

Australian Cultural and Creative Activity: A Population and Hotspot Analysis

Ballarat
Victoria



**Digital Media
Research Centre**



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Australian Government
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This report is an output of an Australian Research Council Linkage project (LP160101724) led by Queensland University of Technology in partnership with the University of Newcastle, Arts Queensland, Create NSW, Creative Victoria, Arts South Australia and the WA Department of Culture and the Arts. Susan Kerrigan, Phillip McIntyre, Marion McCutcheon, and Stuart Cunningham, 2020. *Australian Cultural and Creative Activity: A Population and Hotspot Analysis: Ballarat*, Brisbane. Digital Media Research Centre. Available <https://research.qut.edu.au/creativehotspots/>.

Strategic summary

Ballarat sits on Wathaurong land at the crossroads of four main Victorian highways. It has a strong creative services sector and a highly engaged creative and performing arts sector, based on employment of 2,137 'creatives' from 2011 to 2016, with a mean income across all Creative Industries sectors of \$55,600.

- Creative Industries workers are an essential part of Ballarat's economy, which has prospered because of its regional geography and proximity to Melbourne.
- The liveability of Ballarat makes up for wages that are lower than in the metropolitan centre.
- A number of State agencies located in Ballarat support and build entrepreneurial activity.

Early release of the National Broadband Network (NBN) continues to be paramount in developing Ballarat's technology businesses, enabled by Federation University's Technology Parks, and has become critical to games development in the region.

- IBM is the longest serving occupant of Ballarat's Tech Park, employing 650 people. IBM offers business technology solutions and is moving into consultations.
- IBM's 20-year presence sets the benchmark as a 'knowledge hub', providing software and technology capability that has been embedded across Ballarat's four Tech Parks and more broadly into Ballarat Health Services.

Games development and career pathways in the gaming industry are offered through a scaled approach from school, to university, to start-up, to entrepreneur.

- Local well-known gaming entrepreneur Matt Hall, who built the successful *Crossy Road*, spotlights Ballarat as a place that nurtures gaming through infrastructure and peer support.
- 'Getting to Games', and the Games Developers Association of Victoria promote gaming careers to school and university students, supported by Regional Development Victoria (RDV) and Federation University.
- Structured career pathways exist to build gaming entrepreneurs through Ballarat Tech School, Hacker Space, Federation University, and partnerships with P-tech and IBM.
- Ballarat Runway accelerator program connects start-ups through FabLab and support.

Ballarat values performing arts, invests in local theatre, hosts the oldest eisteddfod in Australia, and offers an educational pathway to cultural production careers.

- The Royal South Street Eisteddfod is Australia's oldest eisteddfod, attracting 11,000 performers and 34,000 audience members annually from Australia and New Zealand.

- The historic Her Majesty's Theatre welcomes 75,000 patrons and 15,000 performers a year.
- Local and State Government ongoing support for performing arts has been essential for this sector to return economic benefits to the broader economy.
- Music production has relied on the NBN, which has been a game-changer for independent musicians and community involvement.
- Performing arts are embedded through schools and in Federation University degrees offered at Camp Street Campus, including singing, dancing, theatre, music, and musical theatre.
- Really strong amateur theatre companies in Ballarat produce high-quality productions.
- Numerous high schools have performing arts venues and programs and Ballarat Grammar School has the largest pipe band in the country.

Being creative has become part of Ballarat's business language, as creative and critical thinkers.

- In 2019, Ballarat was designated a UNESCO City of Crafts and Folk Art.
- The City of Ballarat's 2019 *Creative City Strategy* has plans for live music, public art, and venues such as Her Majesty's Theatre, the Art Gallery, the Eureka Centre, and Civic Hall.
- Local and State Governments value the venues that attract cultural tourists, such as Sovereign Hill, the Gold Museum, the Eureka Centre, and the Art Gallery of Ballarat, which has hosted the Archibald Prize and the Ballarat International Foto Biennale.
- Public events such as White Night and use of spaces such as laneways are seen as opportunities for innovation and arts-based business.

Ballarat developed a successful collaborative ecosystem when private enterprise and local government planners came together to map out government and privately funded projects.

- Government and private enterprise planning conversations continue to benefit these projects.
- Ballarat Tech School and Startup Ballarat are managed by the City of Ballarat with LaunchVic funding.
- Platypus is a federally funded entrepreneurship facility, and private coworking space.
- Ballarat Runway's accelerator program supports local start-ups and entrepreneurs with creative businesses ideas, as also occurs in Geelong.
- RDV is focused on local businesses that can provide jobs; the Stronger Regional Communities program has supported three events, although one was considered unsuccessful.
- Government investment in walking trails and tourism supports businesses that employ Creative Industries workers.

Creative Services businesses that are using the agencies model are in a growth phase.

- Design agencies have become high-end digital media production companies.
- Architects benefit from their proximity to Melbourne.
- Ballarat heritage landscape is a screen industry attractor for feature films, documentaries, and television series.
- In media, screen, radio, and print have been maintained, consistent with other regions.

Recommendations:

- The early NBN connections have allowed Ballarat's digital software and gaming sector to prosper and this should be maintained by local and state governments
- Ballarat Art Gallery should be supported to grow its Indigenous collection as a point of distinction from other regional galleries
- The Screen Industry could be better supported through the development of a regional screen agency.
- Better cooperation between Bendigo and Ballarat Councils could boost both regional cities, with Ballarat strong in creative services and Bendigo's strength in cultural production.

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Acknowledgements

The research team gratefully acknowledge the assistance of the following people and organisations for providing the information and insights that made this report possible:

Rachel Abela: Regional Development Victoria
Chris Ashmore: Podcasting
Gerard Ballinger: Jazz events
Helen Bath: Voice FM Community Radio
Christine Berry: Voice FM Community Radio
Richard Chew: Federation University Arts Academy
Caleb Cluff: The Courier newspaper
Adam Connally: The Lost Ones
Julia Cornwell: Regional Development Victoria
Lucy Gilbert: Uncover magazine
Rebecca Fletcher: Ballarat Writers
Clare Gervasoni: Ballarat Heritage Services & FedUni
Matt Hall: *Crossy Road* game developer
Rex Hardware; Music producer, Ballarat Trades Hall events
Jessie Harman: Ballarat Symphony Orchestra
Daniel Henderson: Her Majesty's Theatre
Lucinda Horrocks: Wind & Sky Productions
Brett Macdonald: Royal South Street Society
Erin McCuskey: Yum Studio
Kirstyn McDermott: Words Out Loud
Krystina Menegazzo: Wootten leather craft
Kelli Moran: The City of Ballarat
Jary Nemo: Wind & Sky Productions
Marieke Ormsby: MJ Oh My Advertising
Stephen Ormsby: MJ Oh My Advertising
Jane Osborn: Regional Development Victoria
Nathan Porter: Porter Architects
Tara Poole: The City of Ballarat
Jeff Pulford: Federation Uni Tech Park
Nichola Sleight: Runway Ballarat
Emily Smith: The Lost Ones
Louise Tegart: The Art Gallery of Ballarat
Casey Thomas: Dark Shadow Studios
Kevin Thompson: Crossroads Music
Leon Underwood: Regional Development Victoria
Jane Walsh: Mass Motion
Scott White: Regional Development Victoria

Background and context

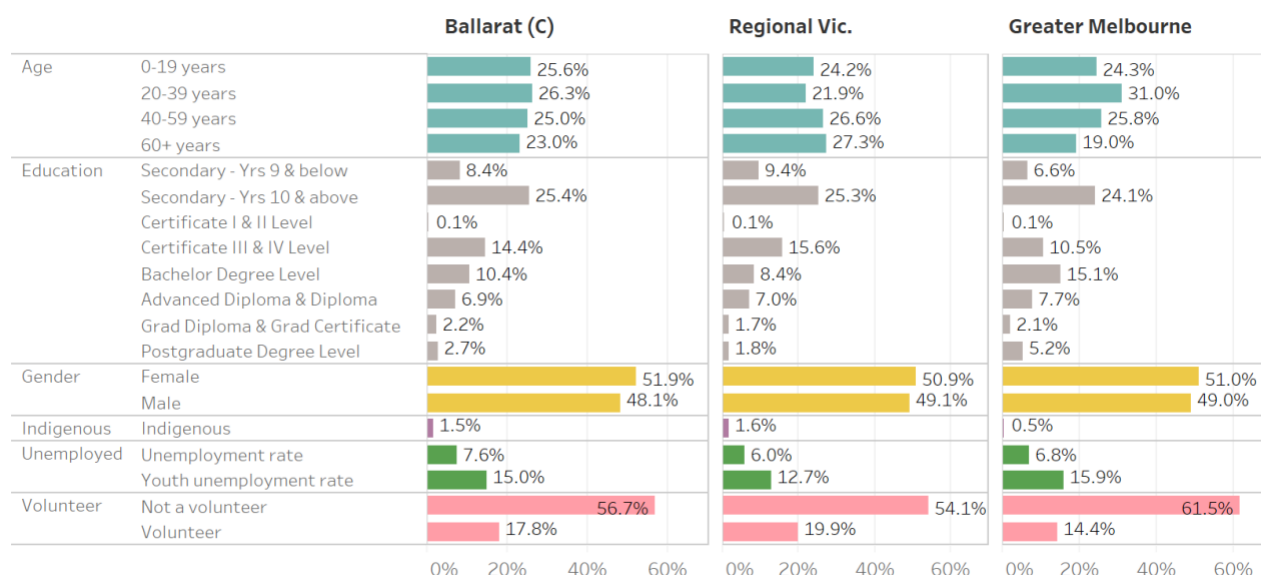
The City of Ballarat is Victoria’s third-largest city and sits on the land of the Wathaurong (Waddawurrung) people, who have been in the area for more than 25,000 years. European settlement beginning in the 1830s (Co-operative, 2020). Australian democracy was said to have been born in Ballarat in 1854 during a period of civil disobedience when 27 people, mostly rebels, died during the Eureka Stockade. With this historical event as part of its makeup the local government area of the City of Ballarat was created through the 1994 amalgamation of three council areas and parts of four shires. As Victoria’s largest inland centre the City of Ballarat now covers nearly 740 square kilometres and also includes the townships of Learmonth, Buninyong, Miners Rest and Cardigan Village. Situated in western Victoria, 110 kilometres from Melbourne, Ballarat is an important freight, tourist and commuter transport hub where four main highways converge (.idcommunity, 2020a). Traditionally, the region’s economy was underpinned by wealth from mineral and agricultural work, but has transitioned to manufacturing, tourism, health and community services.

Key amenities in Ballarat include three Federation University campuses, the Ballarat campus of the Australian Catholic University, two hospitals, the Ballarat Aquatic and Lifestyle Centre, and the Ballarat Showgrounds. The area is home to natural and man-made tourist attractions including Sovereign Hill, Ballarat Bird World, Ballarat Wildlife Park, Ballarat Botanical Gardens, Ballarat Aviation Museum, Ballarat Tramway Museum, the Eureka Centre, and Ballarat city centre.

Population

After a post-war influx of new inhabitants, Ballarat’s population remained relatively stable across the 1980s and into the early 1990s. From the late 1990s, Ballarat has experienced population growth, particularly in the inner-northern suburbs, prompted by an expansion in food processing and agricultural industries. In 2012 alone, the city’s population grew by 2 per cent. Between 2013 and 2019, Ballarat’s population grew from 96,000 to 109,505 (.idcommunity, 2020a).

Figure 1 Demographic profile by place of residence, Ballarat local government area compared with greater Melbourne and regional Victoria, 2016



Sources: Australian Bureau of Statistics (2016)

From an employment perspective, Remplan data from 2016 estimated that 48,443 people work in Ballarat. Similarly, 2016 Census data showed that 44,716 Ballarat residents were in employment, with nearly 25,500 of these working full-time. Ballarat represents 90.56% of the 53,491 people

working in Greater Ballarat, 1.77 % of the 2,730,332 people working in Victoria, and 0.45% of the 10,683,322 people working in Australia (.idcommunity, 2020b).

From an ancestry point of view, 2016 Census data shows that Ballarat is predominantly a population of European descent, with English, Australian, Irish, and Scottish being the four most nominated ancestry groups. The birthplace data from the same Census shows that more than 85,000 of the city's then 102,000 people were born in Australia; more than 9,500 people were born overseas and nearly 7,000 did not state their birthplace.

The liveability of regions such as Ballarat makes up for lower wages. As Leon Underwood from Regional Development Victoria stated, 'when you go back and you look at the figure per annum that you put on the Creative Industries wages, which doesn't seem a lot, but you're comparing that to what might be a slightly inflated figure in Melbourne, but the cost of living, bang for your buck, we figure we're a fair bit ahead' (Underwood iv, 26 June 2019).

Economy

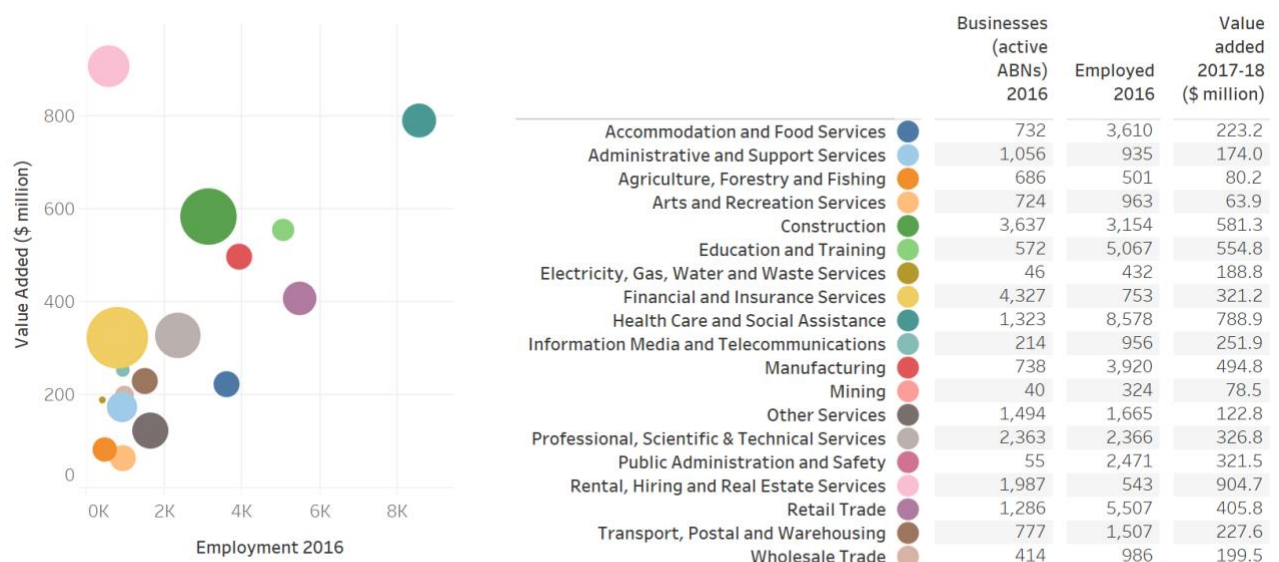
Ballarat's Gross Regional Product for 2019 was \$6.05 billion, which is 1.36% of the state's, with 8,860 local businesses in the Ballarat LGA (.idcommunity, 2020). Health Care and Social Assistance is the largest employer (with 18.7%), followed by Retail Trade (12%) and Education and Training (11%).

Table 1 Economic indicator summary, Ballarat local government area, 2016

	Population	Gross regional product (\$m, 2017-18 dollars)	Total employed	Total businesses
Measure	101,689	5,632	45,794	23,570
Avg annual growth, 2011 to 2016	1.7%	8.4%	3.3%	3.0%
% of state	1.7%	1.5%	1.7%	1.3%

Sources: Australian Bureau of Statistics (2016), (Australian Bureau of Statistics, 2018a), Australian Bureau of Statistics (2018b), .id (2019)

Figure 2 Economic activity by ANZSIC subdivision, Ballarat local government area



Notes: Bubble size ~ business count

Sources: Australian Bureau of Statistics (2016), Australian Business Register (2019), .idcommunity (2019), REMPLAN (2019)

These three top employers, i.e. Health Care and Social Assistance, Retail Trade, and Education and Training, account for 41.8% of local workers. Ballarat's local employment figures are higher than the Victorian state average (.idcommunity, 2020). Manufacturing declined between 2011 and 2016 (-

1,173 local workers), even though historically the region had a strong manufacturing base, which itself was a legacy of the gold rush. Locals pride themselves on this ‘capability of making things and manufacturing ... really clever people designing and tooling’ (Osborn iv, 26 June 2019). There is a large number of financial and insurance businesses operating out of Ballarat, followed by Construction and Professional, Scientific and Technical Services.

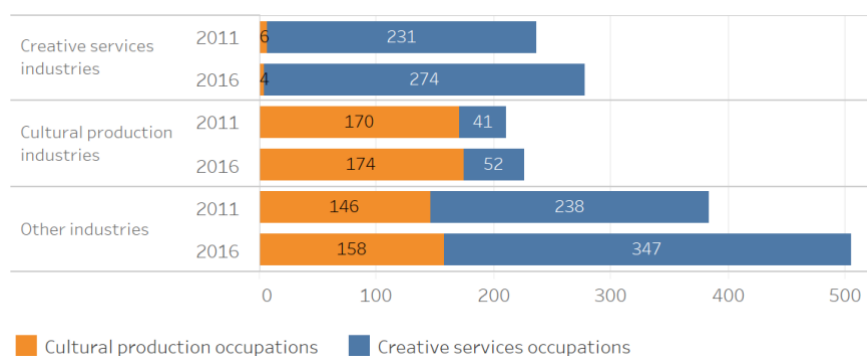
Creative economy

Victoria appears to be the ‘just so’ state, not too big and not too small, in terms of its creative economy because of its size and minor decentralisation. Ballarat is one of the regional commuter belt towns that surround Melbourne and has been able to sustain higher intensities of creative business because of efficient transport and infrastructure connecting it with the state’s capital. A 2013 Victorian Creative Economy report found there were ‘5,500 creative businesses ... located in rural Victoria, representing approximately 7% of all rural businesses’ (Essential Economics, 2013, p. 19). As this report points out, creative activities that engage with the broader economy through science, agriculture, community, and heritage, have higher levels of representations, particularly with visual arts and craft, journalism and writing, and architecture. It is also true historically that rural and regional Creative Industries workers seek jobs in metropolitan or capital cities.

In 2013, employment of rural residents showed there were fewer creative sector jobs in rural areas (Essential Economics 2013 p. 19). Rural creative workers have lower incomes and have a lower incidence of full-time employment, compared to metropolitan Melbourne’s creative workers (Essential Economics, 2013, p. 43). When comparing creative workers in regional cities to metropolitan Melbourne, rural creative workers have similar representation in Cultural Production sectors but ‘much lower representation’ in Creative Services (Essential Economics, 2013, p. 43). The characteristics of the rural creative worker, compared to the non-creative rural worker, are higher levels of education and preference for volunteerism; high preference to relocate from Melbourne, interstate or overseas; and a ‘higher propensity of business ownership and self-employment’ (Essential Economics, 2013, p. 43).

The data gathered for this study examined Creative Industries workers employed from 2011 to 2016, and found the mean income across all CI sectors in Ballarat was \$55,600, based on 2,137 ‘creatives’.

Figure 3 Creative service and cultural production employment by industry and occupation, 2011 and 2016, Ballarat local government area



Sources: Australian Bureau of Statistics (2016)

In Ballarat, the Creative Services (CS) sub-sector, consisting of architecture and design, advertising and marketing, web design, software app development and games, has good employment figures. Architecture and Design employed the most workers, with 164 ‘creatives’ drawing a mean wage of \$46,900. Software and Digital Content was the second-largest employer, with 141 ‘creatives’ earning a mean wage of \$69,200. The highest mean salary of \$70,700 was earned by Software and Digital Content specialists, followed by Advertising and Marketing workers employed inside the Visual and Performing Arts sector, who earned slightly less at \$63,700. The Cultural Production (CP) sub-sector,

that is, visual and performing arts, music, film TV and radio, and publishing, was consistent with other regional hotspots, with the lowest income of \$29,900 being for Visual Arts specialists and the highest salary of \$58,500 for Film, TV and Radio workers who were employed in the Visual and Performing Arts sub-sector. For embedded creatives, those working in creative occupations in other industries, the highest income was within Creative Services, with Software and Digital Content employees drawing an average wage of \$85,500. Embedded creative workers are in a growth cycle (Figure 3), a trend seen across all national hotspots, particularly with Creative Services employees in other industries.

Changes in Creative Industries employment, total earnings and mean income and business registrations have been tracked. The comet chart below (see Figure 4) provides a comparison between 2011 and 2016 Ballarat data, revealing a unique decline in Software and Digital Content for both employed persons in very small businesses (or micro businesses, those with no GST registration and turnover of less than \$75,000) and larger businesses (those registered for GST). This is an unusual result when compared to other Victorian hotspots studied, where strong growth has been observed for that sub-sector. Examination by sector indicates significant growth in Architecture and Design, but it is noted there is decline in mean income for that sector for both micro businesses and larger businesses, with growth occurring in self-employment, which was stronger than employment in larger GST-paying business.

Figure 4 Creative industry employment, total earnings and mean income by place of work compared with business registrations, 2011 and 2016, Ballarat local government area



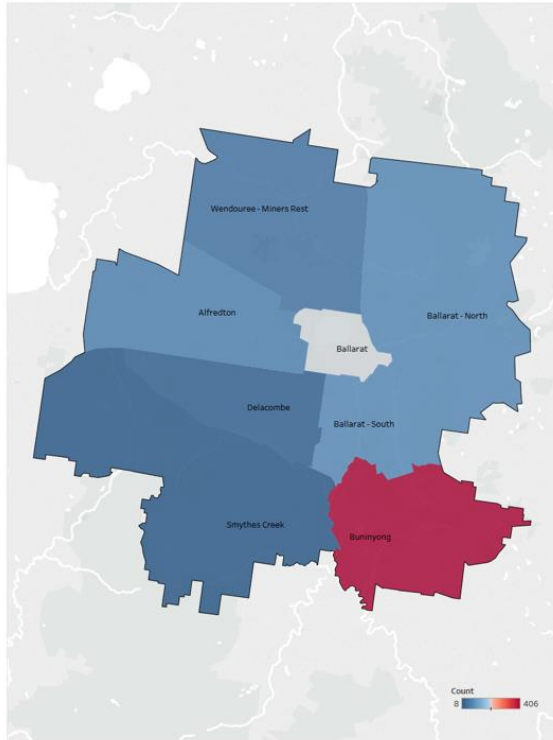
Sources: Australian Bureau of Statistics (2016), Australian Business Register (2019)

There are several areas where there is no growth, or there is a decline, such as employment and earnings for Advertising and Marketing, Film, TV and Radio, and Publishing. However Publishing shows a significant growth in mean income, while the number of employed persons shows no change in larger businesses and micro businesses. This reflects organisational change in the newspaper industry, in that there are fewer jobs, but those who remain appear to be paid more. Visual and Performing Arts shows growth across all measures; employed persons, total earning, and mean income. It is of note that micro businesses in the Visual and Performing Arts sectors are doing well (see green comets at the top of Figure 4) when compared to Architecture and Design, which is a highly divergent category with a proportionate number of non-GST registered businesses.

Given the strong level of Victorian investment in facilities for the Cultural Production sub-sectors, it is pleasing to see some growth in terms of earning and employment. However, it is likely that more growth is there, but not visible in this data, as it draws on primary income Census data, and any secondary incomes, casual earnings or volunteerism is not visible.

Figure 5 Creative services employment by SA2 region

Ballarat SA3 by SA2 area, employment in creative services industries by place of work (2016 Census)



Ballarat SA3 by SA2 area, employment in creative services industries as a share of total employment, by place of work (2016 Census)

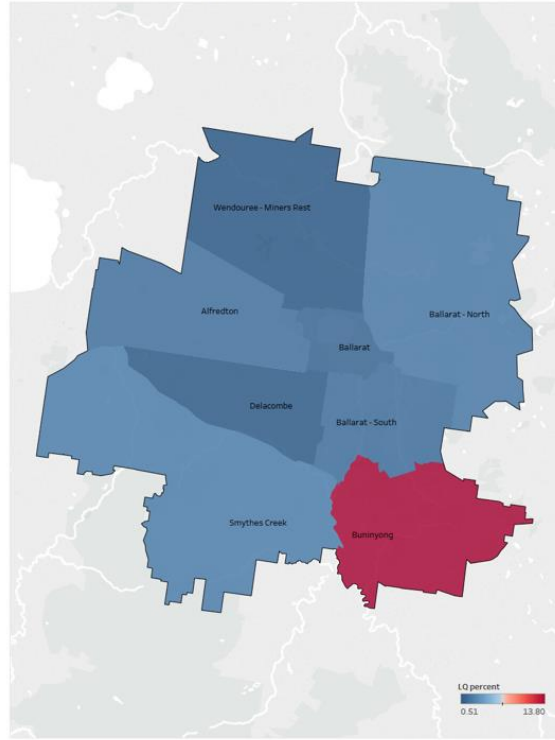
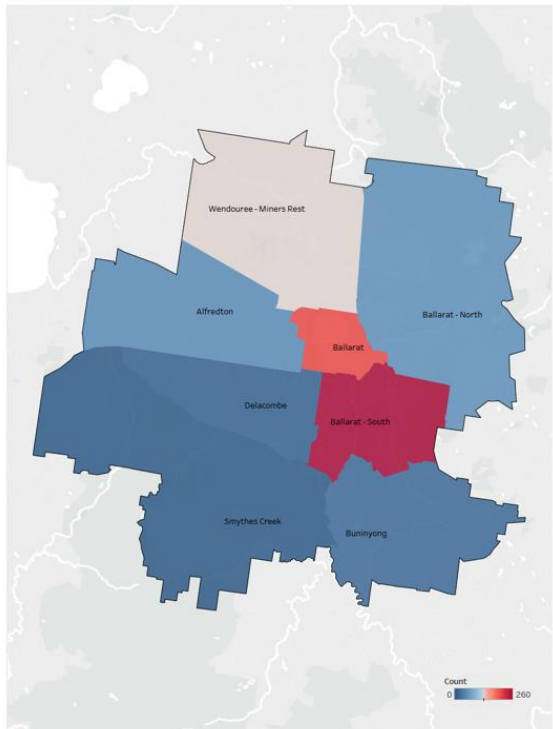
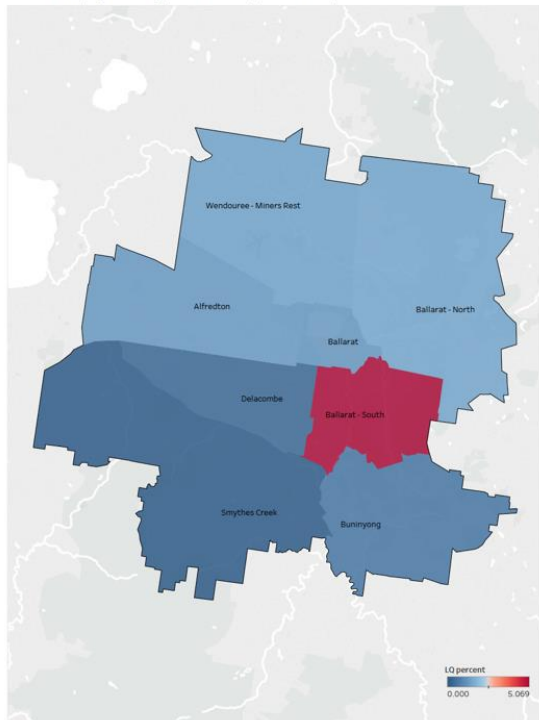


Figure 6 Cultural Production employment by SA2 region

Ballarat SA3 by SA2 area, employment in cultural production industries by place of work (2016 Census)



Ballarat SA3 by SA2 area, employment in cultural production industries as a share of total employment, by place of work (2016 Census)



Creative Services employment visible in the heatmaps, below, shows that there are different locations for the concentration of CS and CP professionals, counted as a proportion of total employment. For Creative Services, the concentration is in Buninyong (Figure 5), while for Cultural Production, the concentration is in Ballarat South and Ballarat (Figure 6).

Local Government policy context

The City of Ballarat's *Today Tomorrow Together: The Ballarat Strategy* is a long-term plan for Ballarat from 2017 to 2040 {Ballarat, 2015 #7}. Aiming for a greener, more vibrant, and connected Ballarat, it sets out a vision to activate the CBD as a destination for working and living. There is also a heritage plan, *Our People, Culture and Place* (City of Ballarat 2017), and a *Creative City Strategy* (City of Ballarat, 2019a). These three interrelated plans continue to develop Creative Industries strategies in a focused and meaningful way. *Today Tomorrow Together* (Ballarat 2015) provides an overview of CBD site activation through arts, culture, events and illumination, of laneways and public spaces, and for establishing co-working hubs to generate opportunities for innovation and business development. It mentions the streamlining of planning processes to reduce wait times and increase certainty regarding applications. And it expresses the desire to expand and diversify technology and innovation sector jobs, leveraging off the established Ballarat Technology Park Mount Helen Campus and Camp Street CBD Campus.

The heritage plan, *Our People, Culture and Place*, for 2017-2030 (City of Ballarat 2017), outlines the city's heritage understanding as including Indigenous cultural heritage, built and created landscapes, and cultural landscapes, including living intangible elements such as diverse traditions, cultural meanings, stories, historical events, festivals and skills, as well as images and other material culture (City of Ballarat 2017 p. v). The priorities that are relevant to Creative Industries activities include the CBD Regeneration Program, delivering streetscape upgrade projects, (2017, p. 29), cultural events and recognition programs including 'major events, such as [Ballarat Heritage Weekend](#), [Ballarat Begonia Festival](#), [Ballarat Heritage Awards](#) and most recently, [White Night Ballarat](#)' (2017 p. 37). A second priority area involves celebrating Ballarat's stories, through digital knowledge, by engaging the storyteller's network and toolkit, a revitalised cultural tourism package, and 'creative heart' partnerships with universities and cultural intuitions to build Ballarat's reputation as 'an incubator for innovation, education and creative excellence' (2017, p. 41).

In 2019, Ballarat was designated a UNESCO City of Crafts and Folk Art and Ballarat's *Creative City Strategy* (City of Ballarat, 2019a) was released. It aligns with the city's longer term vision in *Today Tomorrow Together: The Ballarat Strategy*, by outlining targeted planning through:

- Live Music Strategy – Strategic Plan 2016-2020
- Public Art Master Plan – Ballarat Events Strategy 2018-2028
- Strategies and business plans for Her Majesty's Theatre, The Art Gallery of Ballarat, Eureka Centre, and Civic Hall

The Ballarat *Creative Precinct Master Plan* (2019b), compiled through the Council's economic development arm, is focused on endorsing a STEAM approach (Science, Technology, Engineering, Arts and Maths) and outlines five ways to maintain, extend, attract, facilitate and monitor creative initiatives and individuals within the region (City of Ballarat, 2019b p 34.)

The *Creative City Strategy* gave the Council a language to talk about Creative Industries. Tara Poole, recently appointed as the city's Coordinator Creative City, said the creative industries are 'not just being about something fun to do ... [but] a money spinner. It is actually something that employs people' (Poole iv, 26 June 2019) and the strategy has helped 'change the language from arts and culture to Creative Industries', with a strong push from LaunchVic around entrepreneurship and innovation (Moran iv, 26 June 2019). Ballarat's *Creative City Strategy*, according to Kelli Moran, the Economic Development Sector Specialist at City of Ballarat, 'was a collaborative piece of work across all of Council and State Government and key stakeholders', deliberately driven by Council's Economic Development Unit who were 'aware of the economic impacts of getting it right' (Moran iv,

26 June 2019). The *Creative City Strategy* is 'about encouraging innovation and creative thinking in all sectors' (Moran iv, 26 June 2019). The strategy is about Ballarat: 'what makes Ballarat unique, and how can we tell that story through our Creative Industries' (Moran iv, 26 June 2019). To be sustainable, the strategy had to be 'authentic and actually driven by the grassroots of people who are here' (Poole iv, 26 June 2019). Design is an important part of the strategy: 'it's how our streetscapes look ... what our new developments would look like, to what our public transport will be, to what our manufacturing will be, to how many people go to the Art Gallery' (Poole iv, 26 June 2019). The business community expressed faith in the Council's leadership with Julia Cornwell from Regional Development Victoria stating that 'our leadership in Ballarat is incredible ... leaders that are forward-thinking and collaborate really well together' (Cornwell iv, 26 June 2019). The *Creative City Strategy* and *Creative Precinct Master Plan* emphasise Council's 'cultural aspect' that sees the growth of Creative Industries, as Jane Osborn from Regional Development Victoria indicates, 'a natural fit ... coming back to really celebrating that ability and people, when they come here, find there's that sort of depth that just needs a bit of reactivation' (Osborn iv, 26 June 2019). In terms of cultural tourism, Scott White, the Manager of Investment and Trade for Regional Development Victoria in the Grampians, notes that 'every different region will have something there, and it's just about trying to tap into that and understand what the legacy of that is' (White iv, 26 June 2019).

Local, State and Federal grant funding

Regional Development Victoria (RDV) is focused on investing in businesses that create jobs, asking 'what's the direct employment of that opportunity rather than what are the indirect benefits ... If we're investing in a business they've got to be of some scale that is creating significant jobs' and the Creative Industries 'could be a lower benefit' (White iv, 26 June 2019). Creative Industries, however, can, as Rachel Abela from Regional Development Victoria points out, tap into general business support provided by Business Victoria through the Small Business Mentoring Service and Small Business Workshops (Abela iv, 26 June 2019). And RDV might refer creatives to Film Victoria and Creative Victoria (Osborn iv, 26 2019).

Creative Victoria, the 'state government body dedicated to championing, growing and supporting Victoria's creative industries' (Creative Victoria 2020), have capitalised on their understanding of what 21st century Creative Industries are and how they are constituted. Their funding program contributes to the highly interlinked state and regional economies of Victoria. As a result, Victoria has stolen a march on all the other states in attracting the Creative Industries. Creative Victoria's 'funding and support programs are designed to stimulate high quality, diverse creative activity across the state; strengthen Victoria's reputation as a centre for creative excellence; and ensure that all Victorians have opportunities to enjoy, participate in and benefit from a rich creative ecosystem' (Creative Victoria, 2020). This support comes in multiple forms including their Creative Activation Fund, the Innovation in Marketing Fund, their Quick Response Grants, Unlocking Capacity Grants, the First People's Creative Industries Traineeship Program and quite a number of other initiatives (Creative Victoria, 2020).

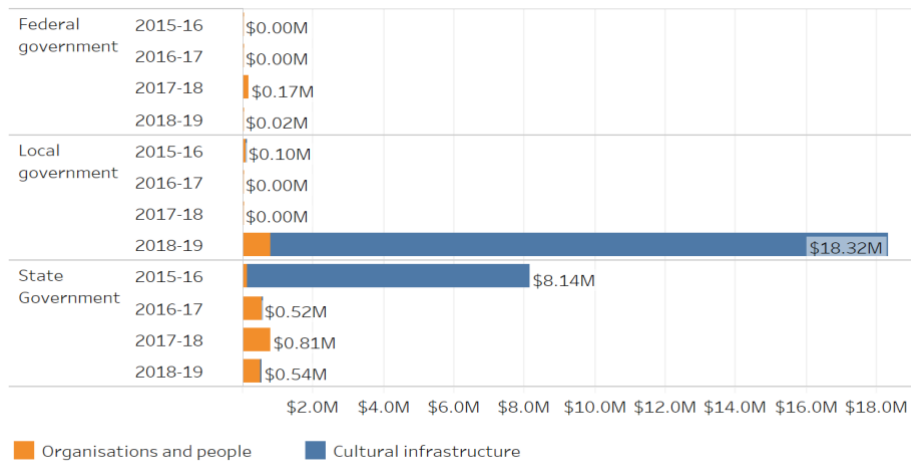
Economic Development Officers employed by the City of Ballarat operate in line with Creative Victoria's understanding and this alignment can be seen through the provision of business support and the integrated understanding of the fundamental drivers of the regional economy. This approach has been laid out in the *Creative City Strategy* (2019a) and *Creative Precinct Master Plan* (2019b).

In 2018-2019, the City of Ballarat also provided significant investments in cultural infrastructure grants (see Figure 7). Two libraries were upgraded, [Ballarat Central Library](#) (\$950,000) and Sebastopol Library Community Hub (\$3.1 million). In terms of heritage, the Council restored the [Civic Hall](#) (\$8 million) and [Her Majesty's Theatre](#) received major works funding (\$5.5 million).

Her Majesty's Theatre also received two grants from Regional Development Victoria for 2016-2018 (\$400,000) and the Victorian Government [committed](#) a further \$10 million for the theatre's restoration in their 2019-20 budget. However, no funds have been forthcoming from the Federal

Government for the theatre restoration (Henderson iv, 26 June 2019). Creative Victoria provided three small grants (from \$3,000 to \$15,000) from the Good Music Neighbours program.

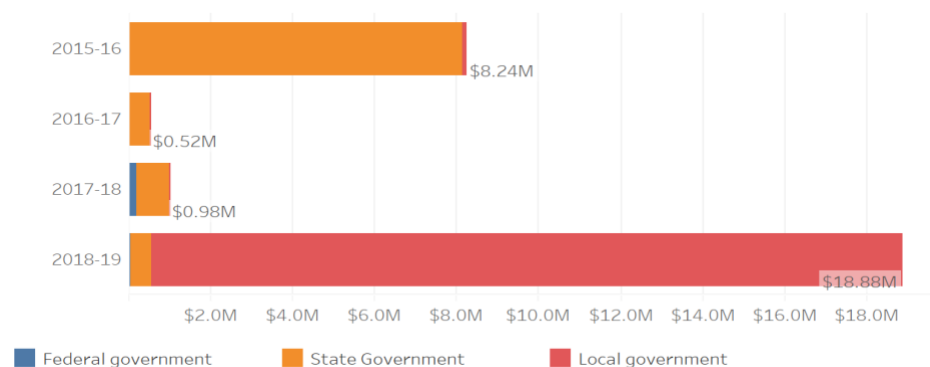
Figure 7. Cultural grants by investment type, Ballarat



From 2015 to 2019, there were smaller investment grants for organisations and people. The [Ballarat International Foto Biennale](#) received Federal Government funding in 2016-2017 from the Building Better Regions Fund and in 2018-19 from Festivals Australia to support Aboriginal and Torres Strait Islander exhibitions. In 2017, The Prime Minister’s Literary Award for Young Adult Fiction was awarded to Cath Crowley for her novel [Words in Deep Blue](#), and the prize was \$80,000 (McMillan, 2017). Crowley also received VicArts grant in 2016-2017 worth \$9,999.

Creative Victoria also funded organisations and people from 2017 to 2019: Musician [Freya Josephine Hollick](#) was funded to tour, and Ballarat International Foto Biennale, the Museum of Australian Democracy at Eureka (now the [Eureka Centre](#)) and the [Gold Museum](#) at Sovereign Hill all received four-year funding. The Gold Museum received the most, with annual funding of \$253,000. In 2015-2016 Regional Development Victoria invested in [Sovereign Hill](#) (\$8 million). The [Art Gallery of Ballarat](#) was awarded \$25,000 for commissions from VicArts grants in 2018-2019. Regional Development Victoria provided funding for Ballarat Regional Tourism (\$50,000) in 2018-2019, and in earlier years it funded the Museum of Australian Democracy at Eureka (\$30,000) and the Art Gallery of Ballarat in 2015-2017. The City of Ballarat in 2015-2016 awarded 15 Community Impact grants that contributed to cultural and Creative Industries activities, ranging from \$1,000 to \$10,000. There were also five promotions and publications small grants awarded in 2015-2016, and two photography workshops received Council funding (\$8,000) in that year as well.

Figure 8 Cultural grants by level of government, Ballarat



Strategic Theme 1: Interrelationships across the sub-sectors of the creative industries?

Based on ABS Census data, employment in the Creative Industries in Ballarat grew by an average of 2% per annum between 2011 and 2016, and the average annual income for fully employed CI workers in 2016 was \$55,600. The Cultural Production (CP) sub-sector includes visual and performing arts, music, film TV and radio, and publishing, while the Creative Services (CS) sub-sector includes architecture and design, advertising and marketing, web design, software app development and games. There is a maturity in the Creative Services area that is unique to Ballarat and is due to the activities occurring at the Federation University Tech Park which has been operating for more than 30 years with long-term tenant IBM. More recently, Runway has set up as a start-up accelerator and is nurturing regional entrepreneurs through local Council and Federation University support. The interrelationship occurring within this mature and established CS sub-sector shows the strength of Ballarat's creative ecosystem. The NBN connections in Ballarat are excellent, and this has benefited both Cultural Production and Creative Services small to medium enterprises. Of particular note are the entrepreneurial games developers, such as Matt Hall, the creator of the successful *Crossy Road*.

CREATIVE SERVICES

It is notable that employment in the Creative Services sub-sector is growing more rapidly than the Cultural Production sub-sector across both industry and occupation groups. Ballarat is doing well because it 'went after the capital city experience', according to Jeff Pulford, the Executive Director of the Federation University Technology Parks, who worked previously at the City of Ballarat on the economic development of major projects, in arts and culture, tourism and events (Pulford iv, 27 July 2019). Pulford explains that there was a 'strategy around the old Ballarat culture. And we kind of blew that up, created a lot of enemies, a lot of angst in the process ... But what it was about was opening the town to creatives that weren't necessarily born and bred here' (Pulford iv, 27 July 2019). One of the longer-term benefits of that strategy is that companies in Ballarat now offer exactly the 'same services offered from a Melbourne company or a Sydney company' (Pulford iv 27 July 2019). This includes those in the games subsector.

Games development

Crossy Road and *Doodle Find* were games created by [Hipster Whale](#) studio founder Matt Hall, a games developer who lives on the outskirts of Ballarat. Even though Hipster Whale has a Melbourne office, Hall works from his home on a semi-rural block that has fibre to the premises. He feels that Ballarat, 'has a lot of advantages' for creative business (Hall iv, 12 August 2019). His contractors are scattered throughout the world: 'your contractors can be from anywhere as long as they do good work and we can pay them, it doesn't matter' (Hall iv, 12 August 2019). Hall describes the games business as being made up of programmers, games producers, and a marketing team, and so 'one of the biggest things I was most looking forward to when I went independent, was to completely peel back the curtain and learn: what is marketing? And I've considered that for the longest time to be my most valuable skill' (Hall iv, 12 August 2019). Hall believes the relationship between design and marketing is critical, and this means it's essential to have the right marketing image to attract the right player through the apps store (Hall iv, 12 August 2019). His strategy has paid off over the longer term.

In 2000, Hall was retrenched from his job and took the opportunity to 'build a portfolio' for the games industry, which led to him getting a job at Tantalus Interactive, who were official Nintendo games developers. He was employed there for seven years (Hall iv, 12 August 2019). Following that, the Steam and Xbox Live Arcade was released and 'there were opportunities to be a bedroom coder

again' (ibid), so Hall and his family decided it was a perfect time 'to start over', returning to his parent's farm near Ballarat to work and raise their family (Hall iv, 12 August 2019). Hall self-funded that initial period, 'while working on the game from [his parents] kitchen table. Although I did at one point apply for Newstart but that simply didn't feed entrepreneurship at all' (Hall iv, 12 August 2019). It took a year for Hall to release his first game.

Hall had a series of successes, with at least three games, one of which was *Doodle Find*, before his major success with *Crossy Road*. During this time, he worked out how to manipulate the advertising banners in the games and decided to use his ads to support other Australian games developers. *Doodle Find* was really successful in the games charts and it was a moderate financial success, and Hall was then able to apply what he had learnt to *Crossy Road*, which was 'extremely huge with regard to number of downloads, I think we're at 250 million now. And, of course, that was a big financial success too' (Hall iv, 12 August 2019).

The Victorian Government has been particularly proactive with games development. Film Victoria also had a number of funding programs that Hall benefited from. Hall says those funding programs have improved based on gamers' feedback, for example, there are smaller grants, applicants need to submit a prototype, and there have been adjustments to accommodate mobile games (Hall iv, 12 August 2019). Hall asserts that 'it does help if you go with these funding rounds and I've heard of other people even moving to Victoria to make use of the program' (Hall iv, 12 August 2019). Hall passes comment on other state funding schemes saying that 'Queensland's doing pretty well in terms of state funding, but NSW has poor state funding. Adelaide has suddenly realised, and is improving things. I don't think I know a single developer in Western Australia, maybe one, maybe two' (Hall iv, 12 August 2019). Hall says that he has had a bit of local contact with Federation University: 'they are putting on Get Into Games each year in Ballarat where they encourage children to apply to Federation University to do games' (Hall iv, 12 August 2019).

Hall explains his games are available to the global community. We 'made a big effort to make sure our games are sold everywhere', with the US market returning 40% of revenue. 'In Australia, I think it's something between 3% and 4% of our financial revenue. Like, there was just no way at all that a game is feasible to be targeted towards Australians. It's not possible ... But it is quite difficult to sell and market a game into China. Like, that's not trivial. That money is not easy to access, neither culturally [nor because of] regulatory barriers ... particularly the last few years' (Hall iv, 12 August 2019).

VR Game Drone Legion

Casey Thomas is CEO of [Dark Shadow Studios](#), and creator of [Drone Legion](#), a drone racing game that has virtual reality (VR) capabilities. The idea for *Drone Legion* began during Thomas's time at university and after gaining 'so much hype and traction' as a university project, she decided to pursue it as a real-world venture (Thomas iv, 27 June 2019). The game emerged because, at the time, both drones and VR were becoming more prominent, and Thomas wondered if 'we could merge these two different worlds together'. Following the positive reception, Thomas's team began showcasing the program widely, at events such as 'Melbourne's Technology & Gadget Expo, PAX, the Melbourne Esports Open [and] the AFL League of Origin Grand Final' (Thomas iv, 27 June 2019). As part of showcasing at these events, Dark Shadow Studios had gained permission to create virtual versions of Rod Laver Arena and Marvel Stadium in *Drone Legion* for gamers to compete in. Sponsorship is key for Dark Shadow Studios to take *Drone Legion* to events, as sponsors provide hardware including 'monitors, chairs, keyboard, mouse, you know, everything that we needed, basically free of charge' (Thomas iv, 27 June 2019) so that event attendees can play. Currently, Telstra is the *Drone Legion* technology partner and Thomas is seeking a partnership with Red Bull.

Advertising and Marketing

The digital age has transformed advertising and marketing businesses, making it hard to say they work completely within Creative Services or Cultural Production. Businesses in both sub-sectors

usually refer to themselves as ‘agencies’, having dropped the once popular descriptors of ‘advertising agency’ or ‘design agency’. This indicates an expanding list of creative services for hire and includes branding and strategy, design, web and app development, media buying, as well as writing copy, screen-based production of television and radio commercials, building social media and making corporate videos, often employing filmmakers to produce corporate videos and ads, theatre people as actors or voiceover artists, photographers to shoot for websites, all of which are occupations and services typically associated with the CP subsector. In Ballarat, advertising agencies include RU Advertising, The Ad Group, Pepper Brand Managers, Mass Motion, Gasoline Media and ASCET Interactive. The Word Store is a public relations firm and Lateral Design Group and ASCET Digital are website designers.

MJ Oh My! Advertising

[MJ Oh My! Advertising](#) is a creative services business that is focused on the publishing sector, itself normally associated with cultural production, helping authors sell books directly to customers via the web. This small business does creative design, advertising, website design and social media branding for these small businesses. Husband and wife team Stephen and Marieke Ormsby work for authors doing marketing, liaison with bookstores, and organising and presenting book launches. They have previously been e-book publishers, publishing 50 books in three years, ‘and it virtually killed us and ruined our marriage ... There was money to be made in it [but] the hours were atrocious’ (Ormsby, S. iv, 27 June 2019). The publishing business relied on relationships between publishers and bookshops and was equally profitable for both parties (Ormsby, S. iv, 27 June 2019). However, they don’t believe the small end of the Australian publishing sector is sustainable. Now, they work with Booktopia and NetGalley to ‘try to build up some groundswell [and] open up American and English doors ... which is a lot harder for Australian authors to do’ (Ormsby, S. iv, 27 June 2019). They also help authors to sell directly to customers, ‘without having to cut profits with Amazon’ (Ormsby, S. iv, 27 June 2019). They have toyed with a corporate micro funding model: ‘the business gives \$5,000 to an author, the author writes a book ... and in the book it says “with sincere thanks from the organisation”’ (Ormsby, S. iv 27 June 2019). Stephen, a published author in the horror and urban fantasy genres, is spending more time writing and says Ballarat is a good place for it: ‘there’s an undercurrent here that wants to be creative’ (Ormsby, S. iv, 27 June 2019).

Design agencies growth

There has been a growth in design agencies in this region in the last few years. Bigger government organisations such as the Health Services, the City of Ballarat and Federation University, and tourist attraction Sovereign Hill, ‘have their own in-house capability, but in recent years it has been overflowing, and we’re starting to see the emerging of more of those [agencies]’ (Underwood iv, 26 June 2019). The arrival in Ballarat of Melbourne-based Mass Motion ‘was really when the worm turned ... they’re a small but very punchy high-end production company, very expensive, and they’re very good at what they do’ (Osborn iv, 26 June 2019). RDV investment and trade specialist in tourism for the Grampians, Jane Osborn, believes Mass Motion ‘came here because it made economic sense for them’ and have picked up local, national and international campaigns (Osborn iv, 26 June 2019). Other local businesses are Small Dog Design, Nashish Marketing and Design, and Brown Ink Design.

Mass Motion

[Mass Motion](#) is a design studio that does strategic branding, film, and animation. They offer a broad range of creative services and producer Jane Walsh says, ‘being quite small and ... a multi-discipline company, all of our roles are fluid’ (Walsh iv, 27 June 2019). Clients are mostly local, including big organisations such as the City of Ballarat, Federation University and Sovereign Hill: ‘We’re probably 20% to 30% more expensive than any other agency ... in town. So, we don’t tend to get work from the smaller businesses because they can’t afford us’ (Walsh iv, 27 June 2019). However, sometimes they ‘try to look for solutions for small businesses’, and that might include rebranding with ‘new

logo, new website, the suite of graphic design material, illustrations, strategy [and] copywriting' rather than film (Walsh iv, 27 June 2019). They've done 'storytelling' videos for a regional 'premium ragout beef producer' and BUPA in Melbourne, and plan to target the metro market more.

The scale of the creative services offered by Mass Motion varies, with many of their projects in the \$6,000 to \$10,000 range, although bigger clients can spend \$80,000 in a year: 'You tend to have one or two bank-rollers, and then all the other jobs sort of fill in the gaps' (Walsh iv, 27 June 2019). A lot of their work is TV commercials but 'not all the clients have a budget to put it on the television, so most of it goes online' (Walsh iv, 27 June 2019). They haven't had a client who's been able to afford a Melbourne broadcast campaign, but others have done Ballarat and western region TV campaigns which is 'so much cheaper, it's really quite affordable' (Walsh iv, 27 June 2019).

Everyone working at Mass Motion is classified as a creative specialist. Owned by graphic designer and videographer Luke Keys, the studio has five full-time employees and contracts freelancers when needed (Walsh iv, 27 June 2019). All the employees are Ballarat locals except Walsh, who is originally from the UK. She joined Mass Motion when she and her winemaker husband moved from Melbourne to Ballarat 'to plant vines' (Walsh iv, 27 June 2019). Walsh says it's a very different work environment to a Melbourne studio where 'you'd be doing the same role day in, day out. Whereas with Mass, you might be on the set filming one day and the next day you'll be doing a bit of graphic design, the next day ... you might manage the whole animation job' (Walsh iv, 27 June 2019). The studio has 'younger people who are looking to really further their career in the best place' and people like herself who 'want to live in the best place for our families' (Walsh iv, 27 June 2019).

Architects - proximity to Melbourne

For this Creative Services sub-sector, Ballarat's proximity to Melbourne is 'both an advantage and a hindrance', and Ballarat is 'under-serviced' by large architectural firms, according to RDV economic development coordinator for the Grampians, Leon Underwood (Underwood iv, 26 June 2019). Underwood feels that 'the quantum of work required in regional areas hasn't probably met the demands for those types of businesses to locate or to originate out of regional areas' (Underwood iv, 26 June 2019). Melbourne is the architectural stronghold for Victoria.

Architectural services to be found in Ballarat include Morton Dunn Architects, who do educational and Council work, Moloney Architects, who custom design residential houses, and Porter Architects, who do residential and commercial designs (Porter iv, 26 June 2019). There are enough firms doing high end jobs to offer local clients architectural choice, especially for home renovations. While some of the architectural work, 'the higher end detailed stuff still goes to the metro areas ... there'll be a few that cross over servicing out of metro while living in a region' (Underwood iv, 26 June 2019). For example, although Ballarat's [GovHub](#) building was designed by Melbourne-based architects [John Wardle](#), the main architect working on the project 'actually lives in Ballarat' (Abela iv, 26 June 2019).

Those 'economic refugees' who choose to commute from Ballarat to a Melbourne firm can do so; similarly Ballarat architects also service Melbourne's metropolitan areas (Poole iv, 26 June 2019). The additional benefit here is there is now architectural services employment being offered in Ballarat for Creative Services support staff such as project managers and draftspeople, as well as construction industry employees such as builders. Ballarat offers good internet speeds, which is essential for architects as they work with large digital CAD files and virtual walk-throughs using online software.

Porter Architects

[Porter Architects](#) began as a home business in 2011 and is now located in the Ballarat Technology Park Central co-working space. They do residential and small commercial designs, focusing on 'interesting projects that are engaging and challenging' anywhere from \$50,000 to \$5million (Porter iv, 26 June 2019). As company director, Nathan Porter offers a range of architectural services and employs a full-time project architect. Porter believes they are in 'quite a strategic, strong location' (Porter iv, 26 June 2019) drawing clients from Ballarat, Mornington Peninsula, Melbourne, Bendigo,

and Swan Hill. He says the Ballarat economy is growing and ‘culturally, Ballarat has really changed and evolved’ (ibid) with professionals such as himself returning to build businesses and raise families. Ballarat offers ‘a really good life ... we live on the fringe of the city, in the bush, we’ve got a lovely house I was able to design. I can walk to work every day. The business is strong’ (Porter iv, 26 June 2019). Porter says ‘the people of Ballarat generally always want to engage Ballarat professionals’, but he welcomes Melbourne architects working in Ballarat providing they try to ‘understand how the region works’. It also creates diversity of design, and ‘diversity is important to a city’s fabric and culturally’ (Porter iv, 26 June 2019).

Porter tries for a balance of small commercial projects that are important ‘business transactions’, as well as residential house designs (Porter iv, 26 June 2019). Sustainability is increasingly important, and Porter likes to use recycled materials ‘not just because it’s good for the environment, but because they have a story’ (Porter iv, 26 June 2019). He expects architecture will grow in Ballarat as the city is ‘gaining momentum’ but the growth will be slow. He prefers to use Ballarat engineers because ‘the prices are generally good [and] you’re generating income in the Ballarat economy’ (ibid). His pro bono work includes providing advice on building issues to a local high school and advising the Council on urban design: ‘We’ll always put our hands up to help out there. That is important. And that’s part of the tightening community. You want to see it progress’ (Porter iv, 26 June 2019).

CULTURAL PRODUCTION

The Cultural Production sub-sector includes visual and performing arts, music, film, TV and radio as well as publishing. The City of Ballarat Creative City Coordinator, Tara Poole, said Federation University’s visual arts and graphic arts graduate used to ‘stay and live and practise here’ but this was not necessarily the case with newer graduates (Poole iv, 26 June 2019). Poole said there was ‘a heritage around visual arts’ that went back to the 1980s and ‘90s, but that had ‘died off and now there is a push to bring it back’ (Poole iv, 26 June 2019). Poole said ‘the performing arts in Ballarat at the moment is much stronger than the visual arts’ (Poole iv, 26 June 2019).

Ballarat has a lively and well-established theatrical community with several local ensembles and a number of large performing arts venues with capacities from 100 to 900 seats. Four venues are run by Federation University’s [Arts Academy](#), while others are run by secondary schools. The [Mechanics Institute](#) hall which seats 700, is used for travelling performances and cinema shows.

Poole said part of her job was ‘ensuring that developers pay a contribution towards Creative Industries that will ensure grant programs for visual arts and micro loans for people who want to start Creative Industries’ (Poole iv, 26 June 2019). Prior to working for Council, Poole had organised ‘Creative Industries Meetups’ to facilitate communication and collaboration among the Creative Industries in Ballarat and ‘it’s been going strong ever since’ (Poole iv, 26 June 2019). She was also involved in starting Ballarat Evolve to help artists ‘locked away in a silo’ develop income streams: ‘I completely understand you don’t want to be a business product, but you also need to pay the rent ... get the electricity paid, and we want to make sure that we can do that for you by giving you the tools to do it yourself’ (Poole iv, 26 June 2019).

Visual arts creatives who reside in Ballarat are mostly selling their work online and through Instagram (Poole iv, 26 June 2019). An aim of the *Creative City Strategy* is ‘to become the city of the sustainable practitioner’ so Council would help artists with ‘advice on representation, collaboration, copyright, all the legals, possibly lift you up and take you different places’ (Poole iv, 26 June 2019). For example, Indigenous artist [Marlene Gilson](#) ‘has been indirectly and directly supported by the Council in her practice to the point where she is now bought internationally and held in national galleries’ (Poole iv, 26 June 2019). The same was the case for all Creative Industries: ‘we’ll link you into the economic aspect ... we’re supporting and providing infrastructure’ (Poole iv, 26 June 2019).

Activated Artwork Project

An example of ‘meshing together ... creativity and tech’ was through the [Activated Artwork Project](#) as part of the Winter Festival (Moran iv, 26 June 2019). ‘We took half a dozen traditional artists who’ve never animated before, and we taught them how to do it, so we provided them with free training, free education, they’ve been mentored all the way through the program toward how to animate their own visual artworks’ (Poole iv, 26 June 2019). The project had intergenerational appeal, as older people might see ‘a nice poster’, but younger people ‘they’ll just hold their phone up and it does something different ... mum is being taught by a child’ (Poole iv, 26 June 2019).

Wootten – Cordwainer and Leather Craftsmen

A unique and highly specialised cultural production business is [Wootten](#) - Cordwainer and Leather Craftsmen, owned and run by Jess Cameron-Wootten and his wife Krystina Menegazzo. In addition to making bags, aprons and wallets, they are specialist shoemakers, crafting bespoke and custom-fit fashion and orthopedic leather shoes which they make in their workshop in Ballarat and sell online and through a shopfront in Richmond, Melbourne. Cameron-Wootten began his career working with GM Holden on leather interiors, and was inspired by his late father Ross Wootten, who had been a master shoemaker, to move in that direction. Menegazzo, is employed in the shopfront, bringing experience in wine retail and customer service, and she does administration, bookkeeping, and also works in production ‘cutting [leather], putting soles on, and finishing’ (Menegazzo iv, 27 June 2019). They employ two part-timers, one who formerly worked in a Ballarat shoemaking factory that closed down who ‘comes with skills she hasn’t necessarily used in the last 20 years’ (Menegazzo iv, 27 June 2019). But ‘Jess will do the really highly-skilled stuff, like lasting the shoe ... or using certain machines to put the sole on because it’s about the finesse’ (Menegazzo iv, 27 June 2019). The pair moved their workshop to Ballarat in 2018 when their Prahran building was to be demolished. Clients include people who want ‘dress shoes’ but who ‘can’t fit into standard shoes well’ or are ‘wanting that boot that you see on the shelf, but made to fit their foot’ (Menegazzo iv, 27 June 2019). Others, such as people who have had polio, require specialist orthopedic shoes. ‘We do a lot less of that because people struggle to get funding. Because we’re not a medical body or a medical provider, not medical practitioners, we’re just a maker. So, to come privately can be hard’ (Menegazzo iv, 27 June 2019). Customers pay anywhere from \$500 to \$2,000, come from throughout Australia, and range in age from ‘21 to well into their 70s’. And they are prepared to wait for quality. Such is the demand for the custom-fit process, the wait is ‘now six to 12 months, because we’re just so busy’ (Menegazzo iv, 27 June 2019). But repeat custom suggests the wait is not an issue.

The Royal South Street Eisteddfod

[The Royal South Street Eisteddfod](#) ‘underpins the whole visitor economy in a stealthy kind of way. It’s just people. The town is full for three months ... People come across the country to perform ... it’s pretty phenomenal’ (Osborn iv, 26 June 2019). The Royal South Street Eisteddfod is Australia’s oldest continuously operating eisteddfod, has been held in Ballarat since 1891 and now attracts 11,000 performers and 34,000 audience members annually from throughout Australia and New Zealand (Henderson iv, 26 June 2019). Brett Macdonald, the CEO of the Royal South Street Society, who started his career at Radio Ballarat as Program Director and then joined Rural Press occupying senior advertising roles, says the Eisteddfod is traditionally held in Her Majesty’s Theatre, which seats more than 800 ‘but is so intimate’ (Macdonald iv, 27 June 2019). In the year it was not held in the historic theatre which was closed for renovations at the time, entries ‘tumbled by 18% ... and that led to smaller audiences’, which had a ‘massive knock-on effect’ (Macdonald iv, 27 June 2019). Macdonald said: ‘it’s not just about a 13-year-old ballerina who hasn’t turned up. It’s about her family as well, and it’s about her family not eating at the Golden City Hotel and staying at the Quest Apartments’ (Macdonald iv, 27 June 2019). Macdonald said the society that runs the eisteddfod had been ‘largely self-sustaining’ for its long history, but their relationship with Council had been strengthened through adversity, and all the Councillors had ‘unanimously backed what we do’

(Macdonald iv, 27 June 2019). The Society relies on Creative Victoria funding and has an ongoing relationship with Federation University. Their success is connected to their history, but also to the involvement of 'passionate individuals [who] largely are volunteers' (ibid). With 2.4 full-time equivalent employees working throughout the year, more are required such as theatre technicians when competitions are on. Still the Society relies on about 160 volunteers (Macdonald iv, 27 June 2019). Other challenges are the cost of copyright fees, which 'went from roughly \$400 to \$4,000 overnight' and the venue hire: 'the theatre costs us at least \$2,000 a day to get into' (Macdonald iv, 27 June 2019). Most audience members come to watch the performers they know, while others are drawn to the program generally. The eisteddfod has of course been impacted by COVID-19 restrictions in 2020 and has cancelled all live performances, with some competitions to continue via video entry.

Her Majesty's Theatre Ballarat

[Her Majesty's Theatre](#) would normally welcome 75,000 patrons and 15,000 performers a year, but the Covid-19 pandemic has suspended all performing arts opportunities, including the major drawcard, the annual Royal South Street Eisteddfod.

Built in 1875, Her Majesty's Theatre Ballarat is 'one of the oldest continuously operating theatres in the country', says Theatre Manager Daniel Henderson. \$17.3 million is being injected by local and state governments for 'saving, preserving and enabling the future of one of our nation's most significant theatres' (Henderson iv, 26 June 2019). Alongside the capital works program is the '[Save Her Maj](#)' community campaign, reflecting 'the huge, huge love and affinity' the community has for the historic theatre.

'We've got thousands and thousands of people who've been outpouring their own experiences in the theatre over the years of varying ages and abilities that have either been onstage or witnessed an experience onstage ... Her Majesty's Ballarat is not just a grand historic building, it's a living and breathing home where experiences are shared that educate, entertain and challenge our community' (Henderson iv, 26 June 2019).

While the architect for the refurbishment is not Ballarat-based, the builder [Nicholson Construction](#) is and they use 'local builders, local artisan plasterers, painters, artisan conservators who hold deep respect for heritage' (Henderson iv, 26 June 2019). The refurbishment is being documented 'in new innovative ways', using drone-enabled 360-degree photography and videography: 'When you are spending tens of millions of dollars on a performing arts venue, you really do need to ensure that the community comes with you' (Henderson iv, 26 June 2019). Henderson said, 'six months of the year' the venue was booked by local groups performing shows 'that are not necessarily blockbusters that guarantee sales but are important works that provoke critical discussion' (Henderson iv, 26 June 2019). He said, 'there is a hothouse of vibrancy and activity of live performance in Ballarat, particularly in music, theatre and education... You find yourself being entertained by your accountant or your cashier or your grocer. And having no idea that the lead roles are filled by your high school teacher. It's a really creative, vibrant city' (Henderson iv, 26 June 2019). Able to seat 890, but with capacity for more intimate shows, the renovations to Her Majesty's are hoped to also better tap the 'touring market which was focusing more on the 200- to 300- seat theatre venues' (Henderson iv, 26 June 2019).

Art Gallery of Ballarat

The [Art Gallery of Ballarat](#) is the largest and oldest regional gallery in Australia. Established in 1884, it houses the original Eureka Flag and has an extensive collection that represents colonial art right through to contemporary works (Tegart iv, 27 June 2019). The gallery hosts the Archibald Prize, and the Ballarat International Foto Biennale, which brings 25,000 visitors to Ballarat each year. Gallery Director Louise Tegart hopes to change the relationship with the Foto Biennale organisers: 'we want

to be a partner, we don't want to be a hall for hire' (Tegart iv, 27 June 2019). Tegart is proactive and wants to improve the Gallery's offerings.

In addition to Council support, the gallery receives State funding from Creative Victoria, and has applied for Federal funding through the Australia Council: 'the gallery never really went for grants or anything like that. So, we've probably got more in the last year than we have in 15 years' (Tegart iv, 27 June 2019). The gallery also used to host the Victorian Indigenous Art Award and wants to build on its Indigenous collection as a point of distinction from other regional galleries (Tegart iv, 27 June 2019). They work with local schools on Indigenous culture, include running the Bunjil Program, which they hope to expand. Each year 11,000 school students visit the gallery, to experience a program centred around the [Eureka Stockade](#). A worker supported by the Catholic Education Office helps coordinate these school visits, attracting schools from Melbourne, and they collaborate with the Eureka Centre, which Council also owns. The Eureka Stockade school visit includes a role-play of the trial of Peter Lalor: 'one kid's a miner, one kid's a magistrate ... then they look at artworks related to Eureka and often do a hands-on workshop' (Tegart iv, 27 June 2019).

The Gallery employs the equivalent of 11 full-time staff. A website redesign is being undertaken to better manage ticketing and online retail sales, and a staff restructure is looking to boost marketing capacity: 'While there's probably urgent needs in terms of the collection management, I need people that can bring in the money in order to pay for those roles' (Tegart iv, 27 June 2019).

The gallery operates as a non-for-profit with a board, a foundation, and 'a very complex governance structure' through Council, which is being reviewed by consultants Positive Solutions. Tegart believes the board needs some new members, 'high-flyers from Australia ... if this gallery is going to go forward' (Tegart iv, 27 June 2019). There is also a gallery friends association, 'but they're much more than that because they actually set the gallery up. They ran it until the 1980s and then they handed it over to the Council' (Tegart iv, 27 June 2019).

The gallery has an area called Backspace, which could 'provide a pathway for local artists ... you might start exhibiting here, and then as you become more professional you might then move through to the gallery proper' (Tegart iv, 27 June 2019). They also run a professional development program with Regional Arts Victoria covering marketing and copyright. Tegart believes there is a 'negativity' about Ballarat, and that it is 'a highly critical place' (Tegart iv, 27 June 2019). She believes Ballarat was 'a really thriving community for visual arts in the ... '80s, when the university was just pumping'.

The Ballarat region has other galleries along the innovation corridor stretching between Melbourne, Daylesford, Kyneton and Bendigo. These 'little villages have smaller galleries [that] want to be more funky' (White iv, 26 June 2019). Other 'top-end' galleries demonstrate Ballarat's 'very cool Indigenous capability', including the [Gillons](#) and [Josh Muir](#) (Osborn iv, 26 June 2019). Tegart is also on the board of the Public Galleries of Association in Victoria and they hope to better work with Bendigo Art Gallery and break down the 'ridiculous rivalry between Ballarat and Bendigo' (Tegart iv, 27 June 2019).

The Media – Television News and Radio

In terms of television news Ballarat is serviced by the public broadcasters, ABC and SBS, and three relayed commercial services broadcasting through WIN (sub-licensee of Network Ten) and Prime (sub-licensee Seven) and Southern Cross Nine (sub-licensee of Channel Nine) which is based in Bendigo. Subscription services on Foxtel are also available. The relaying of programming schedules allowed Ballarat television to maintain local commercials and regional news programming, with WIN producing a 30-minute local news bulletin each weeknight from Wollongong, which has 15% of regional Victorian audience share (WIN Regional Network, 2019). Southern Cross Nine News produces a one-hour local news bulletin from Melbourne which combines regional, national and international news on weeknights from 6pm. All local television news bulletins are supported through local advertising.

Ballarat radio maintains a whole series of interrelationships both within Creative Industries itself and beyond into the wider economy. Radio is a mature sector, with five locally based radio stations that are highly active as commercial, public and community broadcasters. There are two commercial stations on the FM band, 3BA-102.3 FM and Power FM103.1. There is a Ballarat branch of ABC Local Radio's national network broadcasting on the FM band (107.9FM) but the region could be affected by job cuts at the national broadcaster, with the ABC announcing it will slash up to 250 jobs – 19 from the Regional and Local Division - and cut programming as it deals with budget cuts of \$84 million (Worthington & Hitch 2020). There are also two community FM stations in Ballarat, Good News Radio-103.9 a Christian community station, and Voice FM99.9.

Brett Macdonald has been a journalist in Ballarat for his entire career and says 'radio still has a part to play' in telling local stories, through the family-owned Grant Broadcasters, and 'we're lucky enough to have an ABC studio here' which produces 'quite a lot of local content' (Macdonald iv, 27 June 2019). MacDonald says 'it's been great to have Channel Nine who own Austereo invest in a local newsroom and have some local content' (Macdonald iv, 27 June 2019). He adds that community station Voice FM is 'a strong community advocate' (ibid).

Voice FM Community Radio

[Voice FM Community Radio](#) has been operating in Ballarat for 34 years, providing music, language, arts and sports programs, and news bulletins, with no paid employees, and a volunteer coordinator working '60 to 70 hours a week'. With recent funding cuts: 'We've had about 60% of our budget dropped back in changes to the way that the CBF [Community Broadcasting Foundation] do funding' (Bath iv, 27 June 2019). Volunteers, with experience in broadcasting, music, the arts, human resources, engineering, training, marketing, graphic design, software and small business, keep the digital station, and its website and social media, running. Valuing volunteers is important: 'we have to harness their expertise and foster their enthusiasm ... the beauty and diversity of the volunteers that we have makes this such a gorgeous place' (Bath iv, 27 June 2019).

The station has recovered from some serious financial issues and a tax debt and has been well supported by Federal MP Catherine King (Bath iv, 27 June 2019). Financial support has not been forthcoming from Local Government (Berry iv, 27 June 2019), but regarding the State Government, the 'new Labor representative is very supportive' (Bath iv, 27 June 2019). With a grant from a local philanthropic group, the station moved in 2019 to [Barkly Square](#) community hub, which has disability access, training facilities, free parking, and a coffee shop. Digital technology has helped with compliance and copyright issues and has meant 'being able to rip all of our CDs and store them down in the basement area' (Bath iv, 27 June 2019). The station would like to do more streaming and podcasts but is limited by ageing technology and volunteer capacity (Bath iv, 27 June 2019).

Podcasting

Podcasting is an emerging Creative Services specialisation, sitting across radio production, social media, entertainment, and business promotions. While podcasting content is easy to access through streaming technologies, producing professional podcasts is a highly specialised creative skill. Located in Ballarat, [Hardy Audio](#) offers 'access to Australia's best voiceover artists' (Hardy Audio, online) as well as guidance in a professional audio studio by experienced engineers, writers, journalists and producers. Hardy Audio 'have Spotify as their number one client on the eastern seaboard ... they've just employed two young sound engineers, and they're up for business. They're very high-end, but niche' (Osborn iv, 26 June 2019).

Runway Ballarat has podcast producer [Chris Ashmore](#), who has been able to transpose his expertise built up over two decades of journalism and production into the podcasting space. His business is focused on training organisations to create their own quality podcasts. Unlike other podcast producers, who Ashmore says come from a technical or IT backgrounds, he advises clients about production techniques and 'what makes a good podcast' (Ashmore iv, 27 June 2019). When producing on behalf of a client, Ashmore writes and conducts the interview, edits it, and puts it on a

podcast-hosting platform so it can reach the client's audience. He sees teaching production skills as potentially 'more lucrative because it's scalable, whereas if I produced for you, well, there goes 10 hours out of my week' (Ashmore iv, 27 June 2019). Despite the ease of producing podcasts, which has proliferated with the advent of streaming technologies, Ashmore says poor production practices let down podcasters who are unable to invest in production expertise.

Screen Production

Ballarat has been the filming location for many notable feature films, documentaries, television series and television commercials. For example, [The Doctor Blake Mysteries](#), starring Craig McLachlan and Nadine Garner, was filmed in Ballarat and produced by Melbourne-based December Media in association with Film Victoria and ABC TV. Five series were filmed between 2013 and 2017. Set in the 1950s gold rush city of Ballarat, it featured Lydiard Street and the [Old Colonists Club](#). The feature film, [The Getting of Wisdom](#) (1977), directed by Australian Bruce Beresford, also used some locations in Ballarat. Community TV in Ballarat is strong, including producers such as [Lance TV Ballarat](#), with a focus on the queer community, [The Matt Cave](#), who concentrates on roots genres, and [Vision by Demunk](#) (Hardware iv, 26 June 2019). The Council facilitates a growing number of productions that choose Ballarat to locate their filming and permits are available for a wide range of productions including student, commercial, community and not-for-profit productions, as well as still photography.

In terms of screen audiences [The Ballarat Film Society](#) is a not-for-profit member of the Federation of Victorian Film Societies. Located in Ballarat Mechanics Institute, it screens an eclectic program of films on the second Thursday of each month, with refreshments served. Entry is by membership, costing \$60 a year (Ballarat Film Society, 2019).

Wind & Sky Productions

The Ballarat based independent film production company [Wind & Sky Productions](#) specialises in short form documentaries. The company, founded in 2008 by Jary Nemo and Lucinda Horrocks, take on commissions and they have a unique creative approach in which they produce self-driven projects by developing 'story concepts, source funding, and bring together project partners and collaborators' (Wind&Sky Productions, 2020). This allows them to keep their production costs down and to maintain transparent reporting and reviewing processes, as their manifesto attests: 'We keep the Company and we are the Company we keep' (Wind&Sky Productions, 2020).

Their website has links to 26 short documentary films. All can be viewed on YouTube with additional information about the topic accessible on the Wind & Sky website. Production values are important to this team. Nemo has a 40-year career in film, theatre and music production (Nemo iv 26 June 2019) and Horrocks has worked as a researcher for universities. Their work is released under 'creative commons' and they can manage this 'because we get productions funded up front ... [and] we don't operate within the broadcast distribution spectrum. So, our films are distributed online' (Horrocks iv 26 June 2019).

Newspapers and The Courier

Brett Macdonald was the last general manager of *The Courier* newspaper 'before Fairfax decided they didn't need general managers anymore' (Macdonald iv, 27 June 2019). Macdonald says Ballarat is like other regional media markets, trying to monetise their digital assets; 'the old rivers of gold in print have started to dry up' (Macdonald iv, 27 June 2019). He says the 'community is crying out for solid journalism and people that can ask the difficult questions [but] it doesn't happen anymore. And it's simply because I don't believe there's the resources to do it anymore' (Macdonald iv, 27 June 2019). Macdonald believes that while *The Courier* is 'still the number one source of news in the region' a new free newspaper, *The Ballarat Times*, based out of the Surf Coast has entered the market and 'they're trying to pinch the real estate [advertising]' (Macdonald iv, 27 June 2019).

Caleb Cluff is an investigative reporter at *The Courier* who formerly worked as online producer for ABC Rural. In his four years at the paper he has noted 'the rate of turnover of staff is very high because we're not paid very well' but that is 'across the industry generally ... when I came here, the quality of the staff was very high. Those that were highly intelligent, highly motivated ... well connected to police or well connected to politicians or council' (Cluff iv, 26 June 2019). Some had been working at the paper for 30 years. Now, because of mass redundancies, 'those people are all gone [and] we tend to have to rely on a lot of younger journalists coming out of university ... who are enthusiastic and have energy, but don't have a lot of experience' (Cluff iv, 26 June 2019). Cluff has a strong interest in the arts and believes Ballarat has a vibrant arts community: 'Some really strong people working in the sector live in Ballarat, and more so as people find that they can't afford to live in Melbourne and start moving up here' (Cluff iv, 26 June 2019).

Since these interviews took place regional media has been impacted by the economic downturn caused by the Covid-19 pandemic, with 200 regional and community papers stopped or suspended (MEAA, 2020). In Ballarat, the daily newspaper, *The Courier*, is printed by Australian Community Media (formerly Fairfax, then Nine) (Gee, 2020). Publication was not affected by the ACM decision in April 2020 to temporarily stop printing some newspapers, but the Ballarat printing press was one of four closed and its staff stood down (Canberra Times 2020). ACM announced in July 2020 a 'review of operations' would likely lead to permanent closure of presses at Ballarat, Albury-Wodonga, Canberra, and Murray Bridge in South Australia, following 'economic challenges brought by the Covid-19 pandemic' that had affected 'not only our own business but many other publishers who utilised ACM's nine print facilities around the country' (The Courier 2020). The Australian Manufacturing Workers' Union estimated 200 jobs would be lost because of the press closures, the majority at the Ballarat site, which employed 120 people (Terzon 2020). More journalism jobs could be lost once the Federal Government's Jobseeker support ends. Printing of Ballarat's free weekly newspaper, *The Ballarat Times*, (formerly *The Miner*) published by the Times News Group, was also unaffected by the Covid-19 downturn.

Uncover Magazine

The evolution of high-end magazines in this region is running counter to broader publishing trends, with Ballarat's *Lifestyle* magazine relaunching under the name *Uncover* in June 2019. Owner Lucy Gilbert said the name was changed so the magazine could be sold beyond Ballarat, in areas such as Daylesford, Creswick and Halls Gap, and the goal is to reach broader western Victoria: 'We're hoping we will get some of those tourism bodies, for example Visit Ballarat or Visit Grampians, to come on board [as advertisers]' (Gilbert iv, 27 June 2019). Content is local and profile-focused, 'whether it be creative, or business-minded or innovative' (Gilbert iv, 27 June 2019). The quarterly publication sells for \$9.50, but more than a thousand complimentary copies are sent to 'waiting rooms - hairdressers, doctors, dentists, cafes' (Gilbert iv, 27 June 2019). *Uncover* is produced by Gilbert and another part-time employee; together they do 'pretty much everything' including content creation, design, and advertising sales, with some writing and photography contracted to freelancers. Regional Development Victoria has introduced Gilbert 'to the people who've bought the *Lost* magazine over in Daylesford to see if they can't maybe work a bit collaboratively' (Osborn iv, 26 June 2019). *Uncover* has 'aspirations to be regional, a Victorian regional-wide publication, so when they're ready we'll introduce them to Visit Victoria' (Osborn iv, 26 June 2019).

Unfortunately, local magazine sales have been poor and businesses have been reluctant to pay a \$30 annual subscription. Gilbert defends the decision to continue in print 'as a tangible, tactile product' as based on international research showing sales growth in lifestyle magazines. The magazine doesn't publish digitally, but they do use social media, including a blog with 'mini-articles ... travel adventures' and a book club (Gilbert iv, 27 June 2019). The magazine 'survives on advertising dollars' and they have between 30 and 50 advertisers in each issue, with some 'advertorial' support offered. Gilbert admits 'it's a really scary industry to be in', relying on small business advertisers: 'our aim ... is to try to get some of those bigger government-funded bodies'. They print in Melbourne because it

is significantly cheaper than Ballarat and the turnaround is faster: 'we loved being able to say that we were 100% local ... but we had to reassess'. They draw on seven regular freelance writers, some former Federation University students, and pay \$200 to \$250 for a 1,000 word story. Photographers are harder to find. While there are local 'commercial' photographers, *Uncover* wants 'really talented photographers that can shoot in natural light, that can shoot candid' (Gilbert iv, 27 June 2019).

Ballarat Writers and Words Out Loud

Writers who live and work in Ballarat are supported by a number of retail book shops including Ballarat Books, Collins Booksellers, Minerva's Books, Book Bazaar and the Book Grocer. They are also supported by [Ballarat Writers](#), a grassroots organisation promoting local writing and writers in western Victoria. Established in 1989, it runs monthly Members' Nights, regular competitions, and workshops to promote writers and writing within the Ballarat region. Ballarat Writers is 'a hub around which writers can gather to discuss craft' (Fletcher iv, 26 June 2019). Chairperson Rebecca Fletcher, a freelance writer and editor, said the group 'try to include everybody' (Fletcher iv, 26 June 2019). Most members are 'hobby writers', who write for 'self-fulfilment', and 'mentorists' such as 'family history writers: People who have a vision of creative outlet. They're not necessarily looking to monetise it' (Fletcher iv, 26 June 2019).

Ballarat Writers piggyback onto [Words Out Loud](#), a spoken word group run by professional author and creative writing academic Kirstyn McDermott and her husband (Fletcher iv, 26 June 2019). They have guest speakers, facilitate two critique groups and a weekly Write Club, and hold an annual competition – the [Southern Cross Short Story Competition](#) which alternates with the [Martha Richardson Memorial Poetry Prize](#). All the creative services required to run and promote Ballarat Writers and Words Out Loud are done in-house due to lack of funding (McDermott iv, 26 June 2019). McDermott said her husband's skills as a journalist come in handy and their organisations are supported by local media including ABC Radio, *The Courier*, *The Ballarat Times* and community radio (McDermott iv, 26 June 2019).

Fletcher says although they apply for grants through Writers Victoria, 'we are capable of being self-sufficient' through memberships (Fletcher iv, 26 June 2019). While financial support has not been forthcoming from the City of Ballarat, McDermott says 'there's a lot of funding that does go to art groups. But it does seem to always be, you need a project. So, there's not ongoing funding to just run your organisation' (McDermott iv, 26 June 2019). Fletcher says they would 'like to build a closer connection with the library', which is 'very, very supportive' (Fletcher iv, 26 June 2019). McDermott says other professional writers 'tend not to be involved with the writers' community' but she and her husband were keen to 'support the next tiers coming up'. As she had done, McDermott said other writers had moved to Ballarat because 'they can't afford the mortgages in Melbourne' and because of Ballarat's 'visible and quite passionate creative community' (McDermott iv, 26 June 2019). She said the trend to self-publishing had an upside; 'an incredible growth industry' in freelance editing, proofreading and cover design (McDermott iv, 26 June 2019).

Ballarat Heritage Services – A Ballarat Specialist Publishing House

[Ballarat Heritage Services](#) are in their 21st year as a specialist publishing house and heritage consultancy business. In 2019, they won the overall prize in the Victorian History Awards with a book called the *Eureka Encyclopedia* and they also won an innovation award for the Ballarat District Industrial Heritage wiki, 'a gift of the University' (Gervasoni iv, 27 June 2019). Their bestseller 'is an early numeracy book in education' (Gervasoni iv, 27 June 2019) and they also publish educational materials for the Australian Catholic University. The business is owned by Clare Gervasoni and Dorothy Wickham; Gervasoni is also employed full-time as the Curator of the Art and Historical Collections at Federation University. They are moving to e-books but will still publish hardcover books. They work from home and rely on the NBN to market and distribute their products. They have been unsuccessful in approaching the City of Ballarat for grants, but did some work for the Council for the Histories for Heritage Weekend: 'We were paid to do some history research for

brochures and things that were handed out and one year we did actually do quite a bit of the organising of lectures and exhibitors' (Gervasoni iv, 27 June 2019). They have not approached the State Government for grants but have been recipients of 'the overall prize in the Victorian Community History Awards' of \$5,000. Customers for their books are mostly from Victoria, with some from the US and Asia, and the Nordic countries are a market for their 'maths book'.

Music Scene and Live Music Streaming

The music industry has three arms – recording, live performance, and publishing. Ballarat has an established live performance sector with multiple music venues in the city with minimal recording facilities. Music publishing is centred in Melbourne but Ballarat still has a 'very strong, very diverse music scene', although local music industry producer Rex Hardware says the 'choral and classical genres feel a little bit left out' (Hardware iv, 26 June 2019). Hardware says in Ballarat the live performance industry is 'always in a state of flux. When one or two major or minor venues close down, people are up in arms saying the music scene is dead ... but I've seen this wave of up and down for 30 years and as soon as one player leaves, another player sticks their head up' (Hardware iv, 26 June 2019). He argues the economic impact of music should not be underestimated: 'We're talking about everything from the instrumental school music programs right through to death metal in pubs' (Hardware iv, 26 June 2019). Hardware says schools, public and private, have been 'a nursery' for musicians including iconic Ballarat artists such as [The Mavis's](#), [The Dead Salesmen](#), [Epicure](#), and [Hunting Grounds](#). Ballarat had three very high-quality guitar makers in Ian Noyce, Sandy Richards and Dave Churchill, but Hardware is concerned that growth in online retail makes it harder for musicians: 'if you break a string on a Tuesday and you need it for that gig, you can't wait for it' (Hardware iv, 26 June 2019).

Hardware wants to make recording affordable for musicians and has set up [H-Square Studios](#), as a boutique TV studio 'to assist musicians produce content, to assist them to get work at festivals and live events' and, with the help of former students, Hardware has spent 'a seven-month period at the Main Bar filming local bands who are in a development phase' (Hardware iv, 26 June 2019). Hardware says he wants to capitalise on the content-hungry social media mill: 'We're fools if we don't utilise the fact that everyone's got this thing in their hand [a phone] to assist the creative industries' (Hardware iv, 26 June 2019). Hardware has a complete understanding of the Creative Industries and wants music content producers who are creative specialists and audiences to benefit: 'The artist needs to benefit, we as producers need to benefit, and the online community who wants to see and watch music, they need to benefit' (Hardware iv, 26 June 2019). The NBN had 'made a massive difference' to Ballarat, making content so much more accessible. While Hardware had the benefit of the university's 'AARNet backbone' and access to a privately-owned high-speed cable service, most punters did not. 'So far as our ability to be able to be creative, do business, and involve the community, the NBN has just been an absolute game-changer' (Hardware iv, 26 June 2019).

As a proud 'early adopter' of technology, Hardware has been streaming live music performances since 1997 (Hardware iv, 26 June 2019) and he is committed to archiving the city's music history by sharing images, audio and video he has produced and collected on Facebook and YouTube. He's also put on an exhibition but has been 'flatly turned down by the National Film and Sound Archive and Australia Council' for funding to help digitise the collection (Hardware iv, 26 June 2019).

Recording Studios

There are a number of commercial recording studios located in Ballarat. [Homestead Studio](#), for example, is located on the peak of Mount Helen which overlooks Ballarat and provides an 'affordable and accommodating space for artists looking to record an album, voice overs or pre-production' (Homestead 2019). It has 'a huge 7m-9m recording space, isolation booths, control room, options for accommodation and a comprehensive gear list' (Homestead 2020). [Bantam Studio](#) 'is regional Victoria's newest boutique production recording studio' (Bantam 2020). It is '10 minutes drive from Ballarat and around 1 hour's drive from Melbourne, Geelong, Bendigo and Colac, making

it accessible for a day's recording or for hire over longer periods' (ibid). It is an 'acoustically designed, fully isolated, state of the art studio'. This studio also specializes in 'film and TV sound design, sound track composition and voice overs.' The main room is a '38 sq meter, acoustically designed studio' and the studio also has a multi-purpose control room, drum/live room, a dedicated vocal booth, a wide range of Instruments and traps all of which cater to 'full band recordings, solo artists, 'mix downs, drum tracking, film post production, film scoring and ADR, radio advert production and podcasts' (Bantam 2020).

Redwood Studios is located in Central Ballarat and is one of the oldest studios in the city. It was established in 1979 and has 'two spacious studios and control rooms with floating floors, iso Booths, vocal booth [and] kitchen' (Truelocal 2020). It is equipped with vintage microphones, preamps, compressors, and an array of plugins and boasts an inhouse grand piano. It is owned and run by the highly experienced Graham Hodge.

Crossroads Music - Retail

[Crossroads Music](#) offers a full retail service, teaching, repairs, and equipment hire. Kevin Thompson has owned the store for 30 years and is the 'last man standing' out of five music stores in Ballarat. He has three employees and hires space to five teachers. He buys and sells mainly Melbourne manufactured and Australian made Maton and Cole Clark guitars. A lot of his stock is also made in Japan, China, and the US, supplied through 30 Australian wholesalers based in Sydney, Melbourne, Brisbane, and Perth. Customers are mostly from Ballarat, but increasingly they are from Melbourne, Geelong, Horsham and Warrnambool: 'I've noticed more over the last four, five years, they've been coming from within maybe a 150-kilometre radius. A lot of times, though, because we specialise in guitar repairs, and I've got, without bragging, I've got a really good name in the industry for repairing, and moderately, very moderately priced' (Thompson iv, 26 June 2019). Thompson doesn't sell online but he is sought out: 'People travel a lot to come and see us ... that's what amazes me, how far they'll come to get something repaired' (Thompson iv, 26 June 2019). Brisbane-based Steve Crick, who Thompson has performed with 'heaps of times ... actually puts his guitar in a case and flies it down' (Thompson iv, 26 June 2019). On one occasion, Bill Chambers, who was playing in Melbourne, travelled to Ballarat to have Thompson fix his guitar (Thompson iv, 26 June 2019). Customers seem happy to come through the door because of the 'back-up service'. Much of the store's promotion is based around Thompson's personal identity as a performer, repairer, and an intrinsic part of the music scene in Ballarat. He says Ballarat is strong in jazz, and schools actively promote music 'from kindergarten through, from ukuleles to whatever'. However, university students have to 'travel out of Ballarat to do an advanced diploma in music because they've closed that in Ballarat'. Performers, too, have to travel to Melbourne and Geelong to perform because 'there's not always the venues around Ballarat' although 'there are quite a few private functions' (Thompson iv, 26 June 2019).

The Lost Ones Venue, Gallery and Bar

[The Lost Ones](#) contemporary art gallery and basement bar is owned by Tara Poole, the Council's Creative City Coordinator, and she says her creative business is not fully captured in CI data (Poole iv, 26 June 2019). The venue is in the 1872-built Masonic temple; the gallery is upstairs, and the bar is in the basement, together providing 'an integration of things we love, art [and] music' (Smith iv, 27 June 2019). Such opportunities are 'part of the fabric of what makes this an interesting place to live, because I can't afford to do that in Melbourne' (Poole iv, 26 June 2019).

The basement bar is open Tuesday to Saturday, with a live performance on Saturday afternoon by artists who are local, regional, Australian and 'sometimes international if we can get them at the right price' (Connally iv, 27 June 2019). Bands are paid '\$200 guarantee plus a door sale. So, anything after 20 tickets sold, at \$10 a ticket, goes directly to the artist [which] gives them an incentive to promote' (Connally iv, 27 June 2019). Acts have included jazz, folk, classical, solo piano, solo guitar, experimental, country and DJs. The bar has 'a relationship' with Federation University, hosting their

annual Cabaret Festival, but punters tend to be ‘a little bit older demographic [seeking] ... a more mature, cozy feel’ (Smith iv, 27 June 2019) and the venue has become ‘a hub’ for book clubs. The Lost Ones advertises through social media, using hashtags and geotags: ‘It’s incredible. Every week, you get at least one person in here who goes, “Oh my gosh, I have lived in Ballarat all my life and I had no idea you were here”’ (Smith iv, 27 June 2019).

The gallery features four- to six-week exhibitions of ‘contemporary art, a fresh view on Ballarat’ of mostly local, but also national and international artists, some of whom have been contacted by the gallery through Instagram (Smith iv, 27 June 2019). Most are ‘really well received. There are few that have tested the boundaries, a few political statements, but it ignites a great opportunity for those to be made in a smaller town’ (Smith iv, 27 June 2019). The gallery has a small permanent collection, holds events such as Buy Local, where a ‘range of artists and makers, all local’ will sell their wares, and has hosted theatre productions such as *The Vagina Monologues*.

Ballarat Events

[Ballarat Events](#) is a creative infrastructure service. It began in 2017 to provide management services for conferences, festivals, and small events, as well as specialist advice on marketing, ticketing, and infrastructure. Managing director Gerard Ballinger says the NBN has been ‘marvelous’ for business and allows him to feature audio and video content on social media and web pages (Ballinger iv, 27 June 2019). Ballinger has two websites, which separately promote events and jazz, and these have been created by local digital developer Alphaville. Ballarat Events has helped to coordinate the [Australian Jazz Convention](#) in Ballarat for four years. (Because of Covid-19 restrictions, all events have been put on hold for 2020).

Ballarat Events has previously received seed funding of \$25,000 from Regional Development Victoria for an agricultural event and would investigate further State Government funding under the Victorian Jazz Industry Strategic Plan (Ballinger iv, 27 June 2019). Ballinger believes Ballarat has the ‘bones and ability to do something really amazing’ on the scale of the Bendigo Blues and Roots Festival (Ballinger iv, 27 June 2019). He says Council is ‘very receptive, and they’re very supportive’ but running a festival presents an element of risk for a small business: ‘It really comes down to the number of people buying tickets, income versus expenditure, profit and loss ...the weather and all sorts of things’ (Ballinger iv, 27 June 2019). Ballinger is a jazz singer himself with a band called Bobby Ballinger. He is also president of the [Ballarat Jazz Club](#), and also runs the Jazz Series of concerts.

Ballinger says the City of Ballarat ‘wants to support the community’ and have ‘a range of grants that are available’ but these are aimed more at not-for-profit organisations rather than private enterprise. However, they look favourably at festivals ‘because as we know, festivals can create such an enormous economic benefit all round; accommodation providers, restaurants ... it creates opportunities for the creative side of things. So, it’s not just performing’ (Ballinger iv, 27 June 2019).

Ballarat Symphony Orchestra

All the musicians in the [Ballarat Symphony Orchestra](#) are volunteers, with a paid professional conductor, and paid visiting soloists. While the orchestra does have ‘a very long history’, including an early connection with the University, it was ‘reincarnated in 1987’ (Harman iv, 27 June 2019). Jessie Harman is chair of the Orchestra board, and promotes their talent: ‘It’s a highly-skilled voluntary orchestra and it typically comprises music teachers of regional schools and colleges as well as the medicos and engineers that often tend to be musicians as well’ (Harman iv, 27 June 2019). They perform three concerts a year at the [Wendouree Centre for Performing Arts](#), which is connected to Ballarat Grammar School (Harman iv, 27 June 2019). Her Majesty’s Theatre was their primary performance venue, but it was closed because of structural damage, putting pressure on available venues with tuned concert pianos (Harman iv, 27 June 2019). Harman said after ‘years and years of seeking support’, the City of Ballarat funded the Orchestra for three years to the tune of \$5,000 a year, but now they are forced to apply for community grants: ‘we asked for \$5,750 and I think they

funded us to the tune of \$2,700' (Harman iv, 27 June 2019). Lack of subsidised support means they raise funds through ticket sales and donations.

Annual concerts are held in March, June, and November. The concert audience, between 250 and 300 mostly Ballarat locals, is the 'family of players ... [and] the classical audience'. They play a broad program 'appealing to the broadest audience we can'. They draw on a range of volunteers either on a 'gratis' or 'quid pro quo' basis to help organise the concerts, including designers, printers, photographers, and IT specialists (Harman iv, 27 June 2019). Social media is done 'free of charge' by a board member who is a communications professional, and meetings are held in local coffee shops. Advertising in local media is done 'sparingly' but media releases are generally picked up by print and radio, but never by TV newsrooms.

Strategic theme 2: The relationship of cultural and creative activity to the wider economy

The City of Ballarat economic development sector specialist Kelli Moran said Ballarat was 'incredibly fortunate in 2018 to have a whole load of government-funded and private stuff all land at the same time' including the State Government-funded Runway accelerator program, Ballarat Tech School and Startup Ballarat, which is being managed by Council based on LaunchVic funding, as well as a federally funded entrepreneurship facility, and the private coworking space Platypus (Moran iv, 26 June 2019).

This was the start of a collaborative ecosystem that developed between private enterprise and local government planners who were able to sit down together, 'and we actually talked to each other about how we are going to be all working as part of an ecosystem where we all support each other and collaborate. So, there's no competition. It's just all about, from the start, about trying to all make it work together' (Moran iv, 26 June 2019). In addition, 'some pretty interesting businesses, mature businesses' were moving into spaces such as the Tech Park (Moran iv, 26 June 2019). The largest employer in the tech sector is IBM, which has government contracts with the Tax Office and government call centres that are 'bound by confidentiality' (Moran iv, 26 June 2019).

Precincts and Pathways – what underpins regional development

From an economic development perspective, Ballarat, over the last decade, is continuing to build on new and emerging areas, as Scott White from Regional Development Victoria (RDV) stated (White iv, 26 June 2019). Former industrial 'wasteland' was redeveloped as The Gun Cotton complex and has attracted makers and artisans, including Wootten shoemaker and leather craftsman (Osborn iv, 26 June 2019). Julia Cornwell, also from Regional Development Victoria, points out, Wendouree is home to film 'set builders and designers ... doing sets that are going into major productions in Melbourne, Sydney and across the world' and their location 'right on the highway' means easy access to Melbourne (Cornwell iv, 26 June 2019). In addition to Runway, there is the privately-owned Platypus co-working space (Abela iv, 26 June 2019). The University Tech Park, where IBM is located, and the Greenhills Enterprise Centre, was the 'first real space for emerging businesses to co-locate and rent a space ...to start growing (White iv, 26 June 2019). The arts campus of the University located in Camp Street has also been a driver for Creative Industries. 'There are precincts that have emerged, but there's been an underpinning as to why they've happened in those areas ... underpinning infrastructure, both as knowledge and hard infrastructure, that creates this whole gamut of pathways for people to enter into the creative sphere' (White iv, 26 June 2019).

Federation University Technology Parks

[Federation University Technology Parks](#) (FUTPs) offer 'an outstanding example of the Commonwealth Government's Innovation Precinct principles' (FedUni, 2020). There are now four Technology Parks in the Ballarat region, with the main site at Mount Helen (FedUni, 2020) and

others in central Ballarat in the Flecknoe building, at Gippsland, and Morwell. Their combined economic impact is \$300 million, with '2,100 full-time jobs hosted by the two Ballarat FUTPs, equal to almost 5% of the total full-time employment in the City of Ballarat' (FedUni, 2020). The first park opened in 1985, and [IBM](#) was one of the first enterprises to take up residence.

The Tech Parks' principal focus has been to develop information and communication technologies industries and across the four Tech Parks there are 64 enterprises. These also include creative industries companies like Small Dog Design which offers a range of creative design solutions and website development services to local, national and international clients. Southern Cross Austereo is also located at Tech Park Central and they create more hours of live radio and online content than any other broadcast media in Australia. Porter Architects, part of the creative services sector, are located in Tech Park Central as well focusing on cultural, residential and commercial projects providing full architectural services.

16 enterprises are located at Mount Helen (Pulford iv, 27 June 2019). These include Ballarat Health Services – Statewide Equipment Program, Berry Street child and family services, Black Hill Software, the Centre for eResearch and Digital Innovation (CeRDI), Concentrix, Co-pilot Marketing, CT4, Emergency Services Telecommunications Authority, Evaluation Solutions, IBM Ballarat, Internet Commerce Security Lab (ICSL), iGlass, Precision Agriculture, Primary Health Care, St John of God Health Care, and State Revenue Office (FedUni, 2020).

Executive director Jeff Pulford describes the Mount Helen Campus Tech Park as a 'hotspot' because of the enterprise activities; 'probably three enterprises at the Tech Park are specifically doing customer focus pieces, and then there's another 10 or 15 that have businesses that developed applications off the back of that work ... Most of these businesses consult either statewide or nationally or internationally' (Pulford iv, 27 July 2019).

The Mount Helen Tech Park covers '3,000 metres, of which 2,400 is commercial space. It's got a conference room that can seat 120 people. It's got a board room and a data web streaming facility, a cafe and casual seating for about 100 people in the heart of the building' (Pulford iv, 27 June 2019).

While some of the companies in the Tech Park do serve the region, most are global: 'most of these companies aren't actually geographically constrained, and that's a result of [internet] fibre ... it's one of the opportunities strategically for some of the businesses that are here' (Pulford iv, 27 July 2019). The Tech Park has three fibre providers including Burnett and iiNet. Pulford says the NBN uptake is 'probably less than 30% of the connections' because the existing fibre providers are competitive. However he says 'it's a nice fallback because if they can't reach a commercial deal with one of the three providers, they fall back onto an NBN deal' (Pulford iv, 27 July 2019). One such company is Argus Health, a digital platform to Telstra Health: 'They've got 45 people sitting here, they do nothing in Ballarat. They're based here, they're based here because of skills' (Pulford iv, 27 July 2019). Pulford is supportive of long-term partnerships to develop 'the skills piece. And then what we do is we provide an infrastructure piece around it' (Pulford iv, 27 July 2019).

Most of the marketing done by Pulford is about building industry relationships and profiles: 'we have a very stripped-down website, as an example, because quite simply there's not a need or a requirement for it' (Pulford iv, 27 July 2019). The Tech Park is frequently used as an exemplar by Federation University communications but Pulford does all the outward business engagement with the University, including commercial partnerships: 'We are the largest commercial operator in the region. We host 2,100 private sector IT jobs in university facilities. That's a big part of the universities, that is, our engagement' (Pulford iv, 27 June 2019).

Pulford explains that 'the issue for data and technology in regional areas is not infrastructure, it's not capital. It's actually skills-based' (Pulford iv, 27 July 2019). The Tech Park is focused on building partnerships to create an 'ecosystem'. Pulford said one 12-month partnership that focused on developing a skills base was likely to create 65 jobs at the Mount Helen Tech Park: 'We attracted this company out of Brisbane because they weren't able to get sufficient workforce. And so, what we've done is we've basically got a TAFE course around data security. And then we've got an

undergraduate degree around data security. And so, this company has now got a guaranteed student placement program where they're going to have 20 people a year come through, of which they'll probably hire six to eight' (Pulford iv, 27 July 2019).

Within Runway's co-working space are some individual creatives such as a professional podcaster and a magazine editor and in comparison to many of the other startups at Mount Helen these are relatively small operators. Runway Ballarat puts these creatives 'through an innovation program so they can take the application either into the maker space to actually prototype it or take it back to the enterprise' (Pulford iv, 25 July 2019). It allows 'a whole lot of creative people to be able to play with stuff in their own time, rather than doing it in their garage, they tend to come in and do it in the university, in this maker space' (ibid).

And then are the less obvious interconnections between the Tech Park and the creative industries. Each of those SMEs, large and small, across the four Tech Park locations have a professionally designed website featuring professionally written text, highly professional photographs, some with embedded active audio-visual material, developed specifically for their sites.

IBM Ballarat and Concentrix

The longest occupant of Ballarat's Tech Park is [IBM](#), employing 650 people on site across two facilities. IBM now offers business solutions, as they have 'moved from technology into consults' (Pulford iv, 27 June 2019). IBM has a large development stream 'employing roughly 150 people with that skillset' (Pulford iv, 27 June 2019). Tech Parks CEO Jeff Pulford explains that 'the IBM capability is inculcated' across Ballarat and 'everyone who works in IT has got some connection with IBM over the last 20 years' (Pulford iv, 27 June 2019). IBM is increasingly supporting Ballarat Health Services, which is 'the largest employer in town ... with 6,000 employees' (Pulford iv, 27 June 2019). The Tech Park and IBM offer 'an internship program where basically students spend three years doing two shifts a week at IBM as part of their undergrad. And then IBM goes on to employ about 75% of those people' (Pulford iv, 27 June 2019). This capability is unique in regional Australia, and unique to Ballarat.

[Concentrix](#) is an IBM spin-off offering customer services and support. Concentrix moved to Ballarat in 2014 with the 'opening of its new Concentrix Global Delivery Centre at Federation University Australia Mount Helen Campus' (Concentrix, 2020). Nationally, they employ about 2,500 people and in Ballarat they employ about 85 (Pulford iv, 27 July 2019), which is part of the corporation's desire to 'draw on the area's talented labour pool' (Concentrix, 2020). Pulford says that they are working on an impact narrative study to capture the 'the broader narrative' more clearly, specifically around 'the relationship with IBM' (Pulford iv, 27 July 2019).

CeRDI – Centre for eResearch and Digital Innovation

Federation University's Center for eResearch and Digital Innovation ([CeRDI](#)), located at the Mount Helen Tech Park, is a national leader in data interoperability and 'web-based spatial information and knowledge portals which provide public access to data sets that are often hidden from view' (CeRDI, 2020). These data discovery approaches lead to technological innovation that should have longitudinal impact across six research themes; natural environment, agricultural, hazard planning and resilience, health and wellbeing, and importantly for the creative industries, heritage, and cultural and regional development (CeRDI, 2020). There were three creative industries businesses who co-located into the Tech Park to be with CeRDI because 'they've got businesses that develop apps and solutions for clients' (Pulford iv, 27 June 2019). In 2017, CeRDI comprised 36 (full-time, part-time and casual) staff across research (23), technical (10), and project management and administration (3). Six PhD students continued their research within CeRDI during 2017' (CeRDI, 2017, p. 6).

Precision Agriculture

An example of a business partnership with CeRDI is [Precision Agriculture](#), which provides access to data that leads to cost savings for modern farming and horticultural practices. The CeRDI partnership has been going since 2015 and has brought about collaborative and innovative practices in digital agriculture that will have broad implications for improved farming practices (CeRDI, 2017, p. 1).

CeRDI offers new and innovative methods to manage soil sampling data, which leads to precise advice on how agronomy services should advise farmers and horticulturalists. The overall aim is to improve field and paddock production yields, reduce costs, and thus increase efficiencies and profits. Precision Agriculture does this by focusing on 'soil sampling'. In two years they have moved from '10,000 soil samples a season ... to 120,000'. Pulford explains that is due to the data partnership enabled through the CeRDI (Pulford iv, 27 July 2019). While there are a number of other companies that provide these services, the partnership is unique and, as Pulford attests, 'it's sort of like three evolutions on from where the industry is at' (Pulford iv, 27 July 2019). Precision Agriculture have created applications that feed data sets via a GPS to a tractor working a crop. For example, there is a 'variable rate fertiliser system' which adjusts the amount of fertiliser being dispersed on the land as an unmanned tractor traverses a property.

NBN Internet

Ballarat was among the early rollouts of the NBN in Australia. This was the result of a specific strategy that the city put in place '20 years ago so it was pretty good foresight' (Underwood iv, 26 June 2019). Creating the Tech Park at the University and attracting IBM as a major tenant 'set the benchmark of where the city wanted to go as this knowledge hub' (Underwood iv, 26 June 2019). With a pre-existing cable network which offered 100Mbps, but which wasn't across all areas (Underwood iv, 26 June 2019), good internet attracted game developers like Matt Hall, of Hipster Whale: 'the likes of Creswick and Clunes had satellite NBN very early' which was an 'attractor for the likes of *Crossy Road*' (Cornwell iv, 26 June 2019). As discussed above, the NBN has also been beneficial for events and music streaming businesses. Unfortunately for Ballarat, the implementation of the NBN has not seen 'full blanket coverage across the city, but it has definitely made an impact' (Underwood iv, 26 June 2019). Delivery speeds are inconsistent as 'it depends on where you are' (ibid). Pulford said that Ballarat was 'lucky enough to get the NBN rollout early', with much of Ballarat receiving fibre to the premises although, as he said, 'the NBN actually became an impediment to some businesses because the NBN didn't roll out where there was an existing fibre network', which affected a number of business deals (Pulford iv, 27 July 2019).

Co-Working Spaces and Hubs:

Runway Ballarat

[Runway Ballarat](#) is hosted at the Ballarat Technology Park Central and is funded through partnerships between the Tech Park, the City of Ballarat, the Victorian Government and Regional Development Victoria. The hub was funded with \$4.3million from the Victorian Government and features a 'fabrication laboratory that will allow the manufacture of prototypes' (FedUni, 2020, p. News). RDV partnered with Runway Ballarat because the Runway program was already established in Geelong: 'If we have a regional network that is big enough ... and an ecosystem that revolves around regional areas, all of a sudden that starts to compete in the marketplace and draws the sort of level that's needed to attract [capital investment] interest' (White iv, 26 June 2019).

Runway Ballarat operates out of the Flecknoe building, a former TAFE premises for trades apprenticeships. The converted sawtooth warehouse today houses more than 500 people, including 'the Runway accelerator, incubator and co-working space. It's got an incredibly groovy cafe in it. Once again, rent-free. It's got a 260-seat call centre for Victoria Police above it. And then it's got our

sharpest data company that basically are doing Apple servicing for Ballarat' (Pulford iv, 27 July 2019). Within Runway's co-working space are some individual creatives such as a professional podcaster and a magazine editor although 'much of it is very small' (Pulford iv 27 July 2019). But when combined, there is an innovative and technology ecosystem with up to 600 people, and Pulford believes the rent-free café 'is a really important part' of this ecosystem: 'While they don't all meet in the café ... the point is you actually have to provide the human element. It can't just be all about the IT and the desks, it's got to have a social aspect too' (Pulford iv, 27 July 2019).

Runway Ballarat puts creatives 'through an innovation program so they can take the application either into the maker space to actually prototype it or take it back to the enterprise' (Pulford iv, 25 July 2019). The maker space allows 'a whole lot of creative people to be able to play with stuff in their own time, rather than doing it in their garage' (Pulford iv, 25 July 2019).

Runway is a not-for-profit organisation that aims to customise start-up ideas by developing and delivering a specific entrepreneurial program. Runway Ballarat is part of the same organisation operating in Geelong, Dandenong and Warrnambool (Renew Geelong, 2018). Nichola Sleight is the General Manager at Runway Ballarat, which opened in October 2018. Runway Ballarat has a co-working space, a fabrication laboratory, a prototyping lab for commercial purposes, 3D printer, laser, vinyl and textile cutting, and a podcasting studio. They run 'a six-month accelerator program for business development', with similar opportunities as Runway Geelong, 'except with the added bonus of the Fab Lab and the podcasting studio' (Sleight iv, 27 June 2019). Runway Ballarat offers participants a formal space for business growth.

The Victorian State Government financially backed the Fab Lab, modelled on one at Massachusetts Institute of Technology (MIT) in the United States allowing 'people at grassroots level' to get access to 'prototype and innovate' cheaply (Sleight iv, 27 June 2019). The laser cutter at Runway Ballarat is worth \$60,000, and the 3D printers are \$6,000 each. While 3D printers are becoming more available Sleight explains that refined 3D printing is more challenging 'and having someone maintain it and provide assistance for development' are the additional services offered through the Fab Lab. Runway Ballarat also has 'three techs that run the space who provide assistance to people that want to come in and build stuff' (Sleight iv, 27 June 2019). The Ballarat business community is eager to be connected, to be part of a sustainable region and there are events that engage Runway tenants and local businesses to share experiences and knowledge with the community.

Rachel Abela, the Regional Development Officer for RDV in the Grampians, was previously involved with Runway Geelong, and says, just as it has in Geelong, Runway Ballarat has 'scope' for supporting 'creative businesses' (Abela iv, 26 June 2019). Offering start-up support and acceleration, it would 'help Ballarat become a more design-led city' and provide 'an area where business, industry, government can meet, congregate, and then cross-pollinate with education as well ... creating the entrepreneurial spirit for a new and emerging business, and the scaling of existing business looking to go to the next level' (White iv, 26 June 2019). Projects such as Runway would also 'avoid the brain drain that we were finding too, because there were smart people here, but they didn't have the support or an ecosystem to allow them to stay so we kept losing them' (Underwood iv, 26 June 2019).

Ballarat Hackerspace

[Ballarat Hackerspace](#) is a 'geeks club' focused on STEAM: 'a community-run non-profit organisation that supports and encourages Science, Technology, Engineering, Art and Mathematics' (Hackerspace, 2020). Inside Ballarat Tech School, 'it's a geek shed ... a nerd shed' operating as a community club 'built into the tech school so that people can come in, it's like a drop in centre' (Pulford iv, 27 July 2019).

LAB79

[Lab79](#) is a tech incubator and co-working space in the heart of Ballarat. Partnering with Federation University, it is designed to be a world-class institution that will help tech-based companies grow, solve problems and create value. Lab79 is not just a space, but a community of entrepreneurs, engineers, designers, developers, thinkers, businesspeople and more (Lab79 online).

Ballarat Evolve

[Ballarat Evolve](#) is an organization, similar in effect to the Renew Newcastle project, trying to activate empty spaces in the CBD by working with landlords to offer spaces free or for minimal rent to creative businesses with ‘training wheels’ to help them establish (Smith iv, 27 June 2019). They have received funding through Creative Victoria and the City of Ballarat but are ‘still depending on funding from other areas’ (Smith iv, 27 June 2019). The Lost Ones business manager, Emily Smith, who is involved with Ballarat Evolve, said ‘it’s a great program and an interesting one to start in Ballarat, but the landlords who we have managed to convince are very supportive, which is great’ (Smith iv, 27 June 2019).

Secondary and Tertiary Education

Schools in Ballarat are strong supporters of technology as well as performing arts. [Ballarat Tech School](#), with Years 7 to 12, attracts students interested in technology; they learn how to create ‘applications, AI and Virtual Reality’ (Ballarat Tech School, online). It is co-located with Ballarat Hackerspace and next door to Runway Ballarat, providing start-up opportunities that will ‘evolve into the larger Tech Park ecosystem. So, it’s kind of like an inception through to multinational sort of continuum’ (Pulford iv, 27 July 2019).

Performing arts, as part of an ‘embedded culture’, starts in schools and ‘most of the major high schools have got a decent performing arts space’ (Osborn iv, 26 June 2019). Performing arts include singing, dancing, theatre, music, and musical theatre and ‘we’ve got a couple of really strong amateur theatre companies here in Ballarat that do pretty high-quality theatre productions at Her Maj’ (Cornwell iv, 26 June 2019). [Ballarat Grammar School](#) has ‘the largest pipe band of any school in the country ... tiny little kids learn how to play the bagpipes ... That’s the kind of organic stuff that is really strong now and part of the fabric which we just ... take for granted’ (Abela iv, 26 June 2019).

Gaming has also been promoted as a career to Ballarat students by Regional Development Victoria: ‘We’ve run an event called Getting to Games, which is a school-based program in partnership with Federation University, making kids aware of career paths and the total spectrum of jobs in the gaming industry, from video production or sound production to coding, the whole gamut’ (Underwood iv, 26 June 2019). RDV also partners with the [Games Developers Association of Victoria](#) to bring headline speakers to Ballarat (Underwood iv, 26 June 2019). Federation University offers courses ‘at the entry level into that gaming space’ and Ballarat’s proximity to Melbourne means there is ‘the ability to collaborate’ and ‘a commuter offering’ (Underwood iv, 26 June 2019).

Other partnerships include P-Tech with IBM ‘that picks up kids that are tech-oriented that might not fit into the normal school program’, as well as Ballarat Tech School and Runway, ‘so it’s pretty hot in that sense for young people’ (Osborn iv, 26 June 2019).

[Federation University](#) (FedUni) is a modern, progressive university providing high-quality vocational and higher education across a national and international network of campuses. FedUni has two schools that feed into the Creative Industries. The School of Arts offers degrees in Performing Arts, Communication Design, Contemporary Visual Arts, and Creative Arts (Honours). The School of Science, Engineering and Information Technology offers a Bachelor of Information Technology. FedUni also offers TAFE diplomas in Business, IT and Graphic Design, Professional Writing and Editing, Hairdressing and Beauty Therapy, with Visual and Performing Arts offered at the Camp Street CBD Campus. FedUni’s [Arts Academy](#) is on the Camp Street campus, ‘right in the middle of the creative precinct’ (Chew iv, 27 June 2019). They offer students Bachelor programs in Performing

Arts, Visual Arts, and Communication Design. The biggest cohort of students, at 75, is in the Bachelor of Performing Arts, which covers acting for stage and screen, and music theatre. The goal is to 'create multi-skilled performers who'd be quite happy going into voiceover or games development ... into the emerging performing arts industries as well as the traditional musicals' (Chew iv, 27 June 2019). A Collaborative Workshop course, 'where visual arts, communication design and performing arts students are all in the same mix' offers students the chance to respond 'to an initiative outside of the Arts Academy', such as the Council's Our City Our Stories project (Chew iv, 27 June 2019).

Arts Academy director Associate Professor Richard Chew said the 'reputation is that we present well-rounded graduates' and that the school's point of difference was 'the focus on new work and experimental approaches to historical work' (Chew iv, 27 June 2019). Visual art is 'the strongest player' in the post-graduate space, but 'Honours is in decline'. Performing arts students put in long hours 'from eight in the morning till sometimes nine, 10 at night' so 'at the end of their third year, they're ready to go' (Chew iv, 27 June 2019). Students come from throughout Australia and even New Zealand, and former students have gone on to successes including forming their own company, [The Sisters Grimm](#), and touring with the production *Robot Song*. Others become teachers of drama and music in the region or set up their own creative businesses. The university has a strong connection with Ballarat Tech School and fosters internships within the community.

The [Art and Historical Collections](#) at Federation University has a team of 10 volunteers to help catalogue art and historical works. The curator, Clare Gervasoni, is grateful for volunteers, insisting they be 'really well trained, otherwise they're wasting their time and my money' (Gervasoni iv, 27 June 2019). Gervasoni explains their department were early instigators of a pilot program with Victorian Collections for small museum cataloguing, '... it was an absolute godsend for us, and I still love it ... Every year that Victorian Collections has been in existence, we've been nominated for a cataloguing award' (Gervasoni iv, 27 June 2019).

In addition, the Australian Catholic University's [Aquinas Campus](#) has a long history in music teaching beginning in 1909 with the Ballarat East Sisters of Mercy, and they have a small student body of 1,000 students.

e-learning at Yum Studio

[Yum Studio](#) is a small creative media and e-learning company operating from Ballarat since the early 1990s, with clients across Australia. E-learning clients are mainly universities and TAFEs. Early on, their work included development of content and creation of platforms but 'as technology has caught up' it has become about customising 'open-source things like Moodle' (McCuskey iv, 26 June 2019). Creative Director Erin McCuskey and her partner started the business because 'there was no work' in Ballarat for them to do the 'fulfilling and really creative' jobs they wanted to do (McCuskey iv, 26 June 2019). McCuskey says they are 'storytellers through film, photography and word' (McCuskey iv, 26 June 2019). They don't market their services: 'we most often get work through return business, through word-of-mouth and we're constantly putting in for commissions and applying for funding to do ... really on-the-edge creative work that is considered risky or perhaps dangerous even in regional areas' (McCuskey iv, 26 June 2019). They spend half their time in Melbourne: 'there's a lot you can do online, but I love to meet people, and I love to talk to people ... there needs to be time around talking and developing [an] idea' (McCuskey iv, 26 June 2019). Often that time, and more time developing 'comprehensive quotes', is 'not paid' and commissions start when the work does (McCuskey iv, 26 June 2019). At one point they employed six local people, but the lack of local work made that unsustainable and they downsized. They were also a registered training organization but sold their training arm because of 'bureaucracy and administration' (McCuskey iv, 26 June 2019). If support is needed, they 'contract-in ... rather than employ' (McCuskey iv, 26 June 2019).

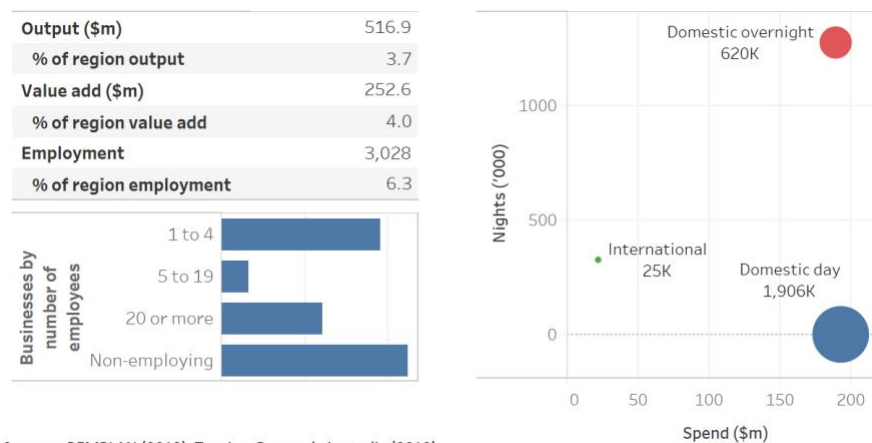
Interestingly, they are sometimes overlooked by Ballarat businesses 'who prefer metro firms' and other times potential clients 'think we're metro, just because of things like our website and our logo, and the kinds of jobs we do' (McCuskey iv, 26 June 2019). While she is pleased the City of Ballarat has developed a creative strategy, McCuskey said it was disappointing they 'did not provide an

opportunity where the artists can become leaders within that strategy’ (McCuskey iv, 26 June 2019). Local networking did not really help them gain local employment: ‘I’ll just enjoy the fact that I live in a beautiful place, I have beautiful friends here, but I will probably never get a job here’ (McCuskey iv, 26 June 2019).

Tourism and cultural policy

Regional Development Victoria has invested in cultural tourism projects, always with a focus on ‘the direct employment of that opportunity’ (White iv, 26 June 2019). In addition to Sovereign Hill, RDV sees the big cultural attractors as the Art Gallery (especially the Archibald Prize), the Ballarat International Foto Biennale, the South Street Eisteddfod held at Her Majesty’s Theatre, White Night, [Organs of the Goldfields](#), and the [Meredith Music Festival](#), as well as the quality of the local food offering. Meredith Music Festival is now self-sustaining: ‘They’re not asking us for money, they’re asking what we know that they can invest in because they want to give back to the community’ (Osborn iv, 26 June 2019) (Note these Festivals were impacted in 2020 because of Covid-19 restrictions).

Figure 5 Tourism activity, Ballarat



Sources: REMPLAN (2019), Tourism Research Australia (2019)

RDV has supported other projects, in the broader sense of economic development, through the Stronger Regional Communities Program which has ‘a population attraction angle to it’ and a ‘creative angle too’ (White iv, 26 June 2019). Projects supported by RDV include Pavilion (the relocation of an architectural installation from Melbourne to Ballarat), [Plate Up](#) (a food festival) and the [Biennale of Australian Art](#) ‘three programs in the last 12 months that have been successful from this office’ (White iv, 26 June 2019). Although, the Biennale of Australian Art ‘was not a successful event in Ballarat, and that actually puts it in a risk profile for us because we had creative industry artists that were not paid for the works they had undertaken. So, where Ballarat is growing this creative industry opportunity, having an event that is not successful taints us with a very bad light’ (Abela iv, 26 June 2019) The Biennale was ‘very ambitious. There were elements of it that were fantastic, from an art and critical perspective, elements of it were really well done. Others weren’t. And the payment factor was unfortunate’ (Osborn iv, 26 June 2019).

The [Ballarat International Foto Biennale](#) ‘started out of Daylesford probably about 12 years ago as a pretty small event and has grown and grown and grown ... they’re pretty well self-sustainable, which is amazing’ (Osborn iv, 26 June 2019). They have ‘purchased an old bank and they’re setting up a permanent exhibition space and home for the Biennale’ (Abela iv, 26 June 2019)

Federal and Victorian Government investment of \$30 million in the [Grampians Peaks Trail](#) is expected to ‘push a high rise in visitation, and people walking means we have to do a whole lot of work around business capability and capacity, and investment attraction, and skills’ (Osborn iv, 26 June 2019). Similarly, the \$6 million investment in [Creswick Trail](#) ‘activates the whole town for

tourism, and so we need to bring businesses along to capitalise on that investment' (Osborn iv, 26 June 2019).

Ballarat has held [White Night](#) for several years and was 'the first regional centre' to have the lighting event: 'this is where your heritage comes into play ... the way it's programmed against the heritage buildings is actually quite stunning' (Abela iv, 26 June 2019). It attracts 40,000 people: 'we've never seen the streets full at night like we did for White Night' including Melbourne visitors because 'there'll be a bit more space ... Melbourne is so overrun' (Osborn iv, 26 June 2019).

Food offerings as part of cultural tourism in Ballarat compete with Melbourne, and this is promoted in Ballarat's *Creative City Strategy*. The activation of laneways in the city brings a unique food offering that attracts 'a whole other gamut of people into town ... there's this whole activation of laneways ... those sort of things that align with the creative industries' (Cornwell iv, 26 June 2019). Food and wine attract weekend visitors, along with 'a really beautiful gallery, some various cultural offerings that we can have, it becomes more attractive from a tourism perspective to actually come, because there's a lot within the CBD' (Cornwell iv, 26 June 2019). Creative City Coordinator Tara Poole feels that there are ways to take advantage of the festival 'skillsets that are brought to town' as part of visiting events such as festivals is to create a 'fringe program ... they need to share their skills and expertise about what it means to run a festival' with local musicians and venues (Poole iv, 26 June 2019). 'Lost and forgotten trades' were also being celebrated in events as well as the [Ballarat Winter Festival](#) – usually held in July, and [Ballarat Begonia Festival](#), running since 1953, [Spring Festival](#) since 2001 and [Ballarat Beer Festival](#) since 2012.

Eureka Centre and Gold Museum

The [Eureka Centre](#) (formerly the Museum of Australian Democracy at Eureka) is located at the site of the Eureka Rebellion known as the Eureka Stockade. It houses the original Eureka flag, upon which the rebels swore an oath as a symbol of defiance against the ruling colonial government. In 1854, a period of civil disobedience by gold miners over the actions of the government, culminated in a rebellion during which at least 27 people, mostly rebels, died. It was the most prominent rebellion in Australia's history. It is held to be the birthplace of Australian democracy.

The [Gold Museum](#) is Ballarat's regional social history museum and part of the Sovereign Hill experience. Opened in 1978, the Gold Museum includes around 150,000 items, covering a diverse range of collections from mining and military history through to costume and photography. The Gold Museum also has an active schedule of exhibitions, public programs and school holiday activities.

Other museums in Ballarat include [Ballarat Tramway Museum](#), [Ballarat Aviation Museum](#), and the [Golden City Paddle Steamers Museum](#).

Strategic theme 3: Hotspot Comparisons

There is no doubt that Victoria has stolen a march on all other states in attracting the Creative Industries. Across all Victorian regions in the study, there was evidence gathered of ecological interdependence, where the regional Creative Industries are interconnected across sectors, and networked within and between each other, exhibiting complementary activity at all scales.

Geelong and Ballarat, as well as Ballarat-Bendigo-Wodonga, are connected through rail and road infrastructure that has developed over a long period of time, proving beneficial to each region as it has allowed Creative Industries workers to commute between regions and to Melbourne, a national hub of Creative Industries.

The constraining and enabling effects of policy actions were also observed in all regions. Each exhibited a very deep connection between digitisation and the ability for regional players to operate competitively in both the local and the global environments. However, it is worth noting that Wodonga has the poorest internet quality of the four Victorian sites. A variety of CI initiatives were supported in all hotspots by Regional Development Victoria, Launch Vic, and Creative Victoria.

The Historic Urban Landscape (HUL) is strong in both Bendigo and Ballarat. A view is held that the City of Bendigo has been a leader in heritage and town planning, and there exists some rivalry between Ballarat and Bendigo in this regard. Greater Bendigo occupies a broad physical area with 15-17% of the population living in rural parts of Bendigo, whereas, Ballarat is virtually an urban area, 'so if there is a lower proportion of people working in the Creative Industries in Bendigo it's because of the rural areas, that actually drags down our percentage, while Geelong is the urban area plus the Bellarine Peninsula, which is a pretty wealthy creative area' (Budge iv, 24 June 2019).

While generalisations between the creative capacity of regional Victorian towns can be made, looking at the specialties of each in this study highlights each region's strengths which have developed over time. When examined systematically the complexities and networks that typify the Creative Industries tend to benefit not only each region but the Victorian state as a whole. In contrast to areas such as La Trobe, where 'economies have been singly focused on their manufacturing', Ballarat, Geelong and Bendigo, have developed economies that are 'much broader and that has allowed for that broadening of infrastructure across a whole gamut of professions to emerge' (White iv, 26 June 2019).

While it is a common theme that the liveability of regional cities makes up for lower wages, it also remains a fact that active agents, that is individuals who 'get things done', are vitally important as one of the drivers of the Creative Industries. In all these communities, Creative Industries clusters have exhibited a patterned set of demographic movements, with sea changes and tree changers taking advantage of the regional lifestyle and real estate prices, commuters moving daily between Melbourne, Geelong and Ballarat, and from surrounding regions to the Surf Coast at holiday times.

It is notable that the relationship between innovation and start-up culture within the Creative Industries, which is very strong in Ballarat and Geelong, has become more entrenched and interconnected, while there is an increasingly wide array of approaches to gaining an income, particularly in micro businesses where highly skilled creatives sell their services or products. Ballarat has [Federation University](#), and with State Government investing over decades into [tech parks](#) here and in other regions, Software and Digital Content is a key area of growth for the broader economy. Geelong has a very large urban area including the Bellarine Peninsula, and there has been significant State Government investment in the [Geelong Arts Centre](#) the [Library](#) and the [Gallery](#). Geelong also has [Deakin University](#) with a number of Creative Industries programs on offer, including architecture, which has massively increased capacity. In Bendigo, the [Art Gallery](#) works very closely with [Bendigo Tourism](#) and also has a developed relationship with La Trobe University's [Bendigo campus](#) and the [La Trobe Art Institute](#), a higher education partner with Bendigo Art Gallery.

Cultural tourism was strongly featured in the four sites, with an increasing importance placed on strengthening the connection between Creative Industries and cultural tourism. The economic injection from out-of-town visitations means these regional centres can prosper. Wodonga delivers a strong cultural program including events staged at [The Cube Wodonga](#), the [Bonegilla Migrant Experience](#), and [Gateway Village](#) creating a vibrant group of cultural organisations that attract visitors to [Murray Arts](#), [HotHouse Theatre](#) and the [Jazz Basement](#). Bendigo has the [Bendigo Easter Festival](#), [Bendigo Blues and Roots Music Festival](#) and [Bendigo Art Gallery](#), which are impressive visitor attractors for Bendigo's economy. For Ballarat, there are museums and family experiences to be found at [Sovereign Hill](#), [Eureka Centre](#), and the [Gold Museum](#), and the Archibald Prize has been hosted by the [Art Gallery of Ballarat](#). Other visual and performing arts events are the [Ballarat International Foto Biennale](#), [The Royal South Street Eisteddfod](#) held at [Her Majesty's Theatre](#), White Night and the [Meredith Music Festival](#). In Geelong, there is the [Mount to Mouth Arts Walk](#), [Geelong After Dark](#) and [National Wool Museum](#), and the Surf Coast has [Falls Festival](#), [Lorne Sculpture Biennale](#), [Surf Coast Arts Trail](#) and [The Australian National Surfing Museum](#).

Table 1 Victoria hotspot comparisons

	Greater Geelong & Surf Coast LGAs	Ballarat LGA	Greater Bendigo LGA	Albury & Wodonga LGAs
ASGS remoteness category	Inner regional Australia	Inner regional Australia	Inner regional Australia	Inner regional Australia
RAI region type	Regional city / Connected lifestyle region	Regional city	Regional city	Regional city / Industry & service hub
Resident population, 2016 ^a	262,828	101,689	110,479	90,427
Average annual growth 2011-2016	2.1%	1.7%	1.9%	1.6%
Employed persons, 2016 ^b	103,752	45,794	45,051	43,915
Average annual growth 2011-2016	3.8%	3.3%	3.5%	3.0%
Total creative employment, 2016 ^b	4,316	2,137	1,367	1,113
Average annual growth 2011-2016	5.7%	2.0%	2.9%	0.3%
Total earnings from creative employment, 2016 ^b	\$260.2m	\$119.1m	\$77.0m	\$64.1m
Average annual growth 2011-2016	4.8%	4.4%	4.7%	3.8%
Total businesses, 2016	66,897	23,499	22,709	21,361
Average annual growth 2011-2016	2.3%	2.9%	1.7%	1.0%
Total creative businesses, 2016	5,060	1,668	1,444	1,125
Average annual growth 2011-2016	4.7%	4.1%	3.0%	2.9%
Proportion of all businesses registered for GST, 2016	49.4%	52.0%	51.2%	51.4%
Proportion of creative businesses registered for GST, 2016	38.0%	40.5%	38.0%	39.9%
Regional domestic product, 2017-18	\$13,852m	\$5,632m	\$5,305m	\$5,192m
Average annual growth	5.0%	8.4%	0.8%	0.1%
Mean age ^a	40.1	39.0	39.5	38.7
Unemployment rate ^a	6.5%	7.6%	6.8%	6.9%
Youth unemployment rate ^a	13.2%	15.0%	14.0%	13.3%
Youth unemployment ratio ^a	45.3%	46.7%	44.8%	45.3%
Indigenous ^a	2.6%	1.5%	1.7%	2.6%
Volunteer ^a	17.4%	17.8%	18.7%	17.3%

Note a. These statistics are provided by place of residence, and b. are by place of work

Source: Australian Bureau of Statistics (2016), ABR (2019), .idcommunity (2019), Regional Australia Institute (2014), REMPLAN (2019)

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Appendices

Data tables and heat maps are available via the following hyperlinks:

Appendix A Census data

- Appendix A.1 [Creative employment: counts, growth rates, intensities and heat maps](#)
- Appendix A.2 [Creative earnings: total earnings, growth rates, intensities and heat maps](#)
- Appendix A.3 [Creative incomes: mean incomes, growth rates, intensities and heat maps](#)
- Appendix A.4 [Creative employment by sector, heat maps](#)
- Appendix A.5 [Creative employment by ANZSIC4 industry category, state comparisons](#)
- Appendix A.6 [Creative employment by ANZCO4 occupation category, state comparisons](#)

Appendix B Australian Business Register data

- Appendix B.1 Creative businesses: counts, growth rates, intensities and heat maps (forthcoming)