

City of Port Phillip

Creative Industries Mapping Project
June 2019



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Image 1 Front cover image: Paradise by Phillip Adams BalletLab and Yellow Wheel. Photo by Gregory Lorenzutti

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Prepared by Hodyl + Co with Jack Fowler for the City of Port Phillip www.hodyl.co

Project team:
Leanne Hodyl
Bec Fitzgerald
Jack Fowler



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Version D

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There are almost 500 identified creative spaces and businesses in the City of Port Phillip.

Introduction

In 2018, the City of Port Phillip developed the Art and Soul - Creative and Prosperous City Strategy 2018-2022. This strategic work articulates three outcomes and 35 actions aimed at fostering the right conditions to sustain and grow a thriving creative ecosystem.

Of most direct relevance to this project is Outcome 2: A Prosperous City that connects and grows businesses. This outcome recognises the important contribution that creative industries make to the local community and economy.

It identifies Port Phillip's competitive location, high growth population and centrality as key strengths of Port Phillip as a place to locate businesses. It articulates 12 actions (Actions 9-20) to progress Outcome 2 that build on these identified strengths.

The strategy also identifies the importance of providing a range of suitable and affordable creative spaces within Port Phillip. It found that increasingly creative practitioners are looking outside of Port Phillip to find development, rehearsal and presentation spaces. There was also an identified need for temporary spaces to test ideas, innovate and activate places.¹

Purpose of this project

The purpose of this project is to deliver Action 9 of the Art and Soul - Creative and Prosperous City Strategy 2018-2022.

Action 9

Map the innovation and creative ecosystem including infrastructure assets such as buildings, creative spaces, studios, work spaces and social assets such as community groups, school communities, not for profit organisations, businesses, philanthropic and interest groups.²

The mapping captures all identified buildings, creative spaces, studios, work spaces and creative businesses. The social assets mapped social organisations which include community groups, school communities, not for profit organisations and philanthropic and interest groups that are focused on creative industries. This includes, for example, not for profit organisations that advocate for the creative sector.

¹ City of Port Phillip, 2018

² City of Port Phillip, 2018

The findings from Action 9 will form the basis of Action 10 -

Action 10

Develop and implement a four-year action plan in consultation with industry and the community, addressing affordability and the availability of diverse space for entrepreneurs and start-ups, clustering and Council's role in securing and leveraging investment opportunities, including opportunities during the transition of Fishermans Bend. The innovation and creative ecosystem mapping will provide the basis for funding these activities in years three and beyond.³

This work will assist Council in effective decision-making as it will establish an evidence base to address issues related to the affordability, diversity and suitability of creative spaces within Port Phillip.

The mapping will also ensure that Council can leverage their investment in creative industries in identified creative clusters and within the Fishermans Bend Urban Renewal Precinct to have maximum impact.

Report structure

The report is structured in five parts:

1. Creative industry definitions

An overview of the creative industry definitions used as the basis of the report and of the method used to categorise the dataset.

2. Creative industries overview

An overview of creative industries in inner Melbourne and in the City of Port Phillip.

3. Port Phillip creative industries

A mapping exercise to establish a spatial understanding of creative industries within the municipality was undertaken. This included the identification of industry clusters and neighbourhood clusters.

4. Neighbourhood profiles

The neighbourhood profiles provide an overview of the particular characteristics of the identified neighbourhood clusters - South Melbourne, St Kilda and Fishermans Bend.

5. Inner Melbourne major infrastructure analysis

A major infrastructure analysis was undertaken within a 10km radius of Port Phillip City Council. The analysis focused on live music venues, theatres and other major cultural attractions to understand Port Phillip's comparative strengths and weaknesses for major drawcard venues within a broader strategic context.

Digital interface

The report is supported by a digital interface which collates the data into an easy-to-use visual format. This interface will provide a readily accessible resource for industry and community members. This will provide an effective tool for consultation and an ongoing resource for the community.

3 City of Port Phillip, 2018

Creative industries are constantly evolving and span across multiple sectors.

1. Creative industries definitions

Creative industries are recognised as making a valuable contribution to Victoria's culture, economy and society. The creative industries are constantly evolving and span across multiple sectors. They cover diverse disciplines from game design and music publishing to filmmaking and architecture. These industries are united by their role in the generation of creative ideas and content.

Definitions

The dataset includes creative businesses and creative spaces. Sometimes a creative space might host multiple creative businesses. In this case, the creative space and the creative businesses are all captured as individual data points.

The dataset also includes outdoor event spaces and community centres that are managed by the City of Port Phillip and are available for creative use and events.

The data collected was categorised in three ways: industry, industry sub-category and type.

1. Industry

The data was categorised into 12 industries:

- Art
- Cultural
- Dance
- Design
- Fashion
- Film + Television
- Media
- Music
- Theatre
- Photography
- Community
- Co-work

Creative spaces and businesses that fall into multiple categories appear on the digital interface under an additional category 'Multiple'. For example, Gasworks Arts Park falls into the Art, Cultural, Film + Television, Dance and Theatre industry categories.

2. Industry sub-category

Each individual business was also attributed a more specific type within its industry category. For example, within the music industry, sub-categories included music venues, nightclubs, orchestras, recording studios, art organisations (focused on music), specialised equipment hire, music entertainment (performer management), music publishing and music schools.

3. Type

Creative businesses and spaces were categorised according to the overarching role of each business or space in the creative industries ecosystem. This particularly assists in understanding the relationship between 'the creator' and 'the audience' or wider community participants.

Experiencing - The 'experiencing' category includes all creative spaces that people visit to experience creative outputs. These include theatres, galleries, libraries and music venues.

Making - The 'making' category includes all creative spaces and businesses that produce creative outputs. These include artist studios, film studios, recording studios and co-working spaces.

Learning - The 'learning' category includes all creative spaces that teach people new creative skills. These include music schools, art schools, dance schools, higher education institutions.

Advocacy - The 'advocacy' category includes all organisations that advocate for creative industries and for people working within creative industries.

Categorisation

See Table 1 and Table 2 for a comprehensive overview of the data categorisation by type, industry and industry sub-category.

Industry	Industry sub-categories	Type	Creative Victoria sector
Art	Artist Studio	Making	Visual arts and crafts
	Textile Manufacturer	Making	Visual arts and crafts
	Framer	Making	Supporting activities
	Printer	Making	Supporting activities
	Gallery	Experiencing	Visual arts and crafts
	Arts Organisation	Advocating	Supporting activities
	Multi-Functional Space	Making, Experiencing, Learning	Other
Cultural	Library	Experiencing	Libraries and archives
	Little Free Library	Experiencing	Libraries and archives
	Museum	Experiencing	Museums
	Multi-Functional Space	Making, Experiencing, Learning	Other
Dance	Dance Company	Making	Performing arts
	Dance Studio	Making, Experiencing	Performing arts
	Dance School	Making	Performing arts
	Education	Learning	Supporting activities
	Arts Organisation	Advocating	Supporting activities
	Multi-Functional Space	Making, Experiencing, Learning	Other
Design	Architects	Making	Design
	Creative Agency	Making	Design
	Digital Design	Making	Design
	Game Design	Making	Design
	Graphic Design	Making	Design
	Web Design	Making	Design
	Education	Making	Supporting activities
	Printer	Making	Supporting activities
Film + Television	Cinema	Experiencing	Broadcasting, electronic or digital media or film
	Film + Video Production	Making	Broadcasting, electronic or digital media or film
	Equipment Hire	Making	Supporting activities
	Casting Agency	Making	Supporting activities
	Film + Video Services	Making	Broadcasting, electronic or digital media or film
	Post Production	Making	Broadcasting, electronic or digital media or film
	Education	Making	Supporting activities
	Multi-Functional Space	Making, Experiencing, Learning	Other

Table 1 Creative industry data categorisation

Industry	Industry sub-categories	Type	Creative Victoria sector
Media	Print Media	Making	Literature and print media
	Radio Stations	Making	Broadcasting, electronic or digital media or film
	Written Communication	Making	Literature and print media
Music	Music Organisation	Advocating	Supporting activities
	Radio Stations	Making	Broadcasting, electronic or digital media or film
	Equipment Hire	Making	Supporting activities
	Music Entertainment	Making	Supporting activities
	Music Publishing	Making	Music composition and publishing
	Orchestra	Making	Music composition and publishing
	Recording Studio	Making	Music composition and publishing
	Sound Design	Making	Music composition and publishing
	Music School	Learning	Supporting activities
	Music Venue	Experiencing	Performing arts
	Nightclub	Experiencing	Performing arts
	Education	Learning	Supporting activities
	Theatre	Theatre Organisation	Advocating
Arts Organisation		Advocating	Supporting activities
Casting Agency		Making	Supporting activities
Theatre Company		Making	Performing arts
Theatre		Experiencing	Performing arts
Drama School		Learning	Supporting activities
Multi-Functional Space		Making, Experiencing, Learning	Other
Photography	Photography	Making	Broadcasting, electronic or digital media or film
		Advocating	Supporting activities
Community	Community Centres	Experiencing, Learning	Other
	Community Events Space	Experiencing	Other
	Outdoor Events Space	Experiencing	Other
Co-Work	Co-Working Studio	Making	Other
Fashion	Clothing Manufacturers	Making	Fashion
	Fabric Manufacturers	Making	Fashion

Table 2 Creative industry data categorisation

Creative industries are the second largest employer in the City of Port Phillip.

2. Creative industries overview

The following is a summary of the key considerations that have guided the development of the report. This includes a holistic understanding of the social and economic value of creative industries as well as an understanding of the economic threats facing creative industries in inner Melbourne.

Creative industries are under pressure as property prices increase.

The creative sector is under pressure in inner Melbourne. The trend over the past 30 years has been for creative spaces to re-locate as areas gentrify.¹ Councils are increasingly committed to reversing that trend as the value of creative industries to the community becomes more broadly understood.

Understanding the spatial distribution of creative businesses is an important step in identifying neighbourhoods in which development pressure and gentrification may displace creative industries in the City of Port Phillip.

Creative industries provide demonstrable benefits to the community and to individual health and wellbeing.

Creative industries have a positive benefit on community health and individual wellbeing as they generate opportunities for participation in arts and cultural programs. Participation in arts and cultural programs leads to an increased ability to recognise feelings and empathise with others.² This improves social relationships³, leads to pro-social behaviour, increases tolerance and builds resilience.⁴

It is important to ensure that there is equitable access to creative programs across the City of Port Phillip. Understanding the spatial distribution of creative industries can assist in identifying gaps in access to creative programming.

1 Shaw, 2013
2 Brouillette, 2010
3 Barry, Clarke et al, 2017
4 Schellenberg 2004 and Romanowska, Larsson et al. 2013

Creative industries will have a growing role in the economy.

There is an increasing awareness of the importance of creativity across a wide range of industry sectors with creative industries playing an important role in leading social change and driving economic innovation. The cultural and creative industries contributed \$22.7 billion to the Victorian economy in Gross Value Added (GVA) in 2013. This was just behind manufacturing (\$26.3 billion) and ahead of construction (\$19 billion).⁵

As a sector, the creative and cultural industry is the second largest employer in the City of Port Phillip. The top three professions by job numbers are graphic design, architecture and advertising.⁶

One of the most over-represented industries compared to Greater Melbourne are those related to Motion Picture and Video Activities.⁷ This suggests that the City of Port Phillip plays a unique role within the film and television industry. The most over-represented occupation is acting which suggests the importance of the film and television and theatre industry within the City of Port Phillip.⁸

The City of Port Phillip has already shown leadership in their development of the Art and Soul-Creative and Prosperous City Strategy 2018-2022.⁹ The strategy will assist Council in improving community outcomes, strengthening the economy and growing the role of creative industries within Port Phillip.

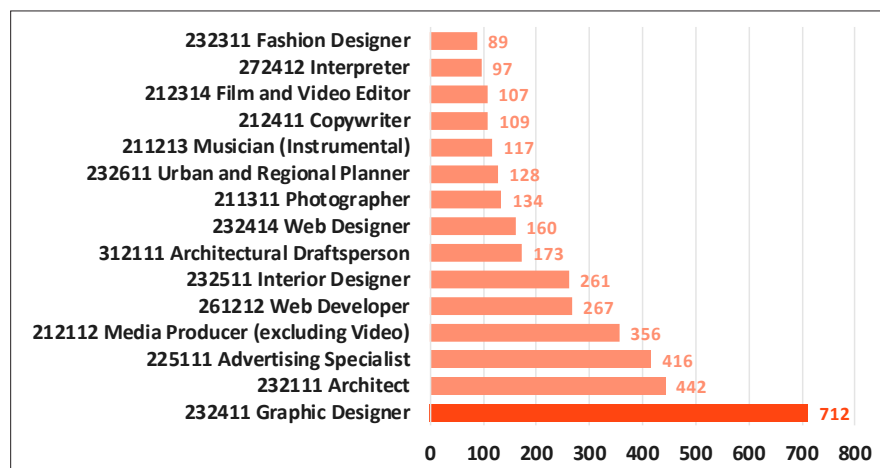


Figure 1 Top creative occupations by number of local jobs. City of Port Phillip 2017/18. Source: ABS Census and the National Institute of Economic and Industry Research, 2018

5 (Victorian Creative Industries Taskforce, 2015)
 6 ABS Census and the National Institute of Economic and Industry Research, 2018
 7 ABS Census and the National Institute of Economic and Industry Research, 2018
 8 ABS Census and the National Institute of Economic and Industry Research, 2018
 9 City of Port Phillip, 2018



Image 2 Australian Tapestry Workshop, South Melbourne

3. Port Phillip creative industries

Chapter overview

Mapping of creative industries has been undertaken to document the location of all identified creative spaces across the municipality. This identified almost 500 creative spaces within the City of Port Phillip. This has enabled the identification of industry clusters and neighbourhood clusters within Port Phillip.

The top three industry clusters (by number of identified creative spaces and businesses) were design, music and film and television. This demonstrates relative strengths in design and film and television when compared with the City of Darebin¹ and the City of Moreland.²

This chapter focuses on understanding the overall spatial distribution of creative industries as well as discussing industry clusters and their place-specific advantages.

The neighbourhood clusters identified were South Melbourne, St Kilda and Fishermans Bend. Neighbourhood clusters are discussed in the following chapter in the neighbourhood profiles.

Digital interface

The mapping is also represented on a digital interface which collates the data into an easy-to-use visual format. This interface allows users to explore and represent the data according to different categories.

Methodology

The database of creative businesses was created by collating data from multiple sources. The following sources were used:

- Google Maps
- True Local
- Creative Spaces
- Beat Magazine
- Port Phillip Internal Database (provided by Council)
- City of Port Phillip website
- Yellow Pages
- Art Almanac

This method is replicable and can be expanded over time to include additional datasets as they become available. The dataset will provide a basis for assessing changes to the creative landscape in Port Phillip over time.

Limitations

The dataset presented in the mapping is a spatial representation of identified locations of creative industries within Port Phillip. This exercise is therefore not representative of all creative practitioners in Port Phillip. Many creative practitioners work as sole-traders and may work from home or across various locations.

Certain industry sectors are more likely to be under-represented in the dataset, for example, the arts sector and the film and television sector.

In the arts sector, artists are difficult to identify as they are often non-registered and work from informal or unlisted locations. It is also difficult to represent the breadth of the film + television sector as creative practitioners often work as sole traders across various locations as film and television sets can pop-up for six months at a time.

¹ Darebin Creative and Cultural Infrastructure Plan, 2018

² Moreland Arts Infrastructure Plan, 2018

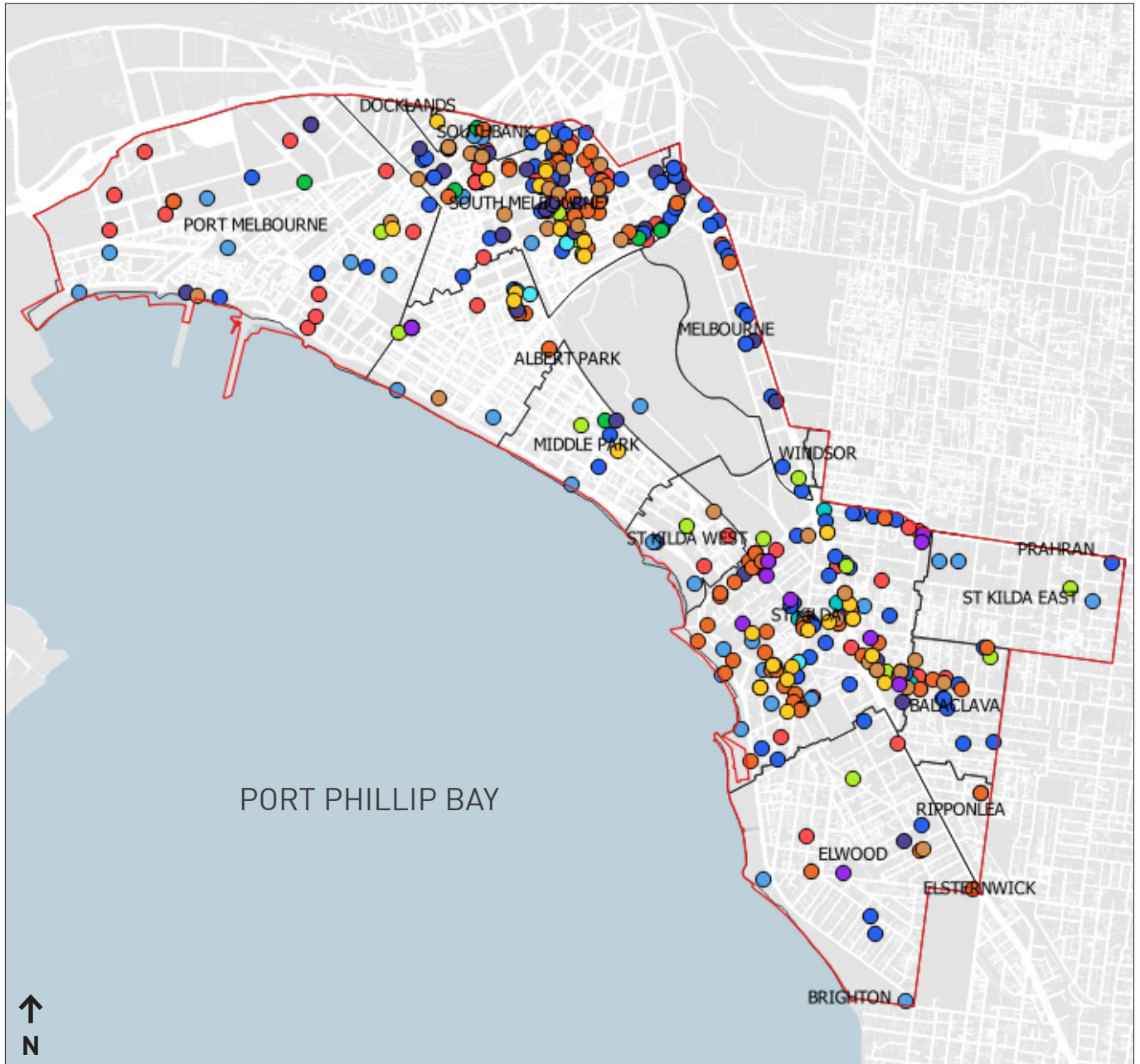


Figure 2 Creative businesses in Port Phillip categorised by industry.

- | | | | | | |
|-----------------------|----------|---------|-----------|-------------------|---------|
| Port Phillip boundary | Art | Design | Music | Film + Television | Theatre |
| Suburb boundaries | Cultural | Fashion | Community | Photography | |
| | Dance | Media | Co-Work | Multiple | |

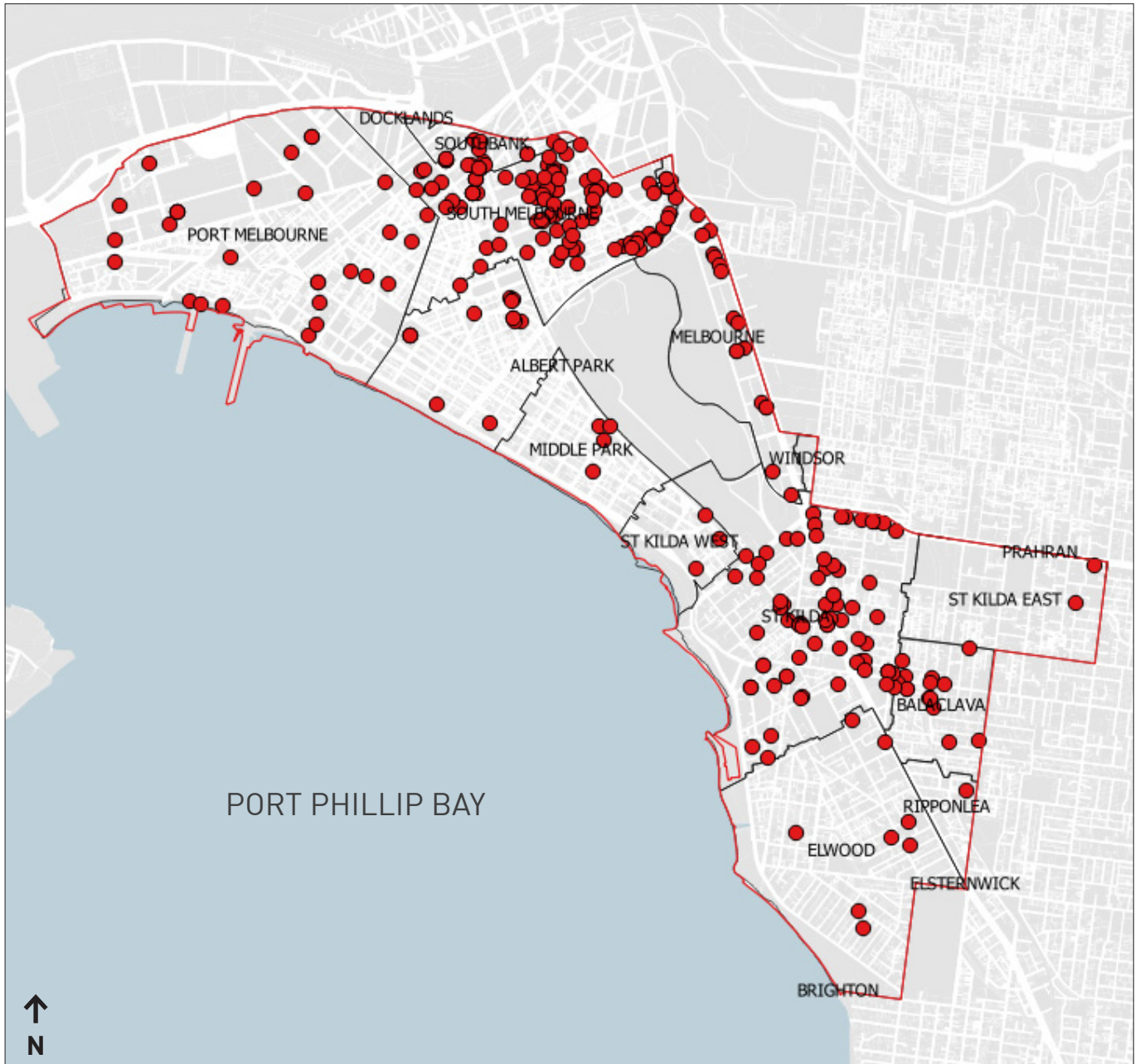


Figure 3 'Making spaces' in Port Phillip.

- Port Phillip boundary
- 'Making spaces'
- Suburb boundaries

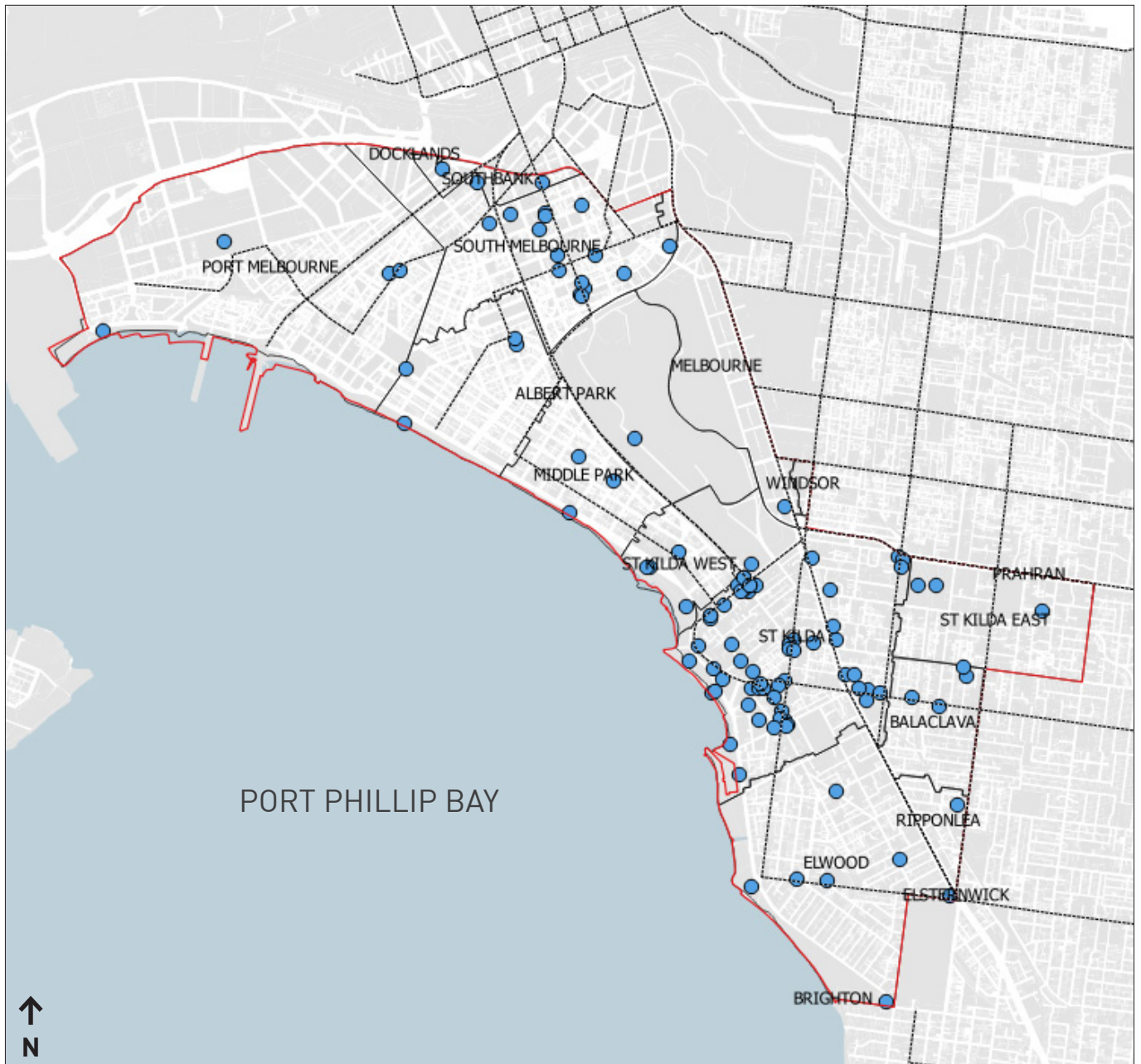


Figure 4 'Experiencing spaces' and 'experiencing/making' spaces in Port Phillip. These creative spaces have a strong correlation with the tram and light rail network.

- Port Phillip boundary
- Suburb boundaries
- Tram and light rail network
- 'Experiencing spaces'

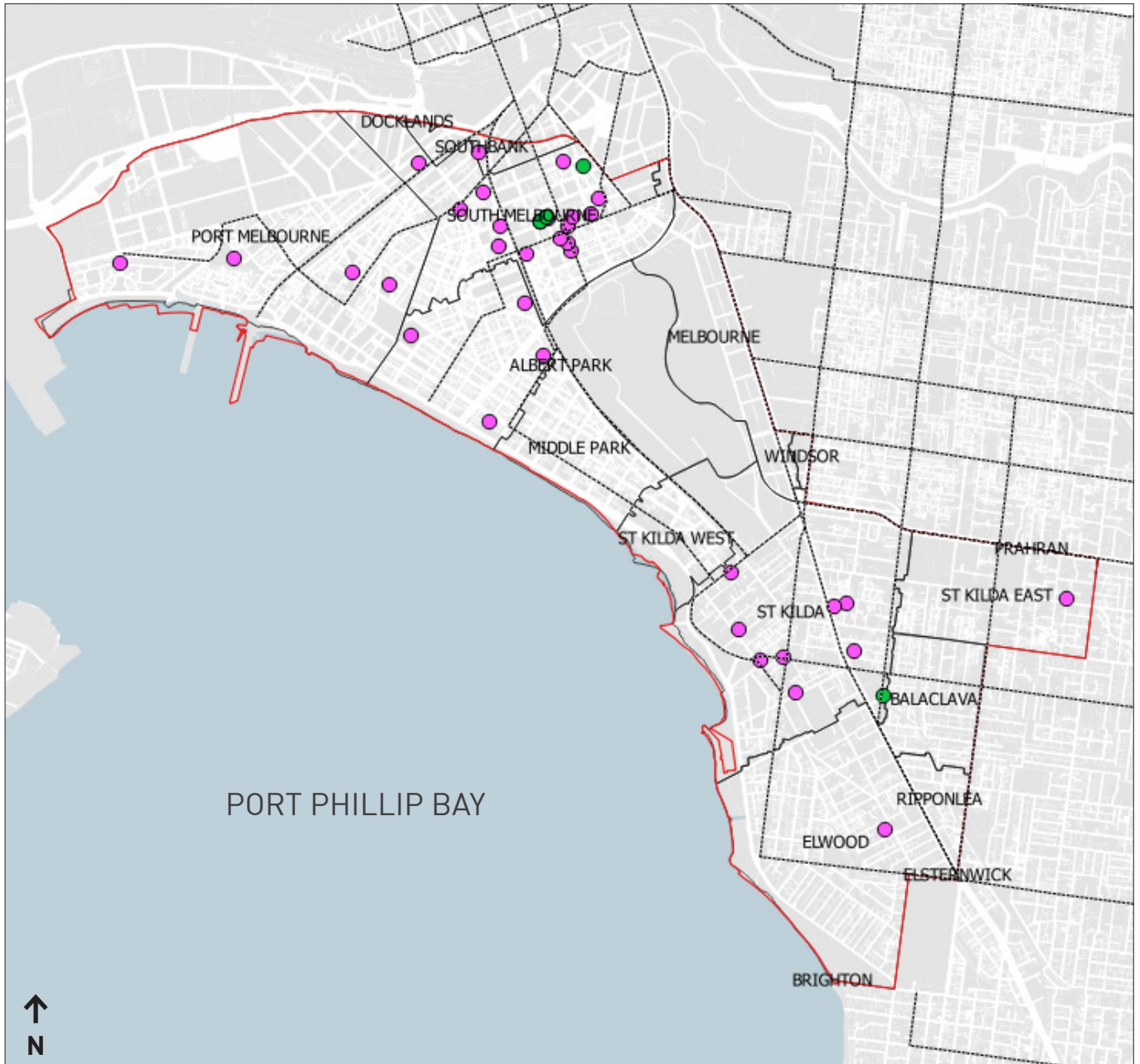


Figure 5 'Learning spaces' in Port Phillip.

- Port Phillip boundary
- Suburb boundaries
- 'Advocacy spaces'
- Tram and light rail network
- 'Learning spaces'

Port Phillip top three creative industries

The top three creative industries in Port Phillip are the design, music and film and television industries. The identification of these top industries will assist Council in fostering the conditions that support these industry sectors.

1. Design

There are 149 identified design industry businesses in Port Phillip. These include the following industry sub-categories:

- Architects
- Arts organisation
- Creative agency
- Digital design
- Education
- Game design
- Graphic design
- Printer
- Web design
- Print media

These industry sub-categories are visualised in Figure 7.

The highest concentration of creative businesses occurs in South Melbourne (36%) and in St Kilda (34%). There is also a concentration of businesses along St Kilda Rd.

The specific strengths of each of these neighbourhoods is discussed in further detail in the neighbourhood profiles.

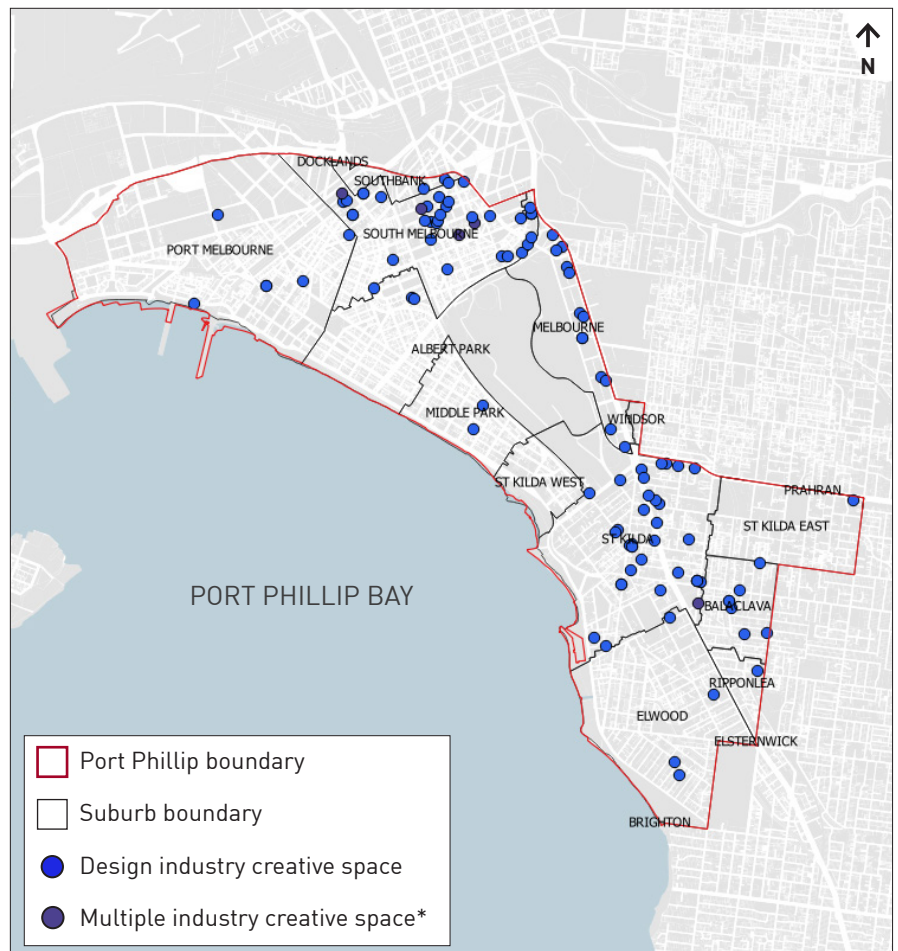


Figure 6 Location of film industry businesses in Port Phillip. * Includes a design business.

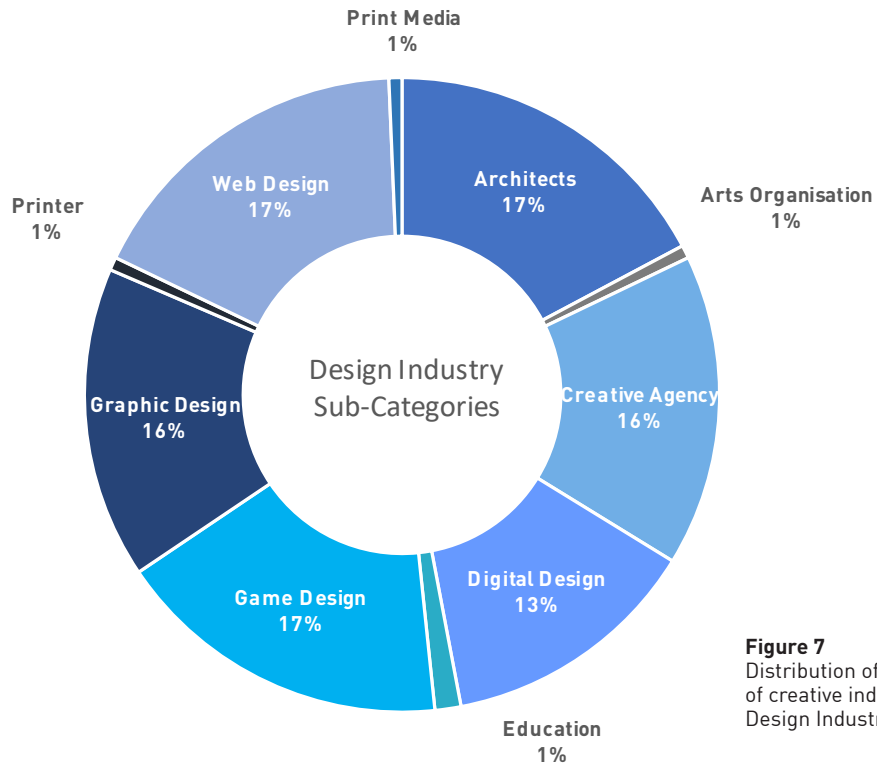


Figure 7
Distribution of sub-categories of creative industries within the Design Industry.

Case study 1: design

The Arcade

The Arcade is home to 27 game design businesses. This represents 93% of identified game design businesses in Port Phillip. The clustering of businesses at The Arcade fosters collaboration and upskilling between game designers. The business was previously located in Southbank but moved to South Melbourne and expanded its premises. The not-for-profit company is housed in a non-descript industrial building in a Mixed Use Zone on Kings Way in South Melbourne. This demonstrates the value of ageing industrial stock for start-up industries that require access to low rents. The location is also readily accessible by tram.

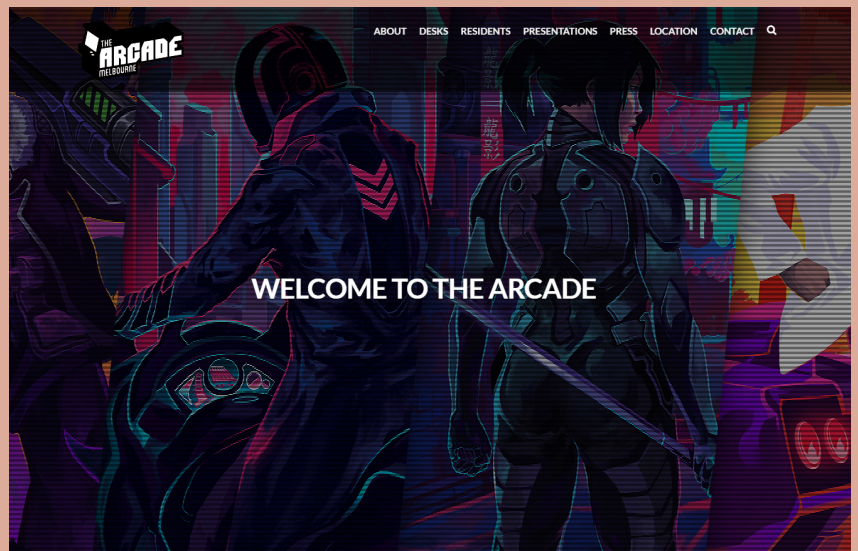


Image 3 The Arcade website landing page
Source: The Arcade, 2019

Port Phillip top three creative industries

2. Music

There are 96 identified music businesses in Port Phillip. These include the following industry sub-categories:

- Music venue
- Nightclub
- Orchestra
- Post production
- Radio station
- Recording studio
- Sound design
- Education
- Music organisations
- Equipment hire
- Music entertainment
- Music publishing
- Music school

These industry sub-categories are visualised in Figure 9.

The highest concentration of creative businesses occurs in South Melbourne (46%) and in St Kilda (44%), representing 90% of the identified music businesses in Port Phillip.

The specific strengths of each of these neighbourhoods is discussed in further detail in the neighbourhood profiles.

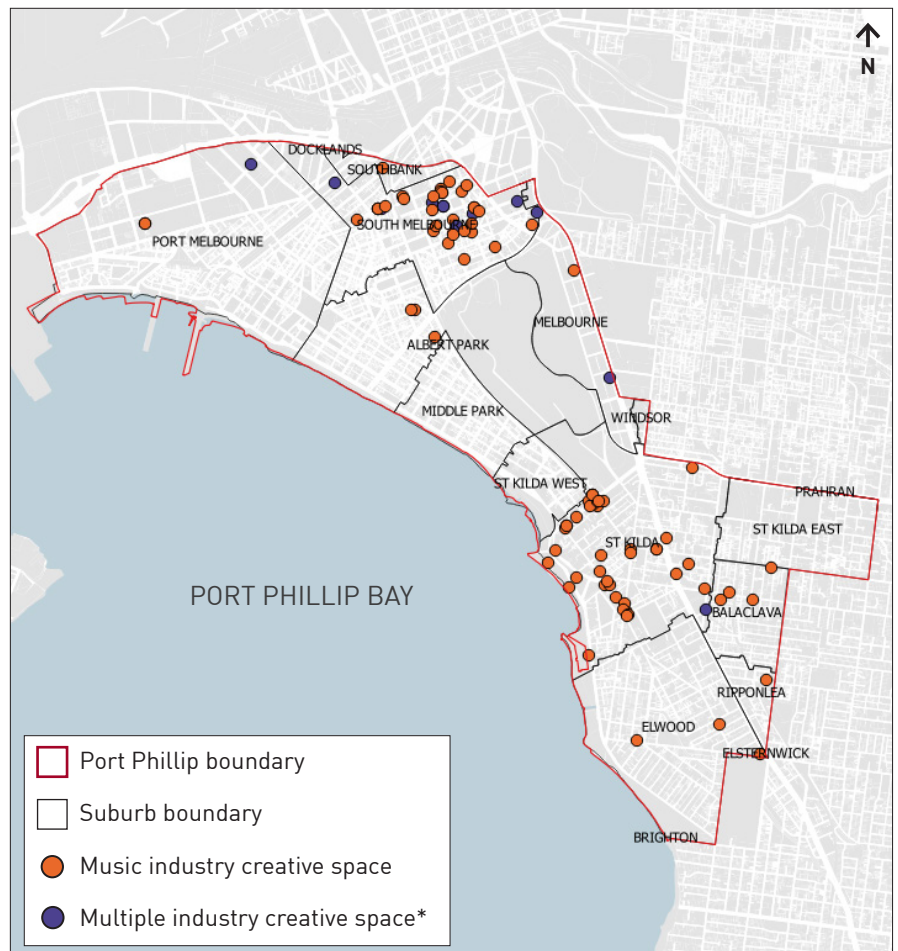


Figure 8 Location of music industry businesses in Port Phillip. * Includes a music business.

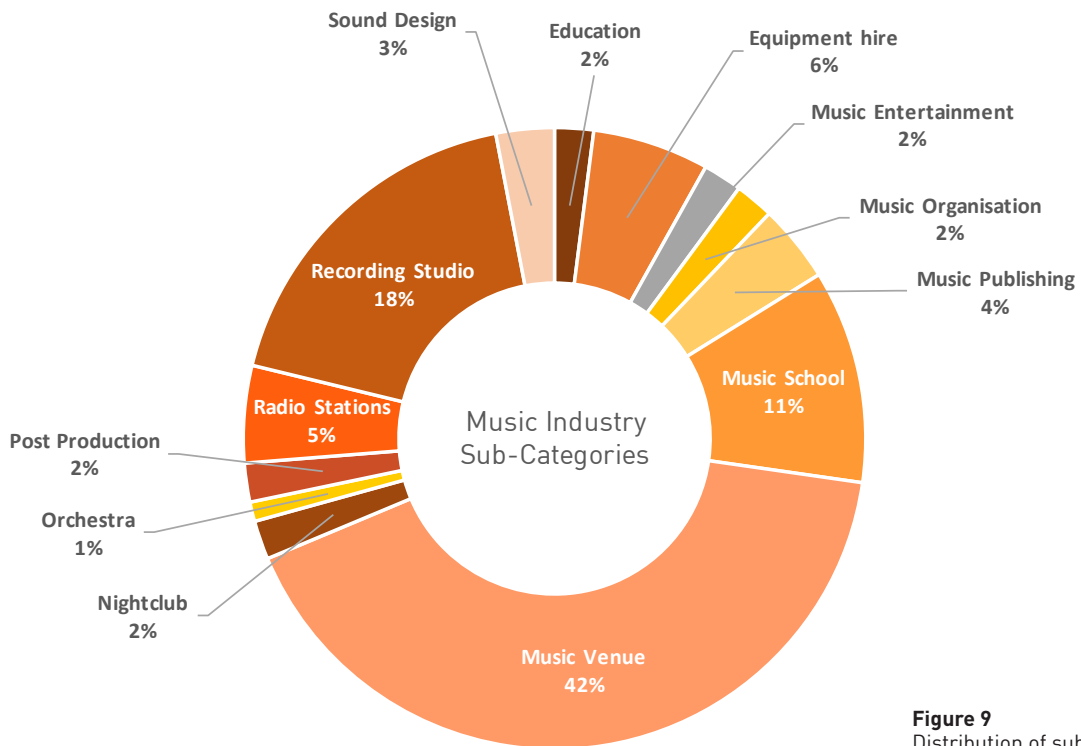


Figure 9
Distribution of sub-categories of music industry businesses in Port Phillip.

Case study 2: music

The Base Recording Studios

The Base Recording Studios are located in South Melbourne (Montague, Fishermans Bend). The building is in a cluster of small-scale industrial buildings on a narrow laneway, Yarra Place. Industrial buildings are often suitable for creative businesses such as recording studios as they are adaptable and can be retrofitted to meet specialised requirements. The development pressure in Montague has the potential to displace these types of small-scale creative businesses.



Image 4 The Base Recording Studio
Source: Google Maps

Port Phillip top three creative industries

3. Film + television

There are 84 identified film and television businesses in Port Phillip. These include the following industry sub-categories:

- Cinema
- Creative agency
- Digital design
- Education
- Equipment hire
- Multi-functional space
- Sound design
- Recording studio
- Film and video production
- Post production
- Casting agency
- Talent agency
- Film and video services

These industry sub-categories are visualised in Figure 11.

The highest concentration occurs in South Melbourne (37%) and in Port Melbourne (23%). The third highest concentration is in St Kilda (18%). This represents 78% of the identified film and television businesses in Port Phillip.

The specific strengths of each of these neighbourhoods is discussed in further detail in the neighbourhood profiles.

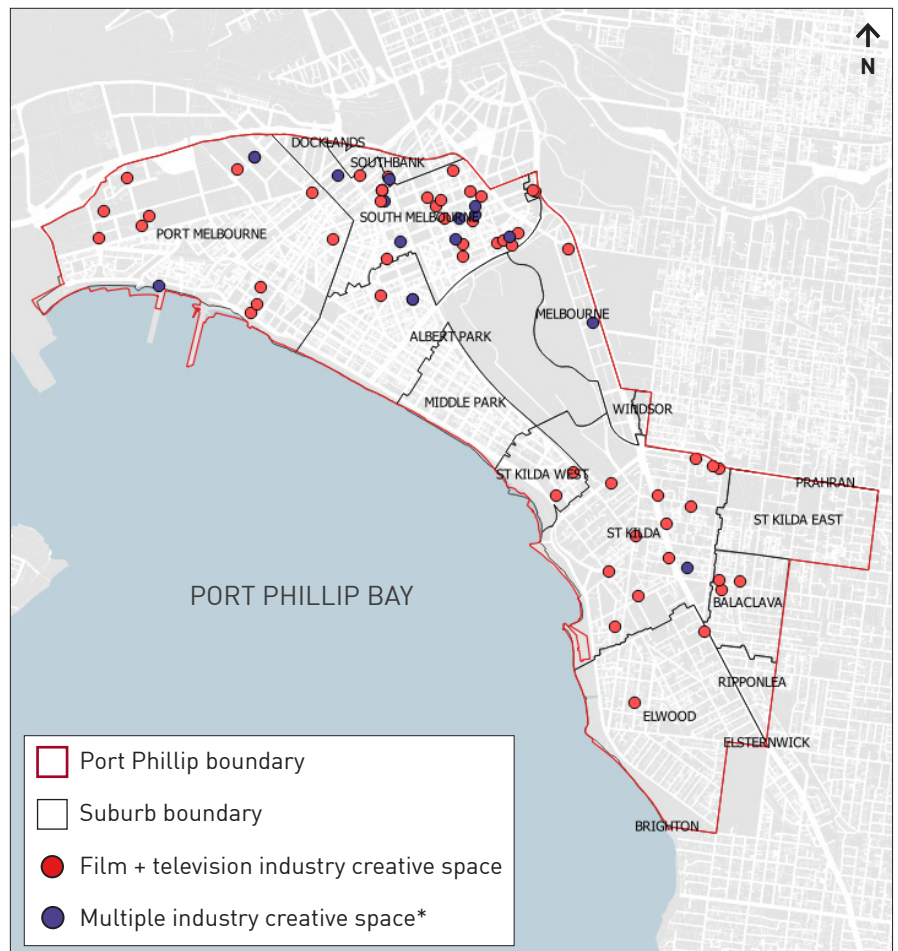


Figure 10 Location of film industry businesses in Port Phillip. * Includes a film and television business.

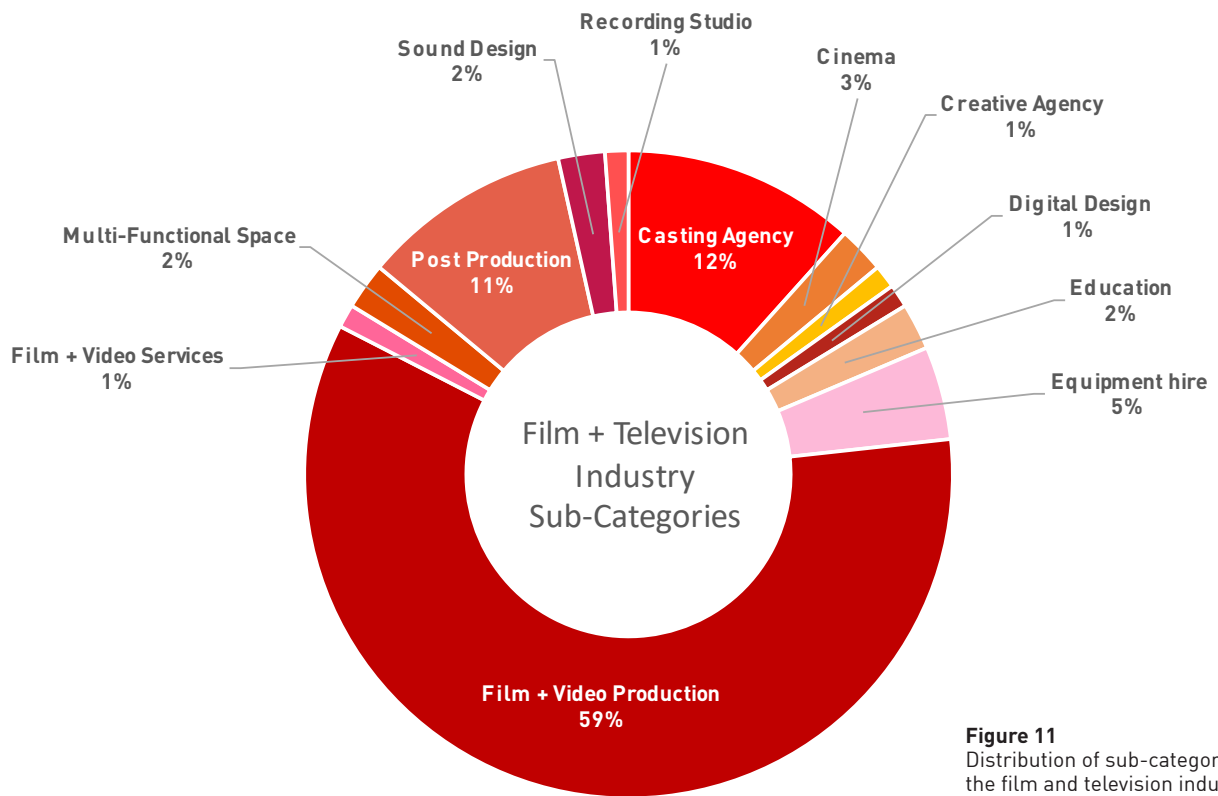


Figure 11
Distribution of sub-categories of the film and television industry businesses in Port Phillip.

Case study 3: film + television

Unicorn Films

Unicorn Films is an independent film production company located on Union Street in South Melbourne. Their recent feature film 'Looking for Grace' was selected in the official competitions at the Venice Film Festival and at the Toronto International Film Festival. Unicorn Films are located in a two-storey, red brick building in the northern part of South Melbourne. This area is predominantly small-scale, older industrial building stock.



Image 5 Unicorn Films are located on Union Street in South Melbourne. Source: Google Maps, 2019



4. Neighbourhood profiles

Chapter overview

This chapter focuses on three neighbourhoods - South Melbourne, St Kilda and Fishermans Bend. The neighbourhood profiles include an overview of the industries present, a summary of local spatial attributes and selected case studies.

Neighbourhood clusters

The neighbourhoods were selected for their high concentration of creative businesses and for their strategic role within Port Phillip in supporting the sustainability of creative industries.

There are 170 creative businesses in South Melbourne and 169 in St Kilda. Together, this represents 72% of all the identified creative businesses in Port Phillip. This is significantly higher than the other neighbourhoods with the third highest concentration being 34 businesses in Port Melbourne.

Fishermans Bend was included for its strategic role and significance within Port Phillip. Fishermans Bend includes portions of South Melbourne and Port Melbourne. The precinct is identified for urban renewal and is expected to change significantly within the next decade.

South Melbourne

South Melbourne is a creative cluster within Port Phillip. The neighbourhood hosts 170 known creative businesses. South Melbourne benefits from its proximity to the city, good public transport access and its relatively high proportion of land where the zoning and building stock supports creative industries. The area also benefits from excellent access to food and drink offerings including the South Melbourne Market as well as numerous cafes.

Industry mix

South Melbourne supports a mixture of creative businesses. The top four creative industries are design (33%), music (27%), film and television (18%) and photography (10%).

Zoning

The majority of creative businesses in South Melbourne are clustered within the Commercial 1 Zone, the Commercial 2 Zone and the Mixed Use Zone. The Commercial 2 Zone provides the strongest protection for creative industries as residential uses are not allowed. They are therefore less likely to be subject to development pressure and rising land costs. There are also a significant number of creative businesses clustered in the Capital City Zone to the north-east of South Melbourne, otherwise known as Montague in Fishermans Bend (see Figure 14).

Building stock

The high proportion of industrial and commercial building stock is suitable for creative businesses. This is compared with more residential neighbourhoods such as Middle Park which have predominantly residential building stock (see Figure 15).

Access

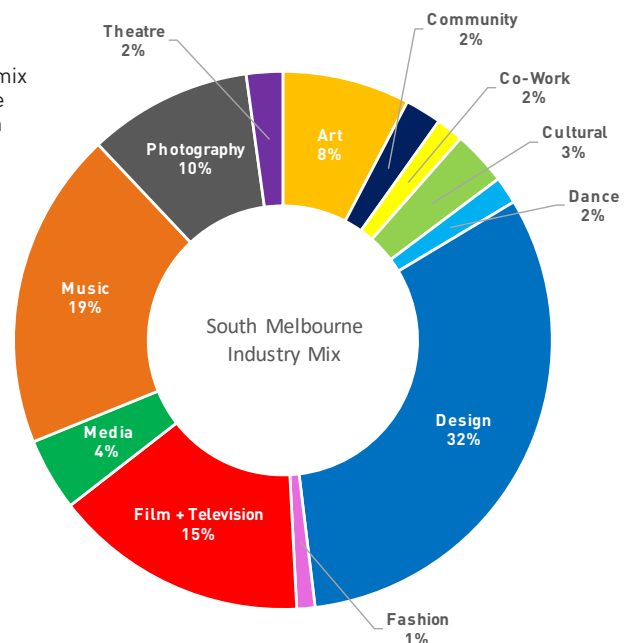
South Melbourne is in close proximity to the central city and has excellent public transport access. This includes the light rail and tram network. There is a significant clustering of businesses along the Clarendon Street tram corridor. This indicates the importance of public transport access for some creative industries.

Domain Railway Station is currently being delivered as part of the Metro Rail. This will improve public transport access to South Melbourne.

Fishermans Bend Urban Renewal

The urban renewal of Fishermans Bend is likely to reduce affordability in South Melbourne. The creative businesses located within the Fishermans Bend Urban Renewal Area are most at risk of displacement. Opportunities to retain creative businesses within Fishermans Bend should be explored.

Figure 12 Industry mix of identified creative businesses in South Melbourne.



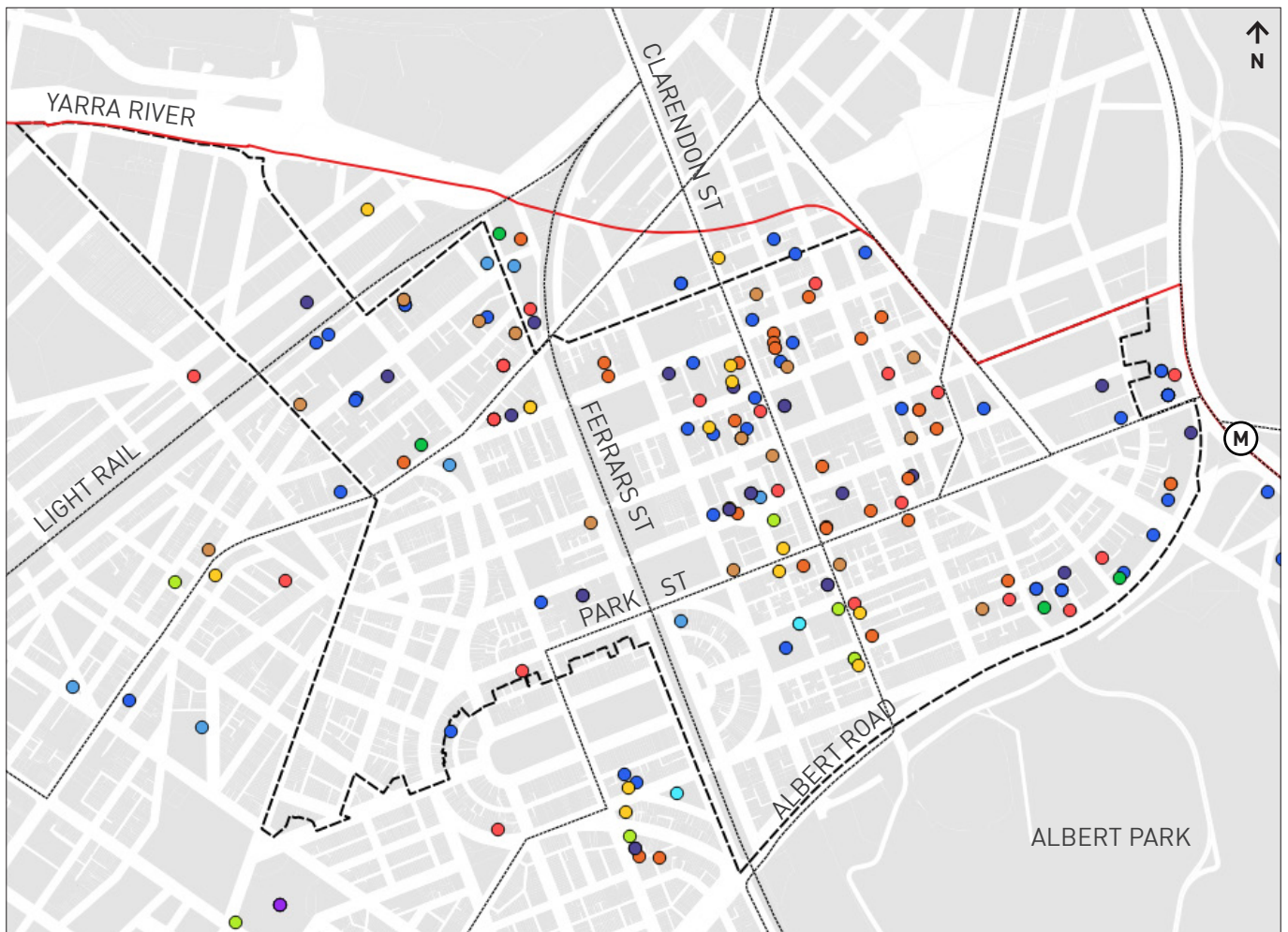


Figure 13 South Melbourne creative businesses categorised by industry.



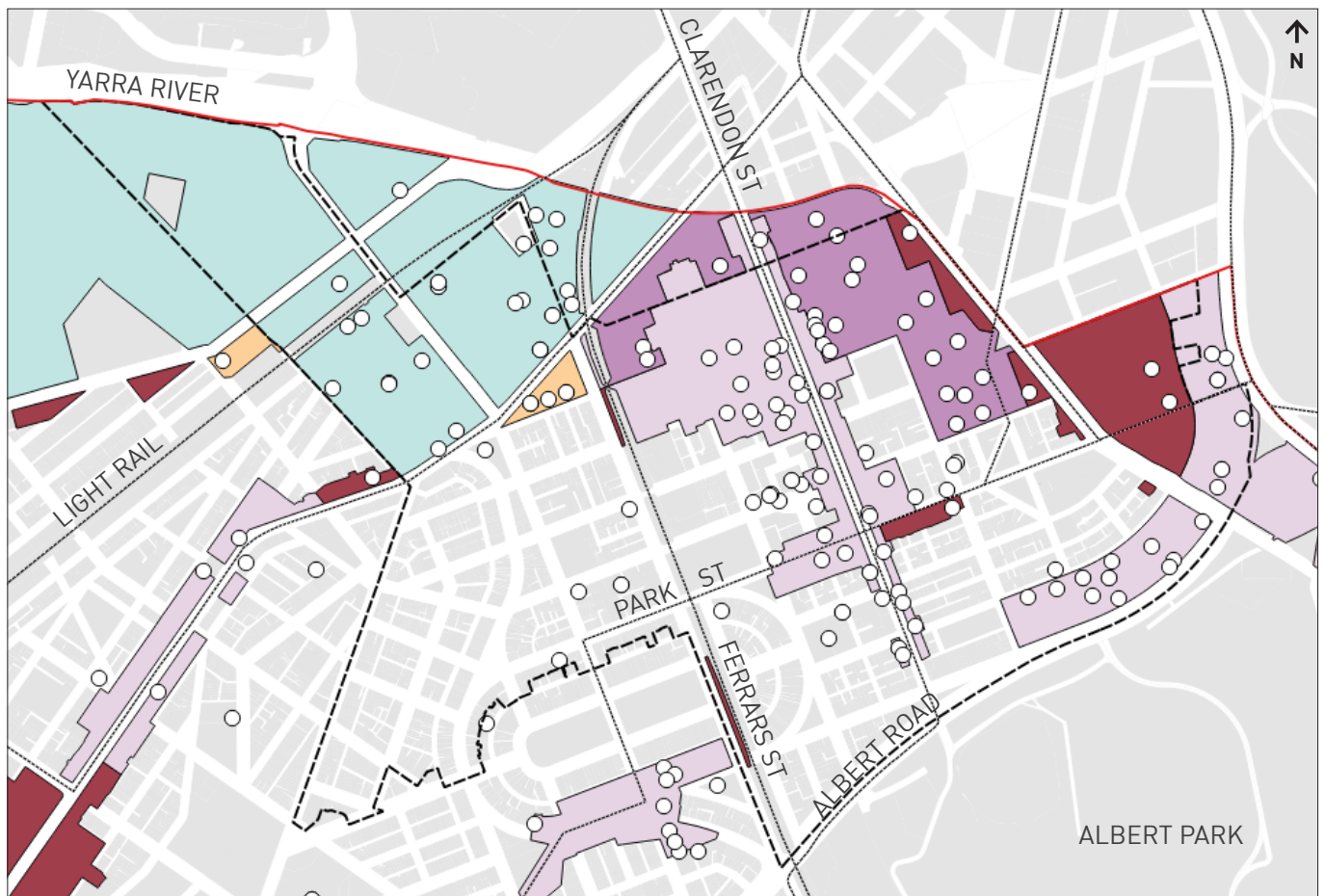


Figure 14 This map demonstrates the correlation between zoning and creative businesses in South Melbourne. Creative businesses located in the Capital City Zone (Fishermans Bend Urban Renewal Area) are most likely to be displaced by increased development activity. Creative businesses located in the Commercial 2 Zone have the greatest degree of protection from displacement.

- | | | |
|-----------------------------|-------------------|-------------------|
| Port Phillip boundary | Commercial 1 Zone | Capital City Zone |
| South Melbourne boundary | Commercial 2 Zone | Industrial 1 Zone |
| Tram and light rail network | Mixed Use Zone | Creative spaces |



Figure 15 This aerial image demonstrates the high proportion of industrial and commercial building stock within South Melbourne. This building stock is predominantly located within the Capital City Zone, Commercial 1 and 2 Zone and the Mixed Use Zone. The distribution of creative businesses aligns with this building stock.

 Mixed Use Zone, Commercial 1 Zone, Commercial 2 Zone, Industrial Zone, Capital City Zone

St Kilda

St Kilda is a historic creative cluster within Port Phillip that continues to support a thriving creative community. The neighbourhood hosts 169 identified creative businesses. St Kilda benefits from its high proportion of iconic venues, its public transport access, its waterfront location, its appropriate zoning and its well-loved entertainment precincts.

Industry mix

In St Kilda, the top three creative industries are design (25%), music (22%) and visual art (21%). There are a high proportion of places to 'see' creative work in St Kilda including theatres, galleries and music venues. Almost 70% of identified music venues in Port Phillip are located in St Kilda. This reinforces St Kilda's important role as an entertainment precinct within Port Phillip.

Zoning

The majority of creative businesses in St Kilda are clustered in the Commercial 1 Zone and the Mixed Use Zone. There is a smaller proportion of land zoned commercial use, industrial use and mixed use in St Kilda when compared to South Melbourne. This land is predominantly located along key corridors - Fitzroy St, Acland St, Carlisle St, Brighton Rd and Wellington St (see Figure 18).

Building stock

When compared to South Melbourne, there is more limited industrial and commercial building stock in St Kilda that is suitable for creative businesses. The neighbourhood also has a higher proportion of residential building stock compared to South Melbourne (see Figure 15 and 19).

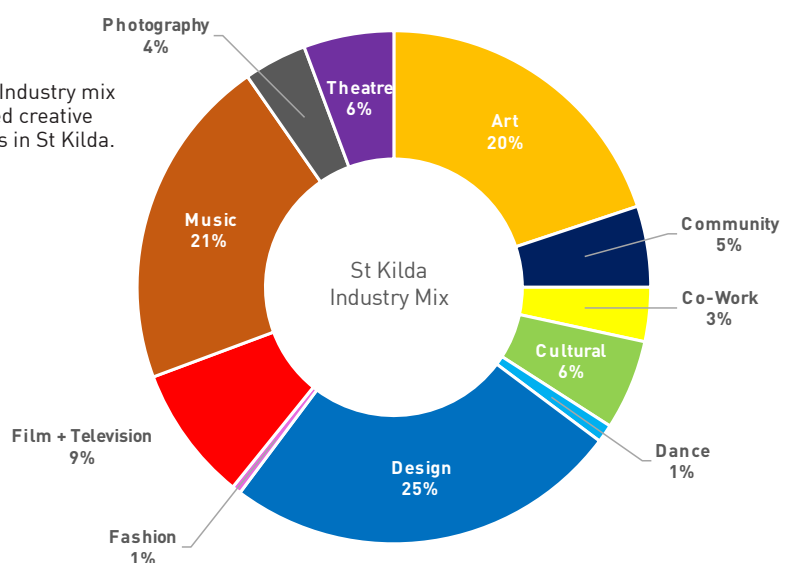
Access

St Kilda has excellent public transport access with multiple tram lines passing through the neighbourhood.

Iconic venues

There are multiple iconic venues in St Kilda which are synonymous with creativity. These include The Espy, The National Theatre, The Prince Bandroom, The Astor Theatre, Memo Music Hall and The Palais Theatre. St Kilda will also soon be home to the Pride Centre, which is soon to be constructed on Fitzroy St. St Kilda has also lost some iconic venues over the years such as the Crystal Ballroom and more recently, the Greyhound Hotel (see Image 7 to 12).

Figure 16 Industry mix of identified creative businesses in St Kilda.



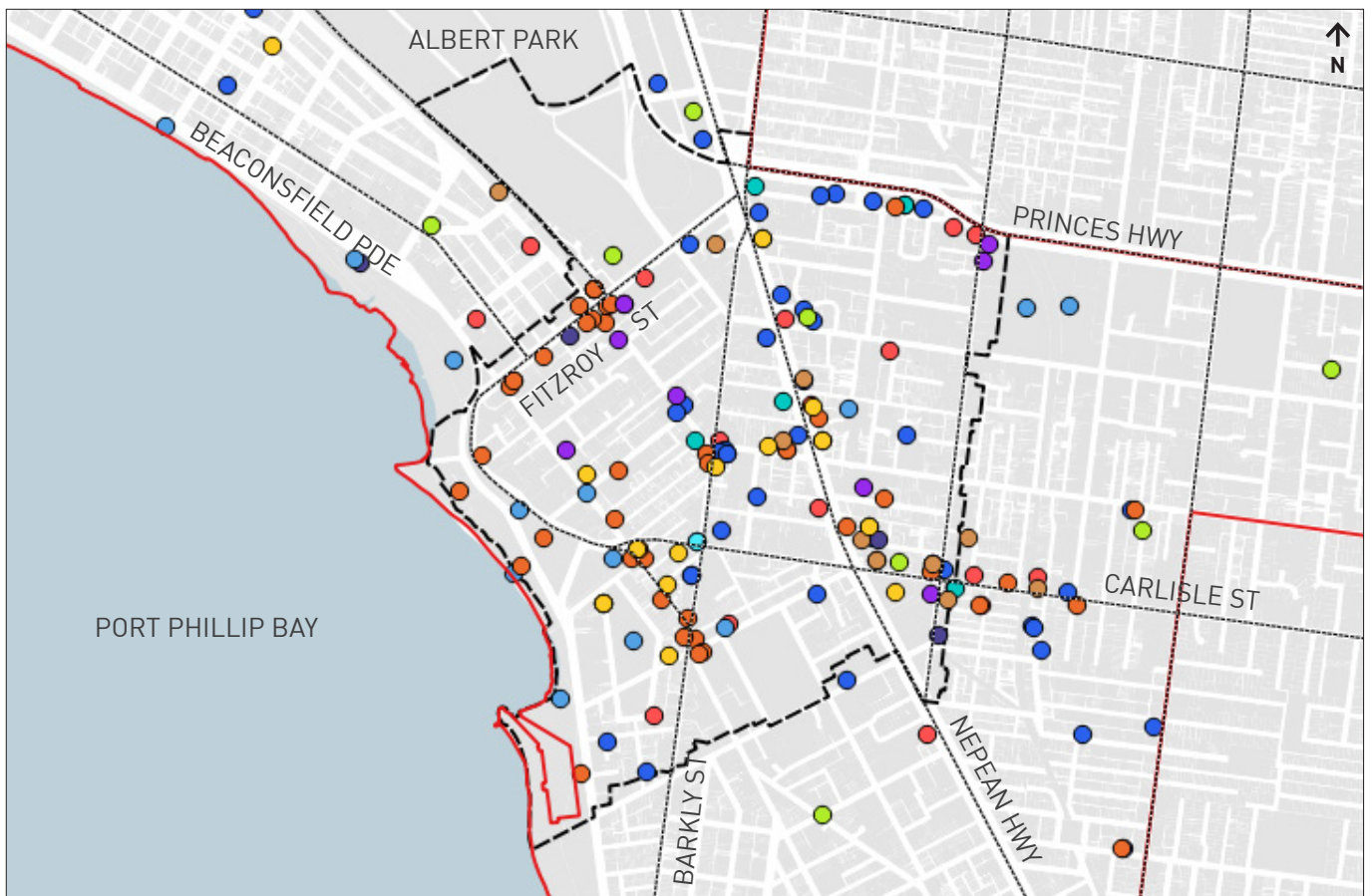
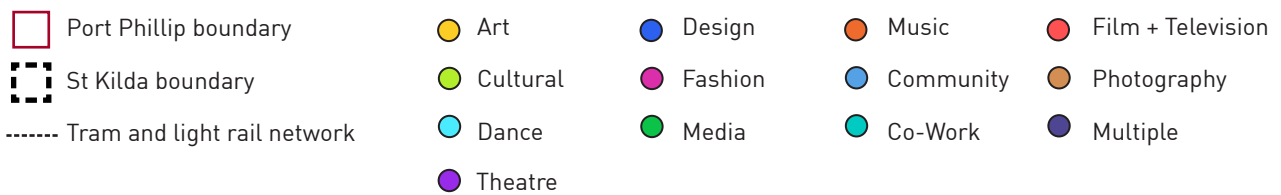


Figure 17 St Kilda creative businesses categorised by industry.



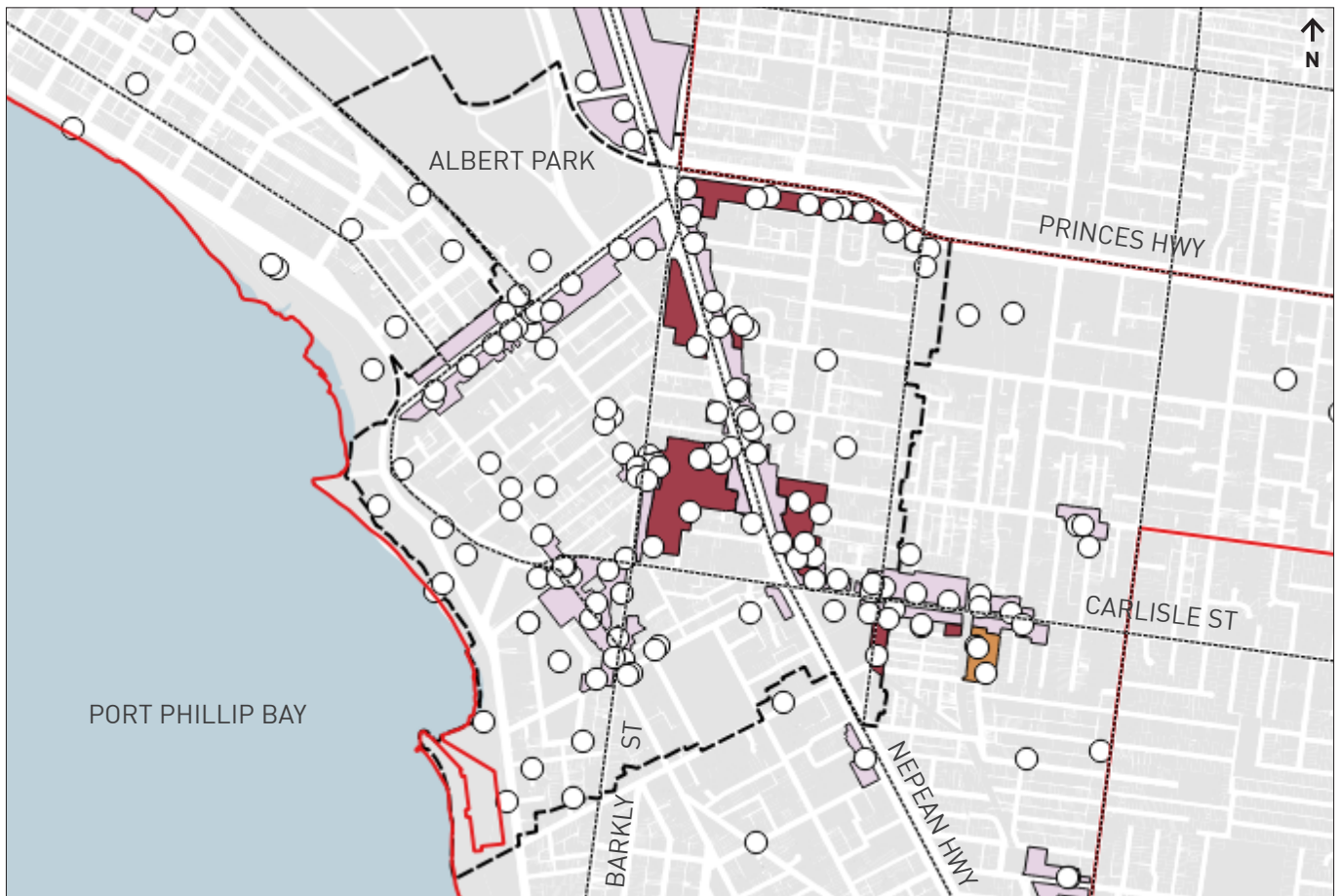


Figure 18 This map demonstrates the correlation between Zoning and creative businesses in St Kilda. Each of these zones allow residential development and creative businesses are still at threat of displacement.

- | | | |
|---|---|---|
|  Port Phillip boundary |  Commercial 1 Zone |  Creative spaces |
|  St Kilda boundary |  Mixed Use Zone | |
|  Tram and light rail network |  Industrial 3 Zone | |



Figure 19 This aerial image demonstrates that the industrial and commercial buildings stock is predominantly located within the Commercial 1 Zone and the Mixed Use Zone.

 Mixed Use Zone, Commercial 1 Zone, Industrial Zone

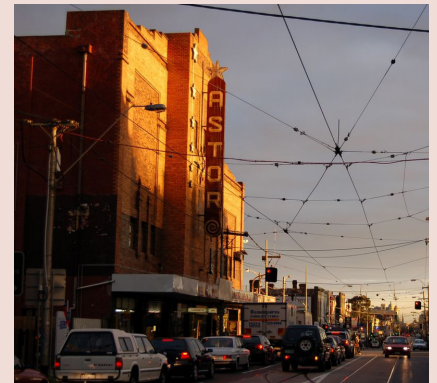


Image 7 The Astor Theatre.
Source: Film Victoria, 2019.

Image 10 The planned Pride Centre for Fitzroy St.
Source: Grant Amon Architects, 2019.

Doors close at St Kilda's iconic Greyhound Hotel for the final time

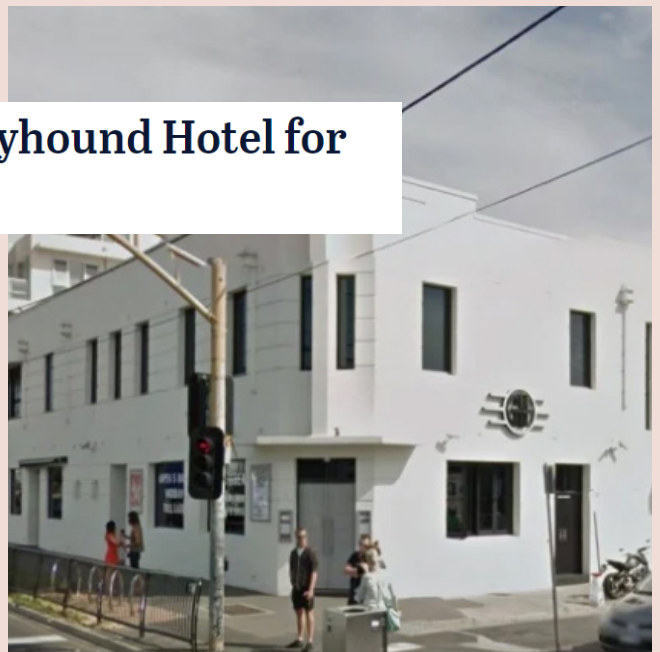


Image 8 The now closed iconic Greyhound Hotel.
Source: Mills, T and Dow, A, 2017.



Image 9 Live performance at Memo Music Hall.
Source: Memo Music Hall, 2019.



Image 11 Audience at the Palais Theatre.
Source: Timeout, 2019.



Image 12 Performance at The Espy.
Source: Beat Magazine, 2019.

Fishermans Bend

Fishermans Bend Urban Renewal Precinct includes portions of Port Melbourne, South Melbourne and Southbank. There are 41 identified creative businesses located in Fishermans Bend. Of these, 19 were also counted in the South Melbourne neighbourhood profile.

Wirraway

In Wirraway, there were eight creative spaces and businesses identified. This included seven from the film and television and music industry. These are particularly suited to industrial areas. Film studios tend to require large-format industrial buildings and truck access for loading and unloading large-format equipment. Opportunities to retain these specialised creative industries should be identified.

The Fishermans Bend Framework (2018) articulated a future vision for Wirraway that included a focus on the arts -

'Wirraway is identified for its thriving arts scene. Small galleries, art and design centres and cultural facilities are promoted and attract visitors from all over Melbourne. This is part of Wirraway's success as a place for innovation and creativity and gives it a clear identity.'¹

Further strategic planning work could additionally focus on the film, television and music industries.

In the Wirraway neighbourhood, an investigation area is identified to deliver an arts and cultural hub. This is located in the centre of the precinct.

Sandridge

In Sandridge, there are five identified creative businesses from the design, media and film and television industries. The Sandridge vision does not specifically refer to creative industries.

Montague

In Montague, there are 28 identified creative businesses from a mixture of industries. Montague is predominantly fine-grain industrial buildings. Smaller-scale industrial buildings are particularly conducive to being used as creative spaces due to their flexible floorplates and high ceilings. The relatively small size of these warehouse spaces compared to larger industrial floorplates in Wirraway and Sandridge also makes them comparatively more accessible and affordable for smaller scale businesses.

Creative businesses currently play an important role in Montague.

Retaining these in Montague in the longer-term will be an important part of maintaining a creative neighbourhood. The Fishermans Bend Framework articulated a future vision for Montague that included a focus on the creative industries -

'The neighbourhood will be established as a diverse and family-friendly community. Co-working spaces, small creative businesses and studios will contribute to the cultural identity of this area.'²

Further strategic planning work could additionally focus on the retention and delivery of small-scale and flexible buildings that can adapt to the needs of different creative businesses.

There is a small investigation area identified for the proposed arts and cultural hub in Montague. An arts and cultural hub in this precinct could provide a centrepiece for the existing creative businesses in the precinct and could assist in providing small scale, affordable creative spaces to local creative businesses.

The vision for Montague also supports the adaptive reuse of existing buildings. Delivering an arts hub through adaptive reuse would assist in retaining part of the valued industrial character in Montague and in delivering the vision.

1 Fishermans Bend Taskforce, 2018

2 Fishermans Bend Taskforce, 2018

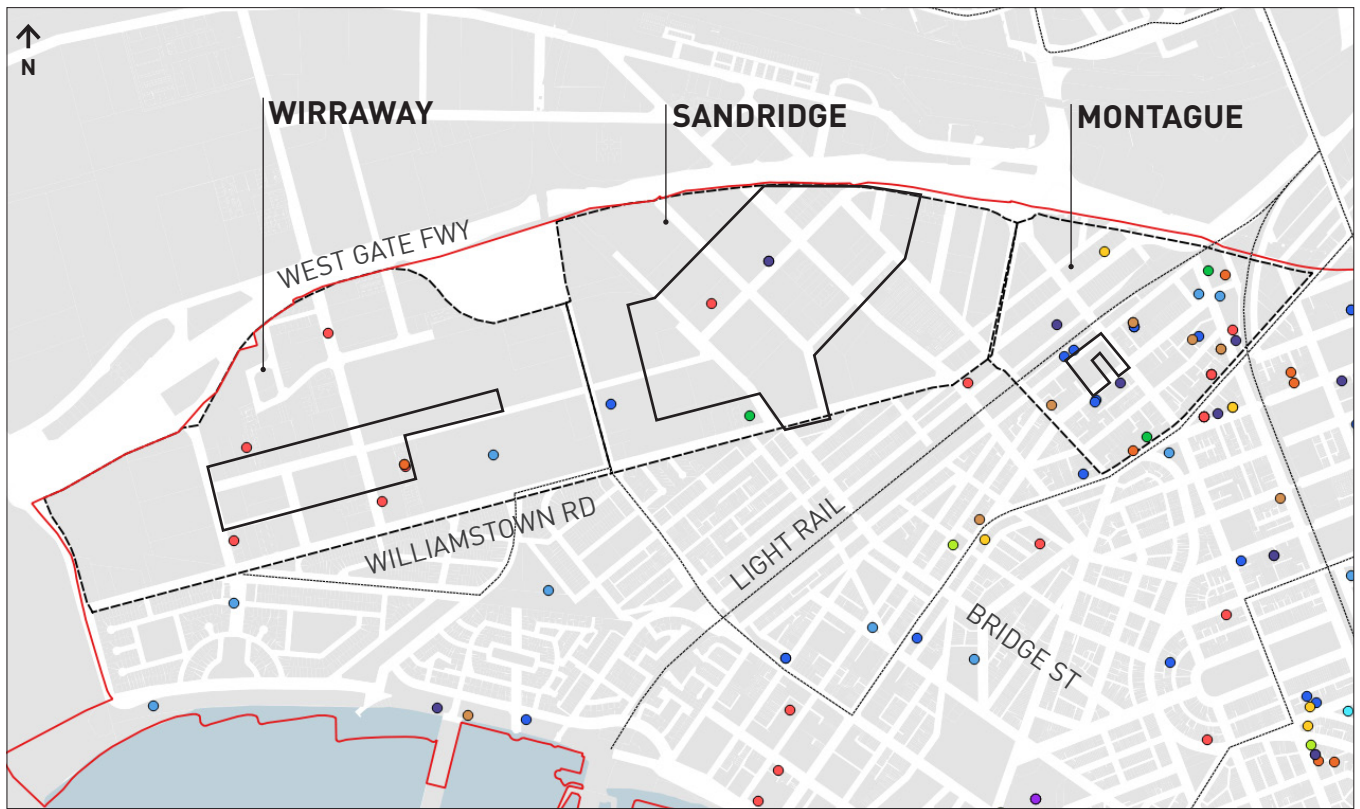


Figure 20 Fishermans Bend creative businesses categorised by industry.





Figure 21 These aerial images demonstrate the relative scale of buildings in Montague and Wirraway.

In Montague, there is a diverse mixture of smaller scale buildings. This mixture of older industrial building stock of varying sizes creates the ideal conditions for creative industries to locate. This is demonstrated by the mapping which indicates that the majority of creative businesses within Fishermans Bend are located in Montague.

In Wirraway, there are predominantly much larger-scale industrial buildings. While these buildings might not be suitable for smaller scale creative industries, they are ideal for large-format uses such as film production.





Figure 22 These aerial images demonstrate the relative scale of buildings in Montague and Sandridge.

Similarly to Wirraway, Sandridge is predominantly larger-scale industrial buildings that are more suitable for large-format uses.





Image 13 Lisa Waup, Elements, 2019 [installation view]. Image courtesy the artist and Baluk Arts. Photo by Theresa Harrison Photography

5. Inner Melbourne major infrastructure analysis

Chapter overview

The major infrastructure analysis provides an overview of Port Phillip City Council's position within inner Melbourne. It maps major infrastructure within a 10km radius of Port Phillip. The analysis focuses on live music venues, theatres and other major cultural creative anchors, such as galleries.

This provides a benchmark against other Local Government Areas and demonstrates the place-specific strengths of Port Phillip within metropolitan Melbourne. It also provides an overview of the gaps within Port Phillip that need to be addressed in the future.

Methodology

The methodology used to collect data was tailored to the specifics of different industries. The data was presented in three categories based on the predominant use of the space -

Live music

For the purpose of this report, major live music venues were defined as venues with a capacity of 400 or more. This included seating live music venues and venues with standing room only. Venue capacity ranged from 400 seats (Iwaki Auditorium) to 14,820 seats (Rod Laver Arena). Venues within Crown Casino were excluded from the analysis as venue capacity data was not available.

Theatre & dance

Theatres and dance venues of all different scales were identified. Venue capacity ranged from 40 seats (La Mama Theatre) to 2,162 seats (Regent Theatre).

Cultural

Major cultural attractions were identified that either had a unique, regional or city-scale offering (e.g. Victorian Pride Centre, St Kilda) or have a reputation for high-calibre, high-profile and consistent creative programming (e.g. Arts House, North Melbourne).

Unprogrammed venues were not included in the analysis. For example, a town hall that is available for rent. This analysis instead focused on venues and institutions that have an ongoing program dedicated to the arts.



Figure 23 Major infrastructure analysis study area

Major infrastructure analysis: Live Music

There were 19 live music venues identified within the 10km radius that had a venue capacity of over 400. Of these, Port Phillip had four major live music venues:

- The Palais Theatre
- The Prince Hotel & Bandroom
- The Esplanade Hotel: The Gershwin Room
- Memo Music Hall

This represents 22% of major live music venues within a 10km radius of Port Phillip. The majority of live music venues are located in the City of Melbourne (56%). The remaining large music venues were located in the City of Yarra (17%) and the City of Moreland (6%).

Place-specific advantages

- Port Phillip has the strongest clustering of major live music venues outside of the City of Melbourne with a capacity of over 400.
- Port Phillip has a mixture of major live music venues across different scales, meaning it can support musicians at varying stages in their career.
- St Kilda hosts the annual St Kilda festival, a celebration of live music in Melbourne.
- The Palais Theatre is the only 'extra large' live music venue outside of the central city. This is of increasing importance after the closing of The Palace Theatre and the current proposal to redevelop Festival Hall.

The City of Port Phillip's Live Music Action Plan 2019-20 will contain more detail about the live music scene.



Figure 24 Major live music venues within a 10km radius of Port Phillip City Council.



City Council	Name	Capacity	Venue owner	
Melbourne	Iwaki Auditorium	400	Federal	Small 400-500
Yarra	The Gasometer	440	Private	
Port Phillip	Memo Music Hall	450	Private	
Yarra	The Night Cat	475	Private	
Port Phillip	The Esplanade Hotel: The Gershwin Room	550	Private	Medium 501-800
Moreland	Howler	670	Private	
Yarra	The Corner Hotel	800	Private	
Melbourne	Max Watts	850	Private	Large 801-1000
Port Phillip	The Prince Hotel & Bandroom	950	Private	
Melbourne	Melbourne Recital Centre	1,000	State	X Large 1001-3,000
Melbourne	Billboards	1,000	Private	
Melbourne	Festival Hall	1,741	Private	
Melbourne	The Forum	2,000	Private	
Melbourne	Hamer Hall	2,466	State	
Port Phillip	Palais Theatre	2,896	State	
Melbourne	Margaret Court Arena	7,500	Private	
Melbourne	Sidney Myer	13,000	State	XX Large 3,001+
Melbourne	Rod Laver Arena	14,820	Private	

Table 3 Live music venues (400+ capacity) within a 10km radius of Port Phillip City Council.

Major infrastructure analysis: Theatre and Dance

There were 35 theatres and dance venues identified within the 10km radius. Of these, Port Phillip has eight theatres and two dance studios:

- The National Theatre
- Alex Theatre: Theatre 1
- Alex Theatre: Theatre 2
- Theatre Works
- Red Stitch Theatre
- Gasworks: Main Theatre
- Gasworks: Studio Theatre
- Phoenix Theatre
- Temperance Hall: Main Hall
- Temperance Hall: Studio

This represents 27% of theatres and dance venues within a 10km radius of Port Phillip. The majority are located in the City of Melbourne (54%). The remaining are in the City of Stonnington, Moreland, Yarra and Moonee Valley.

Place-specific advantages

- Port Phillip has the strongest clustering of theatres outside of the City of Melbourne
- Port Phillip has a mixture of theatres of different scales, meaning it can support artists at varying stages of their career
- The recent conversion of the George Cinema into the Alex Theatre represents new opportunities for theatre performance within Port Phillip
- Surrounding Local Government Areas have stand-alone theatres (e.g. Chapel off Chapel), however, they do not exhibit the same clustering of theatres that can be observed in St Kilda.



Figure 25 Theatres and dance venues within a 10km radius of Port Phillip City Council.



City Council	Name	Capacity	Scale	Venue owner	
Melbourne	La Mama Theatre	40	XS	Private	X Small 30-100
Port Phillip	Gasworks: Studio Theatre	60	XS	Local	
Port Phillip	Red Stitch Theatre	80	XS	Private	
Yarra	Dancehouse: Studio Theatre	80	XS	Local	
Port Phillip	Temperance Hall: Main Hall	85	XS	State	
Melbourne	La Mama Courthouse	90	XS	Private	
Stonnington	Chapel off Chapel: Mezzanine	100	XS	Local	
Yarra	Dancehouse: Sylvia Staehli Theatre	100	XS	Local	Small 101-200
Moreland	Brunswick Mechanics Institute	112	S	Local	
Port Phillip	Theatre Works	144	S	Private	
Melbourne	Southbank Theatre: The Lawler	151	S	University	
Melbourne	The Malthouse Theatre: Beckett	180	S	Private	
Melbourne	Meat Market: Stables	180	S	Local	Medium 201-400
Port Phillip	Temperance Hall: Main Hall	200	S	State	
Port Phillip	Gasworks: Main Theatre	224*	M	Local	
Stonnington	Chapel off Chapel: Loft	240	M	Local	
Yarra	The Melba Speigeltent	250	M	State	
Port Phillip	Phoenix Theatre	276	M	State	
Port Phillip	Alex Theatre: Theatre 2	291	M	Private	
Melbourne	Chunky Move: Studio 1	300	M	State	
Melbourne	Chunky Move: Studio 2	300	M	State	
Melbourne	Arts Centre: Fairfax Studio	376	M	State	
Port Phillip	Alex Theatre: Theatre 1	499	L	Private	Large 401-1000
Melbourne	Southbank Theatre: The Sumner	500	L	University	
Melbourne	Meat Market: Cobblestone Pavilion	500	L	Local	
Melbourne	Meat Market: Flat Floor Pavilion	500	L	Local	
Melbourne	The Malthouse Theatre: Meryl'n	520	L	Private	
Moonee Valley	The Clocktower Centre	545	L	Local	
Melbourne	Capitol Theatre	600	L	University	
Port Phillip	The National Theatre	783	L	Private	
Melbourne	Arts Centre: Playhouse	886	L	State	
Melbourne	Athanaeum Theatre	1,000	XL	State	
Melbourne	Comedy Theatre	1,003	XL	Private	
Melbourne	Princess Theatre	1,488	XL	Private	
Melbourne	Her Majesty's Theatre	1,706	XL	Private	
Melbourne	Arts Centre: State Theatre	2,079	XXL	State	XX Large 2,001+
Melbourne	Regent Theatre	2,162	XXL	Private	

Table 4 Theatre and Dance venues within a 10km radius of Port Phillip City Council. *Capacity of Gasworks: Main Theatre to be increased to 224 seats by 2020.

Major infrastructure analysis: Cultural Attractions

There were 20 major cultural attractions identified within the 10km radius. Of these, Port Phillip had five major cultural attractions:

- The Astor Theatre
- Linden New Art Gallery
- Victorian Pride Centre (opening in 2020)
- Gasworks Art Park
- Jewish Museum

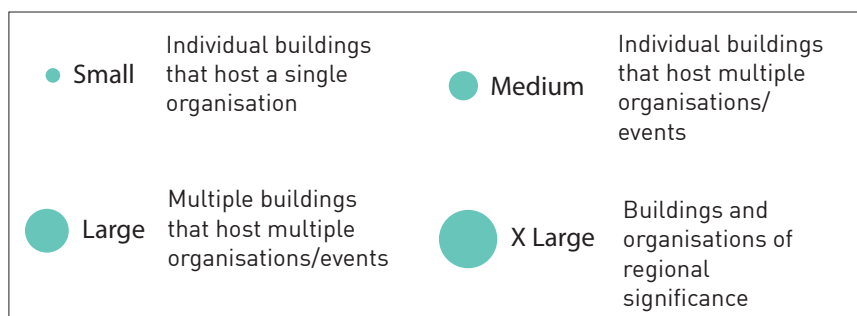
This represents 25% of identified major cultural attractions within a 10km radius of Port Phillip. The majority of attractions are located in the City of Melbourne (50%). The remaining are in the City of Port Phillip, Darebin, Yarra and Maribyrnong.

Place-specific advantages

- Port Phillip has the strongest clustering of major cultural attractions outside of the City of Melbourne.
- These include unique cultural landmarks such as The Astor Theatre and the soon to be built Victorian Pride Centre.
- Gasworks Arts Park is a focal point for the community, hosting markets, an outdoor cinema, exhibitions and performances.
- The Victorian Pride Centre will be a unique initiative that will attract national and international visitors. It will house a mixture of organisations including creative institutions Joy FM and the Melbourne Queer Film Festival.



Figure 26 Major cultural attractions within a 10km radius of Port Phillip City Council.



City Council	Name	Scale	Venue Owner	
Port Phillip	The Astor Theatre	S	Private	Small
Melbourne	Koorie Heritage Trust	S	State	
Port Phillip	Linden New Art Gallery	S	Local	
Port Phillip	Jewish Museum of Australia	S	Not for profit	
Darebin	Northcote Town Hall	M	Local	Medium
Melbourne	Arts House	M	State	
Melbourne	Australian Centre for Moving Image (ACMI)	M	Federal	
Melbourne	Australian Centre for Contemporary Art (ACCA)	M	Federal	
Melbourne	Meat Market	M	Local	
Melbourne	Immigration Museum	M	State	
Yarra	Abbotsford Convent	L	Private	Large
Maribyrnong	Footscray Community Arts Centre	L	Private	
Port Phillip	Gasworks Art Park	L	Local	
Port Phillip	Victorian Pride Centre	L	State	
Yarra	Collingwood Arts Precinct	L	Private	
Melbourne	The Ian Potter Centre	XL	Federal	X Large
Maribyrnong	Scienceworks	XL	State	
Melbourne	NGV Contemporary	XL	Federal	
Melbourne	National Gallery of Victoria	XL	Federal	
Melbourne	Melbourne Museum	XL	State	

Table 5 Major cultural attractions within a 10km radius of Port Phillip City Council.



Figure 27 Fog Theatre, signature, 2019.
Photo by Paul Dunn

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