



CREATING A CAREER IN CULTURAL AND CREATIVE INDUSTRIES

JOBSPLUS

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INTRODUCTION

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

METHODOLOGY

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

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

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

All data relating to employment, vacancies and registered jobseekers has been extracted from Jobsplus' database. This implies that any vacancies which are not notified to Jobsplus and any individuals looking for a job through channels other than registering with Jobsplus are excluded from the data. It is being intended that all statistical figures are first analysed on a quarterly basis; subsequently an analysis on an annual basis should be conducted when the necessary observations become available. Since the research is aimed at analysing the impact on employment pre- and during Valletta 2018, the statistical analysis will run from 2014 up to 2018.

In order to determine the NACE² codes which should be classified under the Cultural and Creative Industries, feedback was gathered from other public entities such as the National Statistics Office (NSO) and the Ministry for Finance (MFIN). Furthermore, reference was made to a number of reports which included guidelines on the NACEs and ISCO³ codes which should be included under CCIs. A full list of NACE codes included under CCIs for the purpose of this research is included in Appendix A.

² NACE or Nomenclature statistique des activités économiques dans la Communauté européenne is the statistical classification of Economic Activities in the EU.

³ The International Standard Classification of Occupations (ISCO) is one of the main international classifications for which the International Labour Organisation is responsible. ISCO is a tool for organizing jobs into a clearly defined set of groups according to the tasks and duties undertaken in the job (ILO web portal).

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

FINDINGS

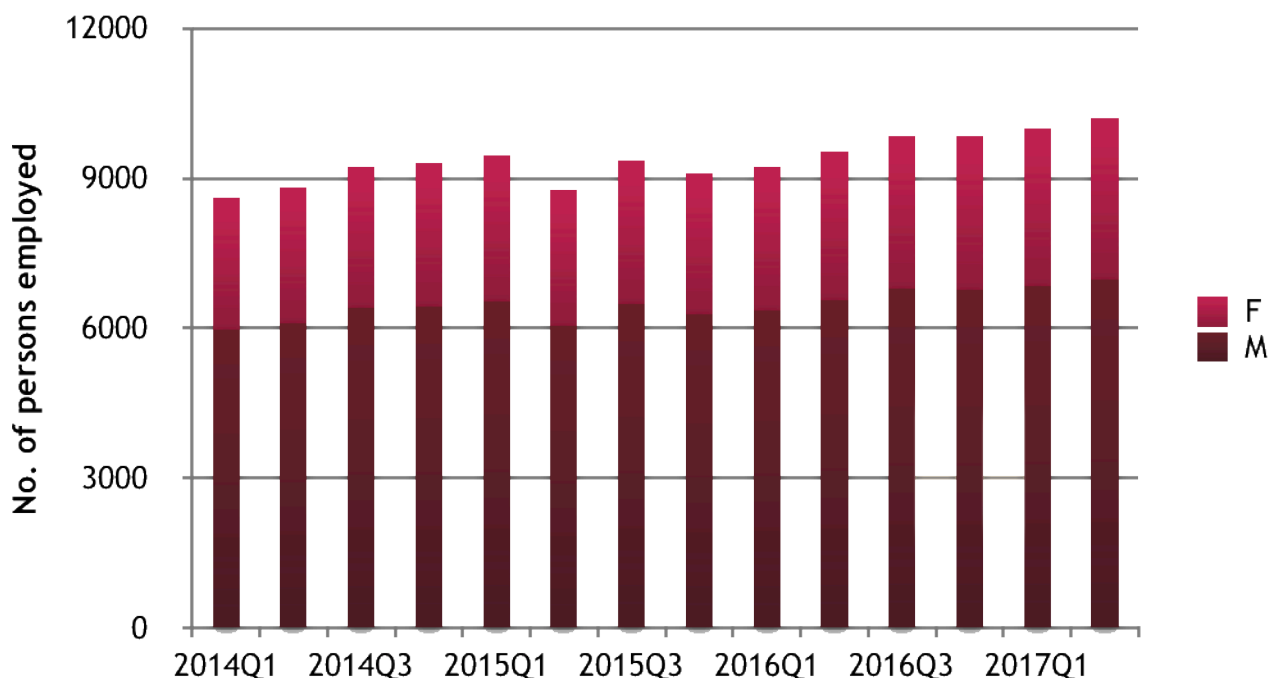
Statistical Analysis

The main results of the research conducted during 2017 are displayed and described in detail below.

Full time employment in the CCIs

As can be viewed in Figure 1, total full-time employment in the Cultural and Creative Industries has increased from 8,618 in Quarter 1 of 2014 to 10,201 in Quarter 2 of 2017, equivalent to an 18.4% increase over a three-year period. This increase is equally reflected in both gender cohorts such that an additional 995 males and 588 females were engaged in gainful employment within the creative sector, corresponding to a 16.6% and 22.3% increase respectively. One should note that during the same period under review, total full-time employment in Malta also increased by approximately 18%. The majority of the 10,201 individuals employed on a full-time basis in the CCIs were employed in the private sector, 93.6%, whilst the remaining 6.4% were employed in the public sector. Although the number of gainfully employed persons in the CCIs decreased during quarter 2 of 2015, mainly due to a significant decrease in the number of persons employed in the Television programming and broadcasting activities sector, it gained pace in the subsequent quarters. Out of the 9,847 individuals gainfully employed in the CCIs as at end of 2016, 73% were Maltese Nationals, 23% were EU Nationals and 4% were Third Country Nationals. The number of foreigners employed in the CCIs pertains to approximately 9% of the total number of foreigner workers in gainful employment during the same period; of which, 64.3% were males whilst 35.7% were females.

Figure 1: Full-time employment in CCIs



The top 5 NACEs contributing to Full-time employment in the CCI as at end of June 2017 (i.e. 2017 Q2), were:

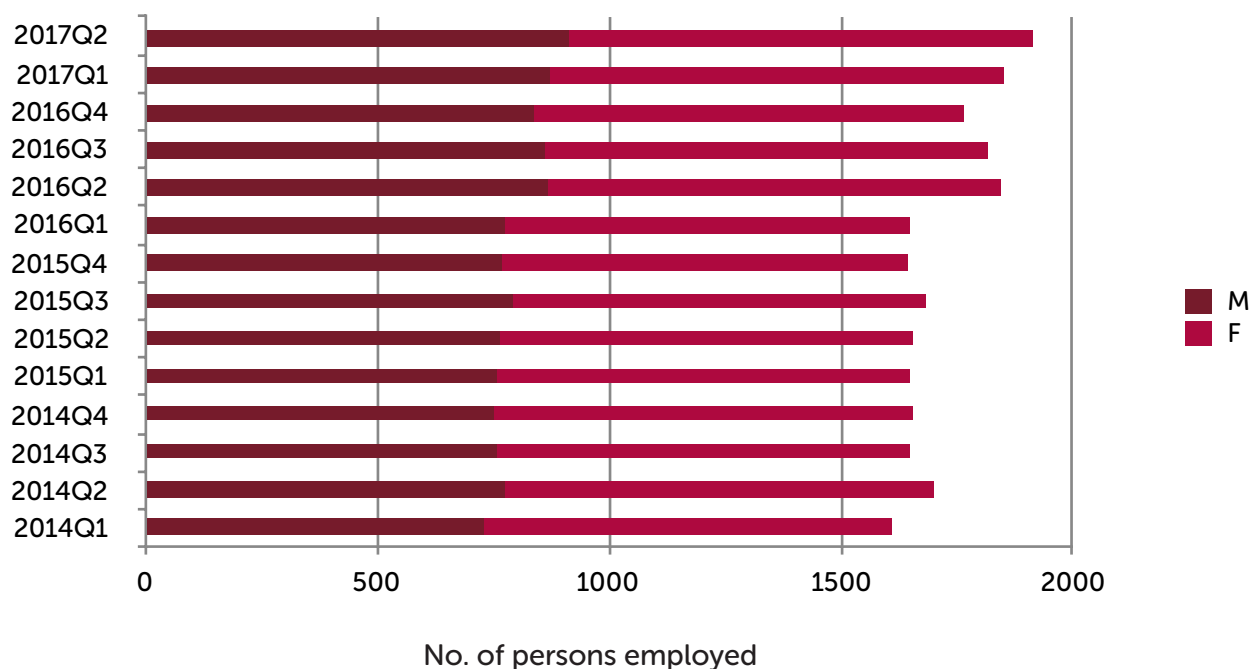
1. 62.01 – Computer Programming Activities (22.0%)
2. 18.12 – Other printing (10.9%)
3. 73.11 - Advertising Agencies (10.2%)
4. 71.11 – Architectural Activities (7.7%)
5. 71.12 – Engineering activities and related technical consultancy (6.1%)

23% of the number of persons employed on a full-time basis in the CCI were employed in Computer Programming Activities followed by Advertising Agencies and Other Printing Activities with 12% and 10% respectively.

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

Figure 2 displays part-time employment (as a primary job) in the CCI between 2014 Q1 and 2017 Q2. In general, total part-time employment in the CCI increased over a three-year period from 1,612 in 2014 Q1 to 1,912 in 2017 Q2, equivalent to an 18.6% increase. Part-time employment in the CCI was more volatile during the period under review as it increased in the second quarter of 2014, decreased for the subsequent three quarters and starting increasing again thereafter, with a major rise in Q2 of 2016 due to an influx of workers in the activities of amusement parks and theme parks and other amusement and recreation activities industries. As at quarter 2 of 2017 both the number of females and the number of males in part-time employment had increased, by 13% and 25% respectively compared to the first quarter of 2014. Similarly, the majority of part-time workers were employed in the private sector with only 2% employed in the public sector. As at end of December 2016, foreigners occupied approximately 19% of part-time employment in the CCI; of which 93.7% were EU Nationals and 6.3% were Third Country Nationals.

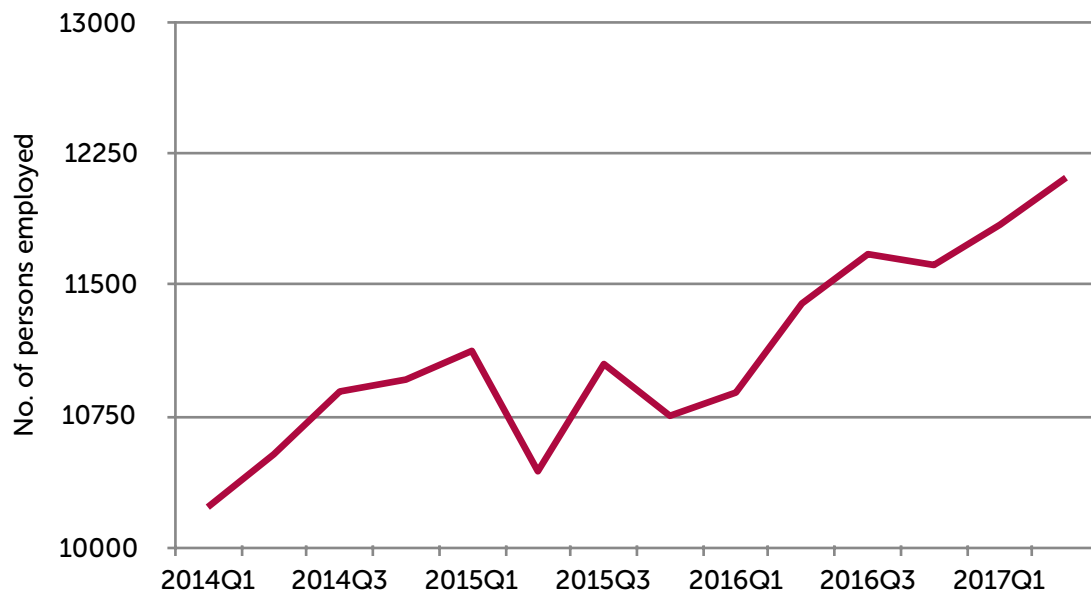
Figure 2: Part-time Employment in CCI



Total Employment in CCIs

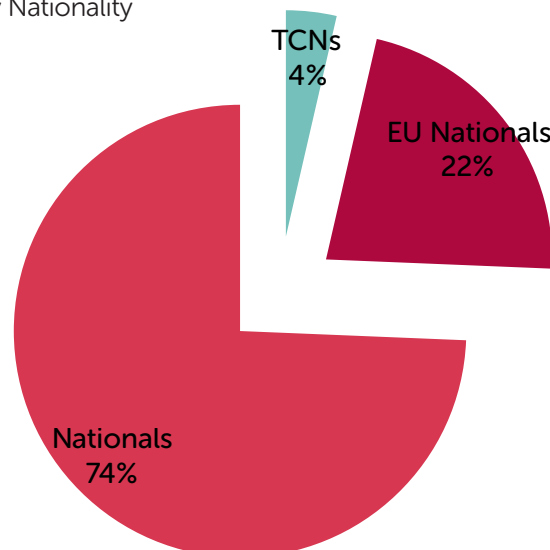
Figure 3 portrays total employment (full-time + primary part-time employment) in the CCIs for the period under review. Total employment in the CCIs increased from 10,230 in Q1 of 2014 to 12,113 in Q2 of 2017; equivalent to an 18% increase over the three-year period. Whilst the share of full-time employment in the CCIs as a proportion of total full-time employment stood at 5.4% in 2014 Q1 and in 2017 Q2, part-time employment in the CCIs as a share of total part-time employment increased from 0.3 percentage points from 2014Q1 to 2017Q2. Moreover, total employment (full-time + primary part-time employment) in CCIs as at end of June 2017 amounted to 12,113; approximately 5.37% of employment in the total economy.

Figure 3: Total employment in CCIs



Out of the total number of persons employed (full-time + primary part time employment) in the CCIs as at end of December 2016, 74% were Maltese nationals, 22% were EU nationals and 4% were Third Country nationals. Moreover, total foreigners employed in the CCIs (full-time + primary part-time employment) amounted to approximately 8.24% of total foreigners employed in the Maltese labour market; of which 61.4% were males whilst 38.6% were females.

Figure 4: Employment in CCIs by Nationality



Notified Vacancies to Jobsplus (relating to CCIs)

The number of vacancies notified to Jobsplus relating to the CCIs has also been analysed. Overall, in absolute terms, the number of vacancies pertaining to occupations within the culture and creative sector has increased from 166 in 2014 Q1 to 343 in 2017 Q4. Notwithstanding this rise, vacancies relating to the CCIs have been quite unstable over the period under review, as evidenced by fluctuations in Figure 5, with vacancies reaching a peak in 2016 Q2 with a total of 527 notified vacancies within the same quarter. On average, between 2014 and 2017, the highest number of notified vacancies during an entire year was registered in 2016 where nearly 7% of all vacancies notified to Jobsplus related to the CCIs. As at end of December 2017 the number of vacancies notified to Jobsplus, relating to the CCIs, accounted for 5.4% of the total number of vacancies notified to Jobsplus during the fourth quarter of 2017.

Figure 5: Vacancies notified to Jobsplus relating to CCIs

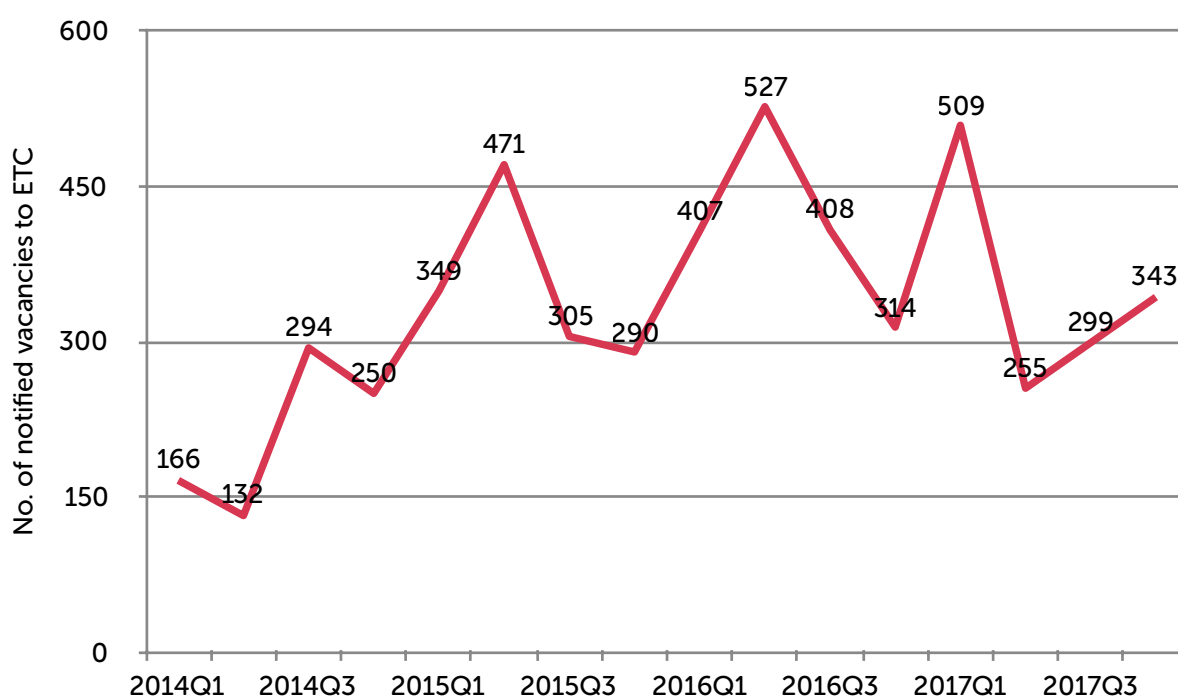
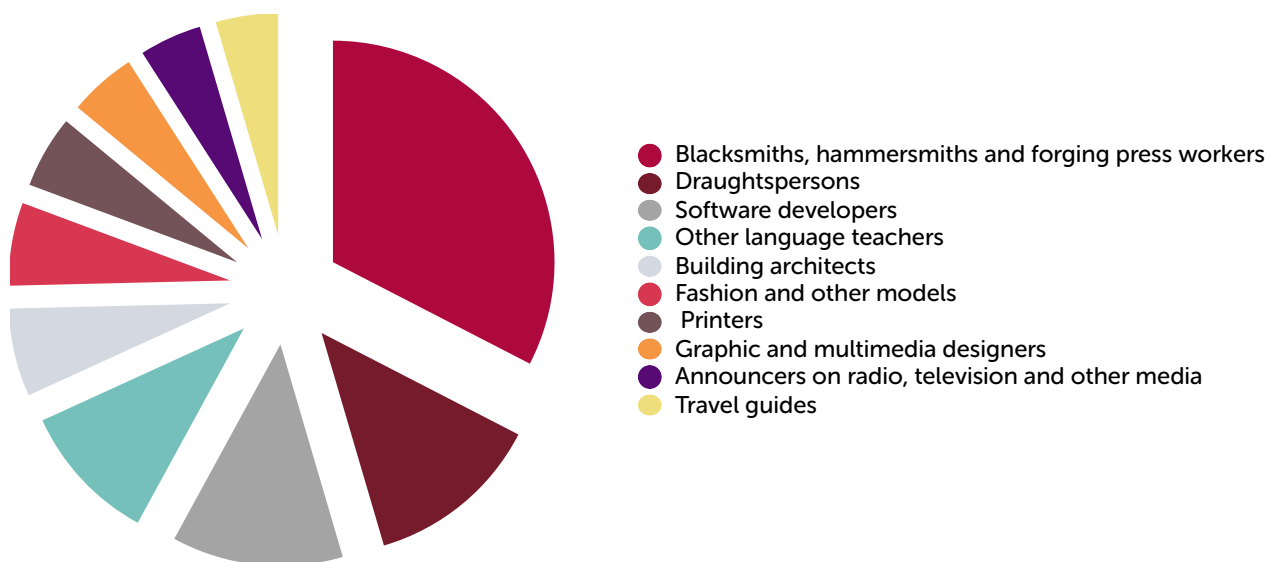


Figure 6 represents the top 10 occupations relating to the CCIs which registered the highest number of vacancies between October and December of 2017. The highest number of registered vacancies during Q4 of 2017 pertained to blacksmiths, hammersmiths and forging press workers which accounted for 25% of total vacancies during the same quarter, followed by draughtspersons and software developers with 10% and 9% respectively.

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



Registered Jobseekers (searching for jobs relating to CCIs)

In general, the number of jobseekers looking for employment in the CCIs decreased from 483 in quarter 1 of 2014 to 174 in quarter 4 of 2017. During the first two years under review (Q1 of 2014 to Q1 of 2016), the number of jobseekers looking for jobs in the creative sector remained stable, as depicted in figure 7, with the exception of a noticeable decrease observed in 2015 Q1. In the subsequent quarter the number of jobseekers seeking employment in the CCIs increased to 483 and then decreased considerably thereafter. Notwithstanding, overall unemployment in the Maltese labour market has declined drastically throughout recent years, with the number of registered unemployed persons dropping from 7,789 in January 2014 to 2,167 in December 2017. The significant increases in Q2 and Q4 of 2015 were mainly pertinent to occupation “2654 – Film, stage related directors and producers”, since a number of jobseekers started showing interest in occupations classified under this ISCO code.

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

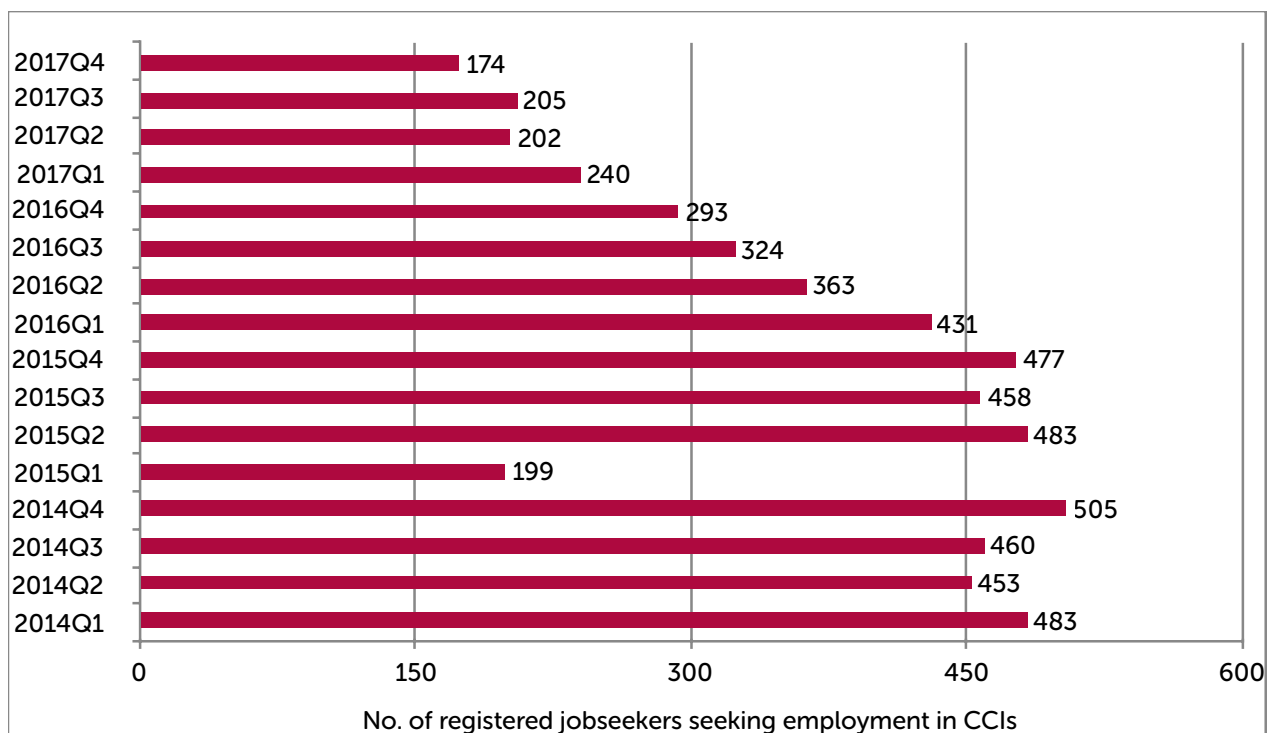
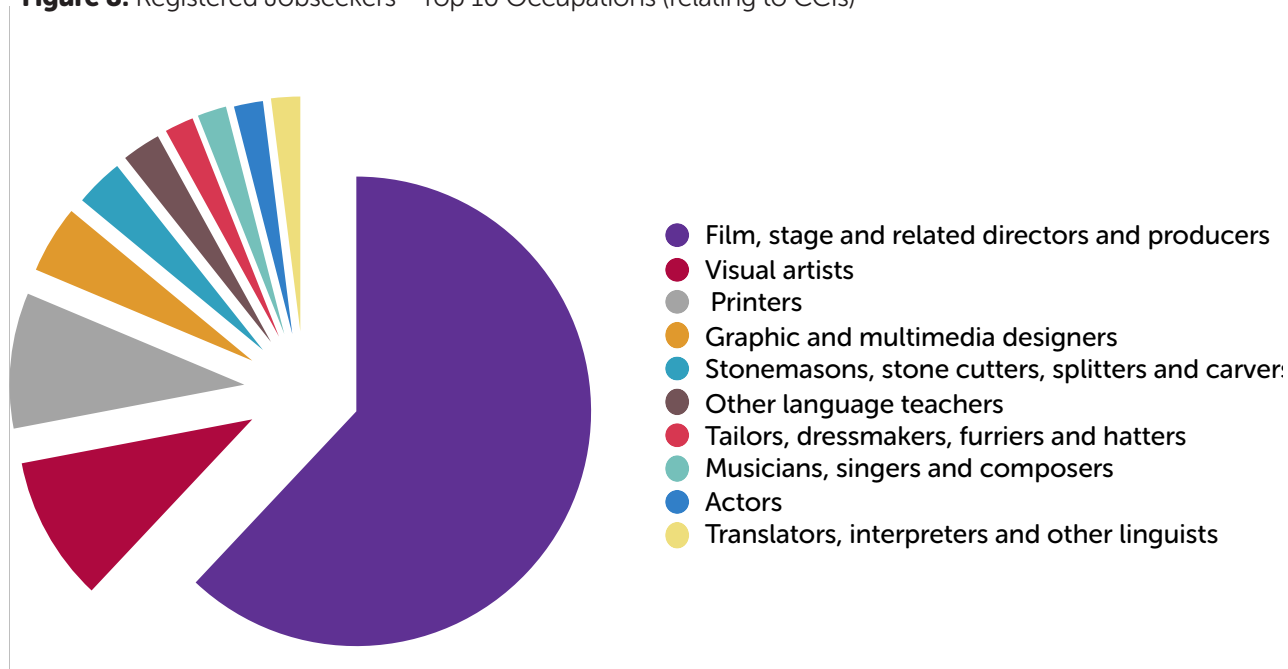


Figure 8 depicts the top 10 occupations (relating to the CCIs) which registered jobseekers listed as their first preference of job, as at end of December 2017. Around 53% of such jobseekers revealed that their job preference related to Film, stage and related directors and producers whereas 9% and 8% of jobseekers favoured occupations relating to Visual Artists and Printers respectively.

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



CONCLUSIONS & WAY FORWARD

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

Moreover, ideally such analysis would be linked with concrete measures and initiatives directly related to Valletta 2018 (such as marketing, events, festivals) to determine the actual impact of Valletta 2018 on employment. Changes in employment also need to be viewed through the lens of factors outside Valletta 2018, such as a number of film productions being filmed in Malta during specific periods of time.

It is envisaged that a continuous statistical analysis will continue during the year 2018 on a quarterly basis and subsequently on an annual basis as well. With regards to the analysis from a labour market perspective, the way forward is to have research beyond the 2018 period, as it is only through such research which covers different periods that an analysis can be conducted.

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