolving to advanced manufacturing. Like Dundee and Liverpool the City's academic institutions and creative spaces are driving renewed cultural vibrancy.

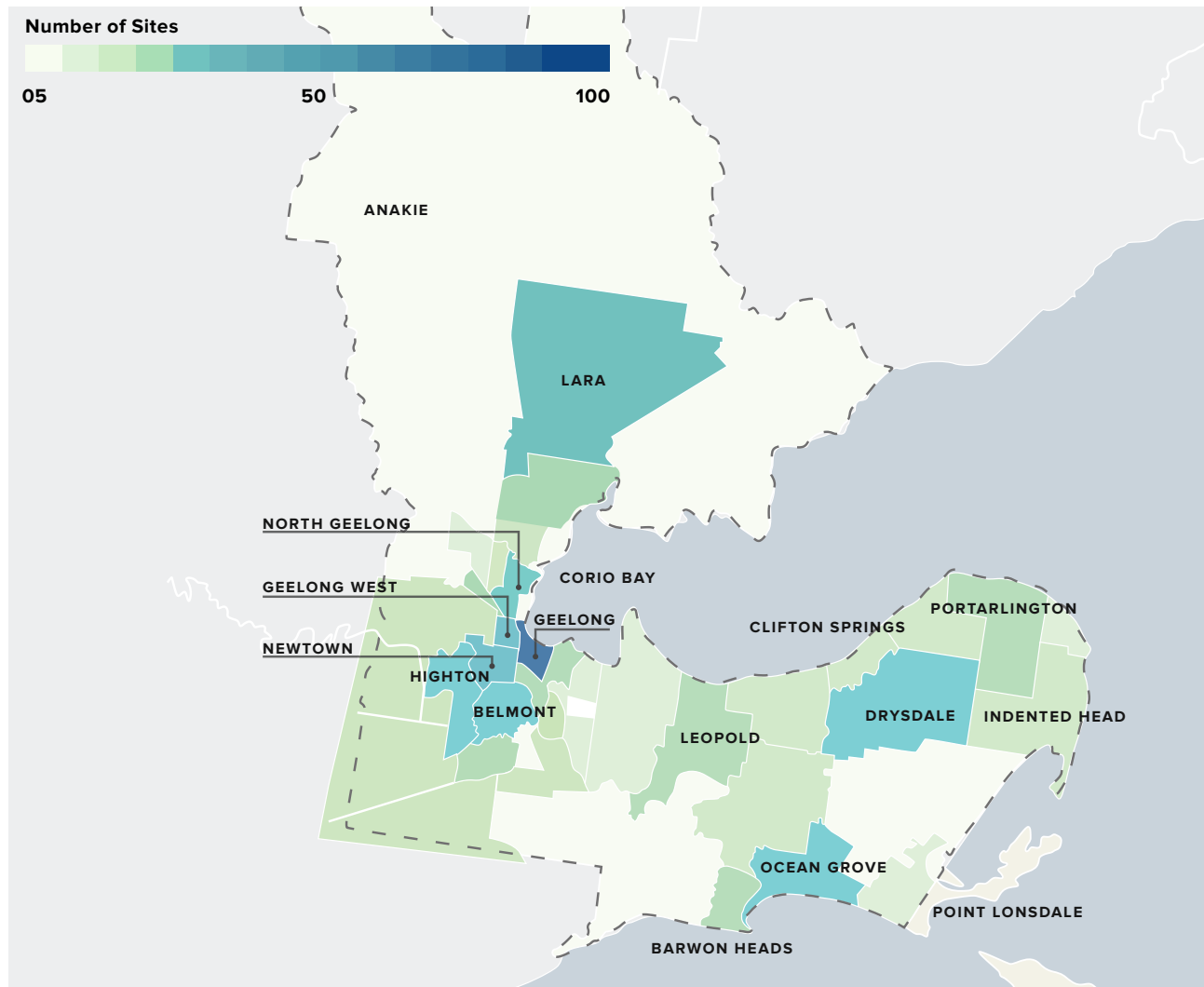
The submission proposed a series of initiatives that included Greening the Songline, a plan to revegetate the song line linking the Mountain to the Mouth. It proposed the completion of the cultural precinct, with additions to both the Geelong Arts Centre and the Geelong Gallery and it proposed the development of an Australian Centre for Innovation and Design. It further committed the City to hosting INDIGO, the International Indigenous Design Network for a four-year period.

Creative Neighbourhoods: Enhancing the viability of Victoria's creative communities

This report, commissioned by Creative Victoria and completed in May 2020 provides the evidence base and knowledge required to pro-actively support, protect and enhance the viability of creative neighbourhoods across Victoria.

Twelve key findings were identified through this research:

1. Each neighbourhood is unique and has been largely established through a local, 'ground-up' approach over time.
2. Affordability of creative spaces is influenced by many factors including housing costs, material costs and income.
3. Creative industries is a relatively homogenising term for a large number of creative practices and businesses which vary distinctively in their needs.



4. Intermediaries play a central role in facilitating relationships between creative organisations and the public and private sector.
5. There is a lack of innovative planning and financial mechanisms to support the ongoing viability of creative neighbourhoods in Victoria.
6. Creative activity may not always be visible as it is occurring in digital spaces, in the home and elsewhere.
7. Creative spaces are often located in or near the home emphasising the localised relationship between housing and creative spaces.
8. Creative spaces have to be tailored to different needs with many practitioners requiring specialised environments.
9. Affordability is the main barrier to accessing suitable creative spaces.
10. Regional creative neighbourhoods are more disadvantaged, have growing affordability challenges and have less access to local government arts and cultural funding.
11. Local government arts venues, tertiary educational institutions and tourism play a particularly critical role in regional creative neighbourhoods.
12. There is unmet demand for creative spaces and many creative practitioners are unable to access a suitable creative space to practice their work effectively.

Australia's cultural and creative economy: A 21st century guide.

This research by A New Approach and published in October 2020.

The purpose of this report was to give an overview of our cultural and creative economy and highlight opportunities for Australia to adopt a 21st-century approach in this industry sector. It outlined the scope, scale and trends within the cultural and creative economy pre-COVID-19, and highlights opportunities that respond to the Organisation for Economic Co-operation and Development (OECD) urging nations to strive to 'build back better'.

Key findings

Finding 1: In 2016, the total cultural and creative workforce (including embedded creatives working in non-creative industries) was 868,098 people, or 8.1% of the total Australian workforce. Within that, the cultural and creative industries employed 645,303 people, or 6% of the total workforce. Within these industries, the arts and entertainment workforce was 193,600 people (1.8% of total workforce). Within that, the creative and performing arts workforce comprised 33,035 people (0.3% of total workforce).

Finding 2: The cultural and creative economy, including activity in the wide range of cultural and creative industries as well as cultural and creative activity performed in other industries, was worth \$111.7B to the Australian economy in 2016–17 (6.4% of GDP). Of this, the 12 domains in the cultural and creative industries contributed \$91 billion.

Finding 3: There is a strong relationship between the success of subsidised and non-subsidised cultural and creative industries. International evidence suggests public and private subsidy of arts, culture and creativity has a positive impact on the success of commercial creative businesses and other businesses. Compared with other industries, the cultural and creative industries also have higher spillover effects into other industries in terms of total output, value-added and employment multipliers.

Finding 4: All 12 domains of cultural and creative activity contribute to Australia's GDP, even when that contribution is numerically small. The largest contributors were: Design (49.8%); Fashion (16.6%); and Broadcasting, electronic or digital media, and film (11.3%).

Finding 5: Cultural and creative employment fuels 21st-century economic growth now, and will continue to do so into the future. Demand from international students for

formal training in Australia's cultural and creative industries has steadily increased, indicating that these courses will be pivotal in rebuilding the international education industry post-pandemic.

Finding 6: 'Literature and print media' is the only cultural and creative domain to have experienced negative GVA growth since the initial ABS analysis of Australian cultural and creative activity in 2008–09. Despite its decline, this domain is still a significant contributor to GDP.

Finding 7: Digital disruptions are causing significant changes in some cultural and creative industry business models, with consequences for activities that have both private and public value.

Finding 8: Australia's data collection methods are not keeping pace with the significant changes to the nation's cultural and creative industries and employment classifications. As a consequence, Australia is missing emerging areas of strength and losing opportunities to strengthen the economy further. For example, there are no detailed analyses of Australia's cultural and creative trade performance more recent than 2008–09.

Highlights of the 2020 The Bureau of Communications, Arts and Regional Research update:

Key findings

Cultural and creative activity has grown from \$110.3 billion in 2016-17 to \$115.2 billion in 2017-18. This is a 4.4% increase in that 12-month period. There has been a 34% increase over the 10 years since the 2008-09 Cultural and Creative Satellite Accounts.

Cultural and creative activity as a share of GDP has slightly decreased between the BCAR's 2016-17 release and the 2017-18 release, from 6.4% to 6.3%.

Cultural and creative activity has fluctuated between 6% and 7% of GDP between 2008-09 and 2017-18.

All four components of cultural and creative activity (GVA + net taxes; Compensation of embedded creative employees; Value of volunteer services; Non-market output of market producers) have grown in the last ten years.

Australia's biggest cultural and creative contributors to GDP are still (in order of contribution) Design; Fashion; Broadcasting, electronic or digital media, and film; and Literature and print media. This is the same as in 2016-17.

The number of embedded creatives — that is, creative specialists working outside of the cultural and creative industries — has grown by nearly 44% over the last 10 years.

Only two industry divisions outpaced the rest of the economy by the end of the 10-year period. Cultural and creative activity in 'Professional, scientific and technical services' outpaced the economy by 18.9 percentage points. Cultural and creative activity in 'Education and training' outpaced the economy by 16.6 percentage points.

**Greater Geelong and Bellarine Tourism Development Plan
Final Report 2019-22**

The plan identifies key tourism product and supporting infrastructure to meet existing and future needs.

The regional tourism market is dominated by day-trip visitors, of which 99% are from Victoria, with 71% from Melbourne. The plan projects an increase of visitation from the 5.8 million recorded in 2018, to 7.5 million in 2027. (It is recognised that the impact COVID-19 pandemic will require a recalibration of those projections.) The report notes that in the three years 2015-18 the region experienced an annual 5% increase in tourism visitation.

Target markets (based on a 2014 analysis) include:

Leading lifestyles – high-income families, representing educated professional backgrounds. This sector includes both influencers and 'tech savvy' people, fond of destinations that offer cultural and seaside experiences, combined with food and lifestyle offerings. This group represents 24% of the overall population.

Metrotechs – young, single, educated inner-city professionals. This sector is cultured, connected, cashed-up and upwardly mobile. These people have a preference for urban destinations offering new and interesting cultural and entertainment experiences. This group represents 13% of the overall population.

Traditional family – the core 'middle Australia' sector. Their preference is for old and familiar environments, captured in the family holiday. This group represents 20% of the overall population.

Overall, arts and culture is identified as a 'secondary strength' of the region's tourism market, with only urban Geelong being identified as a sub-market to focus on arts and culture.

**Greater Geelong and Bellarine Tourism Strategic Plan
2017-21**

This plan provides a framework for the development of the visitor economy in the region, to be addressed through three focus areas – industry leadership, industry promotion and industry development. It does not include strategies of direct relevance to the creative economy.

A new regional tourism Strategic Plan will be developed in 2021 for the years 2022-25.

**Greater Geelong and Bellarine Tourism Action Plan
2020-21**

The Action Plan supports the overall Strategic Plan, and for the 2020-21 year, addresses the impact of the COVID-19 pandemic. The content marketing strategy proposed includes the 'makers and growers' segment and the education tourism market linked to students attending secondary and tertiary learning institutions in the region.

Creative Geelong Strategic Plan 2020-21

Who are we

We are The Exchange, a Centre for Art, Radicalism and Design. We promote critical thinking and discourse that is disruptive.

What do we do

Creative Geelong promotes arts, design and radical approaches to creative place-making through public programs, advocacy, policy making and consultancy. We drive opportunities, fosters collaborations and cultivates community for artists, designers, creative enterprises, makers, researchers and social entrepreneurs.

We do this through activating spaces and supporting makers. We operate out of The Exchange, a creative hub located in Centrepoint Arcade, Geelong. The Exchange provides studio and co-working spaces for creative individuals and collectives, and oversees the Third Space Gallery program of exhibitions and events

Why do we do it

To address a gap in critical dialogues, contemporary practice, innovative design and opportunities for creatives in Geelong. Creative Geelong seeks to address this by connecting individuals and collectives, amplifying practice and generating opportunities for our collective output to be acknowledged within and outside of the region.

How do we do it

We network and engage with creatives in the community. We make space for collaboration, opportunities and discourse both at The Exchange and through our public programs.

Where do we do it

At The Exchange. Online through social media, website and digital programs. In the community through public and satellite programs. Through publications and catalogues.

Where do we go from here (Objectives)

- We engage a Studio Director to oversee day-to-day operations at The Exchange, seek funding for creative programs and to expand the team.
- We continue to foster relationships within our creative community.
- We secure a long-term commercial lease in the Geelong CBD, so we can invest in the space and infrastructure.
- We build a new website.
- We develop a directory attuned to art, design and radical thinking.
- We establish an advisory committee that represents key stakeholders in the community to consult with on key program initiatives.

Where do we go from here (cont'd) – Program Objectives

- Develop Third Space Gallery – securing funding, a curatorial committee/curator, exhibition program and Deakin intern to design marketing and exhibition collateral
- Curate a public talks program at The Exchange that brings together local creatives and innovators
- Establish an events program that activates The Exchange and Little Malop St Mall through temporary public works, workshops and programs and partnerships

Australian Gateway Cities Report and Strategic Framework 2019-22

The report published in 2019 considered the nature and contribution of three of the eastern seaboard 'gateway' cities – Newcastle, Wollongong and Geelong. Each has comparable public institutions and a recent history of transition from manufacturing and heavy industry to new pathways to economic sustainability. The report notes the depth of the creative industries and cultural programs in each of the three cities. Importantly it highlights the resilience and transformative capabilities of each to respond to the challenges of adaptation to changing economic, environmental and social patterns.

It notes the advantages of regional planning and connectedness, and the human dimension offered through liveability and connectivity offered by each of the city-regions.

The report calls for a new policy approach, with recommendations for actions across the three tiers of government. Whilst these do not directly address the creative economy, they do call for support of emerging industries which focus on innovation. The importance of addressing areas of long term economic, social and cultural disadvantage is an overarching recommendation.

G21 Regional Plan

Developed in 2006, the Plan resulted from extensive community consultation, involving almost 1,000 participants. It provides five 'Directions' to shape the region's development over the next forty years.

Direction Three seeks to 'Strengthen our Communities'. It notes the strong arts and culture achievements in primary creation as well as the expression of creative activity in the region. It highlights the importance of urban design and the appreciation and recognition of the heritage of the region and the diverse cultures that influence its development.

The Plan notes the very high disparity between advantaged and disadvantaged groups across the region.

Policy 3.3 focuses on increasing appreciation of diversity, arts and culture, and references the development of Geelong's cultural precinct and a commitment to nurturing the 'creative class', referencing Richard Florida's work which was popular at that time.

G21 2019 Regional Profile report

This report provides an evidence-based resource for planning, priority project identification and implementation, and advocacy for regional growth, health and wellbeing. The 2019 report updates that undertaken in 2014.

Section Five focuses on the Economy, noting that the region is well advanced in transitioning from a traditional heavy manufacturing-based economy to a knowledge-based and service-based focus.

It provides an overview of the Creative Industries sector, notes the pivotal role of ICT in supporting innovation, technology and start-up precincts, and the complementary development of advanced manufacturing and centres of excellence in research.

All STEAMed UP – G21 Region Learning Scoping Study

This study, completed in 2019 by Management Governance Australia recommends the establishment of a region-wide learning strategy, to provide a framework for collaborative and co-ordinated efforts to improve lifelong learning outcomes.

Based on learning principles established by UNESCO in 2014, the recommendations focus on the foundation skills of literacy, numeracy, digital literacy and employability, skills seen as key to communities that are transitioning from an industrial base to one with a more diverse range of services. Its goals include the lifting of educational attainment rates, breaking intergenerational disadvantage and providing for equity of access.

With a strong focus on local accountability, the study recommends initiatives spanning formal and non-formal learning, to be delivered over a 20-year timeframe. It recommends the G21 Education Pillar provide the governance framework for the development and delivery of the Scoping Study's recommendations.

The Future of Work Forum – Committee for Geelong

The Forum brought together leaders with responsibility for learning and skill development in the region to share perspectives and exchange understandings. Convened in October 2020, the Forum presentations addressed themes including the value of a diverse labour force, economic recovery in a COVID-19 world, the changing nature of work, and the challenges to reskill and upskill the workforce. Presentations from secondary education leaders addressed the challenges of the sector to respond to the skill requirements of a changing economy.

The presentations highlighted the high level of understanding and responsiveness within the region to the opportunities to meet the learning and skills development challenges of the times.

Environmental Scan of the Creative Industries in the G21 region – 2018

The Creative Industries Environmental Scan was a joint project between the Geelong Region Local Learning and Employment Network (GRLEN) and Creative Geelong Inc., with funding assistance from the City of Greater Geelong. The research, undertaken in 2018, examined the role and impact of the creative industries at a global, national, state and regional level and concluded that the sector provides growing economic benefits to the region.

The Scan concluded that In 2017, the Creative Industries sectors in the G21 region contributed \$2.085,393 billion, or 5.9% (compared to 5.0% in 2015) to the overall regional output, \$213,406 million or 2.7% (up from \$150.579 million or 1.7% in 2015) to the overall regional export estimate and sustained 9,127 jobs (a 16.4% increase from 2015), or 7.3% of total employment, whilst contributing \$629,364 million or 7.5% (up from \$488.419 million) to overall regional wages and salaries.

The intent of this Environmental Scan was also to provide a picture of the importance of the Creative Industries within the G21 Region. To do this, the project explored the penetration of various Creative sectors into global, national and State economies and communities.

At the global level, the Creative Industries contribute 3% to world GDP and 29.5 million jobs. In Australia, over 531,000 people are directly employed in the Creative Industries with creativity being an important element in the jobs of more than 3.7 million. In Victoria, the creative sector contributes \$23 billion in gross value added, equating to 8% of the Victorian economy, with 5,500 creative businesses located in rural Victoria (excluding Geelong), representing approximately 7% of all businesses. At the regional level, the Creative industries contributed \$2,085,393 million, or 5.9% (compared to 5.0% in 2015) to the overall regional output, and employed 9,127 people, 7.3% of the total regional workforce.

APPENDICES —

Appendix D – City of Greater Geelong – UNESCO City of Design update report

Reason for applying to UCCN.

Our application to the UCCN came on the back of the development of the 30-year community led *Vision – Greater Geelong: A Clever and Creative Future*. Applying to the UCCN came to our attention by external parties and we resolved to apply during the June 2017 intake (intakes are every two years). This left us only three months to prepare an application – a small working group was convened comprising internal and external parties to assist with this. The preparation of the online application was fairly straight forward and was supported by a website (now decommissioned) outlining the history of Geelong's design capabilities. The online application had a strong "design" focus. A couple of the major projects that were suggested could be delivered included Mountain to Mouth, an international conference of IcoD (International Council of Design) and the potential establishment of an International Design Centre. The application's purpose is to assist in being accepted into the network. There are no on-going reporting requirements against the application.

What does being a part of UCCN mean.

There are 246 cities from across the globe in the UCCN. Each city chooses to apply in one of seven creative fields – Gastronomy, Music, Media Arts, Literature, Film, Design and Craft and Folk Art. There are 40 Cities of Design.

All members of the Network commit to work towards the common goal of using "creativity" to drive sustainable, resilient and inclusive cities. The UCCN works towards the UN Sustainable Development Goals – particularly goal 11 Sustainable Cities. Applications to the network often (but not always) are driven by local government to begin with as policy changes are often driven at the local level (UN New Urban Agenda).

What does Excellence look like with the UCCN.

- Each city in the Network is unique. Within the Cities of Design group, there are cities with well over 5 million people such as Istanbul, Puebla, Bangkok and Hanoi and then small cities such as Geelong, Dundee and Kortrijk. Excellence within the Network is not measured by the most impressive and largest projects. Excellence is measured by how well each city works towards making changes that address the need of its community and citizens. In Geelong's case we have a very strong history in manufacturing. Our economy has been in transition for some time. Our community has told us that being clever and creative is how they envisage Geelong's future. Our aim is to ensure we lead initiatives that help us build on this. Detroit has been decimated by the closure of

the car industry. They have significant social problems, urban decay of its CBD, poverty and inequality. Their designation focuses on regenerating public spaces for creatives, empowering creative start-ups and how they build a more inclusive opportunities for the community to participate in design. There are some cities such as Helsinki and Singapore where Design is a major focus at the national level which drives strong design thinking curriculum in schools and government departments. They continue to build on this smartness. Other cities such as those in the middle east (newcomers to the network) know that oil will not drive their fortunes forever and are wanting to build clever industries for their future prosperity.

- There is no pre-described text or schedule on how to be a City of Design.
- The longer a city is in the Network the more cities are able to use the designation as momentum to drive change and deliver projects. There are few cities with dedicated teams of people driving the designation. Usually the designation is embedded in other roles.
- Sometimes Cities are very active in the Network and then through change of political circumstances may be less active until such time the political climate has appetite again e.g. change of Mayor or Government head. There is no judgement between cities on how active or not cities are.

What does good practice look like within the UCCN

There are three key areas of engagement activity:

Local level

- These are projects being activated and delivered at the local level by each city.

International level

- Projects that Geelong as a City of Design participates in with other Cities of Design.
- Projects that Geelong City of Design might participate in with a city in another creative field (Gastronomy, Music, Media Arts, Literature, Film and Craft and Folk Art).

Participation in and supporting development of the UCCN Network

- Participating in the Annual General meeting
- Participating in the Cities of Design Subnetwork meetings, activities and management of the subnetwork.
- Delivery of a four year monitoring report (the assessment piece) on the progress of the activities within each city. Geelong's is due at the end of 2021. The monitoring report is peer reviewed by other Cities within the Design Subnetwork, UNESCO itself and other agencies appointed by UNESCO (not identified). There is a specified template for completion of monitoring reports https://en.unesco.org/creative-cities/sites/creative-cities/files/updated_guidelines_for_membership_monitoring_reports_2020.pdf Examples of monitoring reports can be found at <https://en.unesco.org/creative-cities/content/reporting-monitoring>

What has been happening in Geelong's City of Design designation (this is a high level overview)

- Geelong was admitted to the Network on 1 November 2017. Our first 6 months were spent delivering on operational things such as a logo, website, introductions to other cities and getting a better understanding of what being a member of the Network actually meant.
- We launched the designation formally with a large stakeholder event in May 2018. The Coordinator of the Cities of Design Subnetwork, Ellie Schneider (City of Detroit – Creative City of Design) spoke at the event. 100+ attendees.
- Following attendance at our first AGM and Subnetwork Meeting we were able to work on building our relationships with the other cities. Future collaborations are highly dependent on these relationships – you need to understand what's important to each city and what types of initiatives are being driven to understand where there could be opportunities.
- City of Design Roadshow: We delivered a 12-month road show of key stakeholders to inform key stakeholders about the City of Design designation – audience of 300+ people all up. This roadshow included a second public event with two further cities of Design being present Kortrijk (Belgium) and Dundee (Scotland). We continue to provide updates to groups as requested.

- May 2019 established a City of Design Working Group to oversee initiatives for a two year period that includes Projects, Framework Plan and ongoing Governance Model. Due to COVID this group has been expanded to May 2022. The Group includes internal Managers plus external reps including Deakin Uni, Gordon Centre of Excellence, Geelong Tech School, GenU, Geelong Arts Centre, Design Council of Australia, Office of the Victorian Government Architect, Austeng and Creative Victoria. A broader range of organisations are involved through projects such as the Curatorial Group for Geelong Design Week.
- In 2020 we presented a major roadway sign at the entrance to Geelong at Hovels Creek with Geelong's status as a city of design – seen by 60,000 car movements per day. We also commissioned a set of UNESCO City of Design flags that were displayed around Geelong for almost 8 months in total across 2019 and 2020.

Local Level

There are plenty of great projects and networks supporting creative industries in Geelong. The focus of Geelong's City of Design in the first years has been around activating a couple of key projects that draw attention to and support creative, innovative and design and initiatives where the community can be involved.

Geelong Design Week

A dedicated design week/month/festival or celebration is common amongst the Cities of Design. Our first Design Week 2019, was a subset of Melbourne Design Week. We have great support from NGV. In 2020 we decided to host our own separate event (with full collaboration from NGV) and developed a full program of over 80 events due to commence on 20 March. To kick off the our first Design Week we have collaborated with Deakin University on an International Innovation Ecosystems Symposium with speakers from across the globe. Unfortunately both events were cancelled a few days from launch. Work on a 2021 program is well underway. 60 events have been secured so far.

CODE Souvenir:

This project seeks to lift the profile of local designers through a curated catalogue of "designed-in Geelong" products targeting the Business Events, Corporate Gifts, Tourism and retail markets. Over 70 items have been identified for inclusion following a public EOI process. We expect to launch this project in March during Geelong Design Week. This project was first delivered by Montreal, then Dundee and now Geelong.

Pecha Kucha Nights:

Events that give creatives/designers the opportunity to showcase a project in a short, fun and succinct internationally linked format. These have been held at a Bar in Geelong.

Design Champions:

This initiative profiles local businesses undertaking really creative initiatives. The idea has been to build a bank of stories and that celebrate clever projects.

Design Excellence:

In 2020 the City recruited an Urban Design and Heritage Manager who is overseeing a number of City of Design related initiatives:

Designing Geelong Webinars: A 12-month educational series to de-mystify how cities are designed. These webinars aim to improve the wider community's understanding of urban design and empower them to be better able to engage in the future development of Geelong.

Designing for Diversity: This Australian Research Council Linkage project will be led by the University of Melbourne in partnership with several local government authorities, including the City of Greater Geelong, the Victorian Government and several architectural and urban design practices. The project will provide both public and private sectors with tools to understand and engage with complexity across a range of key public spaces that consider the diverse demographic landscape of Australian cities. This project seeks to build capacity in adapting these spaces as intercultural diversity continues to grow and change.

Design Excellence Initiative: Comprising Design Advocacy, Design Review, Design Competitions, and Design Awards, this initiative aims to lift the quality of architecture and urban design in Geelong. Working with the Office of the Victorian Government Architect and key stakeholders, the City will establish a local design review panel in Geelong, to work alongside the Victorian Design Review Panel, and provide more contextual design advice for future development. This will include training for local architects and urban designers to become panel members.

Designing with Country: Working with the Wadawurrung Traditional Owners Aboriginal Corporation, DELWP and the Office of the Victorian Government Architect, the City is establishing a working group to develop Wadawurrung placemaking guidelines to inform the future design of Geelong. This ground-breaking initiative seeks to embed these guidelines within the planning scheme – a first ever in Australia.

Showcasing our built environment: A new section will be added to the Geelong UNESCO City of Design website – www.geelongcityofdesign.com.au to showcase existing and new civic and private developments in Geelong that demonstrate design excellence, including some of our outstanding heritage buildings and landscapes.

Supporting Arts and Culture Industries through COVID:

In response to COVID-19, the City's Arts & Culture team has developed a series of initiatives to support the healing, strengthening and future evolution of our creative communities.

Geelong COVID-19 Arts Recovery (G-CAR) Advisory Panel

Twenty-one leading cultural and creative practitioners who work across the arts, cultural, entertainment and heritage sectors have been appointed to the G-CAR Advisory Panel. The role of the panel is to understand how the pandemic is affecting professional practices and respond with new insights and support programs.

Arts Industry Commissions (AIC) Program

The Arts Industry Commissions Program offers a series of new commissioning opportunities designed to provide support to professionals working in the arts, cultural and heritage sectors who have been impacted adversely by COVID-19. It aims to generate cross-industry partnerships that will positively impact a range of areas relevant to community life. The program offered up to 15 individual commissions of up to \$20,000 each, for projects to be completed before 30 June 2021.

Grant writing workshops

In collaboration with the City's Economic Development team, the Arts & Culture team offered free grant-writing workshops for people working in the creative and cultural industries, including understanding guidelines, preparing a budget and support materials.

City of Design Framework Plan:

The framework plan that was due to commence in early 2020 (but delayed due to COVID) will set key aspirations and objectives for what we hope to achieve from the designation. From the work that I have done – not road-tested with anyone – I would think it might touch on:

- supporting talent/skills development
- supporting creative businesses

- increasing the profile of Geelong creatives
- identifying international opportunities
- encouraging design/design thinking for business resilience
- implementing design excellence initiatives and policy
- activating inclusive social and community outcomes

Victorian Creative Cities Network:

Since Geelong's designation in 2017, Bendigo (Gastronomy) and Ballarat (Craft and Folk Art) have also joined the Network. The City of Melbourne (Literature) has been in the Network the longest. Geelong has convened a Network of this group which now has traction with the Victorian Government, UNESCO National Commission and has become a go to for other cities in Australia wanting to apply to the UCCN in future. Victoria is the only state to have such a strong presence of Creative Cities and we understand this will be acknowledged in the Vic Govt's new Creative State Strategy.

International Level

- UCCN AGM Fabriano, Italy 2019 – Geelong (CoGG) presented on the Clever and Creative Community Vision.
- Singapore Design Week March 2019 – Geelong (Deakin) was represented in a public panel on different aspects of design within the cities of design network.
- Detroit Design Month September 2019 – Geelong (CoGG) was represented in a public panel on Design – Manufacturing
- UNESCO Creative Cities Asia Pacific Conference October 2019 Adelaide – Geelong (CoGG) participated in one of the panel sessions across the two-day conference.
- Cities of Design Convening July 2020 – Geelong (Multicultural Aged Care Services Geelong) was selected from a list of over 100 projects to form part of an international public panel hosted by Kaunas, Lithuania on Design led recovery to COVID
- Cities of Design Subnetwork meeting – (hosted virtually by Graz Austria) October 2020, Geelong pitched and was successful in its bid to host the Cities of Design Subnetwork Meeting in Geelong in October 2021.

Participation in and supporting development of the UCCN Network

2019 May – Geelong participated in the evaluation of 4-year Monitoring Reports (due in 2018) (4 reports).

2019 October – Geelong led the assessment of applications from cities applying to be part of the UCCN intake in 2019 (9 applications).

2020 May – Geelong led the assessment of 4 year Monitoring Reports (due in 2019) (6 reports).

2020 June – Geelong participated in the organisation of the "COVID Recovery through Design" event hosted in July 2020 by the Cities of Design.

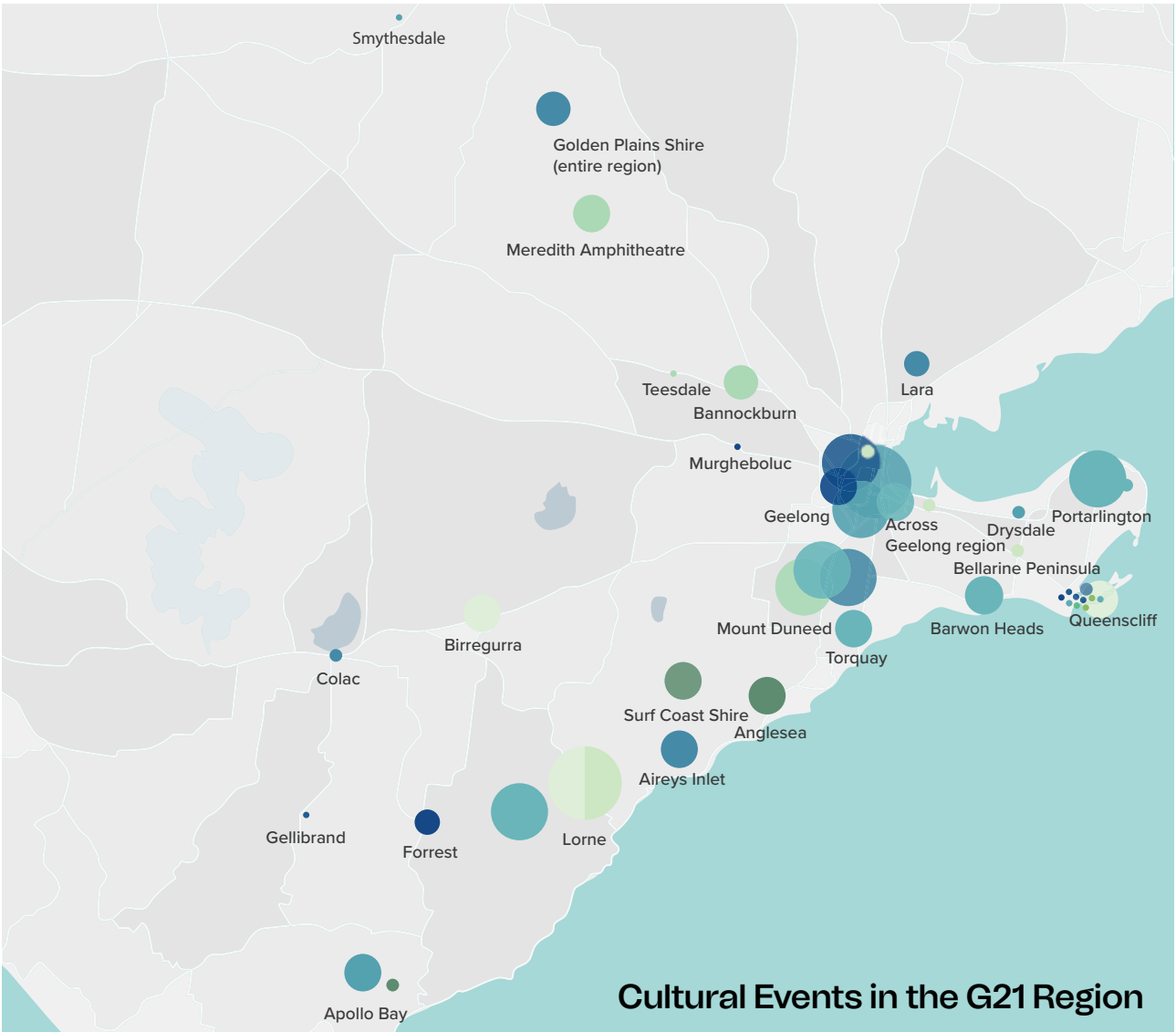
To be successfully making in-roads in the UCCN a city should be working across all three levels of engagement. Geelong has only been in the network for three years, one of which was 2020 and the challenges of COVID, given this I believe we have set a cracking pace.

It has taken some time to set up projects and build the relationships we have required. As an Economic Development Unit we have very strong relationships that have helped us to drive collaborations and build momentum. Until you have something to show it is difficult to rally people together. At the beginning it may have looked like things were going very slowly. We had hoped that Geelong Design Week 2020 would have been the catalyst but unfortunately COVID interrupted that. We have events, ideas and initiatives are coming through to us all the time and it's a matter of identifying those that we can support. The UCCN is a long term proposition. We will get out of it what we have put in and we look forward to being guided by the community on how the designation should be driven.

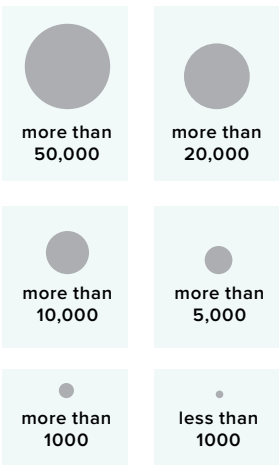
We have worked hard to build a strong reputation within the international Cities of Design network and are participating in a number of projects that we hope to share in the not too distant future. These connections would not exist if it weren't for the designation.

At the start, admittedly the advice we had received had us embarking on a path of developing Geelong as Australia's design centre of excellence. This is not what the designation is about. It's about empowering our creatives, businesses and leaders to use design as a means to make us a smart, resilient, clever and inclusive community and an even more fantastic place to live.

APPENDICES — Appendix E – Cultural Events in the G21 Region



ATTENDEES



JAN FEB MAR APR MAY JUN JUL AUG SEP OCT NOV DEC											
SURF COAST SHIRE											
Surf Coast Arts Trail											
Lorne Sculpture Biennale											
Aireys Open Mic Festival											
Anglesea One Act Play Festival											
Falls Festival											
Nightjar Festival											
GOLDEN PLAINS											
Meredith Music Festival											
Golden Plains Music Festival											
Golden Plains Twilight Market											
Bluestone Blues Festival											
Golden Plains Arts Trail											
Smythesdale Arts and Music Fiesta											
Teesdale Twilight Market and Carols											
BOROUGH OF QUEENSCLIFFE											
Boxwood Festival											
Sacred Edge Festival											
Queenscliff Literary Festival											
Bellarine Lighthouse Film Festival											
Refugee Week Film Screening											
Low Light Festival											
St Kilda Shorts Film Festival											
Peebles Print Prize											
History Week											
Bellarine Arts Trail											
Queenscliff Music Festival											
Blues Train											
Salt Indigenous Exhibitions											
in partnership with McCulloch & McCulloch											
COLAC OTWAY SHIRE											
Apollo Bay Seafood Festival											
Kana Festival											
Gellibrand Music Festival											
Forrest Soup Festival											
Winter Wild											
Birregurra Festival and Art Show											
CITY OF GREATER GEELONG											
The Anchorage											
Portarlington Mussel Festival											
A Day on the Green											
Festival of Sails											
Nightjar Festival											
Geelong Rainbow Festival Pride											
Great Australian Beer Festival											
Festival of Glass											
Pako Festa											
A Day on the Green											
Lara Food and Wine Festival											
Geelong After Dark											
Spiegeltent											
Toast to the Coast											
Word for Word Festival											
A Day on the Green											
Wonderland Spiegeltent											

APPENDICES —

Appendix F – Biographies

TONY GRYBOWSKI

and Associates

Tony Grybowski
Director
Telephone: 0497 966 777
Email: tony@grybowski.me

In 2019, Tony established a Consulting Practice with the objective to form project teams of leading national and international experts to address issues and reviews of the Australian Arts and Cultural sector. Since Establishing Tony Grybowski & Associates the company has worked for the South Australian, Tasmanian, Victorian and Queensland Governments providing Reviews, critical strategic advice and Executive Leadership. Clients across the arts sector have included Bangarra Dance Theatre, The Tasmanian Symphony, West Australian Ballet, Back to Back Theatre, STRUT Dance – the national choreography centre, The Wheeler Centre for Writing Books and Ideas, and ACOLA (Australian Council for Learned Academics). Tony's principal consulting partner and advisor is Graeme Gherashe.

Tony was Chief Executive Officer of the Australia Council for the Arts, the Australian Government's arts funding and advisory body from May 2013 to October 2018. Tony led the Council through its most significant period of strategic and organisational reform, delivering its inaugural overarching strategy A Culturally Ambitious Nation, launched in 2014, new arts funding model, organisational structure, international strategic arts development, research program and integrated support for First Nations people. Tony has extensive government policy and strategy experience and worked on the review and evaluation of numerous policies and frameworks including Playing Australia, the Visual Arts and Crafts Strategy, the Major Performing Arts Framework, the National Cultural Policy and various reviews of the small to medium sector.

Peter Morton

Peter is an accomplished arts administrator, writer and researcher and has worked across a number of projects with Tony and led the writing process on this project. Peter Morton has had a rich and diverse career across some of this country's most significant organisations. This has included a decade as an award winning producer and presenter for ABC Radio National, and subsequently a term as Chief of Staff to the ABC Managing Director David Hill, a high point in the organisation's history and marked by

its strength of commitment to Australian content and an expansion of its digital and international services.

More recently Peter has held senior roles at two of NSW's most important cultural institutions – the Museum of Applied Arts and Sciences and Sydney Living Museums. Each of the roles have required high level liaison and management across Board and Executive, co-ordination with Ministerial offices and sophisticated analytical and communication skills. This has included leadership of the strategic planning processes for both museums, representing each at government-initiated inquiries and reviews, and reviewing and enhancing governance practice.

Peter later served as Chief of Staff to the Lord Mayor of Sydney for a term coinciding with city's hosting of the 2000 Olympic Games. The diverse challenges of planning and delivering the city's 'host city' responsibilities were a highlight of this chapter in his career.

Kitty Walker

Kitty is a highly respected communications and fundraising expert with more than a decade of experience working across the Australian not-for-profit industry.

She has held senior positions at the National Gallery of Victoria, The Australian Ballet and more recently as Director of Development for Australia's national Aboriginal and Torres Strait Islander dance company, Bangarra Dance Theatre. During her time with Bangarra she led the Board and Executive on creating a new strategic outlook which underpinned her strategy of diversifying the company's revenue streams. In her final year with the company she led the highest year-on-year increase in development income in the company's 30-year history. Currently, Kitty is working with the Board and team at Reach to develop a new strategic vision as Head of Strategy and Government Relations.

Kitty is fascinated by the power of good strategy development and has an extensive record of increasing earned revenue across a variety of streams on the back of a clear vision and strategic priorities. She is an expert in external relations management with many years of experience managing government, corporate and philanthropic partnerships.

As well as her work with Tony Grybowski & Associates, Kitty is a Senior Strategist with Dalton Garland Blanchard, is a founding member of the Lighthouse Arts Collective and is the Founder and Leader of Queenscliffe Climate Action.