CREAT!VE FUTURES REPORT

SOUTH AUSTRAL!A

Thank you

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South Australian Arts, Creative and Cultural Industries
Workforce Development Project
2013 Version 2.1
Produced by Service Skills South Australia

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.

Contents

Abbreviations and Acronyms

ABN	Australian Business Number
ABS	Australian Bureau of Statistics
AICSA	Arts Industry Council of South Australia
ANZSCO	Australian and New Zealand Standard Classification of Occupations
ARC	Australian Research Centre
AV	Audio Visual
CEO	Chief Executive Officer
DEEWR	Department of Education, Employment and Workplace Relations
DFEEST	Department of Further Education, Employment, Science and Technology
ESCAN	Environmental Scan
FTE	Full-Time Equivalent
GLARM	Galleries, Libraries, Archives, Records and Museums
GST	Goods and Services Tax
IBSA	Innovation & Business Skills Australia
MEAA	Media Entertainment and Arts Alliance
MEGA	Mobile Entertainment Growth Alliance
NBN	National Broadband Network
NFD	Not Further Defined
OHS	Occupational Health and Safety
PDV	Post, Digital and Visual Effects
RTO	Registered Training Organisation
SAFC	South Australian Film Corporation
SM	Small to Medium
SSSA	Service Skills SA
TAFESA	Technical and Further Education South Australia
VET	Vocational Education and Training
VFX	Visual Effects

EXECUT!VE SUMMARY

Background

The *Creative Futures Report* has been produced as an outcome of a project facilitated by the Arts Industry Council of South Australia (AICSA) and Service Skills SA (SSSA) with funding provided by the Industry Skills Development Directorate of the Department of Further Education, Employment, Science and Technology (DFEEST), Innovation and Business Skills Australia (IBSA) and SSSA.

With a focus on vocational education and training in South Australia the project aimed to effectively capture the essential skilling and workforce needs of the Arts, Creative and Cultural Industries (we will refer to these broad sectors throughout the report as ‘creative industries’) to enable better decision making by industry and the South Australian government who make a considerable investment in the arts. The major mechanism used to capture this data was the *Creative Futures* survey undertaken in September and October 2012 that engaged 886 respondents including large organisations (more than 10 Employees), small to medium businesses (less than 10 employees) and individuals. It also incorporates customised 2011 ABS Census Data, the DFEEST Workforce Wizard information and Innovation & Business Skills Australia (IBSA) training statistics. This statistical data has been used to reinforce the validity of the industry snapshot, the survey outcomes and the project findings and recommendations.

The significant body of data created by this project has the potential to inform sector workforce development and training requirements on both a state and national level. The project recommendations contain actionable priorities. These training related priorities are designed to be achievable within current funding opportunities. It is hoped further funding will continue the momentum created by this project.

Key Messages

- The creative industries are a significant employer with capacity for further growth.
- In order to achieve productivity gains the industry requires support to develop critical entrepreneurial skills and increase the capability of its workforce. Training and professional development outcomes for many in this sector are strengthening self employment prospects – supporting a career as a sole trader - rather than 'getting a job' with a guaranteed number of paid hours work each week.
- Evidence from the largest survey of the creative industry in South Australia since 1998 clearly indicates there are some common training priorities - a ‘skills set’ covering strategic business, marketing, financial and use of new technologies (these are additional to role or sector specific technical up-skilling requirements).
- Current publicly subsidised training provision does not best meet these specific needs and hence a facilitated collective approach bringing together a number of Registered Training Organisations (RTOs), with customised delivery strategies for different sectors will be required.
- This approach will require an entity or a group to build links between industry and the Vocational Education and Training (VET) sector. Training delivery should be supported by the use of industry credible mentors to build the capacity of RTOs.
- The creative industries have a sophisticated, well educated workforce, therefore training needs to be at the appropriate level and the marketing and delivery of any programs needs to be contextually astute.
- While there are some commonalities across the industry, sector specific variations will require specialised solutions, not a ‘one size fits all’ approach.

> “The arts and creative industries are fundamental to Australia’s identity as a society and nation, and increasingly to our success as a national economy.
>
> *(2011:4) Simon Crean, Federal Minister for the Arts, The National Cultural Policy Discussion Paper*

Findings

ABOVE TREND GROWTH

Data provided in the 2012 IBSA Environmental Scan indicates that the South Australian creative industries had approximate revenue of $1.34 billion in the year 2010-2011. There is currently no data available detailing the percentage of the South Australia Gross State Product provided by the creative industries. However in 2012 South Australia’s 10 major arts festivals alone delivered “new expenditure estimated at $62.9 million in new incomes, and the creation of 790 full time equivalent jobs (of course many of these jobs are part time and short term in nature). [1]” Households in South Australia spent an average of $37.67 per week in 2009–10 on ‘cultural’ items according to the ABS 2011 Household Expenditure Survey.

Between 2004 and 2011 there has been a steady increase in attendance from 3.9 to 8.6 million at selected arts activities including: Adelaide Festival of Arts, Adelaide Festival of Ideas, Adelaide Film Festival, Adelaide Fringe, Adelaide Festival Centre Trust activities, Cabaret Festival, Come Out Festival, Country Arts SA activities, JamFactory, South Australian Living Artists Festival, Carclew Youth Arts activities and WOMADelaide.

This growth in attendance is matched by employment growth. According to the 2011 ABS Census data there are a total of 14673 workers (who identified their main occupation as being) in the South Australian creative industries, which is representative of 88 occupations. Data from the *Creative Futures* individual survey indicates approximately 35% of respondents had their creative work as a secondary source of employment. While there are many variables which could be at play, one could estimate the size of the SA Creative Industries closer to 22,574 or 2.8% of the South Australian workforce are engaged in the creative industries.

Employment growth has been 7.5%, higher than the SA average of 5.3%. This growth is occurring nationwide. Newly analysed data from the 2011 census shows that Australia’s creative employment has grown from 463,500 people in 2006 (5.1 per cent of the workforce) to 531,000 people in 2011 (5.3 per cent).

> “This is well above the rate of growth in the Australian workforce in general – and it confirms the trend evident in the past two decades: that the creative sector is rapidly emerging as an economic force to be reckoned with. Creative professionals now outnumber mining sector employees three-to-one, and those of agriculture fishing and forestry two-to-one.”
>
> *Professor Stuart Cunningham, director of the ARC Centre of Excellence for Creative Industries and Innovation (CCI) at the Queensland University of Technology.*

While there has been good growth in the creative industries overall, this is not reflected equally across all job roles. Employment in the ‘traditional arts roles’ such as those producing artefacts grew at only half the rate of the general workforce. The growth is in creative services, or business-to-business creative activity, where individuals and organisations are finding their services are wanted not just by others within the creative industries, but also those in the broader economy.[2]

This change is being driven by the digitisation of the Australian economy[3], and is therefore likely to provide sustainable employment growth if workers have the skills to operate in this new environment. Both the traditional and newer creative sectors are being transformed by digital technology, and opportunities related to digital technologies will increase further with the rollout of the National Broadband Network. Digital technologies are having a major impact on business practices, marketing and distribution of content, and this has real implications for skilling and workforce development.

1. The Economic Contribution Of Festivals Adelaide In 2012, Prepared by Barry Burgan, December 2012
2. Australian Creative Economy Report Card 2013, ARC Centre of Excellence for Creative Industries and Innovation (CCI)
3. Australian Creative Economy Report Card 2013, ARC Centre of Excellence for Creative Industries and Innovation (CCI)

OLDER HIGHLY EDUCATED WORKFORCE

In South Australia 58% of the creative industries workforce is employed full time and over 84% resides in metropolitan Adelaide. The workforce is older - nationally the industry has higher numbers of people from younger age ranges, up to and including 30-39 years of age, while SA has higher numbers in the 40+age ranges. This has implications for workforce planning and 62% of large organisation survey respondents believed their organisation would face issues as a result of ageing. Most cited the loss of a wealth of corporate history and knowledge as a major issue with succession planning being inadequate. This is not just an issue for large organisations, across 34 small to medium organisations, nearly ninety FTE employees retired, more than half the total number of employees who left in the past 12 months.

Workers also have higher qualification levels, with a greater percentage of workers holding at least Diploma level qualifications (77%) than the SA all industries average (61%).

DEMOGRAPHICS

The 2011 ABS Census data indicates there were 157 Indigenous people in the SA creative industries, 1% of the SA creative industries workforce. 3% of *Your Creative Futures* individual Respondents indicated they were of Aboriginal and or Torres Strait Islander origin.

86% of individual survey respondents indicated they were based in the Adelaide Metropolitan region, 9% in Greater Adelaide and 5% in regional SA. All large respondents were based in the Adelaide metropolitan region bar one, which was based in Greater Adelaide, and 79% of small to medium respondents were based in the Adelaide Metropolitan region, 10% in Greater Adelaide and 11% in Regional SA.

Overall there is a relatively even gender split (48% male to 52% female), but there are significant sector variances, for example, the Museums, Libraries and Information Services workforce is predominantly female (84%), while Screen and Media has a predominantly male workforce (69%). Gender split is a good example of significant variances between the sectors, and highlights the danger of a ‘one size fits all” approach to the industry’s workforce development.

VOCATIONAL EDUCATION UPTAKE

Training currently appears to be located predominantly in the higher education sector, with a nearly 30% increase in courses related to the creative industries since 2005. In 2011 there were 2,235 enrolments (3.6% of all higher education). Between four Universities (University of Adelaide, University of South Australia, Flinders University and Charles Darwin University) there are 157 degrees related to the creative industries.

This contrasts with the VET sector – SA uptake is at around half the rate that could be expected based on population size, and only 1% of SA VET students are undertaking creative industries related courses, yet workers in the creative industry make up between 2.2–3% of the SA workforce. While it isn't possible to make a firm conclusion, as there are other variables that impact this finding, it suggests there is opportunity for the sector to access VET level training at a greater rate.

There are seven Training Packages, containing 114 qualifications covering the creative industries. While 75 Registered Training Organisations (RTOs) have these qualifications on scope to deliver within South Australia, it appears that only 14 RTOs have delivered accredited training in the past two years, and 12 of these are registered as Skills for All providers.

BUSINESS RELATED SKILLS WITH EFFECTIVE TRAINING DELIVERY

Individual survey respondents cited business planning and development skills as the top priority for training (43%), followed by specific technical skills related to job role. Nearly 60% of individuals indicated that strategic on-line marketing and development was important to their success, yet nearly 70% of these individuals indicated they only had a low ability to perform this skill. These results are in sympathy with the findings of a national artsHub survey in 2012.

> "Many respondents recognised the value of business education for artists and wanted the opportunity to develop skills in marketing, social media, arts business management. Some suggested that should be a compulsory part of any creative arts degree."
>
> *Deborah Stone - artsHub*

Small to medium organisations cited marketing and promotion, IT and social media as their top priorities for staff training, while large organisations listed business skills and digital literacy as priorities.

Workers value training, it was the second highest rated employment condition behind flexible work practices, but meeting the cost of training is a major barrier across the creative industries:

- Financial factors were the largest barrier to skills development for individuals (63%),
- Access to funding for training was the most cited barrier to skill development (55%) for small to medium businesses and also for large organisations (43%).

Another issue is level of awareness around training options and funding opportunities. Over a third of individuals not knowing what training is available and nearly two thirds who don't know about the *Skills for All* initiative. 39% of large organisations are aware of *Skills in the Workplace* options, and 24% of large organisations have accessed VET funding, however this drops by half for small to medium businesses (12%). Again there a potentially other factors at play here, but increasing awareness of VET options would probably benefit upskilling efforts in the sector.

SUMMARY OF RECOMMENDATIONS

Ongoing stakeholder engagement and communication around the findings of this report will be what drives effective solutions to workforce issues it has identified. Accordingly there is an opportunity for the Minister for Employment Higher Education and Skills, and Premier as Minister for Arts to promote this report as a platform which supports the SA Government strategic priorities, particularly “Creating a vibrant city” and to emphasis the creative industries growing value to the economic future of the state.

There are a number of recommendations that relate to ensuring ongoing stakeholder engagement and communication. Given the varied scope and disbursement of the SA creative industries, any solutions will fail without effective communication and aggregation of needs and demand. The reality is that this takes facilitation and requires resources.

A renewed marketing focus around existing support for training and workforce development in the sector will raise the profile of this activity in the sector. AICSA, DFEEST, and the training sector all have a role to play in this.

A number of opportunities to pursue solutions to issues identified in this report have already emerged from the collaborative process of developing the report. A number of partnerships between AICSA, Service Skills SA, Adelaide City Council, IBSA, DFEEST, Arts SA, and the Australia Council for the Arts will be explored further over the next few months.

Data collated from the Your Creative Futures survey suggests a key focus of any training and up-skilling effort has to be new income generation and current income stream improvement for existing creatives and creative industries organisations. To address the critical skill needs, a ‘Creative Entrepreneur’ Skill Set should be designed which has the following components:

- Business development
- Marketing
- Finance and Taxation
- Project and Self management
- Digital Literacy

The development of business, marketing, digital literacy, and entrepreneurial skills is as important to the ongoing vibrancy of the sector as is the maintenance and improvement of technical skills. There are opportunities to provide greater availability of, and access to tightly targeted, contextualised training in these areas. Examples exist already of successful models in tested in recent times which could guide further developments in training sector capability, and innovative subsidy arrangements.

Financial and time barriers require the skilling strategy to be sophisticated, and the delivery methodology is critical. A collaborative approach between training organisations and a range of industry organisations utilising industry networks needs to be established. This will maximise economies of scale and training options for viable and cost effective delivery.

There are a number of issues and comments raised during the survey that do not fit into our recommendations. These will be of interest to a range of stakeholders and have been listed in the full recommendations section of this report.

!NDUSTRY SNAPSHOT

CREAT!VE FUTURES

Introduction

To ensure sustainable growth and a vibrant future in the Arts, Creative and Cultural Sectors it is imperative that both industry and government are provided with accurate data that reflects the flexible workforce characteristics of the industry.

The South Australian government make a considerable investment in the arts. In the 2112 and 2113 budget, $345million was allocated for recreation and culture. If we take recreation facilities and services out to more accurately reflect investment in culture, the figure is $178 million or 1% of the total state budget.[1]

Government investment in high profile venues, facilities and locations such as the Adelaide Festival Centre, Riverbank, Entertainment Centre and South Australian Film Corporation is progressing some of the infrastructure required to support the growth in festivals and other arts activities. We would also like to acknowledge the support DFEEST provides to the arts through the Elder Conservatorium of Music, Helpmann Academy and most recently Fab Lab Adelaide, Adelaide College of the Arts.

Facilitated by the Arts Industry Council of South Australia and Service Skills SA this project effectively captures the essential skilling and workforce needs data for the South Australian government. The major mechanism used to capture this data was the *Your Creative Futures* survey which engaged 886 respondents from the Arts, Creative and Cultural Industries, inclusive of large organisations, small to medium businesses and individuals.

The South Australian Arts, Creative and Cultural Industries Snapshot has been produced as an outcome of the Creative Futures Project. This snapshot has been devised to provide a comprehensive view of the industry by consolidating data from the *Your Creative Futures* survey, customised 2011 ABS Census Data, the DFEEST Workforce Wizard information and Innovation & Business Skills Australia (IBSA) training data.

With a focus on skills and training, the scope for each sector was predominantly based on the occupation outcomes aligned to relevant training packages, which included Music, Live Performance, Entertainment & Events, Museums, Libraries and Information Services and Screen And Media. An ‘Other’ category was created to capture those occupations that sat outside of these areas. Both the *Your Creative Futures* survey data and the 2011 ABS Census data has been aligned to these areas to make data comparisons possible.

The 2011 ABS Census Data was custom ordered and comprised 88 six digit occupational ANZSCO codes that captured those who identified their main occupation in the Arts, Creative and Cultural Industries. It should be noted that the ABS census data does not capture those who have secondary employment in the Arts, Creative and Cultural Industries, or those who work in the arts but in a non-specific arts occupation. It should be noted the data prepared for this report does not include ‘Not applicable’ or ‘Inadequately described / not stated’.

1. Data Source: Government of South Australia, Budget Statement 2012-2013, Budget Paper 3, Table A.16: General government sector expenses by function, p.137.

Industry size and value

There is currently no data available detailing the percentage of the South Australia Gross State Product provided by the Arts and Creative and Cultural industries. While the ABS does provide some data, the figure incorporates Sport and Recreational activities. At the time of this report, no government department was able to provide an indicative value of the creative industries to the South Australian economy. Hence the number of businesses and revenue figures have been extrapolated from national figures where South Australia is considered to represent 8% of the Australian population.

Based on ABS data[1] the number of SA Arts Creative and Cultural Businesses is 4614.

Data provided in the 2012 IBSA Environmental Scan indicates that the South Australian Arts, Creative and Cultural industries had an approximate revenue of 1.34 billion[2] in the year 2010-2011.

In 2011–2012 South Australia's share of Australian film and screen production was 4%, up from 3% in 2009–2010, with expenditure in SA being $19 million in the year 2010-2011.[3]

Using 2008 figures, Ernst & Young calculated that the South Australian Live Entertainment sector provided 7.3% of the sector's national economic contribution:

- SA Industry output (market value of goods and services) was $136.9 million
- Industry value (the market value of goods and services produced by an industry, after deducting the cost of goods and services used) was $73.4million [4]

Last year South Australia's 10 major arts festivals alone delivered a combined $62.9 million to the South Australian Economy[5].

1. Data Source: ABS Catalogue 8165.0 - Businesses by Industry Class by Main State by Turnover Size Ranges, 2010-11
2. Data Source: 2012 IBSA Environmental Scan – figures calculated from various 2011-2010 IBISWorld Industry Reports
3. Data Source: SA Strategic Plan Progress report 2012
4. Data Source: Economic contribution of the venue-based live music industry in Australia 2011 Ernst & Young
5. Data Source: The Economic Contribution Of Festivals Adelaide In 2012, Prepared by Barry Burgan, December 2012.

Total Employment

According to the 2011 ABS Census data there are a total of 14673 workers in the South Australian Arts, Creative and Cultural Industries, which is representative of 88 occupations (see appendix 1).

TABLE 1

Total Employment	# Occupations	# People	Percentages
Live Performance	6	687	5%
Other – Professional Writing	9	919	6%
Entertainment & Events	9	1106	8%
Music	8	1352	9%
Screen & Media	19	1781	12%
Museums, Libraries and Information Services	9	2372	16%
Other	11	2906	20%
Visual Arts Craft & Design	17	3550	24%
TOTAL	88	14673	100%

Source: ABS, Customised report, 2012

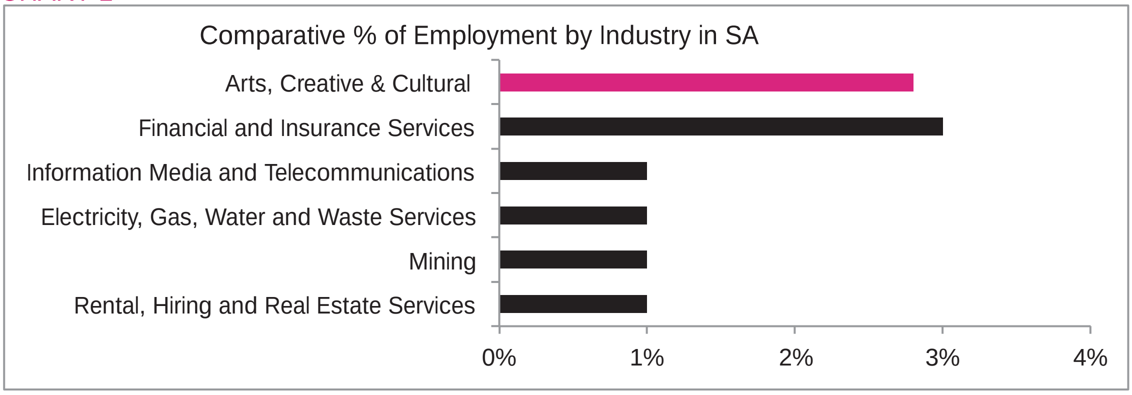
It should be noted that this data only captures those individuals who have identified this as their main occupation and it does not include those who work in the industry in a non-specific Arts, Creative or Cultural role. Recognising that many people also work part time and have multiple roles it is reasonable to suggest that this figure will actually be significantly higher.

"The size and significance of creative industries cannot be accurately measured by using the totals of a number of industry activity codes alone. As a result, we estimate previous studies have underestimated the employment impact of some creative sectors by up to 40%, and the pre-2006 versions of some industry classification systems produce significant errors in sizing, possibly up to 25%."

Source: Creative Industries Mapping: Where have we come from and where are we going?, Peter Higgs & Stuart Cunningham, Queensland University of Technology

In considering the data from the *Creative Futures* individual survey we can determine that approximately 35% of respondents had their Arts, Creative and Cultural employment as a secondary source of employment. While there are many variables which could be at play, one could estimate the size of the SA Creative Industries closer to 22,574 or 2.8% of the South Australian workforce.

CHART 1



Sources: ABS - Customised report, 2012, 'other industries' calculated by the DFEEST Workforce Wizard

Gender

As a total Industry figure the 2011 ABS Census data indicates an even gender split, similar to the SA Workforce Wizard report which indicates a 48% male to 52% female gender breakdown. However there are such significant variances in the gender split of each sector in the Arts, Creative and Cultural Industries that a total industry gender split figure is misleading. For example, the Museums, Libraries and Information Services workforce is predominantly female (84%), while Screen and Media has a predominantly male workforce (69%).

TABLE 2

SA Arts, Creative and Cultural Sectors - Gender Split	Male	Female
Live Performance	29%	71%
Other – Professional Writing	48%	52%
Entertainment & Events	69%	31%
Music	58%	42%
Screen & Media	69%	31%
Museums, Libraries and Information Services	16%	84%
Other	56%	44%
Visual Arts Craft & Design	54%	46%

Source: ABS, Customised report, 2012 – 2011 Census data

When we compare the Your Creative Futures Small to Medium business survey workforce gender ratios by industry sector we see very similar male to female ratios with Entertainment & Events, Music, Screen & Media and Museums, Libraries and Information Services being within a 10% variance of the above figures. However Live Performance and Visual Arts, Crafts & Design had greater variances with Live Performance having 15% more males and Visual Arts and Craft have 21% more females in the small business workforces.

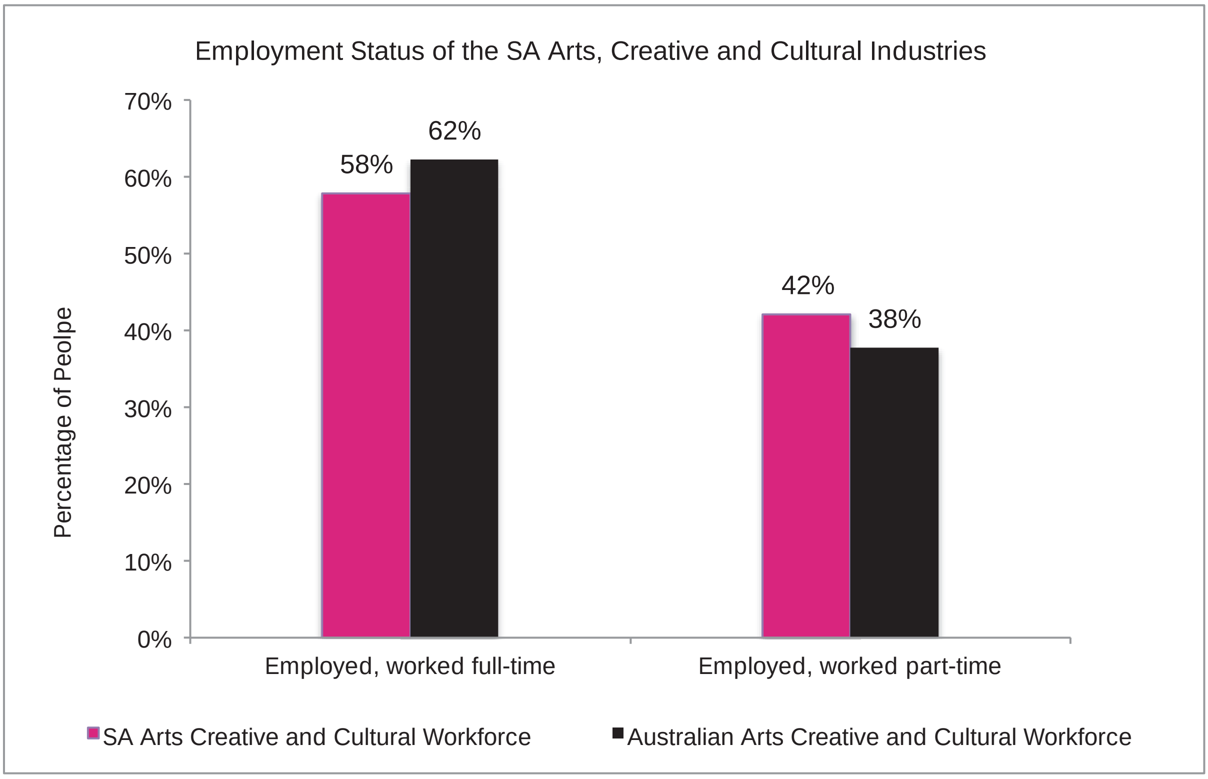
These variances are likely to be due to small business workforce characteristics of each sector. For example the ABS data has a high level of individual females involved in dance whereas small businesses in the Live Performance sector were more likely to have balanced gender split in their workforce.

Sources: ABS - Customised report, 2012, Your Creative Futures Survey – Individual, Workforce Wizard Occupation Report

Employment Status

The 2011 ABS census data showed that 58% of the SA Arts Creative and Cultural Industries employees were in full time employment, similar to 62% nationally. The *Your Creative Futures* Individual Survey results indicated 49% were in full time employment.

CHART 2



Source: ABS, Customised report, 2012 – SSSA has adjusted this data not to include, ‘Employed, away from work’ as employment status was not defined.

The table below breaks down the employment status totals into each sector. Live Performance and Music show a much higher level of part time work.

TABLE 3

SA Arts, Creative and Cultural Sector Employment Status	Full Time	Part time
Other	72%	28%
Screen & Media	71%	29%
Visual Arts Craft & Design	63%	37%
Other – Professional Writing	63%	37%
Entertainment & Events	54%	46%
Museums, Libraries and Information Services	47%	53%
Music	30%	70%
Live Performance	27%	73%

Source: ABS, Customised report, 2012 – This data does not include ‘Employed, away from work’ as employment status was not defined

Hours Worked

The 2011 ABS Census data shows that nationally 29% are working in excess of 49 hours per week, compared to only 13% of South Australians, however a greater number of South Australians work 40–48 hours (27%) compared to the national figures (19%).

CHART 3

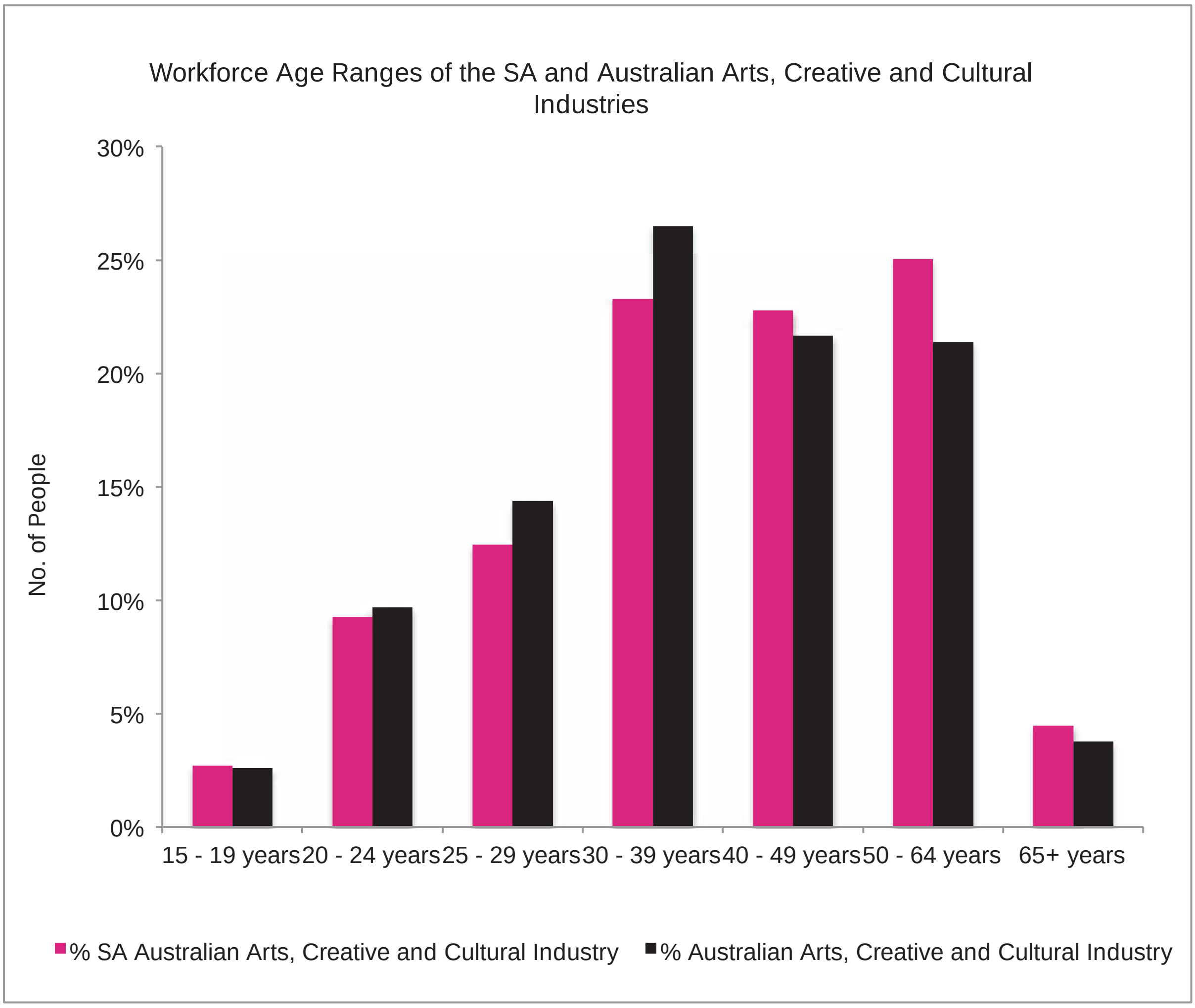
Source: ABS, Customised report, 2012 – 2011 Census data

While differences in the data presented in the two sources mean direct comparison is not possible, data from the Your Creative futures Individuals survey showed that 31% of the respondents are working between 1-19 hours per week, 32% are working 20-38 hours per week and 31% are working more than 38 hours per week. The remaining 6% did not have an arts practice or do creative work.

Age

The 2011 ABS Census figures show that over 50% of the South Australian Workforce is between 40 to 64 years of age. Nationally the industry has higher numbers of people from younger age ranges, up to and including 30-39 years of age, while SA has higher numbers in the 40+age ranges. This would indicate that the SA Arts, Creative and Cultural Industries are being impacted by the states ageing workforce.

CHART 4



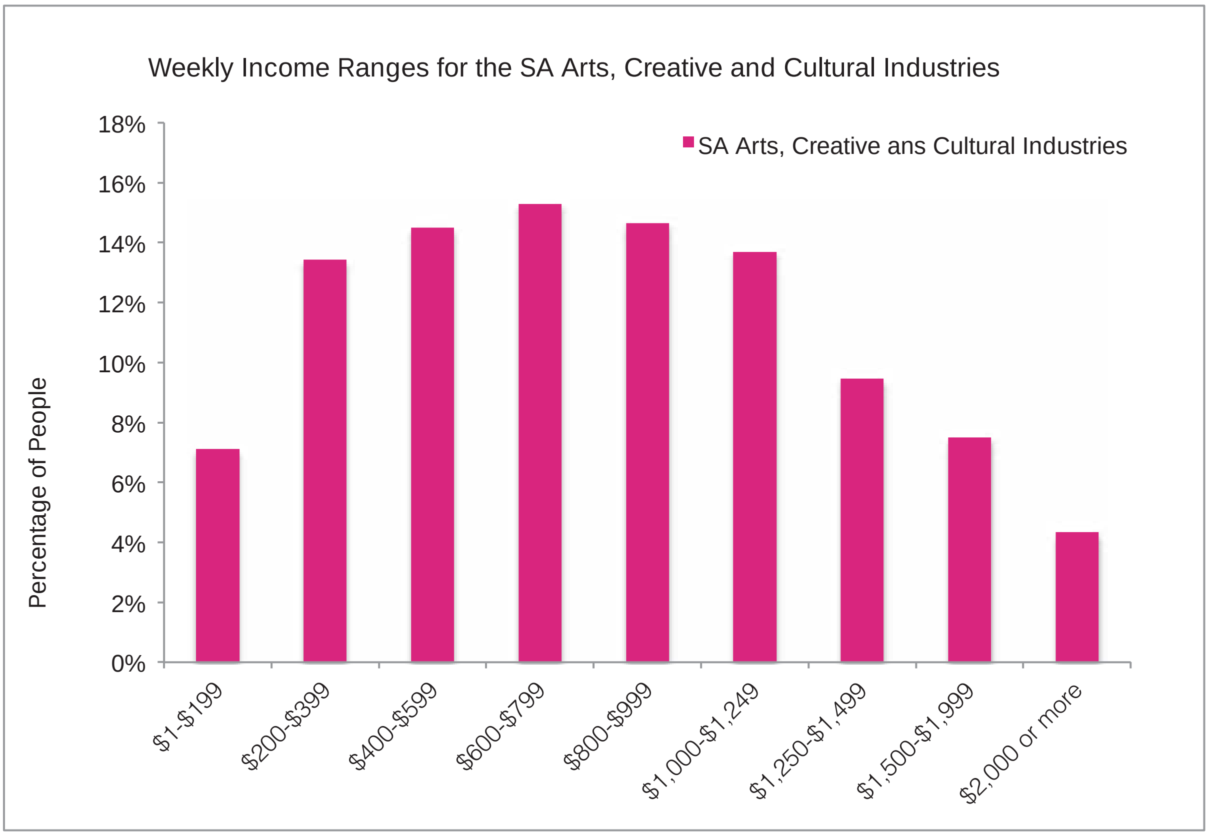
Source: ABS, Customised report, 2012 – 2011 Census data

The 2011 ABS Census age range percentages were almost identical to the age range results from the *Your Creative Futures* Individual Survey.

Weekly Income Ranges

Based on the 2011 ABS Census data over 64% of the industry is earning less than $1000 per week. This figure was mirrored in the *Your Creative Futures* individual survey data, which identified that 64% were earning approximately $50,000 or less per annum. Only 6% of the respondents from the *Your Creative Futures* Individual Survey identified they were earning over $75,000.

CHART 5



Source: ABS, Customised report, 2012 – 2011 Census data

TABLE 4

Weekly Income Ranges	SA Arts Creative and Cultural Industries	Australia's Arts Creative and Cultural Industries	SA All Industries
$1-$199	7%	6%	6%
$200-$399	13%	11%	11%
$400-$599	14%	12%	14%
$600-$799	15%	14%	17%
$800-$999	15%	14%	14%
$1,000-$1,249	14%	14%	13%
$1,250-$1,499	9%	10%	9%
$1,500-$1,999	8%	11%	10%
$2,000 or more	4%	7%	7%

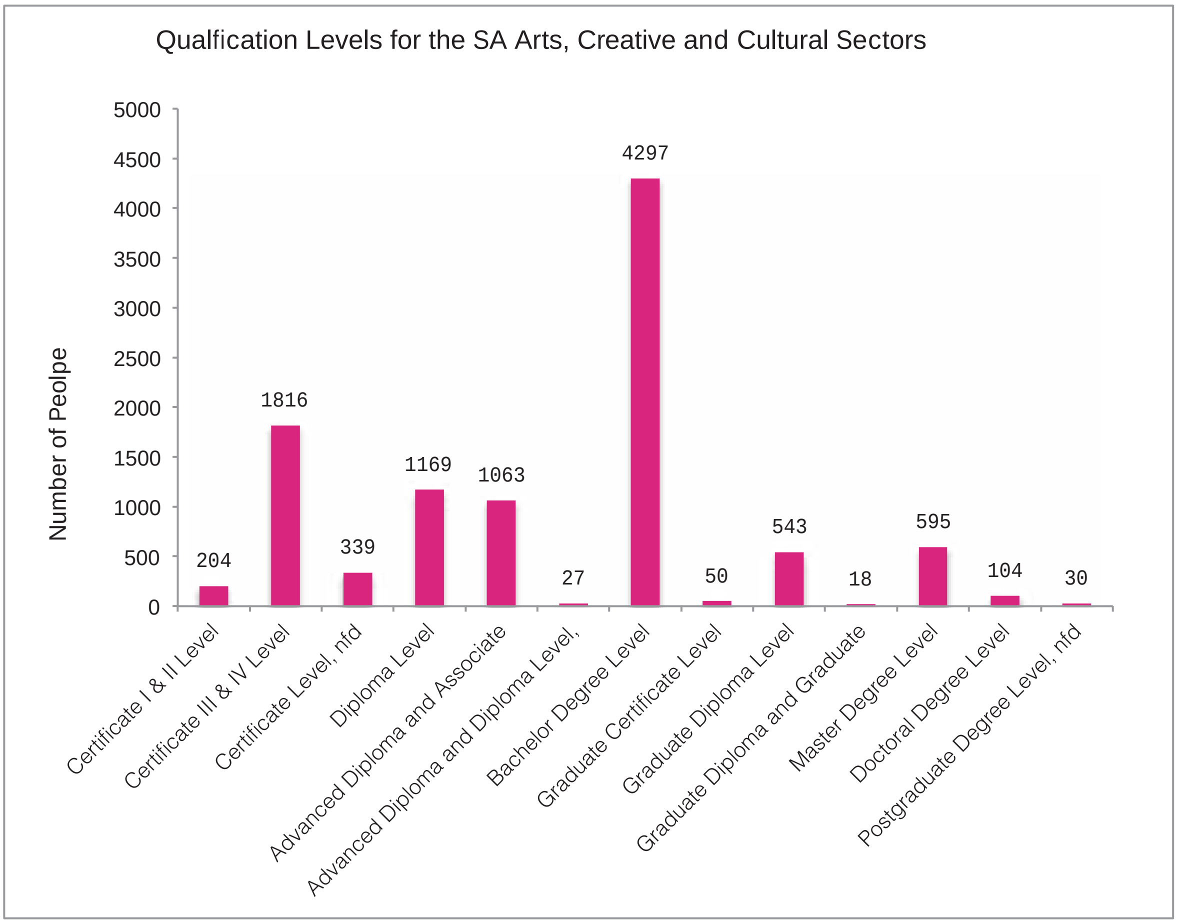
Source: ABS, Customised report, 2012 – 2011 Census data

Qualifications

The Workforce Wizard Occupation Report notes that the SA Arts, Creative and Cultural Workforce is more qualified than the overall South Australian workforce and individuals are more likely to have completed year 12 (or equivalent).

Similar to national figures, approximately 46% of the industry has a bachelor degree.

CHART 6



Source: ABS, Customised report, 2012 – 2011 Census data

TABLE 5

Qualification Level Summary	Your Creative Futures Individual Survey %	Customised 2011 ABS Census Data Creatives %
No Qualifications *(as identified below)*	9%	28%*
Certificate Level	8%	17%
Diploma & Advanced Diploma	16%	16%
Bachelor Degree	36%	30%
Graduate Certificate & Diploma	11%	4%
Postgraduate Degree Level	19%	5%

Source: ABS, Customised report, 2012 – 2011 Census data, Your Creative Futures Individual Survey
* *The ABS "No qualifications" data includes those who are currently studying.*

TABLE 6

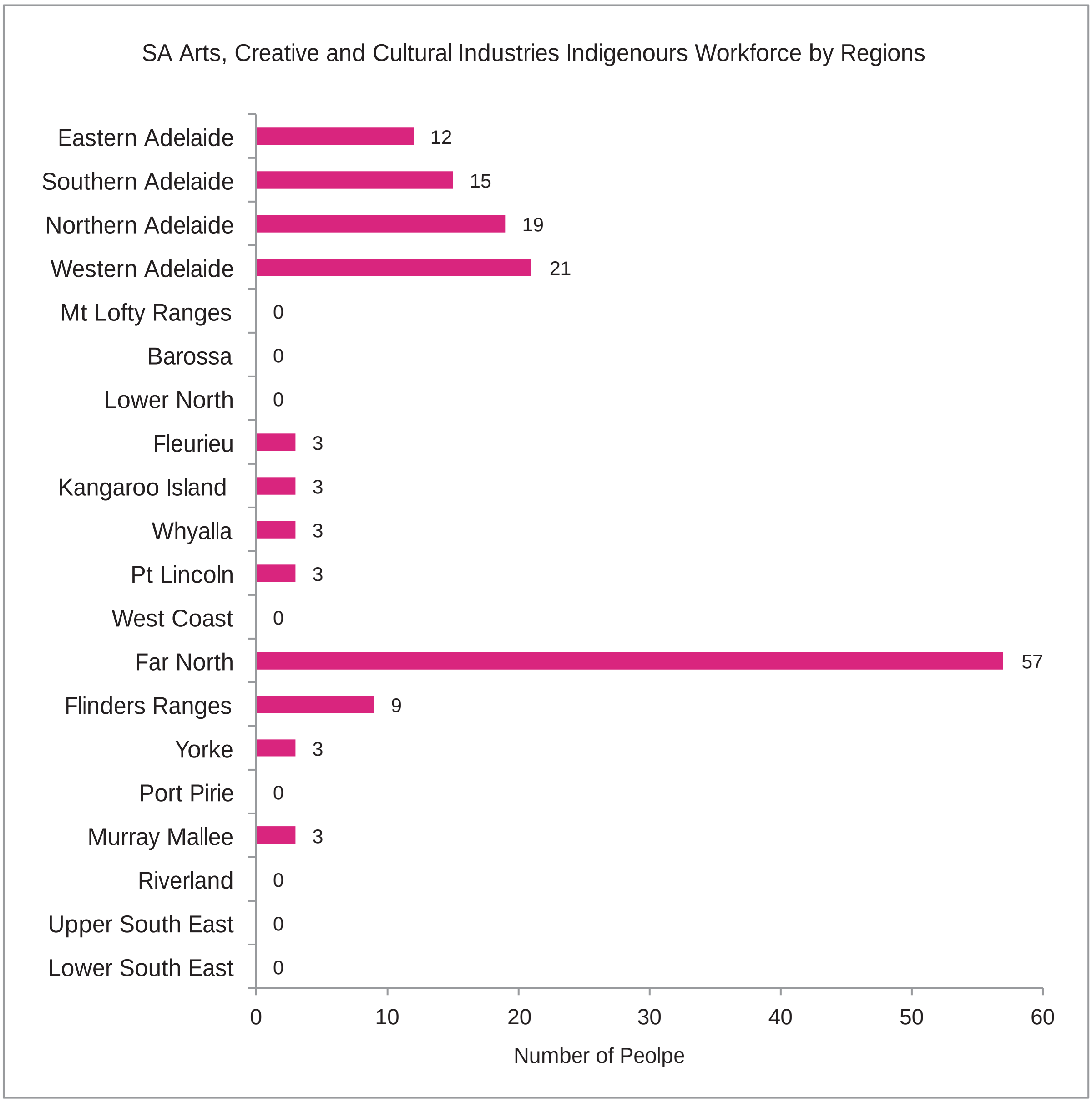
Qualifications Verse Income Ranges	Less than $10,000	$10,001 - $25,000	$25,001 - $50,000	$50,001 - $75, 000	More than $75000	TOTAL (100%)
High School (any level)	23 (47%)	10 (20%)	3 (6%)	8 (16%)	5 (10%)	49
Industry Recognised Training (non accredited)	4 (100%)	0 (0%)	0 (0%)	0 (0%)	0 (0%)	4
Certificate (VET Cert I or II)	8 (89%)	1 (11%)	0 (0%)	0 (0%)	0 (0%)	9
Advanced Certificate (VET Cert III or IV)	21 (58%)	3 (8%)	5 (14%)	4 (11%)	3 (8%)	36
Diploma, Advanced Diploma, or Associate Diploma	35 (37%)	10 (11%)	30 (32%)	18 (19%)	1 (1%)	94
University Bachelor Degree	77 (36%)	38 (18%)	47 (22%)	39 (18%)	13 (6%)	214
Graduate Diploma or Graduate Certificate	16 (25%)	6 (9%)	21 (33%)	18 (28%)	3 (5%)	64
University Postgraduate Degree	39 (35%)	18 (16%)	23 (21%)	23 (21%)	9 (8%)	112

Source: Your Creative Futures Individual Survey

Indigenous

As per the 2011 ABS Census data there were 157 Indigenous persons in the SA Arts, Creative and Cultural Industries. This equates to 1% of the SA Arts, Creative and Cultural Industries Workforce. The Workforce Wizard Occupational Report commented '*the share of Indigenous persons employed in the SA Art Creative and Cultural workforce is higher than in the South Australian workforce'*. 3% of *Your Creative Futures* respondents indicated they were of Aboriginal and or Torres Strait Islander origin. 42% of Indigenous SA Arts, Creative and Cultural workers are located in the metropolitan region whilst over one third are located in the one region of Far North. Ananguku Arts and Culture Aboriginal Corporation report there are 600+ practising Indigenous artists in South Australia.

CHART 7



Source: ABS, Customised report, 2012 – 2011 Census data

The table below shows over 54% of the Indigenous SA Arts and Cultural Industries Workforce is located in Visual, Arts and Craft, whilst 20% are employed in the Museums Libraries and Information Services.

TABLE 7

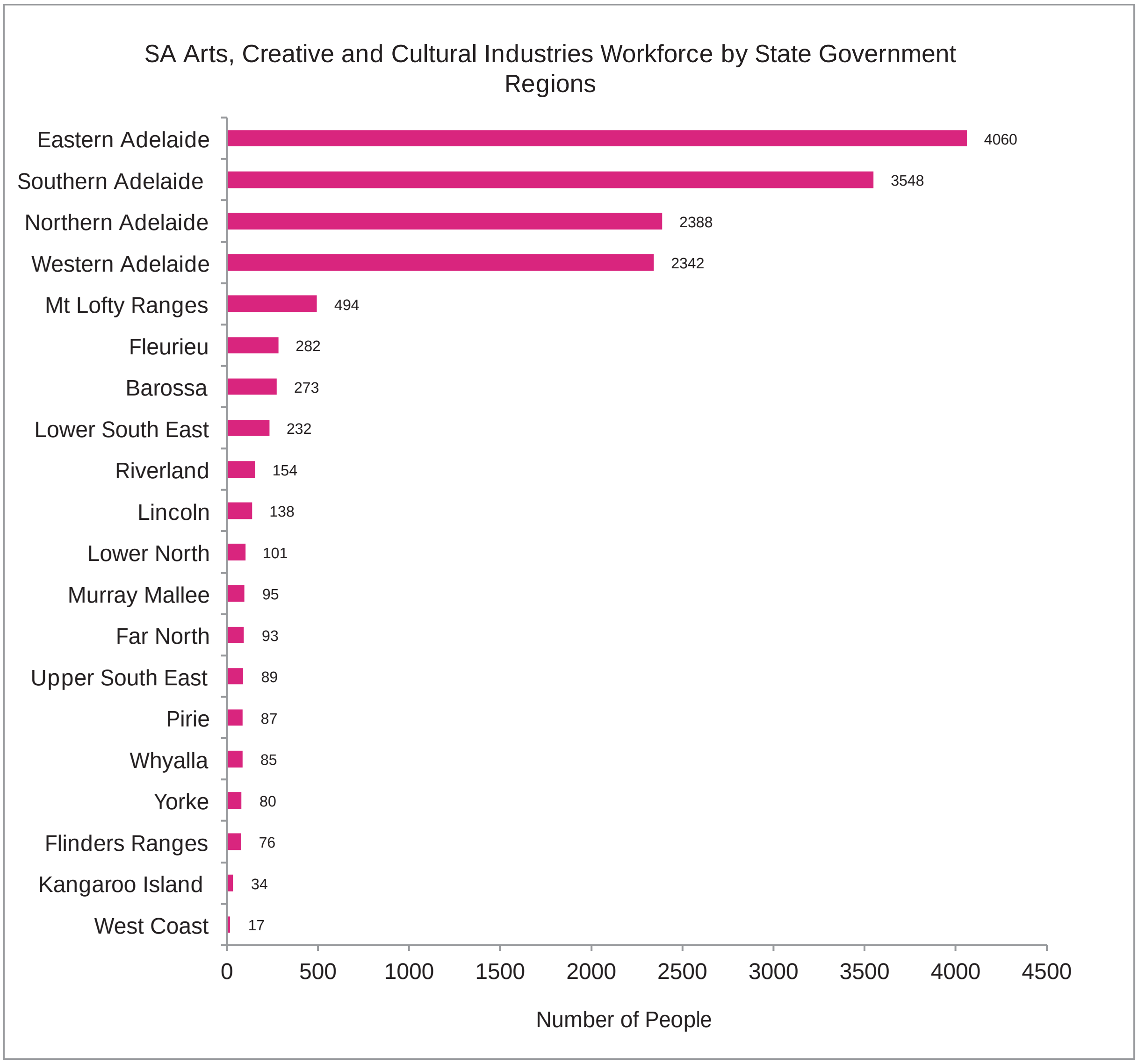
SA Arts, Creative and Cultural Sector Indigenous Employment Status	# of People
Visual Arts Craft & Design	86
Museums, Libraries and Information Services	32
Screen & Media	9
Entertainment & Events	9
Music	9
Other	6
Other – Professional Writing	3
Live Performance	3

Source: ABS, Customised report, 2012 – 2011 Census data

Regions

Based on the 2011 ABS Census statistical data over 84% of the SA Arts Creative and Cultural Industries workforce reside in metropolitan Adelaide.

CHART 8



Source: ABS, Customised report, 2012 – 2011 Census data

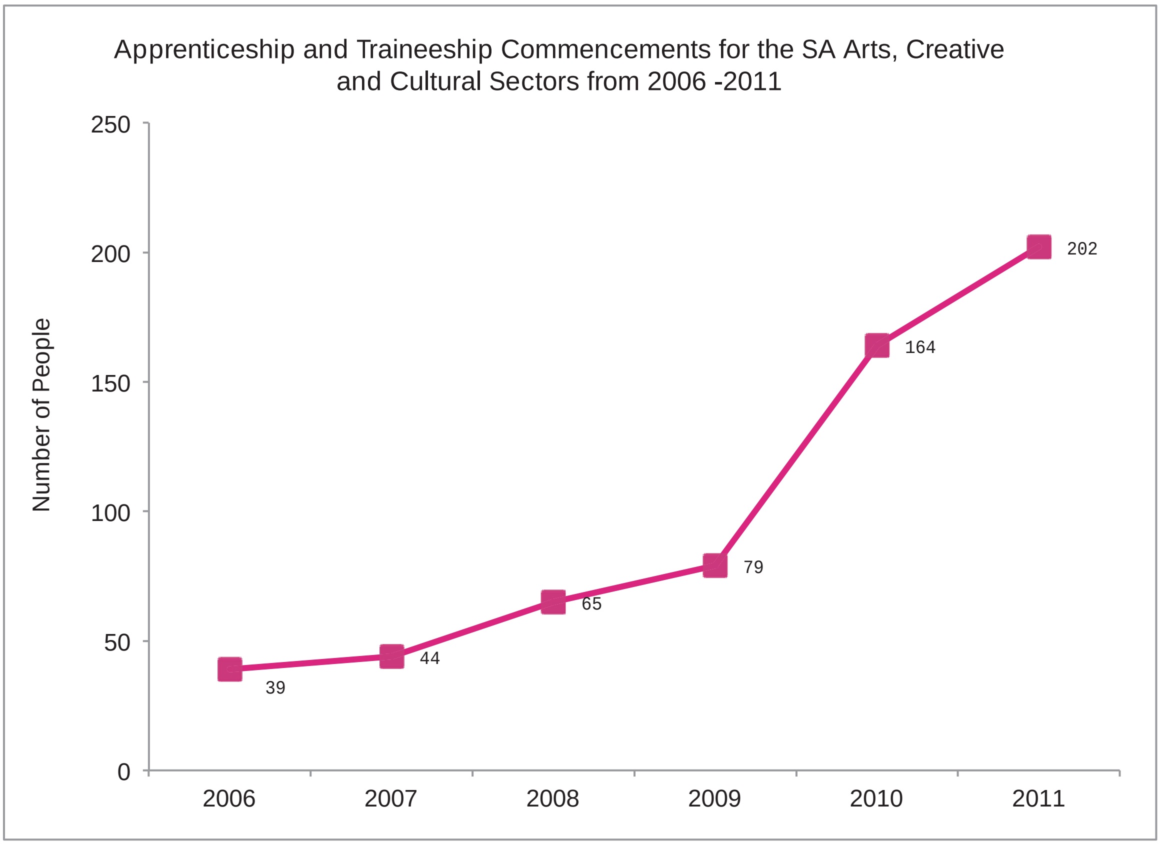
Apprenticeship and Traineeship Commencements

As indicated in the Workforce Wizard Occupation Report (based on National Centre of Vocational Education Research) there were 202 people who commenced apprenticeships and traineeships in 2011, which accounted for 0.8% of all South Australian commencements.

When reviewing the total commencements for the last six years Museums, Libraries and Information Services has had 42%, Sign Writing 23%, Entertainment and Events 19% and Visual, Arts Craft and Design 14%. No commencements have been recorded in other Arts, Creative and Cultural sectors as defined by this report.

National data sourced from the IBSA 2012 Environmental Scan states that Screen and Media equated for 30% of all traineeships commencements, however in South Australia there are no recorded commencements over the same time period.

CHART 9



Source: Workforce Wizard Occupation Report (DFEEST) based on National Centre of Vocational Education Research, Vac Stats

Since 2006, apprentice and traineeship commencements in the SA Art Creative and Cultural workforce have increased by 163 (or 417.9%) which represents Entertainment and Events, Visual Arts, Craft and Design, Museums, Libraries and Information Services and Signwriting.

TABLE 8

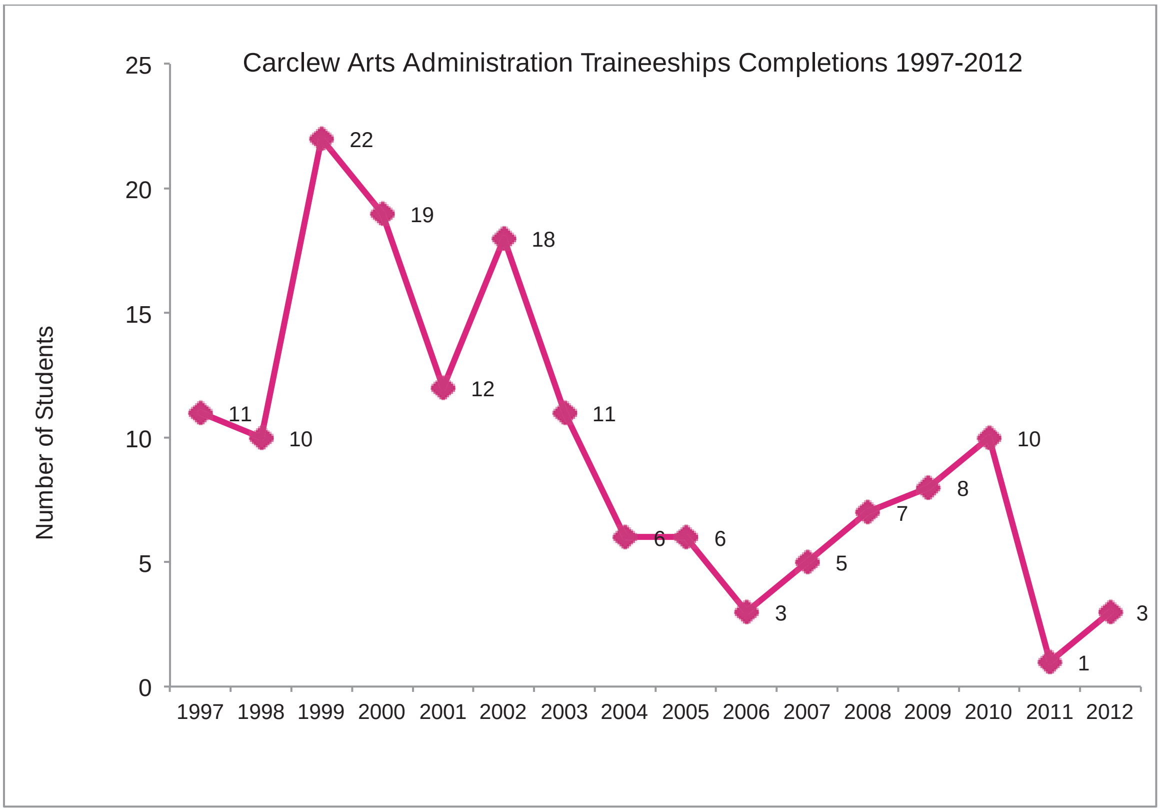
Years	Carclew Arts Administration Traineeships Completions	TAFESA Jewellery Apprenticeship Completions
2010	10	5
2011	1	3
2012	3	5

Source: TAFESA – Adelaide College of the Arts

While the program has increased in popularity amongst the target group (200 applications received in 2010 for 10 positions) the ability of the small to medium sector to take on a trainee has reduced due to the decrease in available employment incentives. Carclew Youth Arts was officially informed on 29 December 2010 that salary subsidies provided to government agencies through the CareerStart SA program, delivered by the Department of Further Education, Employment, Science and Technology (DFEEST), would cease from July 2011. Without this funding it is very difficult for most organisations in this sector to host a trainee.

Sourced from Briefing notes for Minister Hill from Carclew Youth Arts Centre, February 2011.

CHART 10

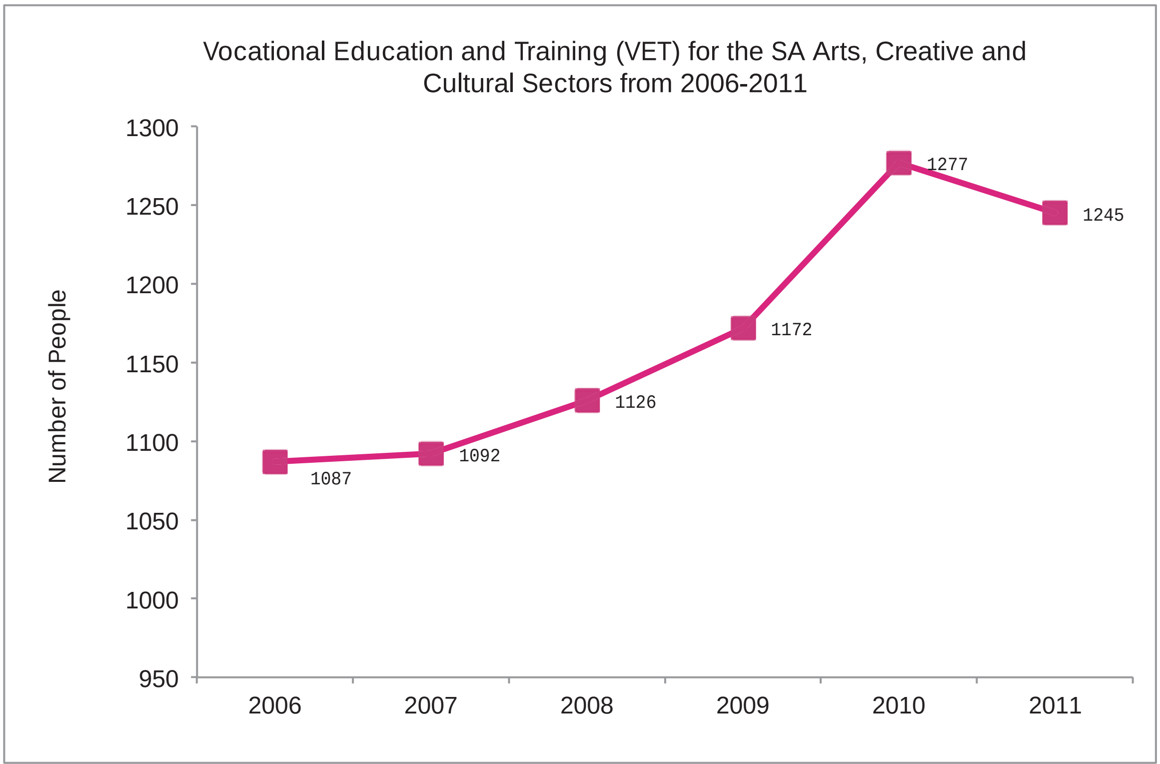


Source: Carclew Youth Arts Centre

Vocational Education and Training (VET)

As indicated in the Workforce Wizard Occupation Report (based on National Centre of Vocational Education Research) there were 1245 South Australian students in VET Courses related to the Arts, Creative and Cultural Industries which equates to 1% of VET students in South Australia.

CHART 11



Source: Workforce Wizard Occupation Report (DFEEST) based on National Centre of Vocational Education Research, Voc Stats

Since 2006, the number of students in VET courses related to the SA Arts, Creative and Cultural workforce has increased by 158 (or 14.5%). The top five areas for VET Courses in 2011 were the same as the top five over the last six years as seen in the table below.

TABLE 9

SA Arts, Creative and Cultural Sector Top five Areas in VET Courses Over the Last 6 years	# Of People	% of People
Graphic & Web Designers, & Illustrators	1597	23%
Photographers	826	12%
Performing Arts Technicians	542	8%
Multimedia Specialists & Web Developers	450	6%
Music Professionals	385	6%

Source: Workforce Wizard Occupation Report (DFEEST) based on National Centre of Vocational Education Research, Voc Stats

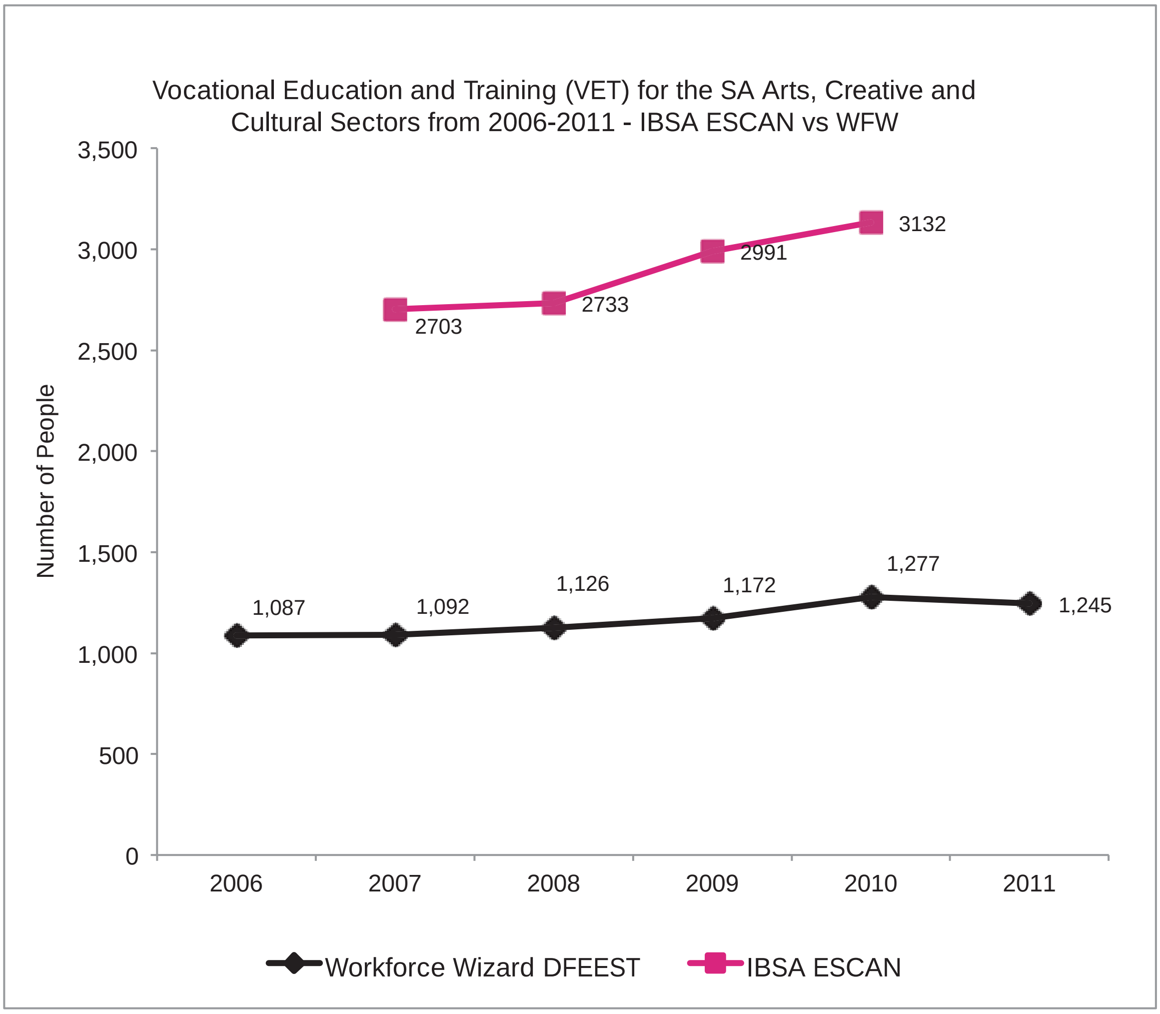
Data calculated from the 2012 IBSA ESCAN National figures follow the same trend line, but would appear to indicate that if the DFEEST figures are accurate then the SA uptake is only around half the amount of VET training that could be expected based on population size, which suggests there is opportunity for the sector to access VET level training at a greater rate.

TABLE 10

IBSA ESCAN DATA	National Enrolments	SA Enrolments (8% of Nat.)
2007	33788	2703
2008	34167	2733
2009	37392	2991
2010	39145	3132

Source: 2012 IBSA ESCAN

CHART 12



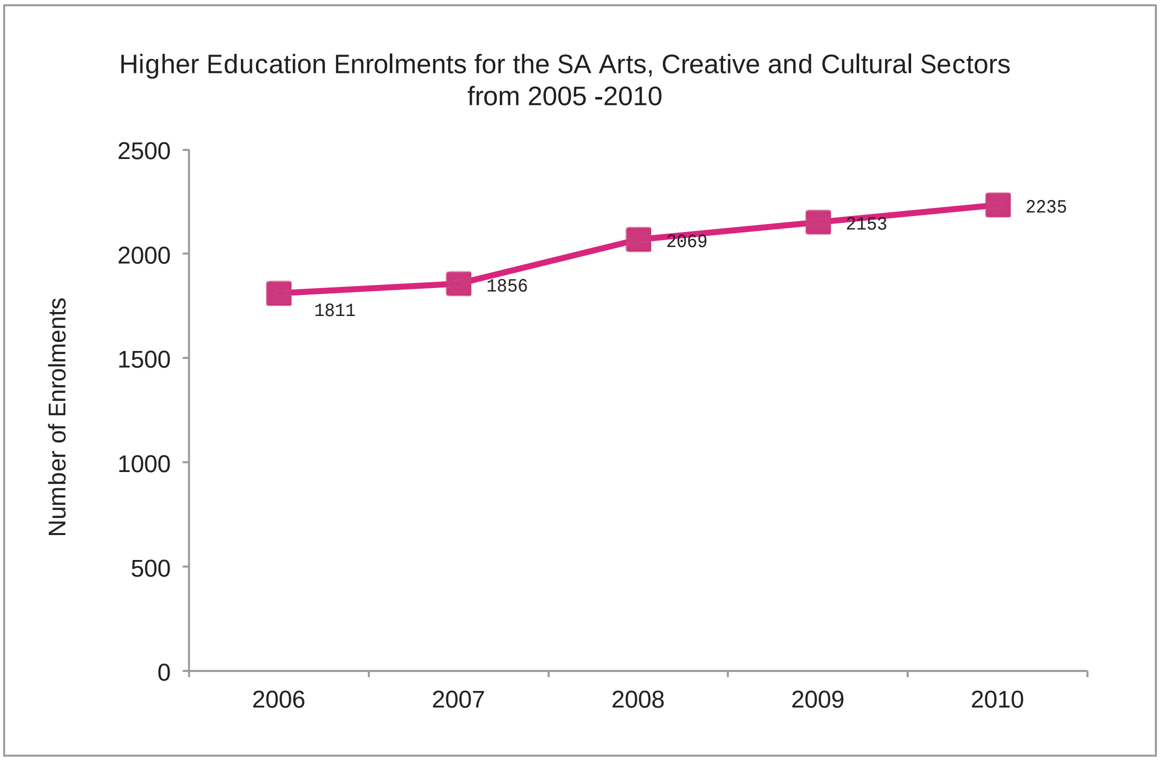
Source: Workforce Wizard Occupation Report (DFEEST) , 2012 IBSA ESCAN

Enrolments in Higher Education

As indicated in the Workforce Wizard Occupation Report in 2011 there were 2,235 enrolments in higher education courses related to the SA Art Creative and Cultural workforce. This figure accounts for 3.6% of higher education in South Australia.

Since 2005, enrolments in the higher education courses related to the SA Arts, Creative and Cultural Sectors have increased by 505 (29.2 %).

CHART 13

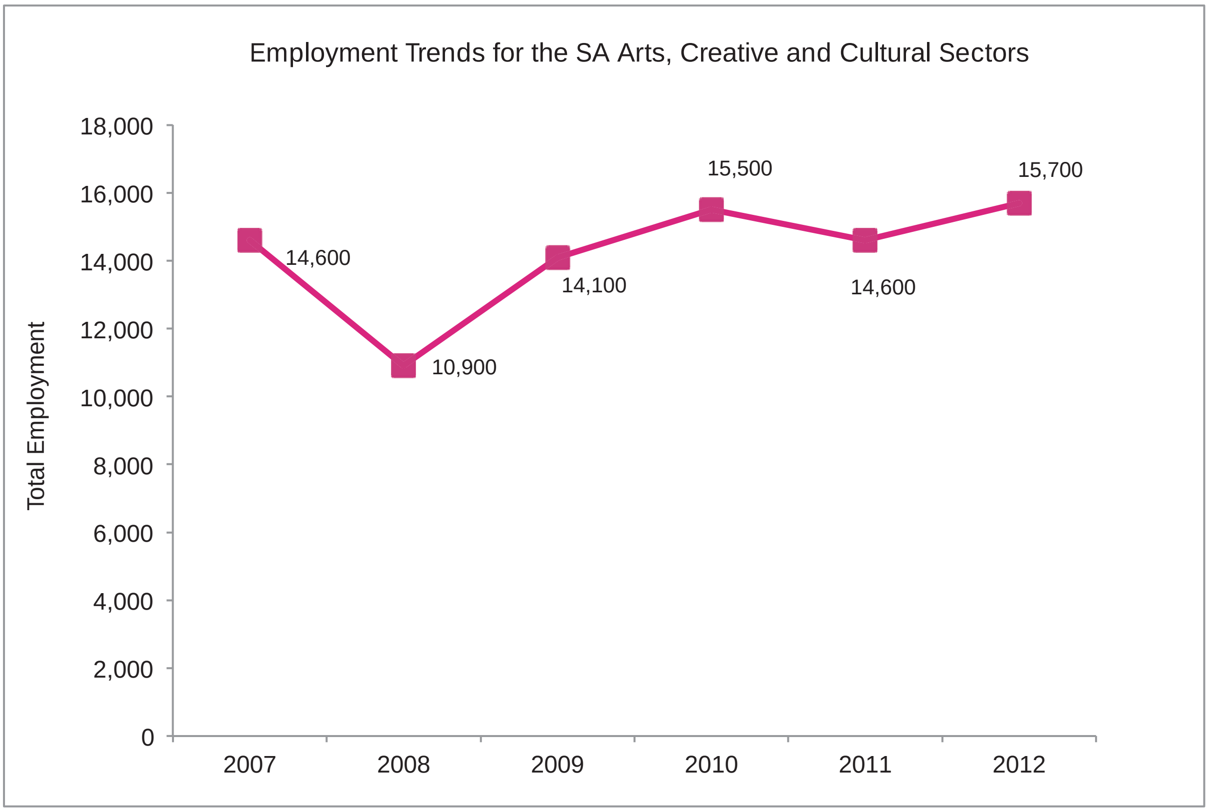


Source: Workforce Wizard Occupation Report (DFEEST)

Employment Trends

As indicated in the Workforce Wizard Occupation Report, since 2007 the number of persons employed in the SA Art, Creative and Cultural workforce has increased by 1,100 (or 7.5%) while the number of people employed in the South Australian workforce has increased by 41,000 (or 5.3%).

CHART 14



Source: Workforce Wizard Occupation Report (DFEEST)

Employment Forecast

South Australians working in the creative industries are working in a sector that is growing faster than average, with some areas recruiting at three times the rate of the rest of the workforce.

Queensland University of Technology researchers Stuart Cunningham and Peter Higgs analysed data from the 2011 census and found that nationally, creative employment has grown from 463,500 people in 2006 (5.1 per cent of the workforce) to 531,000 people in 2011 (5.3 per cent). The growth is most substantial in creative services. Once a subsector in the creative industries, these are often sole traders or small businesses that supply other businesses with their creative work.

This predicted growth is also reflected in the Your Creative Futures survey data.

164 Large and Small to Medium (SM) organisations provided the following information through the Your Creative Futures survey:

CURRENT EMPLOYMENT

- 30 of 129 SM indicated they have no employees (volunteer operated)
- 99 SM businesses employ a total of 605 people
- 35 large organisations employ 2434 people
- 134 businesses in total are currently employing 3039 FTE Staff.

EMPLOYMENT INCREASE

- 15 large organisations planned to hire 346 additional FTE staff over the next three years
- 48 SM businesses planned to hire 147.75 additional FTE staff over the next three years
- 63 businesses identified they would need to employ an additional 493.75 FTE over the next 3 years.

EMPLOYMENT DECLINE

- 13 large organisations reduced 156 staff (previous 12 months)
- 34 SM businesses had 174.4 FTE staff leave (52.2 resigned, 89.2 retired, 33 were ‘let go’)
- In total 47 businesses identified that staff numbers had reduced by 330.4 staff during the past 12 months or an average of 7FTE per business.
- Of the 119 businesses who provided a response to the relevant questions, only 40 (approximately 1/3) identified they either didn’t know or would not be replacing these staff.
- One third of the total reduction = 110 FTE per annum average reduction in employees.

Based on the businesses and organisations that responded to the *Your Creative Future Survey* 34% indicated they would employ additional staff over the next three years.

The 2012 IBSA Escan average national employment growth across the Arts, Creative and Cultural industries is predicted to be 3.8%.

A growing number of Australians, including Indigenous Australians, are finding employment and work opportunities in the arts and cultural sector’, with an estimated increase of 10 percent growth over five years.[1]

1. Source: National Cultural Policy, Discussion Paper

KEY SURVEY F!NDINGS

CREAT!VE FUTURES

Individual Survey – Key Findings

722 individuals

PROFILE

70% worked across more than one sector.

10% indicated they identified with a specific ethnic or cultural group, with over 30 different nationalities represented.

3% indicated they were of Aboriginal and or Torres Strait Islander origin.

Over 342 different job titles were provided to describe their main role.

On average 31% spend more than 38 hours a week on their arts practice or creative work.

53% have worked in the creative industries for more than 10 years.

57% were ongoing employees of any business or organisation.

49% were primarily employed full-time.

14% use an agent, gallery or dealer.

75% have an ABN but only 15% are registered for GST.

74% were earning approximately $50,000 or less per annum.

34% obtain less than 50% of their income from the creative industries.

24% have VET qualifications as their highest qualification, 66% have a bachelor degree or higher.

The most commonly held qualification was a Bachelor of Arts degree (26%).

TRAINING AND SKILLS DEVELOPMENT

Artistic, creative or technical skills were considered most important to success (82%), followed by communication skills (72%).

77% undertook some form of training in the last 12 months and about a quarter was through a formal training program, therefore 18.5% undertook formal training in the last 12 months. The majority of training was self-directed or self-taught (41%).

30% indicated their employer provided support for education and training courses.

Business planning and development skills were the top priority for training (43%), followed by specific artistic, technical or creative skills (29%) and finance and taxation (14%).

18% were prepared to pay 100% of the cost of any training. Financial factors were the largest barrier to skills development (63%), followed by lack of time (56%).

Nearly 80% of individuals rated social networking skills as important to success, yet 38% of respondents indicated their ability in this area was low. This is significant given the use of networks is one of the key recruitment mechanisms identified by the survey.

Over a third don’t know what training is available and 65% don’t know about Skills for All.
70% prefer to gain new skills by short courses, workshops or summer schools.

In five years time, 75% planned to be doing what they do now but better.

WORKPLACE CONDITIONS

Flexible working hours and practices (70%) was the most important employment condition, followed by education and training, new technology (60%).

91% love what they do, but 81% don't like the unstable or low income.

Nearly half of all respondents rated morale as high or very high in their current workplace.

In general, people:

- Join the industry because they are passionate about the arts and making a difference or to gain experience to move along the career pathway.
- Stay with an employer due to positive, flexible work environments and job challenge and satisfaction.
- Leave an employer to take up further career opportunities or because of loss of funding and lower pay rates.

Small to Medium Survey – Key Findings (<10 employees)

128 organisations

PROFILE

23% have no paid employees.

34% are incorporated bodies.

31% have a turnover of less than $50K.

57% have increased productivity in the past year.

55% expect business growth in the next 12 months.

There are slightly more part-time ongoing employees (32%) than full-time (30%).
36% are employed on a casual or seasonal basis or by short-term contract. The remaining 2% are apprentices or trainees.

More respondents cited administration, human resources, finance & management roles (56%) as critical to success than creative functions (36%). Most indicated multiple roles were critical to success, (diverse combinations of roles were specified), overall the most frequently mentioned role was marketing and promotion.

WORKFORCE PLANNING

17% undertook no workforce planning activities.

Only 4% had implemented phased retirement.

Of the 32% who were facing labour or skill shortages 84% indicated the shortage was current or would occur within the next 12 months. The majority of these shortages were fairly evenly spread across five areas:

- Creative
- Management
- Production or technical
- Community engagement
- Project management

Organisations indicated they need the following information to help plan for future workforce needs:

- Skills development and training options
- Business / economic climate
- Compliance and regulation

53% of respondents did not know if the information they needed was available, and 21% indicated the information was not available.

32% indicated that funding support to address future workforce and skills needs including subsidised training is the support government could provide.

INDUSTRY TRENDS

While technology is seen as the area of biggest change, funding sources are predicted to have the most impact.

> "It will be harder to find money and so we will be relying more on the entrepreneurial skills"

RECRUITMENT, TURNOVER AND RETENTION

Organisations source most of their staff from industry and local networks, and just over half believed these sources could supply sufficient staff to meet future needs.

More than half the organisations planned to hire additional staff in the next three years. The majority of these positions will be in three areas: administration, creative and marketing. Over half of the organisations previously had difficulty finding suitable applicants in these same areas, with 41% indicating they cannot find staff with the appropriate skills and experience.

34 organisations reported a total of 174 FTE employees had left in the last twelve month. 51% of these retired, 30% resigned, and 19% were let go for numerous reasons.

TRAINING AND SKILLS DEVELOPMENT

13% employ apprentices or trainees.

27% know what types of qualifications are available under VET.

12% have accessed VET funding.

74% train employees via learning on the job.

Access to funding for training was the most cited barrier to skill development (55%).

Top five priorities for training are:

- Marketing & promotions
- IT
- Social networking / media
- Financial management & accounting
- Management.

Small to medium organisations indicated the crucial skills independent creatives and freelancers need to improve are predominantly business skills and self-management, including planning, project and time management.

WORKPLACE CONDITIONS

Over 70% do not have defined career paths in their organisation.

73% rated employee morale as high or very high.

Large Survey – Key Findings (10+ employees)

36 organisations

PROFILE

46% are a government agency or statutory authority.

The majority of organisations have an annual turnover of between $1 million – $5 million (44%), with one quarter turning over more than $10 million.

58% have increased productivity in the past year, primarily due to expanded delivery and diversification.

60% expect business growth in the next 12 months.

Over half the respondents indicated the approximate total labour cost as a percentage of turnover was 50% or higher. Nine companies (33%) indicated 70% or higher.

Employment is predominantly full-time ongoing (69%).

Roles critical to success were creative, community engagement, member or customer service and management.

WORKFORCE PLANNING

69% undertake succession planning, but only 37% identify employees' retirement intentions.

Just over half integrate workforce planning into business planning.

43% are facing or predicting labour or skill shortages (75% of these shortages are current or will occur within 12 months). These shortages are predominantly in the production or technical areas.

62% believed their organisation would face issues as a result of an ageing workforce.

Most cited the loss of a wealth of corporate history and knowledge as a major issue with succession planning being inadequate.

In terms of information required to plan for future workforce needs, responses were varied and specific, but common themes included:

- A clear long term framework of priorities from government to enable effective planning.
- Access to a database of current contacts - a network of skilled people
- Data and reports around demographics and trends in the arts (eg: around purchasing and attendance) that have a regional focus.
- Accurate skills and training audits information on available training programs and courses
- Understanding the changing IT environment and its impact on products and services.

24% of the respondents did not know if the information they needed was available.

Nearly 60% indicated funded internships, traineeships and work placement opportunities for professional development at all levels was the support government could provide to address workforce and skills needs.

INDUSTRY TRENDS

While technology, business climate and markets are seen as the areas of biggest change, business climate and funding sources are predicted to have the most impact. Organisations are also being affected by the high Australian Dollar, state and federal government priorities and budgets.

RECRUITMENT, TURNOVER AND RETENTION

Organisations source most of their staff from three main sources - industry networks, newspaper adverts and the Internet (besides artsHub), and nearly 70% believed these sources could supply sufficient staff to meet future needs.

43% of organisations planned to hire additional staff in the next three years. The majority of these positions will be in three areas: creative, production or technical, and IT. Over half of the organisations had difficult finding suitable applicants in these same areas, with 67% indicating they cannot find staff with the appropriate skills and experience.

While 31% have considered strategies to attract younger people, only 6% have considered strategies to attract older workers.

83% conduct exit interviews with staff that leave, and 54% intend to replace all workers who leave in the next 12 months.

65% believe employee retirements will hit hardest in more than five years time.

TRAINING AND SKILLS DEVELOPMENT

40% employ apprentices or trainees.

40% know what types of qualifications are available under VET.

24% have accessed VET funding.

39% understand funding opportunities through Skills in the Workplace.

Large organisations use a number of methods to train employees:

- Conferences, seminars, or forums (80%)
- Mentoring, coaching, job shadowing (77%)
- Learning on the job (77%)
- Formal training programs (74%)
- Short courses, workshops, summer schools (71%)
- In-house training courses (71%)
- Self-directed or self-taught (60%)

All cited digital literacy as a skills gap in their organisation.

Access to funding for training was the most cited barrier to skill development (43%), but 29% also can't find training with the right content. Top priorities for training are:

- Business skills
- Digital literacy
- Leadership and teamwork.

WORKPLACE CONDITIONS

68% rated employee morale as high or very high.
42% have defined career paths in their organisation.

Sector specific findings

Some of the findings below are derived from qualitative survey responses, rather than a conclusion drawn from quantitative analysis.

ADVERTISING AND MARKETING

Includes people who work in marketing coordination, art direction, publicity and design.

- 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.

ENTERTAINMENT

Includes festivals and events, theatre production and design, event technician and venues.

- Most jobs within the sector are in technical or production with a high number of individuals having an ongoing work agreement with 3 or more businesses. 45% plan to be working in another part of the arts, cultural, creative sectors, or in a different role in 5 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 alleviated through continued support for tested training models such as “Skills for Creative Events[1]”.
- The most significant impact on business growth is the current economic climate.

INTEGRATED DESIGN AND BUILT ENVIRONMENT

Includes people who work in architecture, landscape architecture, exhibition and interior design.

- The age demographic is older than the overall creative industries sector.
- 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.

MUSIC

Includes the areas of music performance, music business, music production and education.

- A higher percentage of individuals earn less in the music sector than the average of other creative industry sectors.
- The proportion of time respondents have worked in the sector is longer compared to the overall creative industries.
- It appears that employee morale is generally 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.
- Large organisations within the music sector employ a higher percentage of employees on a casual basis compared to the overall average of creative industries.

SCREEN AND MEDIA

Encompasses all who work in the areas of film, television, interactive digital media and broadcasting.

- 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 businesses average expenditure on professional development is higher than the overall average of the creative industries.
- Large organisations in this sector have less turnover than large creative industries organisations overall.
- 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.

SUPPORT AGENCY OR ORGANISATION

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.

- High proportions of individuals in this sector do not have an arts practice or do creative work.
- Employment in this sector is more secure than the overall creative industries with more individuals in full-time employment; individuals earn more than the creative industry average.
- Small to medium businesses have a higher average turnover than the creative industry average.
- Large organisations average expenditure on professional development is lower than the overall creative industry sectors.
- 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.

VISUAL, ARTS, CRAFT AND DESIGN

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

- 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.

VISUAL, ARTS, CRAFT AND DESIGN (continued)

- This sector is significantly more aware of the VET system than the creative industry average.
- Employment in small to medium organisations appears to be more stable than creative industry average.
- Skills development priorities focused on marketing, IT, general administration, business skills and cultural leadership.

WRITING, PUBLISHING AND PRINT MEDIA

Includes authors, writers, publishers and journalists.

- 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 to remain viable.
- Current skills gaps for large organisations are all related to digital literacy.

LIBRARIES, INFORMATION SERVICES, GALLERIES AND MUSEUMS

Includes responses from South Australian libraries and museums.

- 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 in the next 5 years, and none have attempted to employ apprentices or trainees.

LIVE PERFORMANCE

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

- 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.

LIVE PERFORMANCE (continued)

- 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[1] program biennially.
- External factors for large organisations are related to markets (audience perception and behavior) and availability of space.
- The support government 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. Placements would additionally ideally form part of formal training responses,

SOFTWARE DEVELOPMENT AND INTERACTIVE CONTENT

Includes software development, website design, game design & development, and conceptual art.

- 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 of the industry 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.
- 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.

1. The Skills for Creative Events SA program was facilitated by Service Skills SA and funded by the SA Works Industry Partnership Program, DFEEST. The program addressed the primary skills shortage faced by creative events, which was identified as having an event-ready crew. This project clearly filled a need, was highly valued by employers and provided the skills to enable participants to gain increased employment. The project has outstanding training completion rates (89%) and employment outcomes (86%). A skillset based on the training program Service Skills SA designed and delivered has been integrated into the new Entertainment training package.

Methodology

BACKGROUND

The impetus for this project was the *Workforce & Career Development Plan for the Arts and Cultural Sector* in South Australia commissioned in 2011 by the AICSA in collaboration with Service Skills SA. Funds were provided for that Plan by Arts SA. This plan informed the project, whose core objective was to explore current and emerging industry workforce, career development and skills to help inform state and commonwealth investments in skilling and workforce development in the SA arts and cultural sector.

Initially the project was to devise development strategies for four discrete workforce cohorts, in stages: Practising artists; Galleries, libraries, archives, records and museums (GLARM) and community arts; Film and media; Festivals and performing arts. The first stage was to be funded by DFEEST, managed by Service Skills SA in collaboration with AICSA.

However at its first meeting the project steering committee proposed a single whole-of-workforce study focusing on skill development needs of individuals in the arts and culture sector, small to medium businesses (less than 10 full time equivalent employees), and large organisations and companies (10 or more full time equivalent employees). This model ensured a whole of sector snapshot which better reflected its diversity and collaborative nature, and would make the project more deliverable. Funds were increased, and timelines extended to reflect the new broader focus. Recognising the national relevance of the project, an additional contribution was provided by Innovation & Business Skills Australia (IBSA).

A key engagement strategy was to establish an agreement for the provision of services with the AICSA to facilitate and execute the Arts, Cultural And Creative Industries Workforce Development Project. AICSA appointed Megan Rainey as the Workforce Development Project Officer to manage stakeholder engagement, undertake relevant research, analyse data, inform direction and assist compile reports. Megan is also the Executive Officer for the AICSA and Arts Advisor for Service Skills SA.

A broadly representative project reference group was convened by AICSA to drive the project's strategic focus, monitor its progress, and sign off on the final report.

INDUSTRY SNAPSHOT CREATION

The Australian Bureau of Statistics (ABS) were contracted to produce specialised data based on the 2011 ABS Census. We will refer to this as 'customised data' throughout the report. The customised data, DFEEST Workforce Wizard information and Innovation & Business Skills Australia (IBSA) training data has been distilled to form a snapshot of relevant industry sub-sectors. These sub-sectors were defined largely by their occupational alignment with relevant training packages – Music, Live Performance, Entertainment & Events, Museums Libraries and Information Services and Screen And Media. An 'Other' category was created to capture other relevant occupations.

Both the *Your Creative Futures* survey data and the 2011 ABS Census data has been aligned to these areas to make data comparisons possible. 2011 ABS Census Data relating to 88 relevant six digit occupational ANZSCO codes was purchased and reflects SA workers who identified their main occupation in the Arts, Creative and Cultural Industries.

THE SURVEY

Three surveys were devised (including input from the project team, project steering group, IBSA and DFEEST representatives, and selected industry stakeholders), and delivered online. Large organisations were surveyed face-to-face. Industry networks were involved in systematic follow-up engagement with individuals to encourage survey participation.

DFEEST Survey Services provided access to its existing survey software platform, and also provided expertise in refining the survey instrument.

Despite the length and breadth of the survey (taking 20-40 minutes to complete), a large number of responses (886 in total) were received. They were made up of:

- 722 individuals
- 128 small to medium organisations
- 36 large organisations.

Strategies to motivate people to engage with and share the survey included clear branding (including promotional collateral, and web presence), use of simple English, contextualising the survey, and raising awareness through a variety of social media and networks. The number and quality of responses received reflects the high level of need and interest in training and professional development within the creative industry.

SURVEY POPULATION

The survey population was drawn from four key sources:
A core group made up key sector networks, the AICSA, and reference group. Represented sector networks included Bowerbird Markets, Australian Web Industry Association, Australian Graphic Design Association, New Architects Group, Public Libraries SA, Museums Australia, The Digital Industry Association for Australia, and MEGA SA.

AICSA, Service Skills SA and Arts SA contacts databases.
The third group evolved from the gaps in our database and once the survey opened we monitored responses to gauge sectors that needed to increase their representation.
The fourth group were connections made by promoting the campaign through social networks.

DELIVERY MECHANISM

Survey Services within DFEEST were utilised to deliver the survey. This provided a level of advanced survey logic and analysis features that we would otherwise have not been able to access. The vast quantity of data that was generated, and lack of direct access to the survey software has impacted on the depth of analysis we were able to achieve within a tight timeframe. It has also meant that we have not been able to do as much filtering and experimenting withy the data as we would have liked.

SURVEY ANALYSIS

Data cleansing removed ‘void’ surveys, duplicates, and hobbyists NOT seeking to increase financial returns from their creative practice. It ensured organisations had done the correct survey by looking at employment numbers. In instances where more than one person from the same organisation commenced the survey – the more complete survey was kept.

In the overall analysis we relocated respondents who identified they mainly worked in ‘other’ where appropriate. For example, a respondent who selected ‘other’ and specified ‘game development’ when identifying the area they do most of their work was relocated to ‘software development and interactive content’.

When we pulled the reports filtering by the area respondents do most of their work in – we did not relocate from the ‘other’ sector, which is why the number of respondents in the sector reports sometimes differs from the overall data.

The frequency and percentage tables collated the closed questions, and percentages were calculated based on the number of respondents, so in instances where multiple responses were permitted we added the ‘percentage of respondents’ column.

DETERMINING RECOMMENDATIONS

The initial recommendations from the survey findings were tested with key reference group and industry advisors. These validated recommendations where then aligned to known funding and policy directions from IBSA, DEEWR and DFEEST, and again tested with key reference group and industry advisors.

All survey result findings and sector key messages underpinning recommendations are available in the appendices to this report.

RECOMMENDAT!ONS

CREAT!VE FUTURES

Recommendations

IN PROGRESS

1. AICSA is negotiating with the Adelaide City Council to run a pilot of the Digital Enterprise Program customised for the creative industries. Further opportunities to deliver digital literacy training to take advantage of the growth to the industry the NBN can bring should be further investigated.
2. SSSA are piloting a National Workforce Development Fund approach with support from IBSA and a number of organisations involved in the survey.

IMMEDIATE

STAKEHOLDER ENGAGEMENT

3. The Minister for Employment Higher Education and Skills considers recommending a formal launch of the Creative Futures report by the Premier, in his capacity of Minister for the Arts, to support the strategic priorities, particularly “Creating a vibrant city” and to emphasis its growing value to the economic future of the state. This will focus the attention of enterprises and RTOs providing qualifications, training and professional development opportunities to engage in the findings of this report to ensure the needs of the creative industry are being met into the future.
4. The survey results, analysis, report and recommendations should be promoted via the Creative Futures website. AICSA could also promote training and funding opportunities stemming from this report, and those related to the creative industries sector via the website. This could include links to Skills for All, Skills in the Workplace, National Workforce development Fund and Skills Connect information. RTOs and DFEEST should consider additional opportunities to market quality training to the sector.
5. Improving creative and technical skills is a high priority, but will require further engagement with (and linkages created between) the survey respondents by the deliverers of this specialised training.

WORKFORCE DEVELOPMENT

6. Source funding for an organisation experienced in workforce development to undertake a facilitation role, bringing together RTOs and industry in a collaborative approach to implement these recommendations. This is especially critical in the thin creative industries market. RTOs and associations with limited resources do not currently have the capacity to fulfil this role.
7. Investigate with DFEEST and IBSA any opportunities to match the industry skills needs identified in this report to current or impending funding opportunities in Skills for All, Skills in the Workplace and the National Workforce Development Fund to create aggregated and targeted solutions.
8. Given the growth in the major festivals and associated skilled staff, opportunities should be investigated to run the Skills for Creative Events program biennially.

TRAINING AND PROFESSIONAL DEVELOPMENT

9. Data collated from the survey suggests a key focus of any training and up-skilling effort has to be new income generation and current income stream improvement for existing creatives and creative industries organisations. To address the critical skill needs, a Creative Entrepreneur Skills Set should be designed and trialled. Key components should include business development, marketing, finance and taxation, project and self-management and digital literacy.

10. Training and professional development outcomes for many in this sector are strengthening self employment prospects – supporting a career as a sole trader - rather than 'getting a job' with a guaranteed number of paid hours work each week.
11. AICSA and other creative industry associations should invite RTOs to networking opportunities and events. Industry networks are the primary recruitment mechanisms for creative organisations. RTOs need to ensure they develop strong industry links and that industry networking is a component of every training program.
12. Contextualised information and funded training opportunities need to be explored with Safework SA to ensure the industry is able to meet new Work Health Safety requirements.

LONGER TERM

TRAINING AND PROFESSIONAL DEVELOPMENT

1. The significant body of data created by this project has the potential to inform sector workforce development and training requirements on a national level, and research projects with potential partners such as IBSA, Australia Council for the Arts and the Office of Arts should be explored.
2. Amongst large and medium organisations there was significant need to up-skill existing staff in digital literacy, especially with an ageing workforce. Priority roles for digital literacy training are marketing, creation and administration. Given the current and predicted labour or skills shortages in production and technical areas and the impact of new technologies, this will need further investigation to determine an effective solution. Refer to in progress Recommendation 1.
3. Creative industry bodies need to work with the state government to increase the professional development opportunities for creative professionals via funded and supported on the job learning experiences (internships, placements and mentorships). Good examples of this are the JamFactory Internship program, and Fifth Quarter, Arts Business Enterprise. These opportunities should be mapped to accredited training.

TRAINING DELIVERY STRATEGIES

4. Delivery of the critical skills set will need to be flexible, delivered in context, and supported by the use of experienced facilitators and industry credible mentors to build the capacity of RTOs. This work can utilise existing accredited qualifications and skills sets which are contextualised and flexibly delivered. Funding via Skills for All, Skills in the Workplace, Skills Connect and the National Workforce development Fund would need to be considered to minimise participant costs.
5. Financial and time barriers require the skilling strategy to be sophisticated and timing and delivery methodology is critical. The vast majority of industry desire short courses, summer schools and workshops as their preferred method of gaining skills, and they need to be structured to deliver high level contextualised training.
6. DFEEST continues to assist RTOs develop their capability and capacity, specifically:
    a. Flexible delivery methodologies to meet the needs of specific cohorts
    b. Targeted assessment strategies including diagnostic assessment and RPL
    c. Project based teaching and learning approaches
    d. Utilisation and integration of technology into delivery and assessment strategies
    e. Using training as a gateway to establishing workforce development strategies with industries and enterprises

Implementation of these recommendations will strengthen the creative industries in South Australia and help build an even more vibrant state.

OTHER ISSUES AND COMMENTS

The following issues and comments (some direct quotes) were raised by survey respondents. They are not specifically covered by the recommendations. They have been listed as they may alert government or industry stakeholders to other matters of significance in the sector.

- A whole of government approach is required to work with industry bodies to increase and strengthen the capacity for creative industry to contribute to our society and economy by developing enterprising schemes and spaces with and for individuals and groups. Examples are the Manufacturing Works and Innovation Voucher Programs.
- Professional development and training opportunities should be inclusive, embrace diversity, respond to access needs, and reach remote areas.
- Whilst acknowledging the significant investment the government makes to the arts, additional government investment is needed in arts infrastructure across the state. Organisations and individuals need accessible, secure, and affordable venues and spaces to work. The government can do further work to ensure stakeholders are actively engaged and involved in the development of new and revitalized spaces to ensure the needs of the multiple sectors are met. These points are covered in the Theatre Spaces and Venues Audit commissioned by Arts SA 2009/10 and the SA Performance Makers Forum 2012 Report produced by the AICSA.
- Aboriginal 'Elders that are looking to retire will cause significant gaps in cultural leadership'.
- 'Role of volunteers and their need for training'.
- 'Our volunteers need better knowledge of risk management procedures, marketing skills, event management'
- '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'.
- Clear award rates of pay for arts workers
- 'MEAA have antiquated views of employment that doesn't match current employment patterns in visual effects.'
- 'SAFC needs to adapt to the changing climate for media producers'.

The following comments came directly from the survey question:

"Please suggest what kind of support could be provided by government and industry bodies to arts, cultural and creative organisations and businesses to plan and address future workforce and skills needs?"

- A clear long term framework of government priorities to enable effective planning
- Arts policy
- Advocacy tools
- Long term funding commitments
- Develop resources for the sector: skills database, up to date and localised data and information around economic, demographic, market and audience trends; training guides, workforce planning guides and templates, and run information sessions to help organisations understand the mechanics for the future.
- Resource succession planning for organisations.
- Ensure government process and agreements with organisations are meeting the needs of organisations and aren't restricting their ability to control their own workforce
  e.g.: allows redundancies to be made
- 'If the government allowed greater flexibility in the recruitment process we could draw from a larger and sometimes more appropriate pool of people'
- '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'.

- ‘Speedier processing of 457 work visas’.
- ‘Government regulation around employment e.g. visual effects should be included in the Foreign Resident Withholding Variation.’
- ‘Maintain the Post Production Rebate through Screen Australia (PDV offset)’.
- ‘Timely communication from government departments, specifically around changing funding structures’.
- ‘Fringe Benefits tax needs to be simplified. When the post production rebate came in (40%) the dollar was 85 cents - now the dollar is much higher and the value of the rebate is significantly reduced’.

APPEND!CES

CREAT!VE FUTURES REPORT

SOUTH AUSTRAL!A