

Creative and cultural industries in Sri Lanka

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Agenda:

Presentation of report findings

Q&A Dilani
Hirimuthugodage and
Annemari de Silva

Keynote address: John
Newbigin OBE

Panel: Selyna Peiris, Linda
Speldewinde, Anushka
Wijesinha

Concluding remarks: The
way forward

Thanks and close

Introduction – why benchmark the Creative Economy



- A baseline study into the current state of the cultural and creative industries of Sri Lanka.
- A first attempt to create a framework and develop an understanding of current situation and challenges in a world where the creative sector is growing in global significance.
- Cultural and creative industries are those activities which have their origin in individual creativity, skill and talent, and which have a potential for wealth and job creation through the generation and exploitation of intellectual property (DCMS, 1998).

What creative areas does the report cover?



For the report, we identified areas based on the Singapore model.

Arts and culture: Photography, visual arts, performing arts, heritage and crafts

Design: Software, advertising and branding, architecture, interior design, graphic design, industrial design, fashion design

Media: Publishing, television and radio, digital media, film and video

We also researched Ayurveda, Beauty Culture, Culinary Arts

Approach and methodology



Multiple research methods including:

- Analysis of the most recent *Labour Force Survey* (Department of Census and Statistics, 2017b)
- A survey with 492 creatives across 7 provinces
- 8 focus group discussions with 75 participants;
- 40 key informant interviews

Supported by a steering committee of 12 people creative industry representatives and a mix of local and UK experts.

What is the sector worth to the Sri Lankan economy?



*Thaji, principal dancer,
Chitrasena Dance Company,
performs in Samhara, 2017.
© Luxshmanan Nadaraja.*

- Sri Lanka's creative economy has shown steady growth between 2010 and 2014, rising from **US\$433.62 million to US\$845.41 million in contributions to GDP**
- That's a **95 per cent growth**, calculated from exports of goods and services.
- But consistently higher imports have resulted in a negative balance of trade through the same years.
- A conservative estimate of the **GDP contribution places it at 1.06 per cent contribution at 2014** (calculating with creative goods and services exports as a percentage of GDP).

How important is the sector for employment?



- Almost three per cent (2.9 per cent) of the workforce are involved in the creative industries.
- Of those 36 per cent are women, and 67 per cent of are between the ages of 24 and 55.
- The overwhelming majority (71 per cent) are in the private sector, generating wealth and creating public earning through taxation
- The awareness of intellectual property (IP) rights is poor at 8.8 per cent with any form of IP protection,
- The sector employs both the highly educated and least educated ends of Sri Lanka's labour force.

Wages and earnings



*Graduation Ceremony
Military Technical College,
Muscat, Oman, 2015.
© Cyber Illusions.*

- Mean monthly wage of creative sector is LKR 29,418 (US\$192.40) below the national mean LKR 33,894 (US\$221.70).
- Exclude lower paid sectors e.g. crafts, product, graphic, fashion design, all other sectors earn on average above LKR 40,000 (US\$261.60)
- IT, design and advertising sectors have younger demographic over 75% under 45 linked to higher earning potential and prestige of urban companies.
- Craft-making decreasing in uptake among younger generations due to poor work conditions and low wages.

Sub sector analysis – a few highlights



- Sri Lanka has the potential to be an interesting and viable film location supporting international productions
- Online literature has flourished in all three languages and forums are packed with poetry, short stories and serialised novels.
- Sri Lanka's crafts sector is culturally important while not well developed commercially at the moment, it presents immense opportunity.
- Sri Lanka attracts graduates from around the world for post-study immersive study and apprenticeship in residential architecture.

*Jetwing Vil Uyana Hotel and environment, designed by Sunela Jayawardena, open since 2006.
© Jetwing Hotels.*

Some of the challenges



- Performing and visual arts are part of everyday Sri Lanka, but not seen as viable employment and young people are often actively discouraged from pursuing.
- Plagiarism or IP theft is common. Photographers' work is taken and reproduced without copyright permissions or even attribution, including by mainstream media. No IP laws currently govern this sector.
- Craftspeople are vulnerable to the many fluctuations in raw material supply and cost ...market fluctuations affect craft product pricing and...craftspeople struggle to find adequate markets.

Conclusions and recommendations



The creative and cultural industries of Sri Lanka have considerable potential:

- Position Sri Lanka as an ethical and sustainable creative hub.
- Support Sri Lanka's position in global value chains.
- Improve data on cultural and creative industries.
- Develop a strong professional association for cultural and creative industries.
- Strengthen knowledge and access to intellectual property (IP) rights.
- Value creative education, strengthening the teaching of creative skills across the curriculum.

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