Australian Cultural and Creative Activity: A Population and Hotspot Analysis

Bendigo Victoria

Image courtesy of City of Greater Bendigo

QUT Digital Media Research Centre
Strategic Summary

Bendigo’s Creative Industries (CI) are seams of gold that connect all sub-sectoral components and create significant overflow into the broader regional economy.

- Bendigo is the largest inland city in Victoria, with a population of 110,000 and First Nations people accounting for 1.7%. It has a culturally diverse community stemming in part from its gold field past.
- Greater Bendigo 2016 Australian Census data confirms that 1,573 people earnt a primary income in the Creative Industries, with an overall growth of 2.9%.
- The City of Greater Bendigo’s vision is to create the world’s most liveable community, with State Government projections showing modest population growth in rural Victoria over the next 15 years.
- Bendigo was a leader, developing its arts and culture strategy 20 years ago. The 2019-2022 strategy is ambitious but also presents one of the most comprehensive and sophisticated understandings of all the sub-sectoral components of CI.

Key growth areas are in the Creative Services (CS) sub-sector of the Creative Industries, that is in Architecture and Design, Advertising and Marketing, and Software and Digital Content.

- Web design, app development and games experienced a growth of 9.5% between 2011 and 2016.
- The Architecture and Design sub-sector is the second-largest employer in the Creative Industries in Bendigo but there is a ceiling to the scope of projects that are given to regional architects. Many of Bendigo’s architectural firms originated from Melbourne, and most architects are educated there.
- The Advertising and Marketing sub-sector has high levels of embedded creatives who are specialists working ‘in-house’ in other industries.
- The interrelationships that exist between the sub-sectors of Advertising, Marketing, Design, Digital Content and Software development are ripe for entrepreneurial exploitation. Many small Bendigo businesses are already leveraging these interrelationships.
- Digitisation has transformed the Advertising sector, with internet optimisation being an essential component, and businesses moving from print to directly connecting with their potential customers online via website, shopping baskets and social media. Social enterprises and software development platforms are being enabled by Bendigo Council; the bHive is a trial project that will digitally connect 1,000 users in a cooperative platform.
For the Cultural Production sub-sector (CP), the Performing and Visual Arts sectors provide key economic drivers within the city, contributing to the broader economy.

- In 2016, the Bendigo Art Gallery returned $13.2 million to the local economy through their Marilyn Munro exhibition.
- Bendigo Art Gallery activities exemplify the intersection between numerous CI sub-sectors as well as making a contribution to the wider economy through the First Nations curation programming and its involvement in significant cultural tourism activities.
- The publication of the Bendigo Advertiser was not affected by the Australian Community Media decision in April 2020 to temporarily stop printing some papers due to the economic downturn created by COVID-19. The Bendigo Advertiser also now incorporates the formerly independent Bendigo Weekly, following a merger in September 2019.

Interviews and observations with Bendigo business owners and practitioners reveal that CI operatives earn multiple part-time incomes across and within each subsector in order to survive.

- Significant tourism events bring income to the city’s economy and offer part-time work to artists include the Easter Parade, the Blues and Roots Festival and the Writers Festival.
- Performing and Visual Artists earn meager incomes, yet practitioners are relied on to produce significant cultural drawcards for Bendigo’s festivals and events. Film, TV and Radio sector employment remains consistent across the decade of Census data (2006-2016). This situation points to a stable media sector, in terms of commercial and corporate media production.
- There is very little feature film production work occurring in Bendigo, with regional production houses concentrating on a variety of briefs for creating small corporate videos, television and for other clients.
- There is a very healthy music scene in Bendigo, offering different musical genres, including rock, country, electronic dance music (EDM) and classical genres.
- Retail marketing is moving online and the quality of the National Broadband Network (NBN) has been perceived as questionable.

An ‘innovation corridor’ connects Bendigo to Melbourne through an efficient transport system that benefits six municipalities and their creative business. The NBN provides digital connectivity.

- Regional Development Victoria (RDV) has identified 1,700 creative business along this corridor. These commuter belt towns offer Melbourne’s economic refugees affordable living, easy commutes and thriving creative communities.
- The NBN, an essential piece of infrastructure for many creative businesses in Bendigo, has received mixed reviews. There is an opportunity for Bendigo under Regional Partnerships to improve connectivity by tapping into VicTrack’s fibre connection along the rail line.

Recommendations

- The Greater Creative Bendigo Strategy is a visionary document, the delivery of which requires ongoing local business and council support.
- Local and state governments should continue to recognise and support the innovation corridor connecting six municipalities between Melbourne, Gibson, Kyneton, Castlemaine, and Bendigo.
- 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 Bendigo strong in Cultural Production and Ballarat strong in Creative Services.
- The regional roll-out of the NBN has not been beneficial for all Bendigo businesses to this point and the Federal Government should invest in wireless satellite networks to properly service this area.
# Contents

STRATEGIC SUMMARY .................................................................................................................. 1

ACKNOWLEDGEMENTS .................................................................................................................. 4

BACKGROUND AND CONTEXT ...................................................................................................... 5

- Population ........................................................................................................................................ 5
- Economy .......................................................................................................................................... 6
- Creative Economy .......................................................................................................................... 7
- Local Government Policy Context ................................................................................................. 10
- Local, State and Federal Grant Funding ......................................................................................... 11

STRATEGIC THEME 1: INTERRELATIONSHIPS ACROSS THE SUB-SECTORS OF THE CREATIVE INDUSTRIES ................................................................. 14

- Creatively Dividing Cultural Production and Creative Services ...................................................... 14
- Marketing Creatives embedded ‘in-house’ .......................................................................................... 14
- Synthesising Services - Advertising, Marketing and Design ............................................................. 15
- Designing the Built Environment .................................................................................................... 17
- Cultural Production .......................................................................................................................... 18
- The default ‘creative’ sector – Visual Arts .......................................................................................... 18
- Bendigo Factories - Pottery and Woollen Mills .................................................................................. 19
- Theatre and Performing Arts ............................................................................................................ 20
- Music - Retail, Festivals and Orchestras ............................................................................................ 21
- The Screen and Radio ....................................................................................................................... 23
- Publishing Newspapers and Supporting Writers .............................................................................. 24
- Co-working spaces for Creatives ...................................................................................................... 26

STRATEGIC THEME 2: THE RELATIONSHIP OF CULTURAL AND CREATIVE ACTIVITY TO THE WIDER ECONOMY ................................................................. 27

- Regional Development Victoria ....................................................................................................... 27
- From Gold Mining engineering to Military Vehicles ........................................................................ 27
- Education Pathways to CI Careers ................................................................................................... 28
- The Embedded Software and Digital Content Creators .................................................................. 28
- First Nations Art Collections and Curation ...................................................................................... 29
- Festivals and Creative Engagement ................................................................................................. 29
- NBN and connectivity ....................................................................................................................... 30
- Bendigo Tourist Attractions ............................................................................................................. 30
- Social Enterprises Networks and Programs ..................................................................................... 31
- Creative Corridor of Regional Commuters ....................................................................................... 31

STRATEGIC THEME 3: HOTSPOT COMPARISONS ........................................................................ 32

APPENDICES ..................................................................................................................................... 34

REFERENCES ................................................................................................................................... 34
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Background and Context

The City of Greater Bendigo rests in Jaara Country, the traditional owners are Dja Dja Wurrung. Bendigo is a two-hour drive from Melbourne and is a major regional centre for northern Victoria and southern NSW, being the third largest urban area in Victoria. Nearly 92% of Bendigo residents work locally and the municipality includes the smaller communities of Heathcote, Elmore, Goornong, Marong, Redesdale and Axedale. The name ‘Bendigo’ derives from a shepherd who was nicknamed after the English bare-knuckled boxer, William ‘Bendigo’ Thompson. Bendigo really prospered through the Victorian Gold Rush era where the city’s opportunities, inventiveness and resilience were born. Today, this can be seen in Bendigo’s ‘amazing entrepreneurial spirit that comes from cultural inventions’ (Poulter iv, 24 June 2019).

Population

Bendigo is the largest inland city in Victoria, with a population of 110,000 with First Nations people accounting for 1.7%. For 2017-2018, it is estimated that 52,390 people work in Greater Bendigo, and that 16.3% of the population have university qualifications (ABS, online). The cultural diversity of the population can be traced back to the 1850s gold rush, when many migrants arrived to seek their fortune on the gold fields. Among those were the Chinese, and the top languages spoken in Bendigo today, apart from English, are Mandarin, Italian, Arabic and French.

Projections prepared by the State Government show modest population growth across rural Victoria over the coming 15 years, noting that growth is underpinned by significant population expansion in some peri-urban areas, while other areas are forecast to experience little or no growth or even a population decline (Essential Economics, 2013, p. 12). The City of Greater Bendigo Manager for Regional Sustainable Development, Trevor Budge, said Bendigo Council’s vision is to create the world’s most liveable community (Budge iv, 24 June 2019), so it is anticipated that Bendigo will be one of the regions to grow.

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

| Age              | Greater Bendigo (%) | Regional Vic. (%) | Greater Melbourne (%) |
|------------------|---------------------|-------------------|-----------------------|
| 0-19 years       | 25.6                | 24.2              | 24.3                  |
| 20-39 years      | 25.1                | 21.9              | 31.0                  |
| 40-59 years      | 25.4                | 26.6              | 25.8                  |
| 60+ years        | 23.9                | 27.3              | 19.0                  |
| Education        |                     |                   |                       |
| Secondary - Yrs 9 & below | 8.0%      | 5.6%              | 6.6%                  |
| Secondary - Yrs 10 & above | 24.9%    | 25.3%             | 24.1%                 |
| Certificate I & II level | 0.1%      | 0.1%              | 0.1%                  |
| Certificate III & IV level | 15.6%    | 15.6%             | 10.5%                 |
| Bachelor Degree Level | 6.6%      | 8.4%              | 15.1%                 |
| Advanced Diploma & Diploma | 6.6%     | 7.0%              | 7.7%                  |
| Grad Diploma & Grad Certificate | 2.0%    | 1.7%              | 2.1%                  |
| Postgraduate Degree Level | 2.9%    | 1.3%              | 5.2%                  |
| Gender           |                     |                   |                       |
| Male             | 48.5%               | 49.3%             | 49.0%                 |
| Female           | 51.5%               | 50.9%             | 51.0%                 |
| Indigenous       |                     |                   |                       |
| Indigenous       | 1.7%                | 1.6%              | 0.5%                  |
| Unemployed       |                     |                   |                       |
| Unemployment rate | 6.8%                | 6.0%              | 6.8%                  |
| Youth unemployment rate | 14.0%  | 12.7%             | 15.9%                 |
| Volunteer        |                     |                   |                       |
| Not a volunteer  | 55.2%               | 54.1%             | 61.5%                 |
| Volunteer        | 18.7%               | 19.9%             | 14.4%                 |

Sources: Australian Bureau of Statistics (2016)
Economy

Bendigo’s Gross Regional Product for 2017-2018 was $5.305 million, which is 1.37% of the state figure. Manufacturing is the largest industry, while Health Care and Social Assistance are the largest employer at 17.9%. The top three local employments sectors accounted for 39.2% of local workers; these were Health Care and Social Assistance, Retail Trade, and Education and Training. These local employment figures are higher than the Victorian State average (.idcommunity, 2020). Agriculture continues to be important with over a million sheep and lambs being sold through Bendigo Livestock Exchange in 2018. Bendigo and Adelaide Bank has become a major player in Australia’s finance industry; it has its headquarters in Bendigo, employs more than 3,000 staff and has more than a million customers. There has been substantial growth in all business sectors including multinationals, nationals and small to medium enterprises (SMEs), with just under 7,900 local business in the LGA (ibid). The average house prices is $335,000.

Bendigo was established during the Victorian gold rush in the mid-1850s, and prospecting for gold was a main source of income. Today, gold mining employs 1.7% of the Bendigo workforce, but the city’s gold rush heritage continues to pay off through its engineering and advanced manufacturing sectors. For example, Bendigo has the only remaining vehicle assembly line in Australia, which manufactures military vehicles (Thales, 2019).

Table 1 Economic indicator summary, Greater Bendigo local government area, 2016

| Measure                        | Population | Gross regional product ($m, 2017-18 dollars) | Total employed | Total businesses |
|--------------------------------|------------|-----------------------------------------------|----------------|------------------|
| Avg annual growth, 2011 to 2016| 1.9%       | 1.0%                                          | 3.5%           | 1.8%             |
| % of state                     | 1.9%       | 1.4%                                          | 1.7%           | 1.2%             |

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, Bendigo local government area

Notes: Bubble size ~ business count.
Sources: Australian Bureau of Statistics (2016), Australian Business Register (2019), .idcommunity (2019), REMPLAN (2019)
It is notable that the Arts and Recreation Services and the Information, Media and Telecommunications sectors, seen as here indicative in some broad ways of the Creative Industries, contributed 2.6% of all those employed full-time in the region in 2016. Value add for these sectors also stood at 3.25% of the total value add for all businesses in the region at this time. Interestingly, the total ABN registered businesses, those businesses presumably turning over greater than $70,000 per annum, saw these same two sectors contributing 5.36% of the total ABN registrations. One could surmise, then, that these sectors turned over at least an estimated $158.2 million for the 2016 reporting period. In total, the region seems to be doing well, with growth in all key economic indicators. From 2011 to 2016, the regional population grew by 1.2%, the Gross Regional Product (GRP) grew by 2%, almost equivalent with the rest of the state, and the number of operating businesses in the region grew much faster at 2.3% (compared to 1.9% for the state).

Creative Economy

Victoria appears to be the ‘just so state’ in terms of its creative economy; it is a relatively small state with a ring of regional centres all within easy reach of the major metropolitan hub. These regional centres are connected to Melbourne by an efficient transport system allowing Victoria to sustain higher intensities of creative business in its regional commuter belt towns. The Victorian Creative Economy report produced by Essential Economics found there were ‘5,500 creative businesses … located in rural Victoria, representing approximately 7% of all rural businesses’ (2013, p. 19). Creative activities that engage with the broader economy through science, agriculture, community, and heritage, have higher levels of representation, particularly with visual arts and craft, journalism and writing, and architecture.

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

The Victorian Government’s Creative State strategy saw Greater Bendigo selected to participate in the first Regional Centre for Culture program. The initiative involved four regional shires, with an emphasis on including local Aboriginal artists and community representatives in the planning and programming for the year long program (Creative Victoria, 2017). Bendigo Regional Development officers indicate Creative Victoria has been working to launch a Creative Industries hub in the centre of town (Tripp iv, 24 June 2019). and there are at least five ‘maker spaces’ in Bendigo, and ‘a fair bit in ag tech’ from the ‘farming sector’ (Hart iv, 24 June 2019). There is an ‘innovation corridor’ being proposed from ‘Gisborne right up through Bendigo and then into Campaspe, so Echuca area’ where 1,700 creative businesses had been identified (Tripp iv, 24 June 2019).

1,573 people earn a primary income in the Creative Industries sector, with an overall growth of 2.9% according to the snapshot of Australian Census data for Greater Bendigo in 2016, indicating a Creative Trident intensity of 3%. The Creative Trident was developed at QUT to fully cover the spread of workers identified within the Creative Industries. These include the three categories of specialist (e.g. a violinist working in an orchestra, or an architect working at an architectural firm), support worker (e.g. an accountant working at a museum, or an electrician working for a performing arts venue), and embedded worker (e.g. a
Intensity refers to how many can be found there. Key growth areas for these workers can be found with the Creative Services (CS) sub-sector of the Creative Industries, that is, Architecture and Design, Advertising and Marketing, and Software and Digital content, including web design, app development, and games. For example, there has been a significant shift found in the number of Trident workers employed in Software and Digital Content (growth of 9.5%). For the Cultural Production sub-sector, there is a lively music scene with an annual music festival that brings in $5 million to the local economy. The Visual Arts sub-sector is strong, with many day-trippers visiting the international exhibitions in the Bendigo Gallery.

Figure 3 Employed persons in Creative Service and Cultural Production by industry and occupation, 2011 and 2016, Greater Bendigo local government area

The heatmaps above indicate the concentration of Creative Industries in the Greater Bendigo region (see Figure 4). The first of these shows Creative Services (CS) employment by place of work, indicating these activities are concentrated in the CBD. It also shows employment in CS as a share of total employment in each area by place of work. The second heatmap shows more pockets of concentration of CS across

Figure 4 Creative services employment by SA2 region
the Greater Bendigo region as indicated by percentages of employment within these sectors in those localities, with Castlemaine revealing a significant concentration of employment. Similar patterns occur for the Cultural Production sector (see Figure 5). The last of these four heatmaps show employment in Cultural Production as a share of total employment in each area of the region by place of work, again revealing a hotspot in Castlemaine, with a few smaller concentrations in Bendigo.

Bendigo and Castlemaine are seen as ‘twin cities of creativity’ (Budge iv, 24 June 2019) although ‘there’s a very strong cluster of people working in the Creative Industries in Castlemaine, but very poor investment from local government, and that’s the converse in Bendigo’ (Lloyd iv, 24 June 2019). For example, Bendigo’s art gallery is thriving from the strong council support while Castlemaine’s ‘is struggling to open their doors’ (Budge iv, 24 June 2019) and it is only surviving because of ‘significant philanthropy support from state government’ (Tonkin iv, 24 June 2019).

A comparative set of illustrations can be seen in the following comet chart for Greater Bendigo, where Creative Industries employment, total earnings, and mean income by place of work are compared with business registrations between 2011 and 2016 (see Figure 6). This chart compares sectoral changes from 2011 to 2016 (employment persons, total earning and mean income, as measured by the Census) and business registrations (with and without an associated GST registration, from the Australian Business Register). Comparing employed persons and ABNs with no associated GST registration, a comet line moving at a steep angle above 45 degrees indicates that the increase in small business registrations is greater than growth in employment. Note that the Census data cannot be split by business type. It includes employment in both large businesses and small businesses not registered for GST, but it is worth noting that all
businesses, sole traders or companies where turnover is greater than $75,000 per year, must register for GST.

Figure 6  Creative Industries employment, total earnings and mean income by place of work compared with business registrations, 2011 and 2016, Greater Bendigo local government area

For Architecture and Design (orange) and Software and Digital Content (yellow), the steep comet trajectory shows growth in ABN registrations with no associated GST registration being greater than employment growth. This means that people in these industries are increasingly more likely to be self-employed than employed by a larger GST-paying business. With Advertising and Marketing (red), the comets are short and show a negative direction, indicating a decline in employment and income occurring in both GST and non-GST registrations. However, the shift to self-employment is no guarantee of a higher income for all creative sectors, as mean income for people in Advertising and Marketing, Visual and Performing Arts, and Film, TV and Radio, shows a small increase, while the publishing sector fell. A stark contrast can be seen when compared to Software and Digital Content (yellow), which indicates significant growth overall, with growth in larger GST-paying businesses. This sector is followed by Architecture and Design, with the other sectors subdued or showing negative growth. The charts highlight the fall in the Publishing sector in terms of employment, total earnings and mean income, which reflects the organisational change underway in the newspaper industry in particular. While Film, TV and Radio are stagnant, showing a dot for employment and earnings, their mean income has increased slightly. It is of note that those working in the Visual and Performing Arts sector are more likely to be earning incomes with non-GST (see green comets at the top of Figure 2) than, for example, Software and Digital Content and Architecture and Design, which are highly divergent categories. Both sets of data visible in these comet charts indicate that the CP sub-sector is stagnant or shrinking, with significant growth occurring in CS, which appears to have been stimulated by the proactive and long-term strategic plans of local government and state funding.

Local Government Policy Context

The Greater CREATIVE Bendigo Strategy (COGB, 2019) was released by the City of Greater Bendigo in 2019. This strategy describes a ‘creative ecosystem’ made up of an ‘extraordinarily broad range of activities,
professions and interests’ (ibid, p. 9). The creative community is made up of residents, ratepayers, and businesses, and sees creative practice as fundamental to the sector (ibid). The report recognises the contribution to be made by the Aboriginal and Torres Strait Islander culture and draws on the cultural and creative industries employment data from the 2016 census. It notes the highest concentration occurs with ‘supporting activities’ (3,608 people) followed by ‘design’ (1,108) and ‘performing arts’ (711) (ibid, p. 16).

The Greater CREATIVE Bendigo Strategy is named in the Council’s Community Action Plan and is listed as a priority for the diversification of the local and regional economy (COGB ibid, p. 4). While the CI strategy is ambitious and aspirational, it is aligned with the Council’s overall vision to create the world’s most liveable community, and the Creative Industries play an important role (Budge, Poulter & Knight, iv 24 June 2019).

Greater Bendigo’s creative ecosystem is seen through the lens of the digital age, with a regional perspective, illustrating international opportunities. The Greater CREATIVE Bendigo Strategy cites the success of Council assets such as Bendigo Art Gallery’s international reputation, as well as festivals and events such as Bendigo Easter Festival, Bendigo International Festival of Experimental Music, Blues and Roots Festival, and Bendigo Writers Festival. The strategy identifies four themes. It wants to inspire a culture of creativity, create more activated spaces, nurture and support talent, and champion inclusion and access. These themes are addressed through an implementation plan, with short, mid- and longer-term targets in a four-year timeframe. This strategy is the culmination of significant community conversations that are still subject to the Council’s decisions and budget cycle (COGB, 2019).

Bendigo was one of the first local government areas to develop an arts and culture strategy, which emerged from a ‘cultural development network’ that was created 20 years ago (Tonkin iv, 24 June 2019). However, the 2019 strategy leapfrogs from a traditional view to a new CI strategy, which ‘perhaps partly explains why a lot of people got it, but perhaps some didn’t … so, we almost didn’t go through that evolutionary stage of trying to create a fold of people and bring them all together’ (Budge iv, 24 June 2019). This disjointed view of the sector has most likely occurred because a ‘lot of people who are in this space have a fragmented view of it, and people from outside have a fragmented view, too. They don’t necessarily see the totality of it’ (ibid).

By counting the total strength of the Creative Industries, the Council is more likely to leverage state government funding because ‘there wasn’t any point in trying to present this as a fragmented scene. It’s highly competitive … our competitors are Geelong and Ballarat, and so we need to pull the thing together in such a way and present it as a total picture’ (ibid). Budge acknowledges that the strategy is ‘under competition in Council… There’s people who are questioning the value of all this, so I suppose it was a deliberate economic response, as much as it was an arts and creative industry response’ (ibid).

**Local, State and Federal Grant Funding**

Creative Victoria, in particular, knows what the twenty-first century Creative Industries are, how they are constituted and what they can contribute to the highly interlinked state and regional economies of Victoria. They have capitalised on that knowledge. 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 (ibid).
LaunchVic, created in 2016, is Victoria’s start-up agency and to date has provided support to 26 Victorian start-up founders (Launch Vic, 2020). Research on the mapping of Victorian Startup Ecosystem, Angel Networks, Sports Tech, Health Tech, Victorian Tech start-ups and digital marketplaces (Ibid) provides the details about how Launch Vic will develop a globally connected start-up ecosystem. Launch Vic’s first funding round offered $6.5 million to focus on start-up founders, entrepreneurs and investors, corporates and universities. In 2019, Victoria’s ‘early-stage start-up sector revenue was $4.6 billion, representing almost 19,000 jobs’ (Launch Vic, 2020). The 2016 funding round supported ‘18 projects’ (Ibid) targeting ‘start-up sector specialists who can deliver world-class education and support to Victorian start-up founders and entrepreneurs’ (Ibid). Of these 18 projects, seven were for ‘small idea’ projects which received $50,000 to $100,000, with nine grants for ‘large idea’ projects receiving between $200,000 and $1.25 billion.

Regional Development Victoria, part of the Victorian Government’s Department of Jobs, Precincts and Regions, works to stimulate economic activity, ‘to make regional Victoria a place for people to create jobs, invest, and grow economic impact for the region’ (Hart iv, 24 June 2019) and to ‘make Victoria a better place to live’ (Tripp iv, 24 June 2019). As the ‘front door of [state] government’ in Bendigo, it supports business, administers grants, manages the state’s relationship with councils, and implements the state’s Regional Partnership to advocate for regional needs (Hart iv, 24 June 2019). While support for large and medium business is sound, ‘enabling infrastructure’ and to ‘equip them for growth’, a gap is acknowledged in support for ‘start-ups and small business’ (Tripp iv, 24 June 2019).

There is, nonetheless, as discerned from interviews and focus groups, a disconnect seen between State Government departments, as Regional Development Officers from Regional Development Victoria appear to have little real cognisance, in the way Creative Victoria does, of the breadth and value of the Creative Industries to regional economies. This may also be the case at the Local Government level, as Economic Development Officers are employed by local councils to provide business support and are required to understand the fundamental drivers of the regional economy but, despite the cultural strategies and plans being adopted by these local councils, it appears, from interview evidence, there is a limited understanding of either the breadth or depth of the Creative Industries sectors and the part they could play, or are indeed playing, in many of those local economies.

Figure 7 Cultural grants by investment type, Bendigo 2015-16 to 2018-2019

Cultural grants funding was received from the three government tiers with Bendigo (see Figure 7 & 8) organisations receiving federal funding from the Australia Council through seven of its programs. Between
2016 and 2018 organisations include Arena Theatre Company, receiving $100,000, and Story Box Library receiving $24,000. The Smith Dean, Visual Arts Development grant was $24,000, and Adam Ford received $10,800. The Greater City of Bendigo received just over $100,000 across two years for The Capital Theatre and Performing Arts Centre. Grants between $10,000 and $25,000 were awarded to four Bendigo organisations or people. Cultural Infrastructure funding was received through the Social Impact Program for Kultur-All Makaan - The Pavilion Project (Punctum, 2020). The federal government Building Better Regions program provided $25,000 for two projects, one aimed at digital capacity for micro tourism businesses (Pedler, 2018) and the other for a collective of artists who do pop-up exhibitions (Corr, 2018).

Figure 8 Federal, state and local cultural grant and infrastructure funding by source, 2015-16 to 2018-2019

At the state level, Creative Victoria and Regional Development Victoria programs have funded a number of $40,000 to $50,000 grants for a range of projects related to development of First Nations culture and audiences for Bendigo Art Gallery, while Arena Theatre received marketing support. Composer David Chisholm received a grant for a six-hour project with international collaborators (D’Agostino, 2017a).

Since 2015, at the local level, the City of Greater Bendigo has support Creative Communities with two rounds of grants, one being a quick response round and the other a three-year partnership. In 2018, the grant program was changed so it aligned with the City of Greater Bendigo’s Community Plan 2017–2021 (COGB, 2017) with a focus on ‘small’ ($3,000), ‘medium’ ($10,000), ‘large’ (up to $50,000 awarded over two years) and ‘essential’ grants, as well as a subsidy program for the use of Bendigo Town Hall. There are two more subsidies for local artists, musicians and performing artists, and subsidies offered through Dudley House Community Arts. There is also software development investment for digital cooperatives such as bHive, which received a $60,000 council grant (Turnbull iv, 24 June 2019).

The Council has invested in its heritage assets including the Golden Dragon Museum, which reflects the Chinese influence on the goldfields. It has the internationally significant Great Stupa of Universal Compassion and a mosque looking to establish, ‘so faith tourism is an area that’s been looked at as an area of growth’ (Hart iv, 24 June 2019). Castlemaine is also a ‘hub for creative, arts and culture’, and a creative industries hub - a co-working space with a digital focus - is being set up there in a joint state-federal project (Tripp iv, 24 June 2019).
Strategic Theme 1: Interrelationships across the sub-sectors of the Creative Industries

Greater Bendigo is a region with a relatively stable economy and moderate unemployment, and the overall Creative Industries (CI) are statistically an area of strong growth in this region. Based on ABS Census data, employment in the total CI grew by an average of 2.9% per annum between 2011 and 2016, with the average annual income for fully employed CI workers in 2016 being $60,500. The strongest employment growth occurring for creative specialists sits at 3.5% across the total Creative Industries.

Creatively Dividing Cultural Production and Creative Services

The Creative Industries are comprised of two major sub-sectors (Higgs & Lennon, 2014). These are the Cultural Production (CP) and Creative Services (CS) sub-sectors. The Cultural Production sub-sector includes Visual and Performing Arts, Music, Film, TV and Radio, and Publishing, while the Creative Services sub-sector includes Architecture and Design, Advertising and Marketing, and Software and Digital Content. In the state of Victoria, it is notable that employment in the CS sub-sector is growing more rapidly than the CP sub-sector across both industry and occupation groups. The City of Greater Bendigo Creative Industries Strategy accurately identifies the CI as a spectrum where ‘production and creative services are all part of the one thing that makes for a really great creative city’ (Tonkin iv, 24 June 2019). For Bendigo, the CS sub-sector employs slightly more creative specialists than cultural production does, with the highest employment figures occurring in Architecture and Design, closely followed by Software and Digital Content. In the CP sub-sectors, Music and Performing Arts employs the most specialists, followed by Publishing, and Film, TV and Radio. The sub-sectors with the least number of specialists employed were Advertising and Marketing, and Visual Arts. Ethnographic research techniques were used to determine why some Bendigo CI sub-sectors employed more specialists than others, and the results emphasised the dynamic interdependence of each sub-sector occurring at the B2B (business to business) level, and the individual career level.

Through ethnographic work, including observation, in-depth interviews and artefact analysis (examination of websites, pamphlets, notices etc) it became increasingly clear that CI operatives earn multiple part-time incomes across and within each sub-sector in order to survive. Many operatives increasingly move between producing original content and supplying a service to others. In addition, certain forms of Cultural Production are necessarily embedded within Creative Services. Understanding this complex composition of the Creative Industries has become increasingly important. Council’s Trevor Budge describes the misunderstandings that have been encountered from those working in these sub-sectors, with comments such as ‘why are you putting those people in there? Well, why are you including me in this? I’m not in that!’ (Budge iv, 24 June 2019). This fragmented view of the Creative Industries, particularly from those who work in it, emphasises the complexities of this industry.

Marketing Creatives embedded ‘in-house’

The Advertising and Marketing sub-sector has the highest levels of embedded creatives. The Bendigo Art Gallery is one such example with its Marketing Officer, Mark Orlandi, holding the position for the last three years. Orlandi had previously worked at Bendigo Tourism and he describes the gallery’s marketing strategy as being focused on ‘taking the gallery outside of our four walls’ (Orlandi iv, 25 June 2019). Bendigo Art Gallery is Australia’s largest regional gallery. It is more than 130 years old and as Bendigo Art Gallery Director, Jessica Bridgfoot, indicates, its impressive track record in cultural tourism means it is ‘considered as one of the key economic drivers within the city’ (Bridgfoot iv, 25 June 2019). Exhibiting high-calibre international shows brings visitors into town. In 2016, the Marilyn Munro exhibition brought in $13.2 million in economic impact for Bendigo, with 145,000 visitors who booked 47,000 beds in Bendigo hotels over a
four-month period (Kearney, 2016a). Orlandi said the success started with ‘the Forever Marilyn sculpture that they put down in Roslyn Park, which created a lot of the marketing opportunities as well as putting us on the map with this eight-metre sculpture of Marilyn in the center of town’ (iv, 25 June 2019). The Grace Kelly International exhibition in 2012 attracted 155,000 visitors, with the Marilyn Monroe sequel being even more impressive since the Bendigo gallery, which curated the exhibition, acquired items from private collections that had never been exhibited together (Kearney, 2016b).

Bendigo Art Gallery works very closely with Bendigo Tourism. Both assets are council-owned, and the gallery serves as a major focus for Bendigo’s destination marketing campaigns, particularly bringing people to the area and increasing visitor yield (Orlandi iv, 25 June 2019). The current marketing strategy is attracting, ‘Bendigo first, then Melbourne and then regional Victorians, followed by interstate and then international … a lot of our funding comes from Creative Victoria and a big part of our KPI is to increase our interstate visitation’ (ibid).

Much of the gallery’s day-to-day marketing material is managed through contracts and there is a reliance on the Digital Officer, an embedded creative, employed within Bendigo Tourism. Another embedded creative, a Public Relations Consultant, is also employed in Melbourne to covers traditional media outlets, while website collateral is done by local design agencies ‘who are a little bit less pricey than our metro creatives’ (Orlandi iv, 25 June 2019). Orlandi confirms that Bendigo design agencies produce high-quality work and because ‘they are smaller they can be more responsive to what we need’ (Orlandi iv, 25 June 2019). In 2019, the gallery was preparing to launch an online shop as part of its website. Managing the social media channels is a 24/7 job. This includes keeping TripAdvisor up to date and that is handled by the gallery.

**Synthesising Services - Advertising, Marketing and Design**

Advertising and Marketing services are highly valued specialisations occurring across four sub-sectors from both Cultural Production and Creative Services, including Architecture and Design, Software and Digital Content, and the media sub-sectors of Film, TV and Radio. The digital age has transformed the advertising sector with internet optimisation now being an essential component of many business operations. Whereas once a business might have marketed with printed material, now they are doing it directly with their potential customers online via website, shopping baskets and social media.

One Bendigo CEO who has exploited the merging of these sectors is Paul Macartney, he manages three businesses out of one premise. SASI Marketing is a traditional and digital marketing agency which has been operating for 20 years in Bendigo. The Web Company emerged as a digital arm of SASI Marketing and they now operate as separate businesses out of the same building. The third business is Fixus Technologies, a software development business marketing custom software to the health sector. The fact these are seen to be complementary clearly demonstrates the interrelationship that exist between the CP and CS sub-sectors.

Specialist employment in Software and Digital Content is also strong across multiple sub-sectors, with a distinct prominence in Architecture and Design. The skills this sector holds are now a feature of the Architecture sub-sector, which increasingly relies on the digital infrastructure supplied by Federal Government, the NBN, to shunt CAD and other files around its networks and increasingly promote its activities online. Software and Digital Content is important for digital design, too. For example, a custom designed piece of software for an online shopping website might require a focus on user experiences that are discretely designed and coded to ensure the smooth flow of information across a range of software and technologies.

Paul Macartney is the Regional Chairperson for the Victorian Chamber of Commerce. Macartney has run traditional marketing firms as well as software development businesses, so he has managed ‘art directors, creative directors, video production people, graphic designers, all those artistic types that would traditionally
be seen as artistic. Then, up the other end of the building, you’ve got “nerdsville”, with software developers with headphones on, just tapping away’ (Macartney iv, 24 June 2019). He suggests that ‘you get software developers who are very, very technical in nature. Then there’s the artistic software developers. You can pick it up because you have a conversation with them, and they talk about the structure and the style. They’re almost always trying to strive for this perfection that you can never achieve’ (ibid). He believes that software development is ‘an artistic pursuit that your average person never gets to see. The crafting of code is something that you only see the end result of that code, what it does for you, what it looks like as working software’ (ibid).

In Bendigo, Software and Digital Content businesses such as Macartney’s are generally geographically located in the CBD. These firms deliver software solutions for small-to-medium businesses operating in other industries, with the largest number of support workers occurring across all of the Bendigo sub-sectors. Missing components of the Software and Digital Content sub-sectors appear to be in privately funded incubators, such as Runway, which also exists in Geelong and Ballarat, and houses innovation start-ups in information technology businesses as well as games designers.

In the Design sub-sector, the designing of websites overlaps with software development where custom coding might be required for social media, digital advertising and marketing campaigns. For example, RAAK Creative is a full-service creative agency specialising in brand identity, digital design and digital development. They have global clients using specialised software technologies and they code the back end of websites preferring to be ‘really custom’. In the process, they are moving away from the traditional ‘free’ Wordpress hosting services (Lodewijks iv, 25 June 2019). RAAK’s business has seven employees and is managed through three pillars, with a Design director and a Digital director who is expert in coding, and Peter Lodewijks, who oversees the entrepreneurial business development.

The digital age has synthesised Advertising, Marketing and Design; previously those businesses might have been called ‘an advertising agency’ but now they are increasingly calling themselves ‘design agencies’ or just ‘agencies’, indicating the expanding list of Creative Services they now offer, including drone photography and corporate films. This cross-sectoral work can be undertaken by sole traders or freelancers, but the high-quality work is generally done by creative specialists. They work in smaller teams of seven to 10 and sometimes take on freelancers on a brief-by-brief basis. Bendigo’s Creative Services agencies have local and regional client bases and are themselves hired on a project-by-project basis.

RAAK is a business that illustrates the blurring of the sub-sector boundaries between Advertising, Marketing and Design. About 85% of the work RAAK produces is focused on branding, which is digitally delivered through websites (Lodewijks iv, 25 June 2019). RAAK has developed a subscription-based web-design service with a philanthropic component. A percentage of the service fee can be given back to particular causes such as charities (ibid). Like RAAK, there are more Bendigo businesses sitting across this sub-sectoral divide, including Arteria, Bendigo Creative, and Creative Revolution.

RAAK is located in both Bendigo and Melbourne. One business partner is from Bendigo but lives in Melbourne and ‘we've got a handful of Bendigo-based clients and that is about it’ (Lodewijks iv, 25 June 2019). At one point, RAAK had nine employees, but Lodewijks felt that was making them vulnerable: ‘there’s ups and downs, a business of this size, the challenge is the fluctuating demand. Call it awkward size syndrome perhaps, you’re not quite big enough but you’re bigger than small so you’ve got to take either a step back and stay, or you’ve really got to jump’ (ibid). When asked about how they find skilled designers in the region, Lodewijks says he isn’t focused on education, more on their character, and in terms of software looks for use of specialised technologies with lots of custom coding (ibid). A philanthropic website called...
zimpul.com allows clients to pay a monthly amount from which 10% goes to a nominated charity. The target market are business owners who can’t be bothered about their website, letting RAAK make all the decisions for them (ibid).

RAAK has found ‘Bendigo is a very interesting market. It takes a long time to get any sort of traction in a town like this if you’re not from here’ (Lodewijks iv, 25 June 2019). Bendigo’s Design agencies have strong connections to Melbourne’s digital design sector. For example, Arteria relocated from Melbourne to Bendigo a decade ago. Bendigo Creative and Creative Revolution both boast that their Creative Services draw on a wealth of commercial experiences obtained while working in Melbourne. Arteria was founded by Craig Brown and is described as being ‘somewhere between an ad agency and a design studio, who deliver strategy, campaign development, creative direction, and design for their client’s brands’ (Arteria website).

Designing the Built Environment

Architecture in Victoria is most often Melbourne-centric. In Bendigo, many of the architectural firms originated from Melbourne, and many of the regionally based architects have trained there. Rachel Hannan, an employee at e+ Architecture, emphasises that ‘people are wanting to get out of Melbourne’ and the proximity of Ballarat, Bendigo and Geelong to Melbourne makes that possible (Hannan iv, 24 June 2019). Hannan also expresses the sector’s shared frustration that ‘whenever there’s a conversation about architecture, it can’t just be about the Melbourne experience’ (ibid). Hannan describes a push to have a regional conversation about architecture with ‘regional practice forums starting to get a little bit more traction’ (ibid).

While the Architecture and Design sub-sector is the second largest employer in the CI in Bendigo, talking to the architects located there confirms there is a ceiling to the scope of projects that are given to regional architects. While the e+ Architecture practice has a solid portfolio, with projects of up to $5 million and 15 employees, it is ripe for expansion. The firm is keen to take on regional and metropolitan projects in Bendigo, Melbourne and Ballarat and believes this could be achieved by exploiting the feasibility studies they have done for Bendigo Council (Mitton iv, 24 June 2019). Hannan believes that multi-residential apartments will be a future growth area for regional architectural firms and says, ‘There’s a lot of lessons that we can learn from Melbourne, and all of the things that have gone wrong in the industry’ (Hannan iv, 24 June 2019). For Hannan, regional architecture is a growth area and Terry Mitton, one of the directors at e+, states, ‘we’re not a little practice, and we can actually deal with complex solutions, and managing projects from feasibility right through delivery, across a lot of sectors’ (Mitton iv, 24 June 2019).

The firm e+ architecture is a multi-skilled Bendigo-based practice that is solution-driven across sectors such as education, retail, commercial offices and the production industry. Originating in Melbourne about 45 years ago, e+ relocated to Bendigo decades ago and clients now include Parks Victoria, National Resources and Environment, Hazel Deans, Laucke Flour Mills, the Victorian Education Department, Catholic and private schools, and the community sector. They have a solid local reputation for domestic and residential work.

As one of the largest architectural firms in Bendigo, e+ is invited by the Council to complete feasibility studies for large projects and they have noticed a new desire for regional councils to request local content: ‘The City of Greater Bendigo is receptive to supporting local businesses, at least in those early stages’ (Hannan iv, 24 June 2019). The next step for the firm is to take on joint venture projects with Melbourne firms so that very large projects of $50 million to $60 million can be secured: ‘pairing with another complimentary office that has something else to bring to a project. So that’s something that we’re also starting to talk about a bit more with those big projects, where we’ve got local knowledge and we’ve got a lot of contacts in council and some really good relationships too’ (Hannan iv, 24 June 2019).
Another similar practice is Y2 Architecture, operating out of both Melbourne and Bendigo. Established in 1973 with more than 40 years’ experience in educational, health, commercial and community projects with budgets up to $8 million, it offers services in interior and urban design as well.

**Cultural Production**

In terms of Cultural Production, the largest cross-sector employer for specialists in Bendigo is Publishing. Music and Performing Arts, and Film, TV and Radio, also show some cross-sector employment. Visual Arts, however, has the least number of specialists and support workers, which is surprising given Bendigo Pottery and the Bendigo Art Gallery are both strengths in the region. The Visual Arts incongruity must be seen as arising from the limitation of drawing solely on full-time employment statistics, which do not account for those ‘part-time artists’ who earn a primary income in a completely unrelated area. To find the achievements of these part-time artists, who are often the ones described as the most creative, we have to turn to the community and the grassroots ecosystems that exist in Bendigo. Bendigo Pottery is an example that offers handmade pottery classes, and studio spaces for artisans ‘so there’re little cohorts of artists that are performing collectives’ (Tonkin iv, 24 June 2019).

**The default ‘creative’ sector – Visual Arts**

Of all the sub-sectoral groups, Visual Arts, often simply called Creative Arts, is frequently seen as the default for the entire Creative Industries. This conflation becomes increasingly problematic because there are significant disparities between the economics generated through the sector of Visual Arts and the earnings of Visual Artists and the rest of the Creative Industries. Visual Artists earn minimal incomes; in 2016 a visual artist in Bendigo averaged $34,000. As Maree Tonkin, the City of Greater Bendigo Creative Communities Officer, indicates, culturally artists are relied on ‘to produce the most amazing cultural outcomes, but they’re the most least paid in the industry’ (Tonkin iv, 24 June 2019). One way for these artists to cut costs is to band together in collectives. Two examples of local artist-based collectives are Punctum (2020) and Popup Art (Corr, 2018). Punctum has been operating out of Castlemaine since 2004 and has completed a range of small to large-scale visual and live performance works through collaboration with a broad range of local artists and communities (Punctum 2020). Popup Art is a collective interested in travelling exhibitions around V/Line stations to interconnect local communities with art (Corr, 2018).

The City of Greater Bendigo understands the quandary for visual artists, which is why Maree Tonkin is focused on developing opportunities for artists through building ‘ecosystems’ at the ‘grassroots level’. Tonkin insists that this is essential to nurture creative development, ‘to actually get artists to that point where they are producing and creating, and able to then derive a salaried income from their creativity’ (Tonkin iv, 24 June 2019). As Tonkin states, Bendigo Council provides some of those resources for collaborations and partnerships as well as ‘supporting First Nations’ (Tonkin iv, 24 June 2019). The Council offers two subsidies for local artists, musicians and performing artists – the Dudley House Community Arts Hire Subsidy Grant, and the Performance Subsidy. Both subsidies select six groups or individual proposals. The Creative Communities program also provides connections and networks that can, in some way, support and nurture artists ‘that are living on the poverty line’ (Tonkin iv, 24 June 2019). Bendigo artists also rely on organisations such as the National Association of Visual Arts (NAVA) to outline the needs for improvements for economic outcomes for artists. Tonkin believes cross-sector collaborations are important (Tonkin iv 24 June 2019).

In Bendigo, the more economically viable part of the industry is the Art Gallery. Bendigo Art Gallery is owned and operated by the City of Greater Bendigo. There is a board that provides oversight. Though they do not manage the gallery, they are responsible for collections and acquisitions, whereas the city funds the
operations and exhibitions program (Bridgfoot iv, 25 June 2019). Bendigo Art Gallery employs 12 full-time employees and casuals according to programming requirements for ticketed exhibitions. But the core business of a gallery is not to employ artists as specialists. The gallery’s core business is to publicly exhibit art. To achieve this, galleries employ curators and marketers as specialists, as well as employing support staff such as managers, administrative assistants and gallery attendants.

Bendigo Gallery’s collection has nearly 6,000 acquisitions, made up of ‘a large component of historic colonial and European works’ with most of the highlights on display. There is also 20th and 21st Century collection, with only about 5% on display (Bridgfoot iv, 25 June 2019). A new role of Public Programs Officer was advertised in 2019, as the gallery has found that visitors consume culture in very different ways and the gallery is wanting to create more interactive public experiences around art. The unique thing about Bendigo Art Gallery is that the facility ‘conforms to British Museum standards’; this compliance allows them to display touring international exhibitions (ibid). This has been part of the reason why this regional gallery in one of Australia’s most successful.

**Bendigo Factories - Pottery and Woollen Mills**

*Bendigo Pottery* is Australia’s oldest working ceramics manufacturing business. Established in 1858, the pottery has operated on the Epsom site since 1863. For nearly 100 years it was purely a manufacturing business making clay pipes. In the 1970s a new owner purchased the business and brought in a line of tableware and added retail and tourism. The current owners, Sally and Rod Thomson, bought the business in 1999 and have continued to expand the retail aspect through mail order and more recently with online sales. They have begun to exploit tourism by adding artists’ studios, workshops and a function centre that is also leased as a venue for events and weddings (Thomson iv, 25 June 2019). Bendigo Pottery does B2B, as well as B2C (business to customer) sales through onsite retail and an online shop, and in 2019 moved into a different space when they launched a Centre for Learning and Design (ibid). The Bendigo Pottery factory has a number of buildings that are no longer used for manufacturing and these are rented out to up to eight artists who make work onsite and sell directly to tourists who visit the Pottery (ibid). Bendigo Pottery is also a founding member of the *Ulumbarra Theatre* and they have very strong formal and informal relationships within the community, for example, with *Bendigo’s Studio Arts and Galleries group*. Bendigo Pottery directly supplies businesses in the hospitality sector who sell exclusive ranges of tableware as well as packaging clay for arts suppliers. Engagement with interior designers is just beginning because of the ceramics products they make. In terms of their own retail, the Thomsons do all their own advertising and marketing, including taking care of website and social media channels. At the time of the interview they were not connected to the NBN.

In terms of B2B, the tableware range made in the factory is sold online through their website (Thomson, S. iv, 25 June 2019). They also make a range of tableware for Glen Tebble Homeware, which is well established in the hospitality industry. That range, since 2015 has been used in more ‘than 350 restaurants, of which 15 are in the top 50 Restaurants in Australia’ (Thomson, S. iv, 25 June 2019). Bendigo Pottery makes the satin glazed range and sends direct to the customers; the marketing is done by Glen Tebble Homewares. There are a few other companies that are using a similar ‘making and sending’ model. In terms of raw materials, they also do packaged clay to two ceramic distributors who sell to schools and direct to potters.

Bendigo Pottery is significant because of its collection of ceramic wood-fired kilns, which are listed on the Victorian Heritage Register. There are 10 kilns, five are bottle kilns, three are circular kilns and two are rectangular kilns. These kilns now form part of the Interpretive Museum on the site. John Challis Design from Geelong created the museum, which includes a film. There is a large factory on site which makes ceramic
pottery using a range of techniques including hand throwing, slip casting, jolling and pressing. All pottery is now fired in a natural gas-fired kiln, with the last use of the wood fired kiln in 1989.

The Bendigo Woollen Mills sit in the manufacturing sector however it does intersect with the Cultural Production sector of the CI as it is Australia’s largest hand-knitting and crafting yarn mail order manufacturer, using knitwear designs and patterns typical of the fashion sector. The factory runs 24/7 and employs 30 staff in order to meet customer demand (Bendigo Woollen Mills, 2020). The company was started by two local families in Kangaroo Flat and moved to its current location in 1988.

**Theatre and Performing Arts**

In the Performing Arts sector, Bendigo Council works closely with theatre companies including the Ulumbarra Theatre, The Capital, and The Engine Room, to provide ‘space and time, and venues, and then leveraging that to attract funding from the state government’ (Lloyd iv, 24 June 2019). Venues are able to participate in the co-commissioning of works through the support of the Council (ibid). For example, they have worked alongside Chunky Move for a show in September 2019 as well as Arena Theatre, a youth-oriented theatre company, and CreateAbility, a theater of disability (ibid). The business model used by Bendigo’s council-run venues is very different to Wollongong’s Merrigong Theatre Company, who ‘have a very clear agreement to produce works, whereas we’re merely a community asset’ (ibid).

Ulumbarra Theatre means ‘gathering together’ or ‘meeting place’ in the local Indigenous language. ‘Bendigo’s Ulumbarra Theatre rises from within the walls of the city’s 1860s Sandhurst Gaol’ (COGB, 2017) as it blends heritage and modern elements to offer a 950-seat auditorium with first-class backstage and technical facilities. The Capital was built as the Sandhurst Masonic Hall in 1873. Located in View Street it offers a 480-seat capacity. The 90-seat Engine Room is located inside the old fire station. There is also the Bendigo Town Hall and Dudley House.

The Manager of the Capital Theatre in Bendigo, David Lloyd, explains that the venue is frequently hired out, with their curated program occupying it for about 30% of the time. The professional program and community programs also both take 30%. The community can be charged the full rate, or they negotiate a reduced rate which is often ‘about a 30% discount for three years’ (Lloyd iv, 24 June 2019).

**Arena Youth Theatre** company’s move to Bendigo early in 2018 was very strategic. Artistic Director Christian Leavesley named two factors that drove the decision. Firstly, there was a desire for Arena to ‘find a more powerful relationship with its audience’ and this shift occurred at the same time as the Australia Council’s core funding to theatre organisations was discontinued in 2016. Arena had been heavily funded through both state and federal funding schemes but the first budget of the Abbott Federal Government, in which arts funding was radically slashed, meant Arena needed to change its business model (Custers & Leavesley, iv 24 June 2019). The move to Bendigo has allowed Arena to continue to seek funding through other Australia Council and Creative Victoria schemes. When in Melbourne, Arena had developed into a company that used the Presenter Model. This business approach meant they were working with large centres such as The Arts Centre, Malthouse, and Melbourne Theatre Company: ‘Our relationship began to be so much more with presenters than it was with our audience and our repeat audiences were really almost non-existent and because we were always inside other people’s programs, people sort of forgot who Arena was and I really thought that was not useful to the company’ (Leavesley iv, 24 June 2019). Part of Arena’s move to Bendigo was to employ local people on all aspects of the organisation including outsourcing website design and printing. Arena employs five people full time but during productions it can expand to more than 50 people.
Music - Retail, Festivals and Orchestras

It firstly needs to be pointed out that the music industry has three arms, the recording sector, the live performance sector, and the publishing sector. In terms of its contribution to the Creative Industries in Greater Bendigo and its interrelationship to other sectors of the CI, it appears to be the case that the live performance sector dominates, with minimal recording and publishing activity.

As in most regional communities there is a wide set of styles and genres on offer, ranging from rock, in all of its permutations, to country, EDM and classical. Several live music venues offer local independent bands and artists performances on a regular basis. These venues include the Music Man Megastore, the Gold Dust Lounge at the Hotel Shamrock, the Golden Vine Hotel and the Bendigo Blues Club. Several adult choirs and the Bendigo Youth Choir often perform overseas. The Bendigo Symphonic Band, the Bendigo and District Concert Band, several brass bands and three pipe bands perform in the region as well. Musicians originally from Bendigo include Patrick Savage, film composer and former principal first violin of the Royal Philharmonic Orchestra in London, and Australian Idol winner Kate DeAraugo who grew up in Bendigo where her family still live (Wikipedia, 2019). It is also notable that the Bendigo Symphony Orchestra (BSO) has been running for 25 years. They give three performances a year to a mostly older audience. Orchestra members are almost always volunteers, though there ‘are a lot of professional musicians in the orchestra’ (Begg iv, 24 June 2019). This not-for-profit orchestra has a relatively new nominally paid music director who is also ‘expected to do programming and a bit of PR and community liaison’ (ibid). Unpaid committee positions are filled by orchestra members or their spouses and they also have a webmaster who looks after social media. BSO has a ‘very close relationship’ with the Council, receiving grants (ibid). They also gain other occasional income, for example, recently performing at the Capital Theatre for ‘a guitar collaboration’ which turned a profit (ibid). They also received some state government support through Creative Victoria and the Bendigo International Exploratory Music Festival (BIFEM) as well as playing for the Castlemaine State Festival. Alongside Bendigo Bank as a supporter of the arts, the orchestra has made connections with a philanthropic organisation, the Ulumbarra Foundation, that supports their performances too. Although their musicians are involved with theatre companies on big shows such as Wicked and Les Misérables, the orchestra would also like to be more involved with other local arts organisations and hopes to join the annual Easter Parade. Begg states that, ‘communication between organisations and trying to get things happening in conjunction with other organisations is more difficult, but that’s something that the orchestra is keen to do’ (ibid).

The most significant local live music performance event in the city is the Bendigo Blues and Roots Music Festival. This festival was started in 2011 by Colin Thompson, as a ‘spearhead for a resurgence in popularity of live music’ (Thompson iv, 25 June 2019). Based on the city’s data, the festival generates $4.6 million worth of positive economic impact a year, or something like 22 ongoing full-time jobs; ‘none of them festival director, of course’ (ibid). Nine years after instigating and running this annual festival, festival director Thompson is still not being paid. However, Bendigo Bank, where Thompson works, has been supportive from the beginning and Council’s support has increased over the years from $11,000 a year to $30,000. While his committee of four took 18 months to get the festival off the ground, now a committee of 15 to 30 meets monthly across the year to plan (ibid). About 300 people volunteer at the festival itself. Most work on festival days, organising, cleaning and selling merchandise such as T-shirts; others liaise with venues during planning. In addition to using established venues, the festival has a free (donations optional) family park event, for which they hire PA, stage and lighting equipment from Bendigo Party Hire. The festival does want to charge venues more than an ‘accommodation and admin levy’ to pay artists’ accommodation, which is the ‘single biggest cost’ (ibid). Thompson believes the festival is ‘presenting a quality program with quality artists at the grassroots level’ (ibid). Performers come from Africa, Asia, America, Canada and New Zealand as well as throughout Australia with most working cheaply so as to take part in the festival. All local artists and
crews are paid ‘except for the ones who insist on not being paid’ (ibid). Audiences also come from ‘all over: just over half are from Victoria [but] even in the first year one came from Germany because they’d seen the program online and thought what a great looking festival’ (ibid). The number of overseas visitors has expanded exponentially.

While the commercially oriented Groovin the Moo Festival attracted 30,000 youth to enjoy that touring regional music festival, it was unfortunate that the Bendigo Autumn Music Festival was cancelled in 2019. Four weeks before the event, festival director Glenn Wright said ticket sales were far lower than expected, with tickets having been on sale for eight months. While many of the local musicians were very disappointed refunds were given to those who had purchased tickets (Bendigo Autumn Music Festival Cancelled, 2019)

In terms of music retail, which is a good indicator of the health of the regional music scene, Muso’s Stuff Bendigo and Bat City Music are both owned by Greg Perry and are full-service music retail outlets that attract different markets. One is a ‘rock shop’ and the other is ‘more mums and dads, a bit more classical, a bit more traditional’ (Perry iv, 24 June 2019). Perry realises he is working in a ‘regional business’ in a ‘niche industry’ and explained the challenges they’ve faced as a result of the GFC, the high Australian dollar and the ‘rise and rise of internet and Amazon’ (ibid). Specifically, this has affected the national and international stock wholesalers they deal with. As a consequence, Perry has targeted local customers in the ‘circle about an hour around Bendigo’ including those from Echuca, Carine, Wirrabara and Castlemaine (Perry iv, 24 June 2019). As Perry explains, social media ‘enables us to target people more strategically’ (ibid) and he runs a website and is active on social media including Facebook and Instagram which is now his main form of marketing. Website design was outsourced to England, to the store manager’s brother. Perry says the NBN has ‘in many ways been bad for us’ (ibid). While internet speed has increased, ‘we’ve had nothing but issues with phones [and] internet’ which are ‘almost a daily occurrence’ (ibid). Perry supports local schools and festivals through sponsorship and donations and runs jam sessions each week hoping for a pay-off in customers, although ‘they’re the things that cause crises of faith about your business model’ (ibid). The business directly employs six staff; three of these, all of whom are working musicians, are employed full-time. Perry also subcontracts to four instrument repairers and has contact with 15 music teachers. While the Council uses another PA company, they have bought some stock from Perry. He believes they could be more supportive to business in general ‘even with things like monthly rate bills’ (ibid). ‘For us, between the two stores with a $10,000 bill, for any small business that’s a big hit’ (ibid). He’s had little contact with state government but believes they could do ‘more tangible things’ (ibid).

In terms of available recording outlets, another indicator of the vibrancy of a music scene, Ladd Studios was originally set up as an audio and design business but the owners, couple Erek and Amber Ladd, found that ‘advertising under one umbrella really didn’t make sense’ (Ladd iv, 25 June 2019). So, audio engineer Erek encouraged Amber to advertise her design services under her own name. Both Erek and Amber have little to no use for traditional media in advertising their respective businesses. Erek finds most of his clients through ‘mainly word of mouth, social media. Mostly through Facebook, Instagram’ (ibid). He has developed a strong client-based-network and has a lot of return business. App developers have also made use of Erek’s services for voicework and composition work, and audiobook work has come through the studio. Erek’s set-up is described as ‘in the box’ (the use of a DAW set up) and he said, ‘while I would love to have a 64 channel console, reel to reel analogue tape and all that stuff, it’s just not feasible for me’ (ibid). Both have worked locally with Hebron Films, though Amber’s business is less likely to work for local clients and generates ‘100%’ of her business through Instagram with clients from America, New Zealand and Sydney or Melbourne (Ladd iv, 25 June 2019). Ladd Studios operates out of a studio space on Garseed Street. Previously they were working from their home, but it was time for ‘a more professional façade’ (ibid). Erek supports the couple’s Creative Services income by working four days a week in a phone shop underneath their leased studio space.
The Screen and Radio

For the Film, TV and Radio sectors, employment by industry and by occupation remains consistent across the decade of Census data (2006-2016). This situation points to a stable media sector, in terms of commercial and corporate media production, particularly for screen and radio. However, there is very little feature film production work occurring in Bendigo, with regional production houses concentrating on a variety of briefs.

Film and video production companies that create small corporate videos for cinema and television advertising, as well as for corporates, include Hebron Films and Cornerstore Media Production. There are also some wedding videographers that offer video and photography packages.

Hebron Films is a boutique filmmaking studio which has been operating since 2013. Hebron Films specializes in video production and offers a full-service film studio, making promotional films for clients such as Bendigo Regional Tourism, Bendigo Art Gallery and Central Deborah Goldmine as well as corporate content for the mining industry (Maxwell iv, 24 June 2019). Their client base can support three full-time positions. In their spare time they team up with local creatives and make passion projects. Most projects are costed between $3,000 and $10,000, with ‘the odd series or larger thing sitting between $10K and $20K’ (ibid). Caleb Maxwell, the creative director at Hebron, describes Bendigo as an interesting space. For him, ‘there’s not really a heap of creative agencies that outsource and draw together all the different services, or at least video. That’s something that we’re looking to build a relationship with, creative agencies out of Melbourne and maybe even further abroad than that. At the moment, all of our work pretty much comes from clients we approach, as well as from inquiries’ (ibid). Hebron’s main competitor is focused on social media content whereas Hebron are keen to emphasise their high production values and quality filmmaking (ibid).

Bendigo, as a film location, has not managed to attract feature film producers yet, but Film Victoria has included images of Bendigo in a 65,000-image Film Victoria archive, which aims to ‘provide local and international producers with a wide selection of images to ensure they can find the perfect fit for their production needs’ (Kearney, 2016a). Local filmmaking enthusiast Phil Beer has questioned why the region does not feature in more TV shows and films commenting that ‘a lot of stuff should have been shot in Bendigo’ (D’Agostino, 2017b). In 2017, there was a Film Making Club established in Bendigo who were committed to a production called The Pickup with the production company Bancroft Pictures. Most of the film production work that does occur relates to client services for corporate or local screen advertising. Local businesses who use these screen services advertise with Bendigo Cinema, an independent commercial complex with six cinemas featuring Dolby Surround Sound, stadium seating and state-of-the-art projection and a luxury Gold Class Cinema (Bendigo Cinema, 2020), which has a reach of 30,000 people per month for a cinema advertising spot for as little as $95 per week (Cinema, 2020). In addition, operating out of the Eaglehawk Town Hall is Star Cinema. They are an incorporated not-for-profit community organisation which provides the region with independent, arthouse, foreign and classic films. The 100-year-old cinema is ‘led by a voluntary board, with five part-time staff managing and supported by about 45 volunteers’ (Star Cinema, 2020, p. 3).

Television news coverage in Bendigo is locally produced and limited to the three commercial television networks, WIN Corporate, Prime Media Group, and Southern Cross Austereo. The significance of these commercial networks is that they create local news content which is supported through local advertising with Prime Television (PRIME7) and WIN Regional Victoria being the main players. WIN’s Network News Director Stella Lauri explains that WIN offers a unique news service to regional Victorian audiences through its ‘dedicated half-hour local news bulletin in all markets’ (Lauri iv, 15 April 2019) which rates at 15% of
Regional Victorian audience share (WIN Regional Network, 2019). PRIME7 also offers a half-hour local news bulletin five nights a week, and both networks are servicing local advertisers.

Bendigo regional radio also contributes to a whole series of interrelationships both within Creative Industries and beyond into the wider economy. Radio in this region is a mature CI sector. There are at least eight local radio stations that are active across all sub-sectors of commercial, public and community broadcasters.

There are three commercial stations on the FM band. These include 105.1 Life FM, part of the Triple M network of stations, 98.3FM, part of the Easymix Radio Australia network, and Hit 91.9, operated by Southern Cross Austereo as part of the Hit Network. EasyMix Ten71 operates on the AM band.

Audiences in the Bendigo region can listen live or go to the ABC Listen App and access ABC On Air in Central Victoria as well as ABC News, Radio National, ABC Grandstand, triple j, triple j Unearthed, Double J, ABC Classic FM, ABC Classic 2, ABC Jazz, ABC Country, ABC Extra, Radio Australia and Radio Australia Multi-language. ABC Central Victoria radio has been operating out of Bendigo since 1993.

There are four community radio stations in Bendigo. These include Radio KLFM 96.5, Phoenix FM, Fresh FM, and Vision Australia Radio 3BPH Bendigo 88.7 FM. Phoenix FM broadcasts on frequency 106.7 and caters to a wide range of tastes including specialist programming that offers a variety of musical genres with some talk programs (Hogan iv, 24 June 2019). It operates out of a Council-owned building and fortunately, as Anne Conway OAM, the Business Manager with Phoenix indicates, they only have to pay rent once a year (Conway iv, 24 June 2019). Conway is an Indigenous woman who has worked in radio since the early 1980s and has been at Phoenix FM since its foundation. The station was established on a part-time basis in 2008 before gaining a full-time licence in March 2010. It is staffed by volunteers and funded by a combination of sponsorship, donations, membership and fundraising, as well as grants. Donations are rare and sponsorship, while ‘dirt cheap’ is ‘so hard to sell’ (Conway iv, 24 June 2019). Phoenix has been successful in accruing grant funds, receiving more than $30,000, but those funds don’t last long. Conway is steadfast in ensuring Phoenix keeps financially afloat while the community ‘used our own money at first when we had no money. We used our money and that was our passion’ (ibid).

Podcasting, a newer audio medium which draws heavily on the storytelling skills typical of radio in its golden age in the 1930s, is increasingly a feature of the cultural production sector in Bendigo but so far, apart from the ABC podcasts available through the ABC Listen app, only Connect Church Bendigo and a few amateurs run the occasional podcasts available on Apple podcasts. It is of note that these creative operatives could also be classified as part of the Software and Digital Content area of the Creative Services sector.

**Publishing Newspapers and Supporting Writers**

Local newspapers the Bendigo Advertiser and the Bendigo Weekly are now both owned by Australian Community Media, following a merger in September 2019. Both rely heavily on local classifieds. In an interview prior to their merger, Bendigo Weekly managing editor Peter Kennedy said the paper remained steadfast in its commitment to advertisers, as for him it’s very important to be able to maintain that sense of ‘localism’ (Kennedy iv, 24 June 2019). Working across both Cultural Production and Creative Services, Kennedy originally started in accountancy before moving into the Creative Services, working in advertising and public relations. He acknowledges ‘there’s no money in the digital, particularly for a small player like us’ (iv, 24 June 2019). Fortunately, the paper’s relationship with their advertising clients, most of whom are local businesses, is strong (ibid).
While the Bendigo Advertiser is still available in a daily print edition, digital distribution and engagement has become the priority for this paper. Its printing was not affected by the ACM decision in April to temporarily stop printing some papers and close four press sites as a result of the COVID-19 downturn (Canberra Times, 2020). The Advertiser introduced a subscription model in 2018 ‘to try and get people to actually pay for the digital product’ (Croxon iv, 24 June 2019). Presence on social media is also important to the masthead, with events like Bendigo’s Easter Festival livestreamed through their Facebook page, which attracts viewers globally, but would usually be ‘people that have connections to the area’ (Croxon iv, 24 June 2019). Journalists are responsible for putting their stories on social media, ‘especially Facebook’, as well as interacting with readers who comment on them. The digital journalist on staff had also assumed ‘a chief of staff function’ but would ‘compile the figures every day of how many people have been on the website and how long they spend on it’ (Croxon iv, 24 June 2019). At the time of interview, the Advertiser had an editorial staff of seven news journalists, four sports journalists, three photographers, a digital journalist, deputy editor and editor (Croxon iv, 24 June 2019). The sales team is approximately the same size as the editorial team. Production, however, is shared between other mastheads in the ACM stable, including the Illawarra Mercury. Following the economic downturn caused by COVID-19, any jobs losses will become clearer when the Federal Government’s JobKeeper program ends. Advertisers include some larger mainstream businesses, such as food outlets and national department stores, but most are local businesses.

There are still a number of writers in the region hoping to turn professional. Many of these are supported by the Bendigo Writers Council (BWC). BWC is a volunteer grassroots organisation helping local writers whether they seek to be professional writers or, as Dawn Rasmussen from the BWC points out, just write for enjoyment (Rasmussen iv, 24 June 2019). They hold structured writing workshops and monthly events with ‘local authors who had actually published their books’ (ibid) or well-known visiting authors from the Victorian Writers Centre. Guest speakers receive between $50 and $300, which is subsidised by the Writers Council even though they charge a $5 entry fee (ibid). Financials are an ongoing struggle for the Bendigo Writers’ Council even though they have received local government grants (ibid). They have not been associated with the Bendigo Writers Festival beyond its first year when they ran a workshop, as the level the Writers Festival operates at ‘is way above what we do. Like, even our guest speakers don’t really cut the mustard’ (ibid). Nonetheless BWC members have included the President of Australian Horror Writers Geoff Brown, science fiction best-seller Jess Anastasi, and poet and writer Lorraine Marwood. As Rasmussen asserts ‘there are good things that can come from talking to people’ (Rasmussen iv, 24 June 2019) with local publishing houses such as Bart ‘n’ Print, Mulqueen and Kluwell all being supportive of local authors.

Bendigo Library, as Trevor Budge from the Council states, is also a strong supporter of writers and the community with library membership equating to 35% of the regional population (Budge iv, 24 June 2019). Maree Tonkin, also from the Council, says that six years ago Bendigo Library was redeveloped, with Council investing $10 million to attract community support and ‘increase public programming particularly with an arts influence’ (Tonkin iv, 24 June 2019). Part of this redevelopment was the addition of smaller meeting rooms designed as wet and dry spaces. The vision for the library was for it to accommodate a whole range of ‘creative practices and opportunities for community to drive and develop their own arts and cultural outcomes’ (ibid). As a result, says Stacey Poulter, a Strategic Planner for the City of Greater Bendigo, this has expanded library membership and increased access to ‘heritage and archive material’ (Poulter iv, 24 June 2019) where their collections meet the needs of various community groups. As Poulter acknowledges ‘what makes a great creative city is the investment in strategically planning for cultural infrastructure’ (Poulter iv, 24 June 2019). She notes the Librarian, Mark Hand, has a ‘good perspective on the whole Creative Industries’ and he is incredibly progressive with offering ‘new technology for people to test and play with’, as well as offering more Aboriginal community events, and performance art (Poulter iv, 24 June 2019).
Co-working spaces for Creatives

Across the Creative Industries, the co-working spaces are enabled by local councils, and community and educational organisations, and Bendigo has an array of these spaces specifically for CP and CS producers. Three co-working spaces, bHive, Possum Works and Made in Common, are set up with a ‘creative industries focus’ (Tripp iv, 24 June 2019). The digital economy is driving projects, including ‘developing apps around peer-to-peer trading’ (Hart iv, 24 June 2019). Possum Works, a space for innovators and digital creatives, is privately run, while others are organised on a ‘collective’ model where a number of micro businesses joined together to sell their creative outputs or skills, such as Made in Common, supporting designers and creators. Many traditional co-working studios and exhibition spaces are owned and operated by the Council (COGB 2019) and the education sector offers galleries and studio spaces through La Trobe Art Institute and Phyllis Palmer Gallery. Creative Victoria has been working to launch a Creative Industries hub in the centre of town (Tripp iv, 24 June 2019) which was to open as ‘The Creative Industry Hub’ in Bendigo in 2018. This hub eventually reopened at the Morley Johnson building and is run by ACMI. There are also at least five maker spaces in Bendigo.

Possum Works is a privately run co-working space that opened in 2018. It offers a range of membership plans from casual hot desks to permanent desks for entrepreneurs and small businesses housing about 25 to 30 occupants. It attracts a variety of businesses; Thinka does online learning courses for corporates, universities and TAFE, Turncode Productions is a software development company, and there are also micro businesses such as developers working for different start-ups in Sydney and Melbourne, marketing practitioners, a bookkeeper and a not-for-profit organisation (Turnbull iv, 25th June 2019). One of the original occupants grew rapidly, from two employees to eight, and they have since moved out. Marcus Turnbull, who manages the co-working space, says it’s been hard to sell the idea, although it is financially sustaining, and it attracts those who usually work from cafes but in a regional town most people are used to having a home office. After hours, Turnbull runs a monthly software developers’ meeting, and Bendigo Home Brew Club. (ibid). A few members of Possum Works presented at the Municipal Association of Victoria (MVA) and Turnbull said, ‘we had four or five councils who were like, ”You've got to come to our place." But we want to try and get it going in Bendigo first. But it's taken us a while to get our local Council interested, they haven't been as keen as others, but they are now’ (ibid).
Strategic theme 2: The relationship of cultural and creative activity to the wider economy

Creative Industries are important to cultural tourism. Bendigo was not ‘a destination 20 years ago’, but with an acute ‘focus on the arts and culture’ (Tripp iv, 24 June 2019) that has changed. The City of Gastronomy tag has been applied to Bendigo, and the city has one hatted restaurant in Masons ‘so it’s becoming more of a cosmopolitan city than perhaps in the past, with the farming, industrial, engineering, heavy in manufacturing base’ (Hart iv, 24 June 2019). The City of Greater Bendigo tourism unit have redeveloped their website to include the broader region and promote local businesses (Tripp iv, 24 June 2019).

Employment of Software and Digital Content specialists also occurs in the banking and financial services sector, with Bendigo Bank, and in the Defence and Engineering sectors (with Thales, a French company, manufacturing military defence vehicles). Advertising and Marketing is another example, with professionals from this sub-sector located in higher and vocational education services (the La Trobe University and TAFE Bendigo) as well as embedded creatives working within all forms of government in the region.

Mining the Census and ABR data by SA2 level it can be seen that there are clusters of Creative Industries operatives working across the interconnections between the two major subsectors of Creative Services and Cultural Production and those who are embedded within other sectors of the wider regional economy.

Regional Development Victoria

Bendigo has ‘positioned itself well as a brand’ with ‘its theatre, its art gallery, as a place where people feel it’s a good place to live, attracting professional services, and doctors with the growth of the hospital’ (Hart iv, 24 June 2019). Bendigo is ‘now attracting a lot of people’ who are ‘coming and residing here’ (Hart iv, 24 June 2019); the ‘general look and feel of the place is advanced’. The old jail, now Ulumbarra Theatre, is attracting local, Melbourne and international performers. The city centre, taking in View Street, Pall Mall, the Shamrock, the war memorial, the visitors centre, and the post office, ‘from a visitation perspective’ is ‘a key driver of economic growth in Bendigo’ and ‘what has made Bendigo, as far as a tourism destination is concerned’ (Tripp iv, 24 June 2019). Council has ‘driven growth for the city, which brings better services’, including upgrades to the hospital and the airport; ‘those things don’t happen unless you’ve got that sort of thing supported by your council’ (Hart iv, 24 June 2019).

There have been ‘a lot of capital works done in Bendigo in the past 10 years with more to come’ (Hart iv, 24 June 2019). ‘The Bendigo Law Courts have moved, TAFE is being upgraded and there’s another piece of the hospital to come’ (ibid). ‘There’s the airport, the Gov Hub project’ (Tripp iv, 24 June 2019), school, rail and road upgrades and ‘new retirement villages’ (Hart iv, 24 June 2019). Bendigo has a ‘fully digitised hospital’ and La Trobe campus of almost 4,000 students (ibid). The ‘revitalisation of TAFE’ brings about ‘an embedding of the tech component around hospital and health and wellbeing’ (Tripp iv, 24 June 2019). Architects and surveyors find work locally, including with the station upgrade.

From Gold Mining engineering to Military Vehicles

Engineering invention is traditionally strong in Bendigo, as a result of the engineering required to mine gold underground, to invent solutions for mining in a very harsh landscape where techniques developed in Europe often failed (Budge, Poulter iv 24 June 2019). Bendigo engineers were impressive enough to attract a Naval ordnance factory to the city during World War II. One illustration of how this capacity for invention plays out in today’s world is Thales, a French defence manufacturer who is located in Bendigo. This internationally focused business requires a range of highly skilled embedded creatives working as designers, marketers and software solution architects. They produce military vehicles for the Australian and international markets. This operation means that Bendigo has one of the few vehicle assembly line manufacturers remaining in Australia. The $1.5 billion contract was won by bringing 70 international engineers to Bendigo for six months to put the tender together (Budge iv, 24 June 2019).
Education Pathways to CI Careers

Bendigo has a university (a campus of La Trobe University), a TAFE and a tech high school, all of which feed the Creative Industries sector with skilled workers and potential SMEs. At La Trobe, the College of Arts, Social Science and Commerce offers a Bachelor of Arts, Bachelor of Creative Arts and Diploma of Arts (LaTrobe, 2019) and the Visual Arts Building houses the La Trobe Art Institute (LAI) and the Phyllis Palmer Gallery. LAI is a higher education partner with Bendigo Art Gallery. This relationship has developed into an ‘in-kind’ and sponsorship arrangement where the gallery produces an accredited university subject called 'Exhibiting Culture’ and the gallery offers public programs at LAI’s lecture venue (Bridgfoot iv, 25 June 2019).

Bendigo TAFE offers diplomas in Creative and Design (TAFE-Bendigo), with courses in Creative Arts and Digital Media; Graphic Design and Building Design; Writing and Music; and other short courses. Bendigo Tech School is a centre for STEM knowledge. Hosted by the university, and one of 10 such schools in Victoria, it works with 13 local high schools, industry and enterprise, to give students the skills they need for the jobs of the future. Specific areas of study include medical technology and pharmaceuticals; new energy technologies; advanced manufacturing; food and fibre; and transport, defence and construction, and it aims to develop critical and creative thinking, innovation, problem-solving, communication, leadership, teamwork and entrepreneurship skills.

Thales in Australia is ‘partnering with the Ballarat, Bendigo, Casey and Yarra Ranges Tech Schools in Victoria to engage students in a design competition linked to the Thales vision to make life better and keep us safer’ (Thales, 2019). The competition aimed at year 9 and 10 students is around designing, marketing and creating sensor technology to make communities better and safer (ibid).

The Embedded Software and Digital Content Creators

This is a growing sector, with an annual growth in ABNs of 4.6%. In regional areas, these sectors usually embed themselves inside other industries such as the financial sector. For example, Bendigo Bank employs a significant number of ICT Business and Systems Analysts as well as Software and Applications programmers. There are also Software Application Programmers working in Computer System Designs. Bentrol, a firm specialising in building management systems, has have clients throughout regional Victoria and have created software for the customised needs of an array of commercial clients (Brentol, 2020).

The financial sector is considered a ‘safe place to work’ for software programmers and developers (Macartney iv, 24 June 2019). Bendigo does have a handful of boutique software development businesses too, with three examples being Fixus Technologies, AgCloud and Turncode Productions. Turncode Production is a software development company that develops custom applications to help small businesses to more effectively integrate their own data from older ‘discrete data silos’ to share the company’s information across multiple internal systems. Bendigo has enough businesses to support this highly specialised type of work (Turnbull iv, 25th June 2019).

AgCloud is an information technology company improving connectivity for agricultural clients that experience blackspots issues because of digital connectivity. Many rural areas have blackspots issues which affect a working farm’s digital connectivity, now required for farm security, monitoring trough and silo levels and for employees working in isolated areas. Access to high quality and continuous internet on farms is thus a significant issue, so AgCloud custom designs technology to provide a better service for their clients. The start-up was founded in 2017 by Grant Sutton and his partner. They created a prototype platform that ensures a custom-built repeater network will allow the NBN to have consistent coverage across a farm with blackspots (Webster, 2017). Their main clients are corporate famers Hazeldenes chicken farm, VicSuper’s Kilter Rural, and Macquarie Bank’s Lawson’s Grains.
Fus Technologies is a software development company managed by Paul Macartney, who develops software for the health sector offering a client information management system for mental health providers. They have a diverse range of clients located nationwide, with a concentration in Queensland (Macartney iv, 24 June 2019). Fixus is a cloud-based software application. The business employs six people locally and three software developers in the Philippines. The off-shore employment of software developers is because it’s hard to attract developers to Bendigo: ‘I spent four or five months advertising for a software developer. As you can imagine, there’s only 107,000 people in Bendigo, so the talent pool is quite shallow and spread out. Anyone that’s half decent is already locked in somewhere’ (ibid). Another frustration for Macartney has been the regional roll out of the NBN, which he believes will become redundant anyway when entrepreneurs such as Elon Musk deliver their wireless satellite network (Macartney iv, 24 June 2019).

As part of the push to help attract skilled software and digital content developers, the City of Greater Bendigo provided $60,000 to set up bHive, a software development project that aims to create a cooperative platform that will ‘connect people back with their neighbors’ instead of letting multinationals take over (Turnbull iv, 25th June 2019). Built by Marcus Turnbull from Turncode, the Council grant has funded the first part of building the trial ‘Our Villages’ platform, aiming to initially secure about 1,000 users. This initiative is set up as a cooperative and any money it makes goes back into the local economy, ‘projects to eradicate poverty, that sort of thing. So, any spending, we take 4% and you get to choose what projects you spend that on. But it’s local things around the ecology and eradicating poverty and stuff’ (Turnbull iv, 25th June 2019).

First Nations Art Collections and Curation

The development of First Nations artists, and the curation and collections of their works, is being thoughtfully managed by Bendigo Art Gallery. They have created a First Nations Curator position and the Dja Dja Wurrung peoples are working with the gallery on a significant Indigenous reparation project called Place of Keeping (Bridgfoot iv, 25 June 2019). The gallery has no authority to access the collection for private or exhibition purposes but must seek permission from the Dja Dja Wurrung to ensure that the community is part of any process leading to public display. This situation provides a respectful mechanism to ‘actually communicate First Nations work’ to gallery visitors (Bridgfoot iv, 25 June 2019). This foundational work was made possible because of Creative Victoria’s Audience Engagement grant ($150,000) which for three years has allowed the gallery to engage ‘First Nations practitioners to run workshops and public programs, commissioning new work, and also securing funding to actually fund Indigenous communities to come and participate at the gallery in workshops, programs and events’ (Bridgfoot iv, 25 June 2019).

In 2019, Victoria’s regional Indigenous artists were invited to contribute to the ‘Going Solo’ exhibition to showcase First Nations Art, and Bendigo Gallery received roughly 50 applications from mostly early career artists (Bridgfoot iv, 25 June 2019). Gallery Director Jessica Bridgfoot explains ‘it’s an intense process. Putting together the application, you have to really think about what exhibition you might deliver, what body of work you’re interested in, how that relates to the area, that sort of thing. And we have a little selection panel and on the First Nations panel, there are First Nations curators as well. So, they’re a specialist and then we work quite closely with the artist in developing the exhibition and realising the exhibition’ (iv, 24 June 2019). At the time of the interview they were working through finalising who would be invited to exhibit.

Festivals and Creative Engagement

Bendigo’s cultural festivals and events are a significant set of attractors for the city. Major Events Coordinator for Bendigo Council is Jacqueline Murphy, who says ‘our role is to attract new money and bring it to the city’ (Murphy iv, 24 June 2019). Bendigo runs a significant number of cultural events throughout the year, such as Bendigo’s Easter Festival, which is Australia’s longest running community festival. In 2019, the Easter Sunday Parade attracted 80,000 people to Bendigo. It was to celebrate its 150th year in 2020 but this annual event had to be cancelled due to the COVID-19 pandemic. It was not an easy decision to cancel the
event as ‘the city appreciated its contribution to the social fabric of the community, its economy, and its history, especially coming into its 150th year’ (D’Agostino, 2020).

Other significant events that are supported by the council are Zinda, Scots Day Out, and the Blues and Roots Festival mentioned above. Council’s main role has been to provide operational assistance and sponsorship to facilitate these events that engage the community and attract tourists to the city (Murphy iv, 24 June 2019). Murphy’s team draws on local Creative Industries sectors by engaging local artists to run creative programs, running the live stages and hiring significant amounts of staging and sound equipment for these outdoor community events, and local creative services businesses benefit. The private sector also uses Bendigo as a location for events such as White Night, the projection festival held mid-winter, and the Groovin the Moo touring festival, which attracted 30,000 attendees in its last iteration in Bendigo.

**NBN and connectivity**

The National Broadband Network (NBN) in Bendigo has received ‘mixed reviews’ (Tripp iv, 24 June 2019), which is unfortunate as it is now an essential piece of infrastructure for many creative businesses. There are some good ‘levels of bandwidth and capability’ (ibid), with free wi-fi in the city centre and mobile connectivity on trains (Hart iv, 24 June 2019) but it has not been effectively ‘rolled out in the city centre’ (Tripp iv, 24 June 2019). Other ‘pockets of Bendigo’ are struggling with connectivity (Hart iv, 24 June 2019), including farms and regional black spots. Creative businesses such as those engaged in 3D printing were particularly disadvantaged as they are ‘struggling for enough bandwidth’ (ibid). An opportunity could arise for Bendigo under Regional Partnerships for improved connectivity by tapping into VicTrack’s fibre connection along the rail line (Tripp iv, 24 June 2019). Funding was received in 2018 from The Building Better Regions Fund that aimed to improve the digital capacity of 30 to 50 small and micro tourism businesses across the region’s local governments (Pedler, 2018).

**Bendigo Tourist Attractions**

The gold rush legacy is a significant tourist attraction for Bendigo with gold mine tours and Chinese cultural heritage, manifested in the Chinese Dragons that feature in the city’s annual Easter parade. While Bendigo has a diverse cultural heritage with the Chinese community settling in Bendigo during the gold rush days, STEM focused tourist attractions can also be found, and the Discovery Science & Technology Centre has been operating in Bendigo for 22 years. It offered a series of educational programs, a planetarium and The Lab. Support comes from Bendigo Council, La Trobe University, VIC Stem (the Department of Education STEM unit) and some private trusts, philanthropic organisations and foundations.

![Table 2 Tourism activity, Bendigo](image)

Table 2 Tourism activity, Bendigo

In addition, The Central Deborah Gold Mine offers authentic gold rush experiences through a tour of Australia’s deepest underground mine, going 228 metres below the surface on the Nine Levels of Darkness tour. Bendigo Tramways offer a depot and workshop tour and a range of tram rides on a Vintage Talking Tram which visits the Gold Rush story. There is also an Anzac Centenary Tram ride. To service these
attractions, Bendigo regional airport now offers daily flights between Bendigo and Sydney with Qantas confirming this route was ‘the best take-up they've ever had of a new regional service’ (Budge iv, 24 June 2019). Qantas has been a strong supporter of the international exhibitions at Bendigo Art Gallery, and their international and domestic magazines are themselves embedded parts of the Cultural Production sector of the Creative Industries, offering feature stories with photographs. Future new routes include flying Bendigo, Mildura, Adelaide, and this expansion is being driven by the relationship between Bendigo and Adelaide Bank (Budge iv, 24 June 2019).

Social enterprises networks and programs

Bendigo has a social conscience seen in a number of unique social enterprise models and co-working spaces emerging in the region, with a specific focus on improving opportunities for others. Across Creative Industries there are social enterprise co-working spaces that enable social collectives to provide cultural benefits for the community. For example, Access Creative Studios is a registered provider through NDIS, Emerge Cultural Hub works with refugee communities, and Synergize Hub explicitly targets micro businesses, that is, people working for themselves from their homes (COGB, 2019).

The GROW program was formed to address disadvantages in areas of high unemployment. GROW Bendigo is a collective impact initiative with business, government, community organisations and individuals working together. Modelled on the GROW G-21 (Geelong) initiative which has been a huge success, it is being overseen by Be.Bendigo, the peak organisation for business in greater Bendigo (Be.Bendigo, 2019). GROW Bendigo aspires to use collaboration and evidence-based approaches to tackle problems of entrenched poverty and is supported by the State Government. It was launched in Ballarat, Shepparton and Bendigo and is funded until 2021.

Emerge adds a diverse voice to the arts in Bendigo through creating intercultural arts experiences, increasing participation and opportunities by and for artists and community members from former refugee and Indigenous backgrounds. Emerge Cultural Hub Bendigo is an initiative of Multicultural Arts Victoria supported through a state government partnership with the City of Greater Bendigo, where $450,000 has been invested for over three years. As a result, the Emerge Cultural Hub has been established, ‘where projects that are being developed are really kind of driving activity into those cultural, key cultural festivals’ (Tonkin iv, 24 June 2019).

Punctum is an artist-led live arts organisation operating since 2004. It ran the ‘The Kultur-All Makaan - The Pavilion Project’ in Bendigo and Castlemaine from 2018 to 2020 (Punctum, 2020). Supported through Creative Victoria’s Social Impact Program it offered public arts experiences created in collaboration with ‘the South Sudanese, Karen and Hazara artists’ (Punctum, 2020). The project was part of Melbourne Design Week 2020 program looking at ‘how design can create inclusion and foster diversity’ (Punctum 2020).

Creative Corridor of Regional Commuters

There are six municipalities forming an ‘innovation corridor’ that connects a string of rural towns between Melbourne and Bendigo. Towns such as Gisborne, Kyneton, Castlemaine and Bendigo offer affordable areas with thriving creative communities for Melbourne’s economic refugees. Regional Development Victoria explains there have been 1,700 creative businesses identified, from ‘Gisborne right up through Bendigo and then into Campaspe and Echuca’ (Tripp iv, 24 June 2019).

Typically, one partner who lives in this corridor might travel to Bendigo while the other might head to Melbourne for employment. For example, there are half a dozen Bendigo Art Gallery employees who commute from Kyneton or Castlemaine daily. One of the attractions is that house prices in Kyneton were around $550,000, while in Bendigo CBD they were around $335,000 (Bridgfoot iv, 25 June 2019). Bendigo is such an attractive location that people are relocating to ‘Bendigo because they'd come to see an exhibition here ... and they've uprooted from Melbourne and moved to Bendigo’ (Orlandi iv, 25 June 2019).
The City of Greater Bendigo describes this creative corridor as extending up to Echuca and across the northwest to Maryborough (Budge 24, June 2019). To cover this area, the Council offers outreach programs to the Greater Bendigo regions which make up about 13 smaller towns, some 50 kilometers away. David Lloyd from the City of Greater Bendigo says ‘the biggest one has got about 2,000 people, but the Council has been very strong about taking programs to those small communities’ (Lloyd iv, 24 June 2019). From a regional strategy point of view, Bendigo Council has ‘a greater emphasis on delivering things into the rural areas and are actually delivering beyond our boundaries’ (Budge iv, 24 June 2019). Additional support in terms of children’s programs have helped to reach into rural areas where transport subsidies have been offered. These have been ‘heavily subsidized by the State Government. It’s been a really strong initiative’ (Budge iv, 24 June 2019) demonstrating the Council’s belief in harnessing the strengths of this creative corridor.

### 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 (see Table 3).

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 changers 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.
### Table 3 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** | 262,828                           | 101,689      | 110,479             | 90,427                |
| **Average annual growth 2011-2016** | 2.1%                            | 1.7%         | 1.9%                | 1.6%                  |
| **Employed persons, 2016**    | 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** | 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** | $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**                  | 40.1                             | 39.0         | 39.5                | 38.7                  |
| **Unemployment rate**         | 6.5%                             | 7.6%         | 6.8%                | 6.9%                  |
| **Youth unemployment rate**   | 13.2%                            | 15.0%        | 14.0%               | 13.3%                 |
| **Youth unemployment ratio**  | 45.3%                            | 46.7%        | 44.8%               | 45.3%                 |
| **Indigenous**                | 2.6%                             | 1.5%         | 1.7%                | 2.6%                  |
| **Volunteer**                 | 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)

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.

Appendices

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

Appendix A: Hotspot Data
Appendix A.1 Creative employment: counts, growth rates, intensities and heat maps
Appendix A.2 Creative employment earnings: totals, growth rates, intensities and heat maps
Appendix A.3 Creative employment incomes: mean incomes, growth rates, comparative ratios and heat maps
Appendix A.4 Creative trident employment heat maps by sector
Appendix A.5 Creative ANZSIC4 industry hotspot comparison by state
Appendix A.6 Creative ANZSCO4 occupation hotspot comparison by state
Appendix A.7 Employment and business comparison
Appendix A.8 Cultural grant funding by government and type

Appendix B Australian Business Register data
Appendix B.1 Creative businesses: counts, growth rates, intensities and heat maps (forthcoming)

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