CREAT!VE FUTURES

APPENDIX A

SECTOR KEY MESSAGES

SOUTH AUSTRAL!A

APPEND!CES

APPEND!X A

11 SECTOR KEY MESSAGES

ADVERTISING & MARKET!NG

CREAT!VE FUTURES

Advertising & Marketing

Sector Key Messages

This sub-report aims to provide key messages about the Advertising & Marketing sector of the Arts, Creative and Cultural industries in South Australia. This is achieved by comparing responses from those who work in the Advertising & Marketing sector to the overall responses to the *Your Creative Futures* survey.

	Respondents	% of overall Respondents
Individuals	22 of 722	3%
Small to Medium	3 of 128	2%
Large	2 of 36	5.5%

The scope for each sector snapshot is predominantly based on the occupations aligned to relevant training packages from the Arts, Creative and Cultural Industries. To capture those occupations that fell outside of these areas the following sectors were added: 'Support Agency & Organisations', 'Writing Publishing & Print Media', 'Advertising and Marketing', 'Software Development & Interactive' and 'Integrated Design & Built Environment'.

The self-subscribing nature of the survey means people aligned their occupation or area of work to one sector based on their interpretation even though they may work across several. For this reason some occupations have appeared in multiple sectors e.g. Graphic designers may be represented in Visual Arts, Craft and Design, Advertising or Integrated Design and Built Environment.

The Advertising and Marketing data includes people who work in marketing coordination, art direction, publicity and design.

SUMMARY

- This sector is female dominated with all individuals under the age of 50 years.
- There are limited career opportunities.
- Communication, marketing and social media skills were identified as being crucial in this sector.
- There are skills gaps in web development.
- Small to medium organisations believe they will experience growth in the next 12 months and are not facing or predicting a labour or skills shortage.
- Large organisations have had difficulty finding suitable applicants due to the lack of relevant skills or experience and applicants not being suited to the type of work.

A joint project between the Arts Industry Council of South Australia and Service Skills SA with funding provided by the Industry Skills Development Directorate of the Department of Further Education, Employment, Science and Technology, Innovation and Business Skills Australia and Service Skills SA.

Individual Survey Responses

DEMOGRAPHICS (AGE, GENDER, ETHNICITY)

The age demographic is younger than the creative industry average, with no individuals over the age of 50 years, compared to 26%. More females work in the advertising and marketing sector. (77% compared to 62% overall).

WORK OVERVIEW

65% of individual's primary function is within 'marketing and promotion' the next highest function is 'creation' (20% compared to 51% overall).

The average percentage of income individuals derive from their work in the creative industries is 76%. 67% are in full-time on going employment.

45% of individuals have worked in the arts, cultural and creative industries for less than 5 years and 75% have earned over $25,000 in the last 12 months (higher than 48% overall creative industries average).

TRAINING AND PROFESSIONAL DEVELOPMENT

There are no significant differences between the advertising and marketing sector and the overall creative industries average.

EMPLOYMENT CONDITIONS

32% indicated they are not an employee of an arts, cultural or creative business or organisation.

A high proportion of individuals cited 'Limited career path' as a factor that would have the most influence over whether they left an employer.

75% stated employee morale was high.

SKILLS

Respondents indicated the following skills are most important to their success:

- Communication skills
- Marketing skills
- Social media.

If there is subsidised training available, the top three areas that would help individuals careers are:

- Marketing skills
- Digital technologies
- Social media.

The three top ways individuals would prefer to gain new skills are:

- Short courses, workshops and summer school
- Conferences, seminars or forums
- Formal training program or accredited course.

Small to Medium Survey Responses

EMPLOYMENT CHARACTERISTICS

Three respondents employ four individuals. Three are employed on a full-time basis, and three are male.

Most respondents believe their business or organisation will experience growth in the next 12 months and none identified they are facing or predicting a labour or skills.

Respondents indicated they source their staff from industry networks and networks in their local area. One respondent is looking to hire three additional staff members in the next three years in creation and production, or technical positions.

No respondent has had any difficulty finding suitable applicants for positions within their organisations.

No respondent has employed or attempted to employ apprentices or trainees due to expense or not knowing enough about apprenticeships or traineeships.

SKILLS DEVELOPMENT

The average annual expenditure on professional development and skills development is $5,000, slightly below the creative industry average of $5,452 for small to medium organisations.

Respondents train their staff in the following ways:

- On-line training
- Learning on the job
- Self-directed or self-taught.

A specific skills gap highlighted by one proponent within their organisation in the next 2 – 5 years is for a programmer.

The priority training to retrain and upskill staff was identified as being business and marketing courses and web development.

Business climate and technology were identified as having a positive impact due to the expanded opportunities they could bring. *Increased competition* and *outsourcing to countries such as India and China* were identified as external factors that will impact the industry.

Neither of the two respondents knows what types of qualifications are available under the VET system and have not accessed associated funding opportunities. They also do not know what funding opportunities are available to train their employees under the State Government's new Skills in the Workplace initiative.

Data indicates web development is a crucial skill independent creatives and freelancers need to improve.

Creation, marketing & promotion, and information and communication technology roles were considered priorities for digital training.

Large Survey Responses

EMPLOYMENT CHARACTERISTICS

Both respondents were companies and employ a total of 68 individuals.

85% are employed on a full-time basis. 54% are female.

The primary functional areas of employment are creation, project management and media.

The average total annual labour cost as a percentage of turnover is 65%. (60%, and 70%)

Both respondents have had difficulty finding suitable applicants in creation, mainly due to a lack of relevant skills or experience, and not being suited to the type of work.

The barriers to hiring staff within the respondent's organisations are

- Remote location, difficult to travel or not perceived well
- Cannot find staff with the appropriate skills or experience
- Poor attitude of applicants.

Both respondents indicated that employee retirements would hit them the hardest in 2-5 years.

SKILLS DEVELOPMENT

Multiple functions or roles were indicated as critical to success: ie: high quality strategy and creation, project managers, art directors, producers, and copyrighters.

Neither have integrated workforce planning into their business plans.

One respondent is facing or predicating labour or skills shortages within the next 12 months in project management and creation.

Respondents expect technology and development processes to have the most impact on their organisations. They expect this to lead to employing staff with more experience in digital production, and shift from the traditional account manager relationship with clients to providing a strategic pro-active approach more in line with project management.

> "It's important for our staff to feel comfortable with the digital world, eg: search engine marketing, every team member completes an online training course delivered by a Melbourne-based company."

> "Technology is changing so quickly we need to add mediums for advertising to capture the target audience. Digital and social media are evolving so rapidly."

Key external factors impacting on the sector are *the rapidly evolving digital landscape* and the *decreasing talent pool in South Australia*.

Neither respondent knows what types of qualifications area available under the Vocational Education Training system (VET) or what funding opportunities are available to train their employees under the State Government's new Skills in the Workplace initiative.
Average annual expenditure on skills and professional development is $12,500 and $100,000 respectively.

The main barriers to increasing the knowledge and skills of staff were identified as

- We don't know where to get the training I need for our staff
- We can't find training with the right content

The crucial skills independent creatives and freelancers need to improve are digital literacy skills. One respondent indicated they did not consider creativity could be improved through training, they saw creativity more as a gift.

Creation and project management roles were considered the top two priorities for digital training.

FUNDING & SUPPORT

The following suggestions were made concerning what support government and industry bodies could provide to plan and address future workforce and skills needs:

- Higher skilled and stand out creatives are required
- Encouragement of recruitment from interstate and overseas
- Trend studies on the behaviour of organisations and how they are connecting to consumers.

If funding was available to help retrain and upskill staff the following were identified as being priority areas:

- Digital upskilling
- Project management.

ENTERTA!NMENT

CREAT!VE FUTURES

Entertainment

Sector Key Messages

This sub-report aims to provide key messages about the Entertainment sector of the Arts, Creative and Cultural industries in South Australia. This is achieved by comparing responses from those who work in the Entertainment sector to the overall responses to the *Your Creative Futures* survey.

	Respondents	% of overall Respondents
Individuals	43 of 722	6%
Small to Medium	6 of 128	5%
Large	4 of 36	11%

The scope for each sector snapshot is predominantly based on the occupations aligned to relevant training packages from the Arts, Creative and Cultural Industries. To capture those occupations that fell outside of these areas the following sectors were added: 'Support Agency & Organisations', 'Writing Publishing & Print Media', 'Advertising and Marketing', 'Software Development & Interactive' and 'Integrated Design & Built Environment'.

The self-subscribing nature of the survey means people aligned their occupation or area of work to one sector based on their interpretation even though they may work across several. For this reason some occupations have appeared in multiple sectors e.g. Graphic designers may be represented in Visual Arts, Craft and Design, Advertising or Integrated Design and Built Environment.

The Entertainment sector data includes festivals and events, theatre production and design, event technician and venues.

SUMMARY

- Most jobs within the sector are in technical or production with a high number of individuals having an ongoing work agreement with three or more businesses. 45% plan to be working in another part of the arts, cultural, creative sectors, or in a different role in five years time.
- This sector has a high proportion of contract and casual work. The most common issue for organisations is difficulty in maintaining a base of skilled casual employees.
- Organisations have difficulties finding applicants across most areas; the most common area of difficulty is production or technical. There are labour and skills shortages in production, technical, project management and events.
- Small to medium businesses expect business growth over the next twelve months.
- The difficulty in maintaining a base of skilled casual employees, and the common skills gaps for this sector will be substantially alleviated if funding is made available to run the proven, and successful 'Skills for Creative Events' program biennially.
- The most significant impact on business growth is the current economic climate.

A joint project between the Arts Industry Council of South Australia and Service Skills SA with funding provided by the Industry Skills Development Directorate of the Department of Further Education, Employment, Science and Technology, Innovation and Business Skills Australia and Service Skills SA.

Individual Survey Responses

DEMOGRAPHICS (AGE, GENDER, ETHNICITY)

A higher proportion of individuals in this sector identify as a professional artist, creative, cultural or arts worker, (81% compared to 65% overall).

The age demographic is younger than the overall sector, with more individuals in the 20-29 year age bracket (56% compared to 25%), and fewer in the 40-54 year bracket (11%, compared to 37% overall). Fewer individuals identify with a specific ethnic or cultural group. (2% compared to 10% overall).

WORK OVERVIEW

7% of respondents identify their primary function to be creation, significantly less than 51% of individual respondents overall. The primary function of respondents in this sector is:

- 44% Production or technical (creative industry average is10%)
- 14% Events (creative industry average is 2%)
- 9% Administration (creative industry average is 6%)

More individuals have an ongoing work agreement with three or more businesses (41%, compared to 12% overall). This sector has a higher proportion of individuals working under short-term contracts or a casual basis.

The average percentage of income individuals derive from their work in the arts, creative and cultural industry in this sector is 87%. The average percentage of income individuals derives from the creative industries overall is 65%.

Data indicates respondents earn more in this sector than the overall average. 12% of individuals earn less than $10,000pa (compared to 37%); and 85% earn between $10,000-75,000 (compared to 56%).

20% of respondents don't like the working hours in this sector.

TRAINING AND PROFESSIONAL DEVELOPMENT

The highest level of education 39% of individuals have is a Diploma, Advanced or Associate Diploma (16% overall). Fewer have attained a University Bachelor Degree (29%, compared to 36%).

55% or respondents in this sector indicated training or professional development over the past twelve months was conducted by learning on the job, significantly more than the 14% creative industry average. There appears to be fewer opportunities for mentoring, coaching or job shadowing in this sector with only 9% selecting this option, (compared to 22% creative industry average).

EMPLOYMENT CONDITIONS

A high proportion of respondents (45%) plan to be working in another part of the arts, cultural, creative sectors, or in a different role in 5 years time. More respondents (77%) are employed by an arts, cultural or creative organisation in this sector, (the average across all sectors is 49%).

SKILLS

If there is subsidised training available, the top three areas that would help individuals careers are,

- Project Management
- Artistic, Creative or Technical
- Digital technologies.

Individuals in this sector would prefer to gain skills in the following way:

- Formal training program or an accredited course
- On-the-job learning
- Short course, workshop, summer school.

Small to Medium Survey Responses

EMPLOYMENT CHARACTERISTICS

When asked how many men and women they currently employ, data indicates six organisations employ 29 individuals at the time of survey. When these organisations are subsequently asked to indicate how individuals are employed, data indicates they employ 71 individuals combined. The assumption is this difference has come about as when asked how they employ the response is based over a year.

62% of employees in this sector are male, more than the 47% creative industry average.
Data indicates employment is less stable in this sector. Larger proportions are employed on short-term contracts (49%, compared to 14% overall). And 28% of respondents indicate employment is temporary or seasonal, (more than 10% overall).

80% expect business growth over the next twelve months.

50% of respondents employ staff directly from school, TAFE, or a higher education institution, more than the creative industry average of 20%.

Four respondents have difficulties finding applicants across most areas; the most common area of difficulty is production or technical.

A higher proportion of organisations in this sector conduct exit interviews (80%, 45% overall).

No respondent has accessed funding opportunities under the VET system.

SKILLS DEVELOPMENT

Three of five respondents (60%) are currently facing labour or skill shortages in production or technical areas. To help plan for future workforce needs four respondents make three suggestions:

- Provide skill development and training options
- Access statistics from our Festivals
- Understand personal motivations of individual employees

Business climate is the dominant factor respondents expect will have the most significant impact on their organisation. Licensing requirements, having to compete with subsidised companies, and loss of regular hirers were other factors indicated.

Respondents indicated key external factors impacting on the industry in this sector are economic climate, increased compliance requirements, and markets.

> "Social structure and the way people relate and communicate. As this changes so does the creative environment and the value of the creative process. And the way consumers interact with the many forms of creativity."

The total annual expenditure on professional development across four organisations is $24,000. The lowest spend indicated is $2,000 and the highest is $10,000, the average is $4000, lower than the average across all sectors ($5,452).

When asked about current skills gaps two of four respondents indicated difficulty in maintaining a base of skilled casual employees. Others skills gaps identified were lighting technicians, production manager, production coordinator, and event manager.

In-house-training, mentoring, coaching, job shadowing and learning on the job are the most common forms of training offered to employees.

Barriers to increasing the knowledge and skills of staff are:

- We don't have the resources to send staff away during business hours
- Access to funding for training
- We train them and they leave

The crucial skills independent creatives and freelancers need to improve are:

- Business knowledge and awareness
- Administrative
- Self management
- Scheduling
- Spelling and attention to detail
- Understand their client needs

Specific roles considered a priority for training in digital literacy by five organisations.

- Marketing and promotion
- Management
- Events

FUNDING & SUPPORT

Five organisations outline support that could be provided by government and industry bodies to help with workforce needs. The focus was predominantly on training, specifically in human resources, business development and partnerships. Additional comments included:

> "we need a better way to quantify the value of the arts to the community"
>
> "money into wages, not training."

The priority areas for staff training if funding is available was indicated by five organisations

- Social Networking and Marketing
- Rigging and Technical
- 3D animation, Design
- Customer service
- Multi-skilling.

> "Adding skills they do not currently have. For example training a site worker to use computers."

Large Survey Responses

EMPLOYMENT CHARACTERISTICS

Four organisations employ 723 individuals, a high proportion of these are employed on a temporary or seasonal basis (41% compared to 15% creative industry average).

33% (or three) of the large organisations whose average turnover is $10million or more are found in this sector. The average labour costs as a percentage of turnover in this sector is 30%. Three respondents indicated 24%, 46%, and 20% respectively. The creative industry average for large organisations is 53%.

Productivity has predominantly increased due to expanded markets. Ongoing productivity and the health of employees is flagged here by one respondent:

> "… burn out is a common issue with staff at annual festivals."

Two organisations indicate employment breakdown has changed due to 'loss of contracts' and 'casuals have been made part time to cut costs, improve retention rates and retain skills'.

Two respondents indicate they have had difficulty finding suitable applicants for production & technical and marketing roles, largely because applicants lack the relevant skills or experience.

The main barriers to hiring staff are lack of appropriate skills & experience; insufficient local training positions and that the nature of the work is largely seasonal and part time.

SKILLS DEVELOPMENT

Three of four organisations do not have formal HR databases and processes, and are currently facing labour or skill shortages in the production or technical areas.

Functions or roles critical to these organisations' success are artist registration, community engagement, box office, production & technical, programming, and as indicated by the overall data:

> "We operate a lean ship; all functions and roles are crucial."

Two respondents specified issues for their organisation as a result of an aging workforce:

- pressure to fund the aging demographic will mean less funding is available for the arts
- an increase in individuals seeking or waiting for a Total Voluntary Separation Package, (more individuals than packages we will be able to offer)
- wealth of corporate history and knowledge could be lost.

Most information respondents suggest what will help plan for future workforce needs is consistent with the overall summary, and is related to training and professional development, funding and policy issues. Additional comments include:

- memorandum of understanding needs to allow redundancies to be made
- determine the growth of the Adelaide Fringe and the impact this could possibly have on the workforce.

Current skills gaps for large organisations are predominantly inline with the overall data, ie: Digital Literacy, Technical Industry, and Marketing & Development skills. Specific technical industry skills required are a range of tickets (eg: Boom, Scissor, Elevated Work Platform), robotics, hydraulics, and wiring. Additional skills gaps indicated:

- Communication skills: both verbal and written
- Collaborative team-work skills at the management level
- Production team needs to improve computer literacy, communication and administration skills. Also need contract negotiation skills, a better sense of professionalism and business awareness.

The main barrier to training in the entertainment sector is identifying the training requirements.

Three organisations have a total annual expenditure on professional development of $105,000. Each organisations spend is $80,500, $20,000 and $5,000. The average annual expenditure on professional development is $35,500, slightly lower than the overall average in the creative industries of $39,122.

Two of four organisations indicated the type of training that would be a priority to help retrain and upskill staff if funding was available is funded professional development opportunities.

> "Huge benefits are to be gained from mid and senior level staff doing placements interstate and overseas - the opportunity to see how things work in a different context is incredibly useful."

> "We would implement job shadowing and coaching and follow through with development opportunities after staff performance reviews. We would also implement a formal process for mentoring and coaching (internal and external)."

Other priority skills areas include:

- leadership skills
- production and technical skills
- self- management skills
- collaborative and teamwork skills
- communication skills
- project management.

Three of four respondents indicate there are no clearly defined career paths in their organisation.

The crucial skills independent creatives and freelancers need to improve are business skills, flexible practices, production, and career planning.

> "We would like to implement a formal process for mentoring and coaching (internal and external)."

All four organisations consider marketing and promotion a priority for digital training. Two consider project management, information technology, and production or technical a priority for digital training.

FUNDING & SUPPORT

The suggestions four organisations made concerning how government and industry bodies could provide support to help plan and address future workforce and skills needs are largely related to training and professional development opportunities, and additional, and long term funding.

> “there are limited possibilities to share core needs, however there could be more dialogue between companies with similar needs to discuss sharing resources.”

> “any grants available to assist with additional employees and assist with any Adelaide Fringe produced projects”

> “resource to understand the capacity and value of TAFE SA. Lobby for long term funding agreements. Skills of staff need to align with strategic plan.”

> “there is not enough cultural and creative activity to sustain constant employment in Adelaide across the year, people go interstate for work.”

> “training in leadership skills and funded professional development opportunities for mid and senior level staff to travel and do internships or placement overseas are needed.”

INTEGRATED DES!GN & BUILT ENVIRONMENT

CREAT!VE FUTURES

Integrated Design & Built Environment

Sector Key Messages

This sub-report aims to provide key messages about the Integrated Design & Built Environment sector of the Arts, Creative and Cultural industries in South Australia. This is achieved by comparing responses from those who work in the Integrated Design & Built Environment sector to the overall responses to the *Your Creative Futures* survey.

	Respondents	% of overall Respondents
Individuals	10 of 722	1%
Small to Medium	2 of 128	1.5%
Large	2 of 36	5.5%

The scope for each sector snapshot is predominantly based on the occupations aligned to relevant training packages from the Arts, Creative and Cultural Industries. To capture those occupations that fell outside of these areas the following sectors were added: ‘Support Agency & Organisations’, ‘Writing Publishing & Print Media’, ‘Advertising and Marketing’, ‘Software Development & Interactive’ and ‘Integrated Design & Built Environment’.

The self-subscribing nature of the survey means people aligned their occupation or area of work to one sector based on their interpretation even though they may work across several. For this reason some occupations have appeared in multiple sectors e.g. Graphic designers may be represented in Visual Arts, Craft and Design, Advertising or Integrated Design and Built Environment.

The Integrated Design & Built Environment data includes people who work in architecture, landscape architecture, exhibition design and interior design.

SUMMARY

- The age demographic is older than the creative industries average.
- Individuals in this sector appear to have more stable employment, with the majority having worked in the sector for over 10 years, and all individuals having 1-5 employers in this time.
- 88% of individuals hold a University qualification.
- All small to medium business identified they are facing or predicting a labour or skills shortage in creation, project management, information technology, and production or technical areas.
- Large organisations have had difficulty finding suitable applicants in creation.

A joint project between the Arts Industry Council of South Australia and Service Skills SA with funding provided by the Industry Skills Development Directorate of the Department of Further Education, Employment, Science and Technology, Innovation and Business Skills Australia and Service Skills SA.

Individual Survey Responses

DEMOGRAPHICS (AGE, GENDER, ETHNICITY)

The age demographic is older than the creative industry average, with 66% of individuals over the age of 40 years (creative industry average is 50% over 40). Proportionally there are more males in the integrated design or built environment sector (78% compared to 38% creative industry average).

89% of respondents' main role is a professional artist, creative, cultural or art worker.

WORK OVERVIEW

The primary function of respondents in this sector is:

- 80% Creation
- 10% Management
- 10% Creative role outside of arts, cultural and creative industry

A high proportion of individuals within the sector work over 30 hours per week.

Data indicates individuals in this sector appear to have more stable employment than the creative industry average. 89% of individuals have worked in the sector for over 10 years, with all having between 1-5 employers in this time.

The average percentage of income individuals derive from their work in the arts, creative and cultural industry in this sector is 83%. The average percentage of income individuals derives from the creative industries overall is 66%.

In the last 12 months 80% of respondents earned over $25,000 (compared to 48% overall).
A much higher proportion in this sector are registered for GST (60% compared to 15% overall).

The main reason respondents did not like about working in the arts, cultural and creative industries was 'lack of opportunity'.

TRAINING AND PROFESSIONAL DEVELOPMENT

88% of respondents hold a University qualification.

Lack of time was the main barrier to skills development with 33% of respondents indicating this was a factor. 24% of respondents stated there were no barriers.

Data indicates individuals in this sector are prepared to cover a higher percentage of the cost of training, with 74% of respondents indicating they are prepared to pay 50% or over.

EMPLOYMENT CONDITIONS

75% of respondents indicated morale at their current workplace is high.

SKILLS

If there is subsidised training available, the top three areas that would help individuals careers are:

- Artistic, creative or technical
- Marketing skills
- Digital technologies.

The three top ways individuals would prefer to gain new skills are:

- Formal training program or an accredited course
- Conferences, seminars or forums
- On-line training.

Small to Medium Survey Responses

EMPLOYMENT CHARACTERISTICS

Two respondents are companies who employ a total of 8 individuals. 75% are male. Data indicates only 12% are employed on a full time basis.

Both respondents have had difficulty finding suitable applications for positions within their organisation. The areas they are having difficulties finding suitable applicants are:

- Creation
- Administration
- Finance
- Management
- Marketing and promotion
- Project management.

One respondent indicated the main barriers hiring staff were:

- Type of work not perceived well
- Cannot find staff with the appropriate skills or experience.

Neither respondent has employed or attempted to employ apprentices or trainees.

SKILLS DEVELOPMENT

Both respondents identified they are currently facing or predicting a labour or skills shortage in the following areas:

- Creation
- Project Management
- Information technology
- Production or technical.

Neither respondent knows what types of qualifications area available under the Vocational Education Training system (VET) nor what funding opportunities are available to train their employees under the State Government's new Skills in the Workplace initiative.

One organisation indicates average annual expenditure on professional development and skills development is $16,000.

FUNDING & SUPPORT

More funding for arts based projects is the suggestion one respondent indicates government and industry bodies could provide to help plan for future workforce needs.

Large Survey Responses

EMPLOYMENT CHARACTERISTICS

Both respondents were companies and employ a total of 51 individuals. 57% are male and 78% are employed on a full time basis.

The average annual labour cost as a percentage of turnover is 42%. (35% and 49% respectively).

78% of employees' predominately work in a creative role. Other predominant roles are in administration, and production & technical.

One company indicated their organisations productivity has increased over the last year due to the increased experience of staff.

Specific functions or roles critical to success are *the designers and integrity of their work*, account management and solid interpersonal and collaborative skills.

The main source of recruitment is directly from school, TAFE or higher education institutes and recruitment agencies. Both respondents think these sources can supply enough staff to meet their organisations future needs.

Both respondents have had difficulty finding suitable applicants mainly in creative roles due to lack of relevant skills or experience, and poor cultural fit.

SKILLS DEVELOPMENT

Neither respondent is facing or predicting labour or skills shortages.

Both expect business climate will have a positive impact on their organisation.

> "We forecast and offer versatile services that adapt to market."
>
> "Global and national economy affects business confidence and ability to invest in new facilities."

Other external key factors impacting on industry are the nationwide development slump, carbon policy, OHS laws and government policy.

Current skills gaps identified were:

- Upskilling in 3D documentation (REVIT autodesk version)
- Maintaining environmental design skills
- Project management (administrative).

Average annual expenditure on professional development and skills is $81,000 and $150,000 respectively.

The main barriers to increasing the knowledge and skills of staff were identified as

- We can't find training with the right content
- Staff are reluctant to upskill
- Ageing workforce.

Neither respondent knows what types of qualifications are available under the Vocation and Education Training system (VET) or know what funding opportunities are available to train their employees under the State Government's new Skills in the Workplace initiative.

The crucial skills independent creatives and freelancers need to improve are core creative skills, leadership, networking, interpersonal skills, written and verbal communication, and respect & integrity of design and the profession.

Roles were considered priorities for digital training.

- Creation
- Administration
- Production or technical.

Employee morale within the sector is high or very high.

> "Morale is high because we have worked hard to develop a healthy, friendly, dynamic work environment and culture. Individuals are given opportunities. We have developed an engaged, enthusiastic workforce with good work conditions."

FUNDING & SUPPORT

The following suggestions were made concerning what support government and industry bodies could provide to plan and address future workforce and skills needs:

> "Government needs a longer term view and plan to achieve clear strategies and policies."

> "Education stimulus provided an artificial spike in demand, with better planning this could have had a longer impact on the economy and a better result."

> "Business SA is really good as they support students that are coming through the system."

Priority areas identified if funding was available to help retraining and upskill staff.

- Increased funding for travel for professional development & international study
- Support systems for courses to be delivered in industry context.

LIBRARIES, INFORMATION SERV!CES & MUSEUMS

CREAT!VE FUTURES

Libraries, Information Services, Galleries & Museums

Sector Key Messages

This sub-report aims to provide key messages about the Libraries, Information Services, Galleries and Museums sector of the Arts, Creative and Cultural industries in South Australia. This is achieved by comparing responses from those who work in the Libraries, Information Services, Galleries and Museums sector to the overall responses to the *Your Creative Futures* survey.

	Respondents	% of overall Respondents
Individuals	11 of 722	1.5%
Small to Medium	6 of 128	5%
Large	5 of 36	14%

The scope for each sector snapshot is predominantly based on the occupations aligned to relevant training packages from the Arts, Creative and Cultural Industries. To capture those occupations that fell outside of these areas the following sectors were added: 'Support Agency & Organisations', 'Writing Publishing & Print Media', 'Advertising and Marketing', 'Software Development & Interactive' and 'Integrated Design & Built Environment'.

The self-subscribing nature of the survey means people aligned their occupation or area of work to one sector based on their interpretation even though they may work across several. For this reason some occupations have appeared in multiple sectors e.g. Graphic designers may be represented in Visual Arts, Craft and Design, Advertising or Integrated Design and Built Environment.

The Libraries, Info Services, Galleries & Museums sector snapshot predominantly includes responses from South Australian libraries and museums.

SUMMARY

- Data indicates individuals working in this sector have an older demographic with the majority or individuals being female (91%). No small to medium business indicated that they 'identify skills or labour needed in the future.' This means that they are not undertaking workforce planning and are exposed to the implications of the older workforce demographic in this sector.
- A high proportion of individuals in this sector do not have an arts practice or do creative work
- Individuals in this sector appear to have more stable employment with respondents indicating they have worked in the sector longer and had less employers.
- 60% of small to medium businesses anticipate a decline in business over the next 12 months
- All small to medium respondents have had difficulty finding suitable applicants predominantly for management roles and are not planning to hire additional staff over the next 3 years.
- Data indicates productivity has increased over the last 12 months for the majority of large organisations and they are facing labour or skill shortages predominantly in the areas of production or technical and information & communication technology.
- All large organisations predict employee retirements will hit hardest between 1-5 years, and none have attempted to employ apprentices or trainees.

A joint project between the Arts Industry Council of South Australia and Service Skills SA with funding provided by the Industry Skills Development Directorate of the Department of Further Education, Employment, Science and Technology, Innovation and Business Skills Australia and Service Skills SA.

Individual Survey Responses

DEMOGRAPHICS (AGE, GENDER, ETHNICITY)

Data indicates individuals working in this sector have an older demographic. A larger proportion of individuals fall into the 60-64 age bracket (27% compared to 5% creative industry average and only 9% are younger than 30, (compared to the 30% creative industry average).

The proportion of females is 91% in this sector, much higher than 62% overall. No individuals identify with a specific ethnic or cultural group. (10% do overall).

55% of individuals in this sector do not have an arts practice or do creative work compared to 7% overall.

WORK OVERVIEW

No individuals have a role that is primarily creative in this sector compared to 51% in the overall data. Primary roles in this area are community engagement, member or customer services, project management and interpretation.

9 of 11 (82%) respondents are an employee of any business or organisation, more than 57% of individual respondents overall. All respondents in this sector work for one of two organisations, in the overall data 14% work for 3 or more organisations.

Data indicates 100% of respondents are employed on a full time or part time basis, significantly more than the overall creative industry average who are employed full or part time (68%). When compared to the employment figures from the three large organisations in this sector, the 100% full-time figure appears to be misleading as the large organisations indicate 51% of employees are employed on a casual basis. It may be that people who work casually in this sector were less inclined to undertake the survey.

Individuals in this sector appear to have more stable employment. All respondents have worked in the sector for at least five years, and the number of employees they have had in the time they have worked in the sector falls between 1 and 9. In the overall data 23% have had 10 or more employers.

The average percentage of income individuals derive from their work in the arts, creative and cultural sectors in this sector is 88%, more than the overall average of 66%. 80% of respondents earn more than $25,000 compared to 48% overall earning more than $25,000.
18% of individuals plan to be retired in 5 years time (more than 2% overall).

TRAINING AND PROFESSIONAL DEVELOPMENT

All nine individual respondents possess at least a Diploma level qualification.

The data indicates this sector has undertaken more professional development in the past 12 months than the creative industry average. With 11% undertaking none (compared to 23% overall), and 56% undertaking more than 25 hours (compared to 41%).

Not knowing what training is available is more of a barrier to training for this sector (30% compared to 17% overall). The financial barrier appears to be significantly less of an issue with 6% citing ‘financial’ as a barrier compared to 30% of individuals overall.

EMPLOYMENT CONDITIONS

There are no significant differences between the library sector and the overall creative industries. None of the six respondents employers allow their staff to work from home (33% of individual respondents indicated this overall). Data indicates flexible working hours and practice are less important to this sector (50% compared to 70% overall).

SKILLS

Communication skills stand out as being the most important for success to individuals in this sector.
If there is subsidised training available the top three areas individuals identified to help their career are:

- Digital technologies (86%)
- Business planning (71%)
- Communication, marketing and project management (43% each)

Individuals in this sector prefer to gain new skills through formal training or an accredited course (78%, compared to 14% overall), the same proportion prefer to gain skills through short course, workshop or summer school. (70% overall)

Small to Medium Survey Responses

EMPLOYMENT CHARACTERISTICS

Three organisations employ 26 individuals. The data indicates the proportion of women in this sector, 77%, is higher than the creative industry average of 53%.

50% of small to medium organisations in this sector have an average annual turnover less than $50,000.

Data indicates a 60% decrease in productivity over the past year (3 out of 5 organisations). A substantial difference compared to the 14% decrease overall. Reasons for the decrease in activity included business climate and markets, ‘an aging membership and less interest in heritage’.

> “…We feel that the harder economic times has impacted in the way our customers are using the library over the last 12-24 months and this has resulted in a drop in loans, although the number of people through the door has increased. Customers seem to be using the library more as a gathering place and for free Internet access.”

One organisation stated the increase in productivity is…

> “…due to an increase in the number of people visiting our museum by presenting programs that have proved to be more popular and building partnerships that bring visitors to our museum.”

Data indicates 60% (substantially more than 10% overall) anticipate a decline in business over the next 12 months. The remaining 40% expect business growth to be the same. 55% of the creative industries as a whole expect growth.

Respondents indicate no significant change in the employment breakdown compared to a year ago.

Respondents indicate they are not planning to hire additional staff over the next 3 years.

Four respondents have had difficulty finding suitable applicants predominantly for management roles.

Two of three organisations indicate staff left their organisation over the last 12 months as a result of retirement, and wages not high enough.

Three of four respondents intend to replace workers who leave in the next 12 months. No organisation has employed or attempted to employ a trainee, largely because it is too costly.

SKILLS DEVELOPMENT

Four small to medium respondents indicate the top three workforce planning activities undertaken:

- Identify individual employees' professional development and training needs (75%)
- Identify employees' working preferences and needs (50%)
- Succession planning (50%)

The primary planning activity across all sectors is to 'Identify skills or labour needed in the future' with 63% overall, in this sector it registered 0%.

75% (3 out of 4) are facing or predicting labour or skill shortages currently or within 12 months. The primary skill shortage identified is management.

50% of respondents expect compliance and regulation will have the most impact on their organisation (6% overall). This factor will impact in specific ways for each organisation for example:

> "We need changes to the regulation of heritage vessels. We need changes to recognise the skills of our volunteers to enable them to run our steam engine. Without those changes we will have to stop operating heritage vessels."

> "Further limit our ability to operate through excessive legislative red tape."

Average annual expenditure on professional development totals $3,050, lower than the creative industry average of $5,452. The lowest spend in this sector was $0 and the highest spend $6000.

Specific skills gaps highlighted in this sector are steam engine drivers, web developers and one of the respondents stated:

> "Not so much a skills gap - more that 1.5 staff can't do everything."

The barrier to training is predominantly 'access to funding' with all respondents indicating this is an issue. The other barrier indicated is they can't find training with the right content.

The priority training areas for staff if funding is available is unique to each of the four respondents:

- Marine Mariner qualifications
- Marketing, fundraising and community engagement
- Customer service roles
- Managing aggressive behaviors
- Social media training.

FUNDING & SUPPORT

The kind of support government and industry bodies could provide to help with workforce planning is in line with the overall data (predominantly related to training, and professional development) with the addition of assistance with regulatory issues. For example:

> "We are facing a critical skills shortage in finding volunteers and staff to run our steam tug. This is a problem shared by maritime museums around Australia. We need rare trades to run our heritage vessels. We can provide the training. Our problem is that we face antiquated regulations."

Large Survey Responses

EMPLOYMENT CHARACTERISTICS

All five organisations are government agencies or statutory bodies. Four organisations indicate they employ 411 individuals, 70% are women, more than the overall proportion of 57% in large organisations operating in the creative industries.

Productivity for this sector has increased over the last year for 80% of respondents. The main reasons for this are in line with the overall survey data, relating to expanded delivery, increased demand, and diversification.

> "Public Libraries are facing Government cuts year after year. Nonetheless, the community use the library space and services more and more. Consequently libraries have to increase in productivity in order to remain relevant in the competitive market."

The average annual total labour cost as a percentage of turnover is 62%.

There have been no significant changes to the employment breakdown compared to a year ago.

Employees predominantly work in the following areas:

- Community engagement, member or customer services (51% compared to 16% overall)
- Scientific researchers
- Production and technical.

Specific roles and functions that are critical to success are largely related to customer service, management and leadership, and marketing. Critical roles specific to this sector are research and collection management. One respondent rated *an enterprising approach* as critical to the organisation.

All four organisations have formal HR databases, and the majority have integrated workforce planning into business plans (75% compared to 57% overall).

Four respondents predict employee retirements will hit hardest between 1-5 years.

None have attempted to employ apprentices or trainees. The main reasons for this are:

- Non productive time of apprentice and supervisor when training
- Don't know enough about apprenticeships or traineeships
- No-one to supervise.

Employee morale is predominantly 'neither low nor high.'

> "There has been so much change in the organisation morale has been up and down, some people have coped better than others and it can change in some areas on a daily basis."

SKILLS DEVELOPMENT

Three of four large organisations are facing labour or skill shortages predominantly in the areas of production or technical and information and communication technology in 2–5 years.

Technology and funding sources are identified as the two factors that will have the most impact on organisations, and two of four respondents expect these factors to have a positive impact.

These factors will change the organisations structure (people, process, infrastructure) in the following ways:

> "Changes in technology will mean our staff will need up-skilling and education programs will need to be rolled out for our customers."

> "All long term staff have been asked to take their outstanding, long service leave, leading possibly to staff shortages in some areas and the cutting of services."

> "Technology allows us to access new audiences."

> "Pressure to partner with the community or find sponsorship - sharing collections and resources could increase efficiency."

One organisation has had difficulties finding specialist research librarians, and suitable applicants for production and technical roles.

No respondent organisation has considered strategies for attracting specific employee groups such as Indigenous or young people in this sector.

Digital literacy and project management skills are currently lacking and predicted to be lacking in the next 2-5 years. They are the priority areas for training if there is funding made available.

In addition to the common barriers of 'lack of resources' and 'funding' to up-skilling staff, 'reluctance to up skill' and 'aging workforce' are the other barriers cited.

All respondents indicate there are no clearly defined career paths in their organisation.

Two organisations identified the following crucial skills independent creatives and freelancers they engage with need to improve:

> "High presentation skills, customer service skills"
>
> "Our volunteers need better knowledge of risk management procedures, marketing skills, event management."

FUNDING & SUPPORT

Suggestions made concerning what support government and industry bodies could provide to plan and address future workforce and skills needs are in line with the overall sector with one respondent providing detail around better coordination from government:

> "Responsibilities around OHS and work safety are continually on the rise, policies for risk assessment are constantly changing for our worksite. We are offered conflicting advice from government - thus procedures need to be streamlined."

L!VE PERFORMANCE

CREAT!VE FUTURES

Live Performance

Sector Key Messages

This sub-report aims to provide key messages about the Live Performance sector of the Arts, Creative and Cultural industries in South Australia. This is achieved by comparing responses from those who work in the Live Performance sector to the overall responses to the *Your Creative Futures* survey.

	Respondents	% of overall Respondents
Individuals	106 of 722	15%
Small to Medium	14 of 128	11%
Large	2 of 36	5%

The scope for each sector snapshot is predominantly based on the occupations aligned to relevant training packages from the Arts, Creative and Cultural Industries. To capture those occupations that fell outside of these areas the following sectors were added: ‘Support Agency & Organisations’, ‘Writing Publishing & Print Media’, ‘Advertising and Marketing’, ‘Software Development & Interactive’ and ‘Integrated Design & Built Environment’.

The self-subscribing nature of the survey means people aligned their occupation or area of work to one sector based on their interpretation even though they may work across several. For this reason some occupations have appeared in multiple sectors e.g. Graphic designers may be represented in Visual Arts, Craft and Design, Advertising or Integrated Design and Built Environment.

The Live Performance data includes dance & instruction, acting, theatre, playwriting, production and design.

SUMMARY

- A higher proportion of individuals in the sector are an ongoing employee of an arts business or organisation, more are engaged on a casual basis. A low proportion of individuals earn 100% of their income from work in the creative industries in this sector. There appear to be fewer employment benefits offered in this sector.
- Small to medium organisations are facing labour or skill shortages predominantly in the areas of community engagement, and production or technical.
- Proportionally more small to medium organisations in this sector have offered education & training and new technology to retain existing workers.
- Small to medium organisations are facing labour or skill shortages predominantly in community engagement, and production or technical.
- Business growth is expected in the next 12 months.
- The need to upskill casuals and contracted staff in new production techniques could be met with funds to run the proven and successful Skills for Creative Events program biennially.
- External factors for large organisations are related to markets (audience perception and behavior) and availability of space.

A joint project between the Arts Industry Council of South Australia and Service Skills SA with funding provided by the Industry Skills Development Directorate of the Department of Further Education, Employment, Science and Technology, Innovation and Business Skills Australia and Service Skills SA.

- The kind of support government and industry bodies could provide to help plan and address future workforce and skills needs are funded placements with strong mentoring and coaching capability for on the job training.

Individual Survey Responses

DEMOGRAPHICS (AGE, GENDER, ETHNICITY)

A higher proportion of individuals (76%) in this sector identify as a professional artist, creative, cultural or arts worker, (compared to 65% overall). All other demographics are consistent with the overall data.

WORK OVERVIEW

A higher proportion of respondents are an ongoing employee of any business or organisation (67% compared to 57% overall).

Fewer individuals work full time (33%, compared to 49%), and more individuals work on a casual basis (34%, compared to 17% overall). More respondents have worked between 10-19 years in the arts, creative or cultural sectors (36% compared to 26%).

38% of respondents earn 100% of their income from the Arts, Cultural and Creative sectors, less than the overall average of 69%.

TRAINING AND PROFESSIONAL DEVELOPMENT

The level of training and professional development is consistent with the overall data.

EMPLOYMENT CONDITIONS

More respondents are employed by an arts, cultural or creative organisation in this sector than the creative industries average (66%, compared to 49%).

31% selected 'none of these' from a list of twelve benefits offered by employers such as 'time off for personal matters' which 37% of respondents overall indicated was offered by their employer.

SKILLS

If there is subsidised training available, the top three areas that would help individuals careers are:

- Artistic, creative or technical skills
- Business planning skills
- Marketing skills.

Individuals in this sector would prefer to gain skills in the following way:

- Short course, workshop, summer school
- Mentoring, coaching, job shadowing
- Formal training program or an accredited course.

Small to Medium Survey Responses

EMPLOYMENT CHARACTERISTICS

When asked how many people they currently employ, eight organisations indicated they employ 116 individuals combined. When the organisations are asked to indicate how individuals are employed, data indicates they employ 128 individuals combined. A large proportion is employed on a temporary, seasonal, or casual basis (70%, compared to 42%). The assumption is this difference has come about as when asked how they employ the response is based over a year.

73% of eleven respondents indicate productivity in their organisation has increased over the last 12 months due to increased business growth, programming, enrolments, touring, product and expanded reach through online delivery.

Specific functions and roles critical to success are in line with the overall data, (management, finance, administration, marketing and creative) with the addition of roles specific to this sector: dance teachers, dance making, front of house and bar staff.

SKILLS DEVELOPMENT

Four respondents indicate they are facing labour or skill shortages in most areas, predominantly community engagement, and production or technical.

70% of organisations have implemented mentoring or coaching schemes, higher than the 45% of small to medium organisations across the all the creative industries.

The most common suggestion to help plan for future workforce needs is training. Additional needs are, market forecasts, projected numbers of skilled workers, succession, long term planning and information that links dance practitioners to future trends, changes in population, demographics and lifestyles.

Support that could be provided by government and industry bodies to help plan and address future workforce needs is in line with the overall data; funding support, subsidised training, and access to relevant data.

> “Greater investment in employment, education and training for arts practitioners as well as ensuring that company structures and infrastructure receive appropriate investment in order to achieve growth.”

No respondent indicated staff come from volunteer pools.

60% are planning to hire additional staff over the next three years, predominantly in administration, marketing & promotion, and production or technical.

A lower proportion experienced difficulties finding suitable applicants (30% compared to 51%), Most difficulty was in production or technical roles.

Proportionally more organisations (5 out of 6) in this sector have offered ‘education and training, new technology’ to retain existing workers. (83% compared to 39% overall).

Nine respondents do not know what funding opportunities are available to train their employees under the State Government's new 'Skills in the Workplace' initiative.

The average annual expenditure on professional development for small to medium respondents in live performance is just more than half the average across all sectors. Eleven organisations in this sector spend a total of $32,750. Two indicated $0 spend and the highest is $10,000, the average is $2977 (overall average $5,452).

The most common crucial skills four respondents indicate independent creatives and freelancers need to improve are business and communication skills.

Specific roles considered a priority for training in digital literacy by five organisations.

- Marketing and promotion
- Administration
- Member or customer services.

FUNDING & SUPPORT

The priority areas for staff training if funding is available was indicated by eight organisations:

- Digital literacy
- Self management (specifically time and stress management)
- Marketing
- Customer service, community engagement
- Technical theatre skills

Additional areas are in project management, leadership, communication, innovative practice, business and safe dance practice training.

Large Survey Responses

EMPLOYMENT CHARACTERISTICS

Two organisations employ 142 individuals, a high proportion of these are employed on a casual, temporary or seasonal basis (73% compared to 48% overall).

Average labour cost as a percentage of turnover for two respondents is 51% and 59%. Neither organisation indicated productivity has increased over the last year, with one organisation emphasising:

> "Decreased performance output due to financial constraints - productivity of staff is not an issue.

Both organisations are expecting business growth in the next 12 months.

The roles most frequently mentioned as critical to the organisation are artistic director and management, with one respondent emphasising *We operate a lean ship, all roles are critical!*

Neither organisation 'identify employees' working needs and preferences', overall 77% of large organisations incorporate this into workforce planning.

Aging is not a significant issue for this sector with one respondent reporting *less than 25% of our workforce are over 50.*

Both organisations are planning to hire additional staff over the next three years in the area of creation. Other areas specified were administration, marketing and promotion, and production and technical.

One organisation has had difficulty finding suitable applicants in creation, finance, marketing & promotion and information & communication technology. The main reason applicants were not suitable were lack of relevant skills or experience, poor attitude and presentation.

The main barriers for one of the large live performance organisations to hiring staff are they cannot find staff with the appropriate skills or experience, insufficient local training positions, and school leavers' lack of skills or experience.

Both organisations have strategies in place for attracting indigenous workers.

> "We access funds through the ATSI creative mentoring program managed by Arts SA to attract indigenous workers."

SKILLS DEVELOPMENT

Neither predicts labour or skill shortages.

Information that will help plan for future workforce needs is a visionary plan, financial viability, and available talent.

> "We need to develop and maintain actors, directors, writers and playwrights to help solve security and retention issues in the theatre context across the state."

Key external factors impacting on the industry are:

> "Strength of the Australian dollar, and rising costs impact on capacity to tour. Changes to the Australia Council for the Arts and the National Cultural Policy are also key factors."
>
> "There is a psychological shift to an event based culture, which influences audience perspective and behaviour. We have no control over our venue which affects or ability to offer support and help nuture the sector. Space is an issue.

Neither organisation has accessed funding under the VET system nor understands what funding opportunities are available to train employees under the Skills in the Workplace initiative.

One organisation indicated their average annual expenditure on professional development of $10,000, significantly lower than the overall average large organisations overall of $39,122.

The crucial skills independent creatives and freelancers need to improve are:

- Business skills (sense of professionalism and contracting specifically mentioned)
- OHSW
- Current legislations and obligations
- Self-management (time management, preventing and coping with burnout).

Both organisations consider most roles a priority for digital training, specifically: Creation, Administration, Management, Marketing & promotion, Community engagement, Project management, Information technology, and Production or technical.

FUNDING & SUPPORT

Both organisations suggest the kind of support government and industry bodies could provide to help plan and address future workforce and skills needs are funded placements with strong mentoring and coaching capability for on the job training. Concern was also expressed that the level of training for dance in this state is not up to standard. *Students lack the attitude and rigour required of a professional.*

If funding is available to help retrain and up skill staff, the priorities are:

- Cognitive psychological tools to help maintain a positive self esteem.
- Business development
- Marketing and public relations.
- Collaborative skills and team building skills
- Upskill casuals and contracted staff in new production techniques
- Digital content for marketing

Additionally, the board need financial management and corporate governance training for the not for profit sector.

MUS!C

CREAT!VE FUTURES

Music

Sector Key Messages

This sub-report aims to provide key messages about the Music sector of the Arts, Creative and Cultural industries in South Australia. This is achieved by comparing responses from those who work in the Music sector to the overall responses to the *Your Creative Futures* survey.

	Respondents	% of overall Respondents
Individuals	60 of 722	18%
Small to Medium	12 of 128	9%
Large	2 of 36	5%

The scope for each sector snapshot is predominantly based on the occupations aligned to relevant training packages from the Arts, Creative and Cultural Industries. To capture those occupations that fell outside of these areas the following sectors were added: 'Support Agency & Organisations', 'Writing Publishing & Print Media', 'Advertising and Marketing', 'Software Development & Interactive' and 'Integrated Design & Built Environment'.

The self-subscribing nature of the survey means people aligned their occupation or area of work to one sector based on their interpretation even though they may work across several. For this reason some occupations have appeared in multiple sectors e.g. Graphic designers may be represented in Visual Arts, Craft and Design, Advertising or Integrated Design and Built Environment.

The Music sector data includes those who work in music performance, music business, music production and education.

SUMMARY

- A higher percentage of individuals earn less in the music sector than the overall creative industries average.
- The proportion of time respondents have worked in the sector is longer compared to the overall creative industries.
- It appears that employee morale is higher in the music sector.
- A larger percentage of small to medium organisations predict growth in the next 12 months compared to the overall creative industry average.
- Large organisations within the music sector employ a higher percentage of employees on a casual basis compared to the overall average of creative industries.

A joint project between the Arts Industry Council of South Australia and Service Skills SA with funding provided by the Industry Skills Development Directorate of the Department of Further Education, Employment, Science and Technology, Innovation and Business Skills Australia and Service Skills SA.

Individual Survey Responses

DEMOGRAPHICS (AGE, GENDER, ETHNICITY)

The proportion of males in the music sector is higher than the overall creative industries (57% compared to 38% overall) and the percentage of individuals who identify with a specific ethnic or cultural group is significantly lower (2% compared to 10%).

WORK OVERVIEW

A higher percentage of individuals earn less in music than in other sectors of the creative industries, with 41% earning between $1,000-10,000 (21% overall) and 9% earning above $50,000 compared to 25% overall.

The average percentage of income individuals derive from their work in the arts, creative and cultural industry in this sector is 58%. The average percentage of income individuals derives from the creative industries overall is 66%.

The primary function of respondents in this sector is:

- 64% Creative function
- 7% Community Engagement
- 7% Management

The average proportion of time spent each week on arts work or creative practice is significantly less in the 'more than 38 hours' bracket for music (17% compared to 31% for the overall sector). More individuals in the music sector spend between 20-29 hours (40% compared to 15% overall).

A higher proportion of individuals identify as having a primary creative function (64% compared to 51% overall). 90% of individuals in the music sector have an ABN compared to 75% overall.

The proportion of time respondents have worked in the sector is longer with only 14% having worked for less than 5 years compared to 23% of overall respondents.

A higher proportion indicate 'lack of opportunity' is what they don't like about working in the sector (66% compared to 48% overall).

TRAINING AND PROFESSIONAL DEVELOPMENT

38% indicate they have undertaken no training or professional development in the past 12 months (compared to 23% overall).

It appears respondents are prepared to cover a higher percentage of the cost of training, 32% indicate they are prepared to pay less than 50% (a lower proportion than 43% overall), and 30% are prepared to pay 100% (more than 18% overall).

EMPLOYMENT CONDITIONS

34% are employed by an arts, cultural or creative business (fewer than the creative industry average of 49%). Fewer cite 'lack of challenging work' as a factor that would have the most influence over whether they left an employer, (6% compared to 17% overall).

It appears that employee morale is higher in the music sector than the overall creative industry.

SKILLS

Individuals in the music sector would prefer to gain skills in the following way:

- Mentoring, coaching, job shadowing
- Formal training program or an accredited course
- Conferences, seminars, or forums.

Training or professional development individuals undertook in the last twelve months was predominantly ‘self directed or self taught’. A higher proportion than the creative industries overall. (61% in the music sector, 41% overall).

If there is subsidised training available next year, the top three training areas individuals indicated would help their careers are:

- Marketing
- Artistic, creative or technical skills
- Business planning skills

Small to Medium Survey Responses

EMPLOYMENT CHARACTERISTICS

Twelve respondents employ 44 individuals.

8% of small to medium businesses in the overall survey identified as being a government agency or statutory authority, not one of these was in the music sector.

15% of small to medium businesses in the overall survey indicated an annual turnover of more than $750,000, none of these was in the music sector.

A larger percentage of organisations predict growth (64%) in the next 12 months compared to the overall sector (55%). Of the 7 who predict growth, the lowest growth prediction was 5% and 50% the highest; the average is 18%, lower than the overall growth prediction of 29%.

Four organisations indicate additional positions in the next three years will be required in creative and financial roles.

Five respondents have had difficulty finding suitable applicants in the areas of creation (60% compared to 36% overall creative industries) and management (40% compare to 27% overall).

No one indicated there was difficultly finding suitable applicants in the area of production or technical (compared to 9% overall creative industries) or project management (compared to10% overall).

100% of organisations rate employee morale as high or very high.

SKILLS DEVELOPMENT

There are multiple roles critical to success with events & marketing, and creative roles the most frequently mentioned. ‘Other’ roles included touring, distribution, fundraising, booking, graphic design, and music teachers.

> “The members really need to be multi-skilled; they need to have expertise in composition, arrangement, creative and strategic thinking, art management, administration, publicity, finance and more. We require one person to oversee the running and general operations of the quartet. This person also needs to be a multi-skilled arts worker as we are a very small organisation.”

The key external factors impacting on the music sector are

- Markets
- Regulatory
- Economic Climate

> “Liquor licensing and small live music venues, illegal downloads and piracy, noise restrictions or complaints, festival tours and success, the state of various radio stations and what these stations promote.”
>
> “Importance of culture and artistic practice in Australian society”

Six respondents indicated their average annual expenditure on skills and professional development is $892. Two respondents indicate ‘0’ expenditure and the highest also indicated by two respondents was $2000, significantly lower than the overall average of $5,452 for small to medium creative industry respondents.

In-house training is the most common form of training staff (25% compared to 12% overall).

More organisations in the music sector identify employees working preferences and needs (35% compared to only 25% overall data). Only 5% have implemented family friendly polices and practices and less are facing labour or skill shortages (10% compared to the overall sector shortage of 32%).

Five organisations indicate they have different priority areas for the types of training and up skilling staff if funding was available. Two organisations indicate none. Other training identified by each respondent was:

- Specialist music training
- Marketing, administration, production of small scale new music events
- Funds for mentoring and pursuing professional development opportunities for roles at all levels.

> “Mentoring, locally, nationally and internationally. Creative industry conferences, attendances at festivals and events.”

The data indicates self-management - planning & time management is the skill most independent creative and freelancers need to improve. (4 respondents with multiple responses)

71% of organisations are unaware of what types of qualifications are available under the VET system and no respondent has accessed funding opportunities under the VET system or are aware of opportunities under the ‘Skills in the Workplace’ program.

FUNDING & SUPPORT

Eight respondents indicated the kind of support that could be provided by government and industry bodies to help plan and address future workforce and skills needs. The dominant response was around funding support or subsidised training, and funding for attachments, interns secondments and mentoring.

Specific comments included:

> "Financial support, workshops, mentorships, training within the industry; information on effective promotion and marketing, more recognition in general as the music scene as an industry, pathways to gain employment in the music industry, more detailed information about the various roles - i.e. how a band manager differs from a licensor or an agent."

> "I don't think government help is required in this area. There is an oversupply of skilled workers in the areas we require them. The problem is making generating enough revenue to actually expand our business to hire these people."

> "For an organisation as small as us the most useful support would be in up-skilling current employers/workers to be able to expand their skill set in order to more competently fulfil the needs of the organisation."

Large Survey Responses

EMPLOYMENT CHARACTERISTICS

Two large music organisations employ 265 individuals. (One employs 95, the other 170). 51% are employed on a casual basis, significantly higher than the overall proportion of 23% in the creative industries.

The approximate total labour cost as a percentage of turnover is 75% and 81% respectively.

60% of employees predominantly work in 'other', which is defined as education and education-related administrative roles. Other predominant roles are in creation, and administration.

Both of the large organisations expect business growth in the next 12 months.
Neither have integrated workforce planning into their business plans.

SKILLS DEVELOPMENT

Strategies indicated they will adopt to ensure a sufficient supply of skilled labour included:

- Increase the use of seasonal or temporary workers
- Improve productivity
- Maintaining industry networks

One of the respondents noted:

> "Strategies (to ensure a sufficient supply of skills labour) are hard as the supply of musicians is a national issue dependant on long-term training."

The average annual expenditure on professional and skills development is $30,000, and $75,000 respectively.

When asked how they train their staff the two responses were:
- Short courses, workshops, summer schools
- Other: *Staff come with university qualifications with substantial experience in their field*

One respondent indicated the crucial skills independent creatives and freelancers they engage with need to improve: *teaching, communication and administrative skills*.

Neither respondent indicated what type of training would be a priority if there was funding available to help retrain and upskill your staff.

Functions or roles critical to success are the musicians and high quality teachers. One respondent highlighted the importance of strong links to industry, the breadth and depth of studies on offer and the quality of concerts.

Academics and administration have been identified as priority roles for training in digital literacy.

FUNDING & SUPPORT

One respondent made the following suggestions concerning how government and industry bodies could help plan and address future workforce and skills needs:

> "Arts industry funding needs to be increased and not cut"

> "Federal and state arts funding should not be linked together, eg: loss of Australia Council funding should not mean the loss of Arts SA funding."

> "DFEEST needs to recognise the differing delivery costs of courses eg. the cost of delivering a music course is vastly more expensive than delivering a hairdressing course."

Both respondents expect funding sources to have a negative impact. One indicated it could result in pressure to cut programs (or decrease the breadth and depth of programs), services and staff.

SCREEN & MED!A

CREAT!VE FUTURES

Screen and Media

Sector Key Messages

This sub-report aims to provide key messages about the Screen and Media sector of the Arts, Creative and Cultural industries in South Australia. This is achieved by comparing responses from those who work in the Screen and Media sector to the overall responses to the *Your Creative Futures* survey.

	Respondents	% of overall Respondents
Individuals	65 of 722	9%
Small to Medium	20 of 128	16%
Large	4 of 36	11%

The scope for each sector snapshot is predominantly based on the occupations aligned to relevant training packages from the Arts, Creative and Cultural Industries. To capture those occupations that fell outside of these areas the following sectors were added: 'Support Agency & Organisations', 'Writing Publishing & Print Media', 'Advertising and Marketing', 'Software Development & Interactive' and 'Integrated Design & Built Environment'.

The self-subscribing nature of the survey means people aligned their occupation or area of work to one sector based on their interpretation even though they may work across several. For this reason some occupations have appeared in multiple sectors e.g. Graphic designers may be represented in Visual Arts, Craft and Design, Advertising or Integrated Design and Built Environment.

The Screen & Media data encompasses all who work in the areas of film, television, interactive digital media and broadcasting. Industry specific production, technical and design roles are also included.

SUMMARY

- Individuals have worked within this sector longer and have had more employers than the overall creative industries average.
- More individuals in this sector have a creative role.
- Small to medium average expenditure on professional development in this sector is higher than the creative industries small to medium average.
- Large organisations in this sector have less turnover than large creative industries on average.
- Large organisations within this sector have found it difficult to find suitable applicants due to lack of relevant skills or experience.
- Business and online marketing skills are the most frequently mentioned training needs by this sector with a preference for funded on-the-job learning. Examples of on-the-job learning opportunities are local, national and international placements, mentoring schemes, and subsidised internships.

A joint project between the Arts Industry Council of South Australia and Service Skills SA with funding provided by the Industry Skills Development Directorate of the Department of Further Education, Employment, Science and Technology, Innovation and Business Skills Australia and Service Skills SA.

Individual Survey Responses

DEMOGRAPHICS (AGE, GENDER, ETHNICITY)

The proportion of males in this sector is 51%, (higher than the 38% overall creative industries).

More identify with a specific ethnic or cultural group (15% compared to 10% overall).

A higher proportion have a primary function in production or technical (22% compared to 10% overall).

WORK OVERVIEW

More respondents have worked in this sector for longer, 31% for 20 or more years (compared to the overall creative industries of 23%), and fewer have worked for between 5-9 years (16% compared to 26% overall).

33% have had 15 or more employers, higher than the overall creative industries of 17%.

The average percentage of income individuals derive from their work in the arts, creative and cultural sectors in this area is 70% (overall average is 66%).

TRAINING AND PROFESSIONAL DEVELOPMENT

No significant differences are indicated in the data between the screen and media sector and the creative industry sector as a whole. 75% don't know about Skills for All.

EMPLOYMENT CONDITIONS

No significant differences are indicated in the data between the screen and media sector and the creative industry sector as a whole.

The proportion of individuals who are employed by arts, creative or cultural business is slightly lower at 41% compared to the overall creative industries sector of 49%.

'Lack of understanding of personal circumstances' is cited more frequently by individuals as a factor in this sector that would have the most influence over whether they left an employee. (12% compared to the overall creative industries at 4%).

SKILLS

If there is subsidised training available, the top areas that would help individuals careers are:

- Artistic, creative or technical skills
- Digital Technologies
- Business planning skills
- Marketing skills.

Individuals in this sector would prefer to gain skills in the following way:

- Short course, workshop, summer school
- Mentoring, coaching, job shadowing
- On the job learning.

Small to Medium Survey Responses

EMPLOYMENT CHARACTERISTICS

20 organisations employ 122 individuals. 61% of these are male, more than 47% in the overall creative industry.

The predominant business structure in this sector is to operate as a company (63%, compared to 27% overall).

28% of the respondents report a turnover of between $1-5 million, a greater proportion than 8% for the creative industry as a whole.

A slightly higher proportion of respondents are employed full time, (38% compared to the overall creative industries proportion of 30%). Fewer are engaged on a casual basis (10% compared to 32% overall), and there are more who are engaged on short-term contracts (22% compared to 14% overall).

More individuals in this sector have a creative role, (57% compared to the overall creative industries average of 36%).

A higher proportion source staff from industry networks (45% compared to 25% overall) and volunteer pools (20% compared to 11% overall).

69% are planning to hire 28 additional staff in the next 12 months predominantly in the areas of administration, creation, and project management.

A high proportion of respondents don't know if they will replace workers who leave in the next 12 months (42% compared to 25% overall).

69% do not conduct exit interviews with staff compared to 55% overall.

SKILLS DEVELOPMENT

Fourteen respondents indicate 44 specific functions and roles critical to success, the top 3 are:

- Information technology, production or technical
- Creative
- Events, marketing and promotion, community engagement, member or customer.

> "With anyone in any of the roles not doing a good job it's a disaster, from drivers to box office. Critical roles are the director, programming staff, production manager and marketing manager."

Information that could help plan for future workforce needs is predominantly funding stability, skills development and training options. Other information specified includes:

> "Information on employing researchers under contract for future projects, and other potential contract staff as our future works will be project-by-project, each requiring different specialised skillsets and levels of prior staff experience."

“Formal assessments of employee productivity.”

“A crystal ball? Serious, in this industry that is what it would take.”

“Arts policy outlining future directions.”

Key external factors impacting on the industry are largely markets and technology.

“Changing technology. Changing viewing habits. Increased competition for leisure time and changing viewing habits because of the digital revolution.”

SA Film Corporation features in three of the eleven responses.

“The SAFC has no focus on the film industry's small businesses. It now only supports Directors, Producers & Writers. Since this implementation around 4 - 5 years ago our business has not be able to retain any feature film post work as 'sound post' and the small post companies/people within this area are not the priority anymore. In my opinion, this is a lack of vision and has been a very wrong approach for the film industry to survive. It has stifled its growth. A growth which was just beginning to be healthy. Added to this, the SAFC as a funding agency, just doesn't fight hard enough to help these small business's retain the work in SA over other State's funding agencies.”

“The inability of bodies such as the SAFC to adapt to the changing climate for media producers. It's the death of the dinosaurs, and the rise of the mammals. Public monies thus should be distributed in smaller sums to a greater diversity of creative people, with fewer strings attached. The innovative and entrepreneurial will be rewarded on the merits of their ideas and their drive, rather that the beaurocratically inclined, socially and fiscally conservative (which have traditionally been awarded the majority of funding).”

“Technology and content distribution evolving at a rapid pace yet state and federal agencies are not adapting their funding models quick enough.”

The two main reasons this sector is largely not able to offer training contracts are expense and they don’t know enough about apprentices or traineeships.

78% of respondents don’t know what types of qualifications are available under the VET system. No respondent has accessed funding opportunities under the VET system.

Average annual expenditure per organisation on professional development for small to medium organisations in this sector is $5,818. The lowest spend was $0 and the highest spend $30,000.

The top two current skills gaps are marketing & promotion, and management & business development. Other specific skills gaps respondents identified are:

- Film Sound designers and editors with the required experience when needed are not available in South Australia.
- High level media project management.

Respondents identified skills gaps in 2-5 years to be the same as current gaps with one adding:

- Directors
- Production designers
- Sound crew
- Production managers
- Producers.

Dominant ways to train staff in this sector are:

- Learning on the job
- Mentoring, coaching, job shadowing
- Conferences, seminars, or forums.

Eleven respondents indicate a broad range of priority training needs to retrain and upskill staff. Funded on-the-job learning opportunities, business and online marketing skills are the most frequently mentioned. Examples of on-the-job learning opportunities are local, national and international placements, mentoring schemes, and subsidised internships. Other specific skills listed were: visual effects; 3d animation, time management, IT development, distribution skills and:

> "new skills areas to ensure SA can provide staff for every element of producing a television programme

The predominant skills eleven respondents identified most independent creative and freelancers need to improve are:

- Production, event or project management
- Communication.

Other skills identified are: sound editing, financial, networking, voice over training, business, writing and time management.

Priority roles for training in digital literacy are

- Marketing and promotion (67%)
- Creation (42%)
- Community Engagement (42%)
- Project Management (42%)

FUNDING & SUPPORT

The dominant types of support that could be provided by government and industry bodies to help plan and address workforce needs is entrepreneurial, business, and governance support; funding support or subsidised training; and more funding support is sought for attachments, interns secondments and mentoring. Additional quotes from respondents follow:

> "Retain all Government departments' media requirements within South Australia and prevent their relative Agencies from taking work and our tax paid monies to interstate competitors. This will help retain what trained staff we can get here in SA as most leave due to lack of consistent work."

"Prioritise bringing an end to a culture of dependence on public funding, for projects and organisations. More entrepreneurial skill development sessions should be offered, and alternative business models described and promoted … If we build sustainable creative enterprises, then workforce and skills needs become easier to satisfy, as there will be more opportunities for arts workers, and less territorialism."

"This is a very complex question. The Australian film industry only exists within a world market environment because it's subsidised by government funding. Future workforce needs can only be determined when there is a sustainable level of production, which is extremely difficult to achieve within the current environment. In short - unless the Australian government significantly increases its support of the Australian film and television industry to a level that negates a lack of market demand and our strong economy to achieve sustainable levels of production it will be hard to plan future skill needs."

"Better and more relevant skills training for industry specific jobs based on the current work opportunity."

Large Survey Responses

EMPLOYMENT CHARACTERISTICS

Four organisations employ a total of 123 individuals, 63% are male, (more than 43% average in large organisation respondents in creative industries overall).

26% of large organisation respondents overall earn more than $10million per annum, none are in this sector.

The reasons for changes in productivity is unique to each of the three respondents:

- Identified new business opportunities, expanded delivery to meet industry standards, embraced new technology and creative expression, reached new audiences
- Acquired by a larger company, which has led to more business opportunities
- The high Australian dollar means clients will take work elsewhere. Internationally there is more risk aversion, which means not as much is being funded.

The predominant functional areas in this sector are creation, management and project management.

The main functions or roles critical to success are:

- Production or technical
- Management
- Creation
- Committed volunteers and volunteer management.

Specific production or technical roles included: audio producers, audio compositing, visual effects, project management, recruitment, radio presenters & producers, online content producers, journalism skills, radio programming, and VFX supervision.

All four respondents have formal HR databases.

Two of four respondents are facing an ageing workforce, losing experienced staff and valuable corporate memory are the resulting issues indicated. The other two respondents specifically state aging is not an issue.

> "Our workforce is growing up, starting families and wanting to settle, Adelaide is a good spot to do that!."

Respondents indicate introducing new technology is not a strategy this sector will adopt to meet expected labour demand (0% compared to 13% overall) average.

75% are planning to hire additional staff over the next three years predominantly in:

- Creation
- Production or technical
- Marketing and promotion

All have had difficulty finding suitable applicants, predominantly in the areas of creation and project management, largely due to lack of relevant skills or experience.

All respondents indicate the main barrier to hiring staff in this sector is due to remote location. They have all offered relocation expenses to attract suitable applicants.

SKILLS DEVELOPMENT

Three of four respondents indicate they are facing labour or skills shortages (75% compared to 43% overall) currently or within 12 months. These shortages are predominantly in creation, and production or technical areas.

The information four respondents need to plan for future workforce needs is:

- Consistency in policy from funding bodies
- Understanding of markets and technological change
- Strategic management and growth of freelance database and networks
- Project certainty
- Offer work experience through educational organisations.

> "Experienced staff are difficult to find in SA because its a small pool to draw on."

The two dominant factors respondents expect will have the most impact on their organisation are Markets (50% compared to 11% overall) and Funding Sources.

> "Markets drive demand, which changes our priorities and how resources are allocated."

Other key external factors impacting on the industry identified by four respondents are:

- The value of the Australian dollar
- Trends in game platforms and changing terms of use
- International competition
- Demand for funding
- Government telecommunications policy

- Regulatory change
- Technological change
- Overload of admin work
- Audience needs and habits.

> "The Australian dollar, most of our work comes from the US, we wear a loss because they don't want to pay in Australian dollars."

What attracts people to the arts, creative and cultural industries

- Passion and urge to create
- Intellectual stimulation
- Fame and respect
- 'Other': a good skills match, and interesting variety of projects.

Current skills gaps are predominantly technical industry skills, followed by marketing and development. Specific technical industry skills identified were:

- Compositing
- Radio presenters
- FX artist
- Digital lighting
- Visual effects supervisors.

> "Half of the respondents specifically mentioned the need for core film industry knowledge and experience, and multi-skilled staff."

One respondent predicts the following skills gaps in 2-5 years:

- Radio technician
- Training management
- Radio trainers
- Development, marketing and sponsorship
- Radio presenters.

The total average annual expenditure on professional development between four respondents was $195,000, One respondent whose expenditure was $150,000 made up the bulk of this amount, the remaining expenditure was $12,000, $13,000 and $20,000. Overall creative industries average expenditure on skills and professional development was $39,122.

The crucial skills independent creatives and freelancers they engage with need to improve are:

- Technical industry skills
- Business Skills
- General Skills.

> "All roles need technical skills and an understanding of software limitations, and creative skills, need to develop the creative eye, understand when to 'push' and 'pull'

> "They need really good communication skills, a better understanding of business practices (deadlines and scale of business) and the financial implications. This will help build a sense of professionalism and the need to be reliable. For their own business practice they need a better understanding of marketing themselves, invoicing, insurance and contracts."

FUNDING & SUPPORT

Some suggestions made concerning the kind of support that could be provided by government and industry bodies is consistent with the overall creative industry data.

- Consistent policy
- Longer term funding commitment
- Funded internships and traineeships
- Better communication from government departments.

Additional and more specific comments included:

- Speedier processing of 457 work visas
- Make sure there are incentives for companies based here who are exporting.
- MEAA have antiquated views of employment that doesn't match current employment patterns in visual effects.
- Maintain the Post Production Rebate through Screen Australia (PDV offset).
- Timely communication from government departments, specifically around changing funding structures
- Government regulation around employment eg: visual effects should be included in the Foreign Resident Withholding Variation.
- Fringe Benefits tax needs to be simplified. When the postproduction rebate came in (40%) the dollar was 85 cents - now the dollar is much higher and the value of the rebate is significantly reduced.

> "State sponsored three-month internship scheme eg: NSW Film and TV internship program. We want and need more local training opportunities; the costs associated with employing internationally are very high."

Four respondents identified fourteen priority training areas if there is funding available to retrain and upskill staff. They are predominantly technical industry skills (43% of respondents), leadership and teamwork (36% of respondents), and business skills (36% of respondents).

Specific technical industry skills are:

- Radio broadcast technicians
- Online production skills
- Radio presentation skills
- SCRUM methodology for games
- Rotoscoping, and tracking

Additionally two respondents referenced the need for:

- core film industry knowledge and experience, multi-skilling staff
- entry level skills through funded traineeships to train in-house using the software that we use.

All four respondents indicated they have not accessed any funding opportunities under the VET system.

SOFTWARE DEVELOPMENT & INTERACT!VE CONTENT

CREAT!VE FUTURES

Software Development & Interactive Content

Sector Key Messages

This sub-report aims to provide key messages about the Software Development & Interactive Content sector of the Arts, Creative and Cultural industries in South Australia. This is achieved by comparing responses from those who work in the Software Development & Interactive Content sector to the overall responses to the *Your Creative Futures* survey.

	Respondents	% of overall Respondents
Individuals	12 of 722	2%
Small to Medium	5 of 128	4%
Large	2 of 36	6%

The scope for each sector snapshot is predominantly based on the occupations aligned to relevant training packages from the Arts, Creative and Cultural Industries. To capture those occupations that fell outside of these areas the following sectors were added: 'Support Agency & Organisations', 'Writing Publishing & Print Media', 'Advertising and Marketing', 'Software Development & Interactive' and 'Integrated Design & Built Environment'.

The self-subscribing nature of the survey means people aligned their occupation or area of work based on their interpretation. Therefore some occupations have appeared in multiple sectors e.g. Graphic designers may be represented in Visual Arts, Craft and Design, Advertising or Integrated Design and Built Environment.

The Software Development & Interactive content includes software development, website design, game design & development, and conceptual art.

SUMMARY

- All individual respondents in this sector are under 40 years of age.
- A high proportion of individuals are in full time on going employment with over half are working more than 38 hours per week.
- Both small to medium and large organisations report business growth and anticipate it will continue.
- Crucial skills gaps in the sector are in project management, digital technologies, business planning, creative, artistic and technical.
- Both small to medium and large organisation have had difficulty finding suitable applicants in information & communication technology positions.
- The kind of support government and industry bodies could provide to help plan and address workforce needs are innovative funding start-ups, set award wages support for digital right management and damage control and offshore sales assistance.

A joint project between the Arts Industry Council of South Australia and Service Skills SA with funding provided by the Industry Skills Development Directorate of the Department of Further Education, Employment, Science and Technology, Innovation and Business Skills Australia and Service Skills SA.

- Unlike other sectors 'lack of funding' is not a barrier to increasing the knowledge and skills of staff. The main barrier is 'we can't find training with the right content'.

Individual Survey Responses

DEMOGRAPHICS (AGE, GENDER, ETHNICITY)

It appears the age demographic is younger in the software development and interactive content sector than the overall creative industries sector, with no respondents over 40 years (compared to 37% overall).

A higher proportion of males work in this sector (58% compared to 38% creative industry average).

WORK OVERVIEW

The average percentage of income individuals derive from their work in the arts, creative and cultural sectors in this sector is 83% (more than the overall average of 66%).

71% of individuals are in full time on going employment.

Half the respondents in this sector work more than 38 hours per week.

The primary function of respondents in this sector is:

- Creation
- Information Technology
- Project Management
- Production or Technical

Individuals in this sector appear to have more stable employment. 46% of respondents have worked in the sector for between 10-19 years, with 90% having had 1-5 employers in this time.

No respondents use an agent, gallery or dealer. 90% have an ABN (compared to 75% overall in the creative industries) and 30% are registered for GST (compared to 15% overall).

TRAINING AND PROFESSIONAL DEVELOPMENT

A higher proportion of individuals have not undertaken any training or professional development in the past 12 months. 36% (or 4 of 11), compared to 23% of individual respondents overall.

For those individuals who undertook training or professional development it was predominantly self-directed or self-taught (71%) and 56% did not contribute to the training costs.

Respondents indicate they are prepared to cover a higher percentage of the cost of training, with 56% of respondents indicating they are prepared to pay 100% (compared to 18% overall).

> "Training would like to be undertaken to improve skills in the arts, cultural and creative industries - if they were offered at non-business hour times."

EMPLOYMENT CONDITIONS

There are no significant differences between the software development & interactive content sector and the creative industry sector as a whole.

SKILLS

If there is subsidised training available, the top four areas that would help individuals careers are,

- Artistic, Creative or Technical
- Digital technologies
- Business Planning Skills
- Project Management.

> "I am the ITC Coordinator for a local Arts Council, the committee member IT skills are so low that anything beyond basic letter writing is not attempted and frequently gets given to me to complete which wastes my time doing what I consider basic admin."

Small to Medium Survey Responses

EMPLOYMENT CHARACTERISTICS

80% of respondents (4 of 5) within this sector are companies. The five organisations employ 20 individuals, of these 80% are male, significantly higher than 47% overall in the creative industries.

75% of organisations within this sector (3 of 4) have experienced an increase in productivity over the last year and all four expect their business to grow in the next 12 months.

Three respondents indicated they plan to hire additional staff over the next three years predominately in creation, information & communication technology, or production or technical. All intend to replace workers who leave in the next 12 months.

Two of three respondents have had difficulty finding suitable applicants predominately in creation, information & communication technology positions.

No respondents have employed or attempted to employ apprentices or trainees under a formal contract of training to fill job openings, largely because they don't know enough about apprenticeships or traineeships.

SKILLS DEVELOPMENT

Respondents indicate this sector require skills gap identification and resolution strategies to plan for future workforce needs.

Annual expenditure on professional development is indicated by two respondents as $10,000 and $0 respectively.

The following factors are expected to be significantly different for the arts, creative and cultural industries in the next 3 years time:

- Business climate
- Funding sources
- Compliance and regulation
- Governance

It is noted that businesses within this sector did not see technology as being a factor (7%) compared to 69% overall the creative industries.

Key external factors impacting on the industry:

- *Barriers to entry with third party technology*
- *Intellectual property rights*
- *Increased presence of international providers*

The skills gap identified by one organisation was mobile application development.

Marketing & promotion is the highest priority role for training in digital literacy.

Large Survey Responses

EMPLOYMENT CHARACTERISTICS

The two respondents were companies whose average turnover per annum is between $1–$5million. Average total labour cost as a percentage of turnover is 63%. (57% and 70% respectively).

They have 31 employees of which 68% are males, proportionally higher than large organisations overall at 47%. 77% of are employed on a full time basis, also higher than large organisations overall at 36%.

Predominate roles are:

- Administration
- Creation
- Production or technical.

No functions or roles critical to success were specified but the following was highlighted:

> “the ability of being nimble and adaptable to change, particularly in the area of IT maintenance and development.”

One respondent is looking to hire six additional staff over the next three years in creation, finance, management, and information and communication technology.

Neither business have formal HR databases and processes and they do not believe they will face any issues due to the ageing workforce.

Information two respondents indicate they need to plan for future workforce needs:

- Knowledge of the changing market nationally and internationally
- Networks such as; business economic development, Australian Chamber of Commerce and Industry, meetings between industry and political leaders.

Both respondents have had difficulty finding suitable applicants in the areas of member & customer service and information & communication technology and identified poor attitude, presentation, wrong cultural fit and not suited to the type of work as being the main reasons.

Employee morale in both organisations is high or very high.

> "There is a healthy work culture. Staff are respected. They are given ownership, so they are motivated and have initiative and a sense of worth."

SKILLS DEVELOPMENT

They expect the following factors to have the most impact on their organisations:

- Technology
- Business climate.

Current skills gaps are digital publishing and advanced Cascading Style Sheets. Predicted skills gaps in the next 2 – 5 years are user interface design, HTML 5, Java, and other programming skills.

Average annual expenditure on skills and professional development is $10,000 and $30,000 respectively.

The crucial skills independent creatives and freelancers need to improve are business skills, and one respondents indicated:

> "Freelancers need to understand that their specialisation is in either IT (coding) or design (graphics), there is confusion between IT and design at the moment."

Marketing & promotion, community engagement and project management are priorities for digital training.

FUNDING & SUPPORT

Four key suggestions were made towards what support government and industry bodies could provide to plan and address future workforce and skills needs:

- Funds for innovation and start up
- Set award wages
- Support for digital right management and damage control
- Offshore sales assistance

Neither respondent knows what types of qualifications area available under the VET system nor understand what funding opportunities are available to train their employees under the State Government's new Skills in the Workplace initiative.

Unlike other sectors 'lack of funding' is not a barrier to the Software Development and Interactive Content sector. The main barrier is:

> "We can't find training with the right content"

SUPPORT AGENCY & ORGAN!SATION

Support Agency or Organisation

Sector Key Messages

This sub-report aims to provide key messages about the Support agency or organisation for the arts, cultural and creative sector of the Arts, Creative and Cultural industries in South Australia. This is achieved by comparing responses from those who work in the Support agency or organisation for the arts, cultural and creative sector to the overall responses to the *Your Creative Futures* survey.

	Respondents	% of overall Respondents
Individuals	50 of 722	7%
Small to Medium	9 of 128	7%
Large	3 of 36	8%

The scope for each sector snapshot is predominantly based on the occupations aligned to relevant training packages from the Arts, Creative and Cultural Industries. To capture those occupations that fell outside of these areas the following sectors were added: 'Support Agency & Organisations', 'Writing Publishing & Print Media', 'Advertising and Marketing', 'Software Development & Interactive' and 'Integrated Design & Built Environment'.

The self-subscribing nature of the survey means people aligned their occupation or area of work to one sector based on their interpretation even though they may work across several. For this reason some occupations have appeared in multiple sectors e.g. Graphic designers may be represented in Visual Arts, Craft and Design, Advertising or Integrated Design and Built Environment.

The Support Agency or Organisation data includes various organisations, association and government departments that support the creative industries. Areas of work include arts management and administration, finance, cultural & community development, aboriginal arts, programming, project management and event management.

SUMMARY

- A high proportion of individuals in this sector do not have an arts practice or do creative work.
- Individual respondents indicate employment in this sector is more secure than the overall creative industry average with more individuals in full-time employment, and individuals earn more than the creative industry average.
- Small to medium businesses have a higher average annual turnover than the overall average.
- Large organisations average annual expenditure on professional development is lower than the creative industry average.
- Organisations identified they need training, advocacy tools, confidence in future income, and clear award rates of pay for arts workers to plan for future workforce needs.

A joint project between the Arts Industry Council of South Australia and Service Skills SA with funding provided by the Industry Skills Development Directorate of the Department of Further Education, Employment, Science and Technology, Innovation and Business Skills Australia and Service Skills SA.

Individual Survey Responses

DEMOGRAPHICS (AGE, GENDER, ETHNICITY)

A higher proportion of individuals in this sector identify as a professional artist, creative, cultural or arts worker, (84% compared to the 65% creative industry average).

The age demographic differs slightly from the creative industry average, with more individuals in the 60-64 year age bracket (10% compared to 5% overall), and fewer in the 25-29 year bracket (6%, compared to 16% overall).

The proportion of females in this sector is higher than the creative industry average (74% compared to 62%) and the percentage of individuals who identify with a specific ethnic or cultural group is lower (4% compared to 10% overall).

WORK OVERVIEW

26% of individuals in this sector do not have an arts practice or do creative work, many more than the overall average of 7%.

No respondent identified their primary function to be Creation, 51% of individual responses overall identified their primary role to be Creation. The primary function of respondents in this sector are:

- Management
- Project Management
- Administration.

Data indicates that employment in this area is more secure.

73% of respondents in this sector are 'an ongoing employee', of any business; the overall figure is 57%. 71% of respondents have full-time employment compared to 49% overall, and 3% indicate their primary employment was on a casual basis, much less than 17% overall.

Individuals in this sector are less likely to have an ABN (60%, compared to 75%) and 96% do not use an agent, gallery or dealer or are registered for GST.

A higher proportion of respondents have worked in this area for longer (33%, compared to 23% overall), and fewer individuals have worked for less than 5 years ((12% compared to 27% overall).

Data indicates a higher proportion of individuals earn more in this sector with 47% earning between $50,000-75,000 (19% overall) and 11% earning less than $10,000 (compared to 37% overall). Respondents indicate the average percentage of income derived from the arts, cultural and creative sector is 91% in this area, higher than 65% overall.

TRAINING AND PROFESSIONAL DEVELOPMENT

The amount of training and professional development individuals undertook in the past 12 months:

- 22% undertook between 6-10 hours (10% overall)
- 0% undertook between 11-15 hours (7%) overall)
- 11% have undertaken between 16-25 hours (6% overall).
- 35% have undertaken more than 25 hours (41% overall).

How training and professional development was predominantly conducted through:

- Conferences seminars or forums
- Learning on the job
- In-house training course.

27% in this area paid for the training or professional development in full or in part (much less than 54% overall). It appears more respondents are prepared to cover less of the cost of training to improve their skills, 54% indicate they would be prepared to pay ‘less than 50%’ (43% overall), and 10% are prepared to pay 100%, (18% overall).

More respondents have heard about ‘Skills for All’ in this sector, (54% compared to 28% overall).

EMPLOYMENT CONDITIONS

82% are employed by an arts, cultural or creative business (compared to 49% overall).

8% cite ‘wages not high enough as a factor that would have the most influence over whether they left an employer, (compared to 16% overall).

More employers offer ‘time off for personal matters’ in this sector (35%, compared to 25% overall).

SKILLS

If there is subsidised training available, the top three areas that would help individuals careers the most are:

- Business planning skills
- Digital technologies
- Project Management.

Individuals in this sector would prefer to gain skills in the following way:

- Short course, workshop, summer school
- Formal training program or an accredited course
- Mentoring, coaching, job shadowing.

Small to Medium Survey Responses

EMPLOYMENT CHARACTERISTICS

When asked how many people they currently employ data indicates nine organisations combined employ 40 individuals. When these organisations are subsequently asked to indicate how individuals are employed, data indicates they employ 57 individuals combined.

Data indicates a higher proportion of females work in this area than the creative industry average (63%, compared to 53% overall). Larger proportions in this area are employed part time. (53%, compared to the overall creative industry average of 32%).

Of nine organisations, one has not entered any employment data, and two indicate they have no employees.

58% indicate they have an average turnover between $500k-$5million (compared to 15% overall).

Dominant functions or roles critical to these organisations success are:

- Leadership
- Project management
- Marketing
- the passion of our volunteers.

Three organisations indicate they will require additional positions in three years time, predominantly in administration and community engagement.

The main barriers to hiring staff are 'wages or remuneration not competitive' and 'cannot find staff with the appropriate skills, experience' which are both in line with the overall data. The other factor in this sector is 'type of work not perceived well.' (57% compared to 12% overall).

A higher proportion of organisations in this sector conduct exit interviews (83%, 45% overall).

SKILLS DEVELOPMENT

Two organisations indicate they are facing or predicting labour or skill shortages in management and community engagement currently or in the coming year.

Seven organisations identified they need training, advocacy tools, confidence in future income, and clear award rates of pay for arts workers to plan for future workforce needs.

More respondents in this sector expect 'types of organisations' to be significantly different for the arts, cultural and creative industries in the next three years. (53% compared to 14% overall).

The key external factors impacting on the industry are in line with the overall data, largely:

- Economic climate
- Government funding, support and policy
- General community (business and private) attitudes to the arts and philanthropy; and government attitude to collaborative arts projects.

'No-one to supervise apprentices or trainees' is the main reason small to medium organisations in this sector aren't able to offer training contracts. (50%, 21% overall).

The average annual expenditure on professional development combined is $24,000. The lowest spend indicated is $0, and the highest is $15,000, the average is $4000. This is lower than the overall creative industry average of $5,452.

Five respondents indicated current skills gaps in their organisation are arts administration, project management, business management, community engagement, online marketing, teachers and *'experienced project managers used to working with at risk communities'*.

The sixteen priority areas for training and up skilling staff indicated by four organisations fall into the top ten skills identified in the overall data, plus training in financial and database software, grant writing and photography.

Specific roles considered a priority for training in digital literacy by six organisations.

- Community engagement
- Project Management
- Creation

FUNDING & SUPPORT

Four organisations outlined the kind of support that could be provided by government and industry bodies help plan and address future workforce and skills needs:

- Tax reduction
- Advocacy to promote the value of the arts
- Training.

> "Arts training needs an overhaul. Trained artists have a big emphasis on creativity. However, there needs to be a focus on business, business planning and management skills, OHS practices and training on how to lead community-based projects. Some artists have the skill set yet need to develop the confidence to lead community-based projects."

87% expect funding sources will have the most significant impact on their organisation (37% overall).

Large Survey Responses

EMPLOYMENT CHARACTERISTICS

Two organisations indicate they employ 187 individuals, a higher proportion of these are female compared to the overall creative industry average (71% compared to 57%).

All three organisations are a government agency or statutory authority. None indicated productivity had decreased over the past year, with two of the three respondents citing an increase due to new enterprise bargaining agreements, organisational restructure, and additional programs and activity.

One organisation was able to approximate the total labour cost as 30% of turnover.
All have formal HR databases and processes in place.

No organisation indicated they employed staff on a casual basis.

Two of the three respondents indicated aging was not a significant factor.

> "The main issue for our workforce is the high number of women, which means a lot of maternity leave when they have children.

All of the organisations use newspaper ads to seek staff.

No organisation has had difficulty finding suitable applicants for positions.

Two of three organisations have strategies in place to attract indigenous workers and workers with disability by actively seeking funded positions and specific support programs.

All organisations conduct exit interviews with staff and indicate retirements will hit hardest in more than 5 years.

They have all employed apprentices or trainees under a formal contract of training to fill job openings.

Morale is predominantly high.

> “Led by a great CEO who has developed a clear and shared direction with the team, there are new programs and a high sense of achievement. The organisation is vibrant and dynamic.”

SKILLS DEVELOPMENT

Information to help plan for future workforce needs is:

- Clear long term framework of government priorities
- A skills network
- Benchmark information, and data and reports around demographics and trends in the arts.

All respondents said it is not currently available.

Two organisations expect business climate will have the most impact on their organisation. The other organisation expects it will be change of government. The effect this will predominantly have will be increased competition; one organisation outlined the impact of the NBN.

> “The NBN will provide new opportunities for how we deliver our service. It will enable a more focused view, a bigger emphasis on regional SA, which will generate more interest and partnering opportunities.”

The average annual expenditure on professional development is $24,500, lower than the overall average of $39,122. Each organisations spend is $13,500, $10,000 and $50,000.

One organisation listed the following current skills gaps:

- technical production, business development, management and leadership skills, marketing, contract management, IT skills.

Each organisation indicated they used all of the training methods listed to train their staff with the exception of online training, and the addition of interstate and international travel.

Barriers to training are predominantly access to funding and new technologies and:

- Prohibitive cost of conferences and travel
- Workload too high
- Lack of demand.

The crucial skills independent creatives and freelancers need to improve are in line with the overall data:

> “Artists need to be equipped with good business acumen.”

Specific roles two organisations consider a priority for digital training.

- Administration
- Management
- Events
- Marketing and promotion
- Community engagement
- Information technology.

FUNDING & SUPPORT

Three organisations suggested how government and industry bodies could provide support to help plan and address future workforce and skills needs:

- *Advice and information around economic and demographic trends, (current and localised)*
- *Broad bipartisan support for the arts*
- *If the government allowed greater flexibility in the recruitment process we could draw from a larger and sometimes more appropriate pool of people*
- *Artists need to be trained with better business acumen, communication and organisation skills, also better informed about council practice and culture.*

Two of the three respondents do not understand what funding opportunities are available under the Skills in the Workplace initiative.

Priority training areas for staff if funding is available was indicated by two organisations:

- Skills in team work and communication
- IT skills
- Management skills
- Production and technical skills.

VISUAL ARTS, CRAFT & DES!GN

CREAT!VE FUTURES

Visual Arts, Craft & Design

Sector Key Messages

This sub-report aims to provide key messages about the Visual Arts, Craft & Design sector of the Arts, Creative and Cultural industries in South Australia. This is achieved by comparing responses from those who work in the Visual Arts, Craft & Design sector to the overall responses to the *Your Creative Futures* survey.

	Respondents	% of overall Respondents
Individuals	157 of 722	22%
Small to Medium	29 of 128	23%
Large	3 of 36	14%

The scope for each sector snapshot is predominantly based on the occupations aligned to relevant training packages from the Arts, Creative and Cultural Industries. To capture those occupations that fell outside of these areas the following sectors were added: 'Support Agency & Organisations', 'Writing Publishing & Print Media', 'Advertising and Marketing', 'Software Development & Interactive' and 'Integrated Design & Built Environment'.

The self-subscribing nature of the survey means people aligned their occupation or area of work to one sector based on their interpretation even though they may work across several. For this reason some occupations have appeared in multiple sectors e.g. Graphic designers may be represented in Visual Arts, Craft and Design, Advertising or Integrated Design and Built Environment.

Visual, Arts Craft and Design data captures those in traditional visual arts and craft areas but also includes people who work in various design and arts administration roles.

SUMMARY

- A high proportion of individuals with a creative function are operating independently.
- 2% of respondents in this sector are of Aboriginal origin.
- Individuals in this sector are prepared to cover a higher percentage of cost of training or professional development.
- This sector is significantly more aware of the VET system than the creative industries average.
- Employment in small to medium organisations appears to be more stable than the overall creative industries.
- Skills development priorities focused on marketing, IT, general administration, business skills and cultural leadership.

A joint project between the Arts Industry Council of South Australia and Service Skills SA with funding provided by the Industry Skills Development Directorate of the Department of Further Education, Employment, Science and Technology, Innovation and Business Skills Australia and Service Skills SA.

Individual Survey Responses

DEMOGRAPHICS (AGE, GENDER, ETHNICITY)

There are no significant differences between the visual arts, craft and design sector and the sector as a whole.

WORK OVERVIEW

There are fewer individuals who identify as professional (53% compared to 65% overall), and there are more hobbyists seeking to increase the financial return from their creative practice (17% compared to 9%).

75% of respondents' primary function is creative, considerably higher than 51% of the overall individual data average.

30% of individuals have not had an employer (more than the overall average of 16%), and 7% have had 15 or more jobs, (less than 17% overall).

The average percentage of income respondents derive from their work in the arts, creative and cultural sectors in this area is 55% (overall average is 66%).

TRAINING AND PROFESSIONAL DEVELOPMENT

More individuals made a higher contribution towards training than the creative industries as a whole with 39% paying in full (compared to 28%) and only 34% not making a contribution (compared to 46% overall).

38% indicate they have undertaken no training or professional development in the past 12 months and it appears individuals in this sector are prepared to cover a higher percentage of the cost of training (32% indicate 'less than 50% compared to 43% overall), and 30% are prepared to pay 100% (compared to 18% overall).

EMPLOYMENT CONDITIONS

There are no significant differences between the visual arts sector and the sector as a whole. Only 6% cite 'lack of challenging work' as a factor that would have the most influence over whether they left an employer, compared to 17% overall in the creative industries.

SKILLS

There are no significant differences between the visual arts sector and the sector as a whole.

Small to Medium Survey Responses

EMPLOYMENT CHARACTERISTICS

Twenty-nine respondents employ 96 individuals. 68% of these are female.

42% of the organisations have an average turnover less than $50,000.

Productivity over the past year has increased for 52% of the organisations, slightly below the overall average.

There has been no significant change to the status or types of employment in 91% of organisations.

70% indicated marketing, community engagement, member or customer services were the most critical roles or functions to the success of small to medium organisations in this sector (compared to 53% of small to medium respondents overall). Creative roles or functions were also seen as critical (55% compared to 36% overall).

SKILLS DEVELOPMENT

18% are facing labour or skill shortages, less than 32% overall. The four organisations indicated skills shortages are across all roles, predominantly creation and administration.

55% are not expecting to hire additional staff over the next three years (24% overall). 30% are not expecting to replace workers who leave in the next 12 months (15% overall).

A higher proportion is aware of the types of qualifications under the VET system (47%, 27% overall).

Average annual expenditure for small to medium respondents in this sector on professional development is $4,750; the average across all sectors is $5,452. The lowest spend was $0 and the highest spend $25,000.

The primary current skills gap indicated by four of thirteen organisations is marketing and promotion (31%). Other skills gaps included: Information and communication technology; finance; training and teaching.

How small to medium visual arts organisations train staff is largely consistent with the overall data, it does indicate that a higher proportion learn on the job (83% compared to 74%) and through mentoring, coaching and job shadowing (72% compared to 59% overall). 56% of small to medium respondents in this sector trains through self directed or self-taught, and short courses, workshops and summer schools.

The crucial skills independent creatives and freelancers need to improve are predominantly business skills and '*a sense of professionalism.*' English literacy and numeracy, documentation, creative and communication skills are also highlighted.

> "Artists need to be confidently aware of who they can turn to for information and advice in regards to artists' rights, the business of galleries (pricing, consignment vs out-right selling). If artists don't have this information, some will be continually exploited and treated unfairly."

“Would love to see Aboriginal people developing the skill set required to run their own art centre or commercial gallery. It would be deeply meaningful and valuable for all involved, for community members to be leading their own arts centres and commercial galleries.”
“The art centre becomes more important to the community each year as the opportunities for personal development and careers continue to be a problem in remote Aboriginal communities.”

“Elders who collaboratively manage the Coop are not getting younger therefore there's an immediate needs of training the younger ones.”

“Aboriginal arts workers from within their own communities would greatly benefit from professional development and learning opportunities. These people stay in their community for the long term. This is a different trend to the arts centre managers who are usually not from the community, who stay for a much shorter length of time. There is currently not one Aboriginal manager running their own centre. It would take an intense and dedicated process to see a change, spanning many years, this would be a generational change.”

FUNDING & SUPPORT

Support that could be provided by government and industry bodies to help plan and address future workforce and skills needs:

- Funding support or subsidised training
- Funding for attachments, interns, secondments and mentoring
- Entrepreneurial, business, and governance.

Additional suggestions include policy information, sales forecasts and demographics, and long term funding commitment.

50% cite ‘funding sources’ as having the most impact on their organisation, and 52% expect to be negatively affected. This issue is highlighted by the following quote:

“Without immediate financial assistance from funding sources, the Coop will cease to exist and this will have a huge negative impact to the artists and their family. The Coop is the only one in the district who provide ongoing training for emerging artists and providing school holiday arts program.”

The key external factor impacting on the industry is government funding, support and policy (79% compared to 26% overall). The next highest external factor chosen by respondents at 43% was the business market. This is also very high when compared to the overall creative industries respondents at 13%.

Large Survey Responses

EMPLOYMENT CHARACTERISTICS

Three organisations employ 121 individuals, there is a higher proportion of females working in this area than across the creative industries (66%, compared to 57% overall).

The total labour cost as a percentage of turnover is 35%, less than the overall average of 53%.

A higher proportion of employees work full or part time (82%) compared to the overall creative industry average (50%).

Predominant roles are creation (28%), Events, marketing and promotion, community engagement, member or customer (22%), and Information technology, production or technical (19%).

Specific functions or roles critical to success:

- Studio heads, creative directors
- Financial, administration, facilities and storage management
- Curatorial and scholarly grunt
- All are reliant on each other.

One organisation indicated they are planning to hire between 5-10 additional staff over the next three years in the areas of creation, administration, events, and information and communication technology.

None of the organisations indicated they have had difficulty finding suitable applicants.

SKILLS DEVELOPMENT

All three organisations have integrated workforce planning into their business plan.
Two respondents are currently facing labour or skills shortages in all areas. Additionally highlighted in ‘other’ was *cultural leadership* and *practical experience*.

> “We aren't facing labour or skills shortages in specific roles, but skills that can be light on are gained from practical experience. Government administrative processes, experience working in a large organisation and understanding of processes, and refined interpersonal skills.”

Two respondents believed their organisation would face issues as a result of an aging workforce and need to develop knowledge management to avoid loss of institutional knowledge and history.

> “Elders that are looking to retire will cause significant gaps in cultural leadership.”

To help plan for future workforce needs the following suggestions were made towards support government and industry bodies could provide:

- Industry bodies could lobby and promote the benefits of the arts to the community
- The government needs to commit to supporting the arts for the long term
- Funded training and professional development opportunities for people at all levels of their career.

> “Funding to support training placements and projects within organisations. Funded local and international exchange placement opportunities for professional development at all levels.”

Three organisations identified current skills gaps as business and leadership & teamwork.

One organisation predicts digital literacy will be a skills gap in 2-5 years:

> “Curators need to be comfortable with technology, IT and AV roles need constant skills updating, also digital archiving.”

Three respondents have a combined expenditure on professional development of $59,700. This averages $19,900 per respondent, but it does not give a clear picture as one respondent expends $45,000 alone. The remaining expenditure is $6,700, and $8,000 respectively. The $19,900 average is significantly less than the creative industries average for large organisations of $39,122.

The top priority areas to help retrain and upskill staff if funding was available:

- General skills
- Business skills
- Self-management

> “Records management, designing and writing a brief, consulting skills, collaborative practices, interpersonal skills, effective teamwork, basic communication, basic understanding of government practices, policies and processes.”

Two organisations identified the following crucial skills independent creatives and freelancers they engage with need to improve:

- understanding, following and sticking to a brief
- ability to write in clear simple English and posses good grammar
- work ethics, teamwork, collaborative skills.

WRITING, PUBLISHING & PRINT MED!A

CREAT!VE FUTURES

Writing, Publishing & Print Media

Sector Key Messages

This sub-report aims to provide key messages about the Writing, Publishing and Print Media sector of the Arts, Creative and Cultural industries in South Australia. This is achieved by comparing responses from those who work in the Writing, Publishing and Print Media sector to the overall responses to the *Your Creative Futures* survey.

	Respondents	% of overall Respondents
Individuals	45 of 722	6%
Small to Medium	2 of 128	2%
Large	2 of 36	6%

The scope for each sector snapshot is predominantly based on the occupations aligned to relevant training packages from the Arts, Creative and Cultural Industries. To capture those occupations that fell outside of these areas the following sectors were added: 'Support Agency & Organisations', 'Writing Publishing & Print Media', 'Advertising and Marketing', 'Software Development & Interactive' and 'Integrated Design & Built Environment'.

The self-subscribing nature of the survey means people aligned their occupation or area of work to one sector based on their interpretation even though they may work across several. For this reason some occupations have appeared in multiple sectors e.g. Graphic designers may be represented in Visual Arts, Craft and Design, Advertising or Integrated Design and Built Environment.

The Writing, Publishing & Print Media data includes authors, writers, publishers and journalists.

SUMMARY

- A high proportion of individuals earn less from their work in the arts, cultural and creative industries than the average of respondents across all sectors and all respondents in this sector indicated they have an arts practice or do creative work.
- Individuals undertake more training or professional development in this sector, however one small to medium business indicated annual expenditure on professional and staff development was $0.
- Large organisations have had difficulty finding suitable applicants for positions with the main barriers to hiring being the lack of experience and appropriate skills level of applicants.
- There is an urgent need to adapt to the digital environment of book production and online marketing for large organisations in this sector.
- Current skills gaps for large organisaitons are all related to digital literacy.

A joint project between the Arts Industry Council of South Australia and Service Skills SA with funding provided by the Industry Skills Development Directorate of the Department of Further Education, Employment, Science and Technology, Innovation and Business Skills Australia and Service Skills SA.

Individual Survey Responses

DEMOGRAPHICS (AGE, GENDER, ETHNICITY)

A lower proportion of individuals in this sector identify as a professional artist, creative, cultural or arts worker, (50% compared to 65% overall the whole creative industries), with a higher proportion identifying as 'semi-professional' (32% compared to 18% overall).
78% of respondents are female, higher than the overall creative industries at 62%.
0% do not have an arts practice or do creative work (7% overall), and a higher proportion spend less time on their creative work. 29% spend between 10-19 hours per week, (compared to 18% overall); and 20% spend more than 38 hours per week (compared to 31% overall).

WORK OVERVIEW

65% identify their primary function to be creation. Other primary functions are:

- 'Other', predominantly made up of teaching
- Have a creative role outside these industries
- Marketing and promotion

96% of respondents do not use an agent, gallery or dealer.

A higher proportion of respondents earn less from their work in the arts, cultural and creative industries than the average of respondents across all sectors. 23% earned between $1-$1,000 (compared to 10% overall); and 27% earned more than $25,000 (48% compared to the creative industry sector overall).

Respondents have had less employers when compared to the overall creative industries data 65% have had 0,1, or 2 employers, (compared to 41% overall); and 11% have had 6 or more, (compared to 37% overall).

TRAINING AND PROFESSIONAL DEVELOPMENT

31% hold a University Postgraduate Degree.
Data indicates individuals undergo more training or professional development in this sector with 12% undertaking none, (compared to 23% overall), and 51% undertaking more than 25 hours (compared to 41% overall).

The training and professional development was predominantly:

- Self directed or self taught
- Conferences, seminars or forums
- Short course, workshop or summer school

EMPLOYMENT CONDITIONS

A small proportion of respondents in this sector are employed by an arts, creative or cultural organisation (22%, compared to 49% overall). Of those, three respondents indicate morale at their workplace is low, or very low. This equates to 32% who indicated low morale in the writing, publishing and print media sector, higher than 14% of overall individual respondents.

Employment conditions appear to be reasonably consistent with the overall data.

SKILLS

If there is subsidised training available, the top three areas that would help individual's careers are:

- Artistic, creative or technical
- Digital technologies
- Marketing & business planning skills.

Individuals in this sector would prefer to gain skills in the following way:

- Short course, workshop, summer school
- Mentoring, Coaching or job shadowing
- Conferences, seminars and forums.

Small to Medium Survey Responses

EMPLOYMENT CHARACTERISTICS

Two organisations employ 11 individuals. Data indicates there is a significantly higher proportion of females (82%) working in this area when compared to the overall creative industry sector (53%).

Both organisations expect growth in the next 12 months and are currently facing labour or skill shortages in the area of creation.

They both list multiple roles as critical to success, Director, is the one they have in common.

One organisation is planning to hire four additional staff over the next three years in administration, finance, and project management. They also indicate they have had difficulties finding suitable applicants for these roles in the past.

Small to medium respondents in the creative industries overall have implemented three strategies each to retain existing workers, most common are flexible working hours, flexible practices, and family friendly policies and practices. In this sector one respondent indicates they have implemented recognition or reward programs, and 'other' which was specified as 'a structured working environment.'

SKILLS DEVELOPMENT

One organisation indicates $0 annual expenditure on professional and skills development for staff. They also indicate they train their staff through structured individual performance development plans, and it is self-directed or self-taught. They lack administration and HR skills because their organisation attracts creative types not interested in these roles.

One organisation needs business training to help plan and address workforce and skills needs.

Barriers to increasing the knowledge and skills of staff are:

- We don't have the resources to send staff away during business hours
- Access to funding for training
- Access to new technologies.

The crucial skills independent creatives and freelancers need to improve are:

- Business knowledge and awareness
- Sense of professionalism.

Specific roles considered a priority for training in digital literacy by one organisation.
- Administration
- Human Resources
- Finance

FUNDING & SUPPORT

The priority areas for staff training, if funding is available, were indicated by one organisation as:
- Business planning
- Database management
- Writing funding, grant application.

Funding sources are expected to have the most impact on both organisations; one respondent indicates they are '*dependent on it to develop business skills to grow the project.*'

Large Survey Responses

EMPLOYMENT CHARACTERISTICS

Two organisations employ 29 individuals, A higher proportion is employed full-time. (69%, compared to 36% of large organisations in the creative industries).

Neither organisations productivity has decreased over the past year.

The critical role for success specified by both respondents is sales. Also specified are *good interesting writing* and *digital literacy skills to adapt to a changing environment*.

Neither organisation identifies 'skills or labour needed in the future' as part of their workforce planning activities (compared to 77% overall in the creative industries). Neither organisation knows if the information they need to plan for future workforce is available.

Both organisations have had difficulty finding suitable applicants for positions; one indicates this was in the area of finance and management. The main barriers to hiring staff are that wages are not competitive, and the lack of experience and appropriate skill level of applicants.

These organisations are not able to offer training contracts because they don't know enough about them, and the non-productive time of apprentice and supervisor when training.

SKILLS DEVELOPMENT

One organisation is currently facing labour or skill shortages in marketing and promotion, information and communication technology, and production and technical. They also specify the urgent need to:

> "adapt to the digital environment of book production and online marketing so they remain viable."

Respondents indicate technology and markets will have the most impact on their organisaitons, some negative and some positive. They expect this will change product delivery, increase competition online, and create uncertainty around the retail environment and future partnership opportunities. This will lead to the need to employ more people with digital qualifications and experience, and a shift to becoming more retail focussed.

Key external factors impacting on the industry are the local economy, and a downturn in the retail sector.

Current skills gaps are all related to digital literacy, specifically:

- General and advanced digital literacy
- Digital sales training
- Software skills: excel, adobe system suite
- E-book production & e-publishing

The predicted skills gap in the next 2 to 5 years is ‘business analysis’ and ‘developing for growth.’

The average annual expenditure on professional development is $13,000, significantly lower than the average of $39,122 for large organisations overall. Each organisations spend is $6,000 and $20,000.

Common methods of training staff in this sector are

- In-house training courses
- Short-courses, workshops, summer schools
- Mentoring, coaching, job shadowing.

The barrier to training is common to both respondents isthey don’t know where to get the training they need.

The crucial skills independent creatives and freelancers need to improve are self-management, business, communication, and technical industry skills such as writing, sub-editing, research, proofing, grammar, and spelling. *Writers need to maintain their joy for language*.

Both organisations consider creation, and marketing and promotion a priority for digital training.

FUNDING & SUPPORT

Support that government and industry bodies could provide to help plan and address future workforce and skills needs are:

- Provide relevant training programs
- Ensure there are opportunities once students graduate
- Skills registry
- The availability of a business manager to help address our workforce needs.

Priority training for staff if funding is available is largely related to digital literacy:

- General and advanced digital literacy
- Digital sales training
- Software skills: excel, adobe system suite
- E-book production & e-publishing.

Other skills listed were business process and procedures, self-management and proofing.

> “Print media and street press are suffering, our audience is seeking information online, we are tightening up to make ends meet, to achieve budgets and stay alive.”

CREAT!VE FUTURES

APPENDIX A

SECTOR KEY MESSAGES

SOUTH AUSTRAL!A