ACT Government
Chief Minister, Treasury and Economic Development

Freedom of Information Publication Coversheet

The following information is provided pursuant to section 28 of the *Freedom of Information Act 2016*.

FOI Reference: CMTEDDFOI 2023-322

Information to be published	Status
1. Access application	Published
2. Decision notice	Published
3. Documents and schedule	Published
4. Additional information identified	No
5. Fees	N/A
6. Processing time (in working days)	30
7. Decision made by Ombudsman	N/A
8. Additional information identified by Ombudsman	N/A
9. Decision made by ACAT	N/A
10. Additional information identified by ACAT	N/A

From: [redacted]
To: CMTEDD FOI
Subject: RE: FOI SCOPE CLARIFICATION CMTEDDFOI 2023-322
Date: Tuesday, 12 September 2023 3:52:02 PM

Hi Katherine,

That’s correct.

Thank you,

[redacted]

From: CMTEDD FOI <CMTEDDFOI@act.gov.au>
Sent: Tuesday, 12 September 2023 3:49 PM
To: [redacted]
Subject: FOI SCOPE CLARIFICATION CMTEDDFOI 2023-322

OFFICIAL

Hi [redacted]

Thank you for your time just now clarifying the scope of this request.

Can you please confirm the scope of this access application is now:

The economic impact of the arts in the ACT as found in the Creative Industries Research program (a program jointly funded by University of Canberra and the ACT Government).

Happy to answer any questions,

Katharine

Katharine Stuart (she/her) | Senior Director, Information Management

Phone: 02 6207 4497 | katharine.stuart@act.gov.au
Workforce and Information Services| Chief Minister, Treasury and Economic Development Directorate
ACT Government
220 London Circuit, Canberra City | GPO Box 158 Canberra ACT 2601 | www.act.gov.au

ACT Government

Chief Minister, Treasury and Economic Development

Our ref: CMTEDDFOI 2023-322

[redacted]

Dear [redacted]

FREEDOM OF INFORMATION REQUEST

I refer to your application under section 30 of the *Freedom of Information Act 2016* (the Act), received by the Chief Minister, Treasury and Economic Development Directorate (CMTEDD) on 7 September 2023, in which you sought access to the following information:

- *The economic impact of the arts research conducted by the University of Canberra.*

On 12 September 2023, your scope was clarified to: *The economic impact of the arts in the ACT as found in the Creative Industries Research program (a program jointly funded by University of Canberra and the ACT Government).*

The scope of this request was further clarified on 20 September 2023 to: *The economic impact of the arts in the ACT as found in the **draft** Creative Industries Research program (a program jointly funded by University of Canberra and the ACT Government), **noting that the report is in the final stages of being accepted by the Territory**.*

Authority

I am an Information Officer appointed by the CMTEDD Director-General under section 18 of the Act to deal with access applications made under Part 5 of the Act.

Timeframes

In accordance with section 40(1) of the Act, CMTEDD is required to provide a decision within 20 working days of the access application being received.

Due to clarification of scope, this application was paused for a single day in accordance with section 34(4) of the Act.

Therefore, a decision is due by 20 October 2023.

Decision on access

Searches of CMTEDD records have identified one document within the scope of your request.

I have decided to grant **full access** to this document.

Chief Minister, Treasury and Economic Development
GPO Box 158 Canberra ACT 2601 | phone: 6207 7754 | www.act.gov.au

The information identified as relevant to your application is listed in the schedule enclosed at **Attachment A**. This provides a description of the document that falls within the scope of your request and the access decision for that document.

A copy of the document is enclosed at **Attachment B**.

Statement of Reasons

In accordance with section 54(2) of the Act a statement of reasons outlining my decision is below.

In reaching my access decision, I have taken the following into account:

- the Act
- the information that falls within the scope of your request.

Taking into consideration the information contained in the document found to be within the scope of your request, I have identified that the following public interest factors are relevant to determine if release of the information contained within these documents is within the 'public interest'.

Schedule 2:

Factors favouring disclosure (Section 2.1(a))

- (i) promote open discussion of public affairs and enhance the government's accountability.
- (ii) contribute to positive and informed debate on important issues or matters of public interest.
- (xvi) contribute to innovation and the facilitation of research.

Having considered the factors identified as relevant in this matter, I consider that disclosure of this information could reasonably be expected to contribute to positive and informed debate regarding the ACT creative sector and potential competitive advantages of the creative sector. In addition, release of this information could reasonably be expected to promote discussion about the benefits of the creative industries to the region including the industries' direct economic value to the Territory.

Further, release of this information could reasonably be expected to inform the ACT community about current analysis of the creative industries in the Territory.

I am satisfied that these factors favouring disclosure carry some weight. However, these factors are to be balanced against the factors favouring nondisclosure.

Factors favouring nondisclosure (Section 2.2(a))

- There are no factors favouring nondisclosure.

Charges

Processing charges are not applicable for this request because the number of pages released to you is below the charging threshold of 50.

Online publishing – Disclosure Log

Under section 28 of the Act, CMTEDD maintains an online record of access applications called a disclosure log.

Your original access application and my decision will be published on the CMTEDD disclosure log. Your personal contact details will not be published.

https://www.cmtedd.act.gov.au/functions/foi/disclosure-log-2023

Ombudsman Review

My decision on your access request is a reviewable decision as identified in Schedule 3 of the Act. You have the right to seek Ombudsman review of this outcome under section 73 of the Act within 20 working days from the day that my decision is provided to you, or a longer period allowed by the Ombudsman.

We recommend using this form *Applying for an Ombudsman Review* to ensure you provide all of the required information. Alternatively, you may write to the Ombudsman:

The ACT Ombudsman
GPO Box 442
CANBERRA ACT 2601

Via email: actfoi@ombudsman.gov.au

ACT Civil and Administrative Tribunal (ACAT) Review

Under section 84 of the Act, if a decision is made under section 82(1) on an Ombudsman review, you may apply to the ACAT for review of the Ombudsman decision. Further information may be obtained from the ACAT:

ACT Civil and Administrative Tribunal
GPO Box 370
Canberra City ACT 2601

Telephone: (02) 6207 1740
http://www.acat.act.gov.au/

Should you have any queries in relation to your request please contact me by telephone on 6207 7754 or email CMTEDDFOI@act.gov.au.

Yours sincerely,

EH

Emma Hotham
Information Officer
Chief Minister, Treasury and Economic Development Directorate

19 October 2023

ACT Government
Chief Minister, Treasury and Economic Development

FREEDOM OF INFORMATION REQUEST SCHEDULE

WHAT ARE THE PARAMETERS OF THE REQUEST	Reference NO.
The economic impact of the arts in the ACT as found in the draft Creative Industries Research program (a program jointly funded by University of Canberra and the ACT Government), noting that the report is in the final stages of being accepted by the Territory.	CMTEDDFOI2023-322

Ref No	Page number	Description	Date	Status	Reason for Exemption	Online Release Status
1	1-20	Chapter 6 – Environmental Scan of the ACT Creative Economy, of the *Creative Canberra | The ACT Creative Industries Environmental Report (DRAFT)*	2023	Full		Yes
Total No of Docs						
1						

6. ENVIRONMENTAL SCAN OF THE ACT CREATIVE ECONOMY

This section provides an overview of the ACT creative economy, including the composition of the ACT creative workforce, location of place of work in the ACT, employment status and income. Finally, we draw on available economic and industry data about audiences and markets for these industries.

THE ACT CREATIVE ECONOMY

The ACT is one of Australia's premier jurisdictions for the creative industries. It has the largest proportion of creative workers and the highest creative intensity (proportion of people working in creative occupations across all ACT industries),[25] and contributes a greater percentage to the ACT's Gross State Product (GSP) than all other states and territories. According to our comparative analysis of the 2016 and 2021 Census data, the ACT creative economy has maintained these nation-leading attributes since 2016.

However, while the 2019-2020 figures for the ACT creative economy are strong, there are some declines when compared with the 2016 Census data, which may reflect the impacts of COVID on the sale of ACT creative goods and services. As an example of this, the contribution of the ACT creative economy to the ACT's Gross State Product (GSP) decreased by nearly a percentage point from 8.67% in 2016 to 7.6% in 2021.[26] This downward trend is occurred at the national level as well, with cultural and creative activity as a percentage of GDP declining from 6.8% in 2010–11 to 6.2% in 2019–20.[27]

CREATIVE INDUSTRIES FUEL ECONOMIC GROWTH

In the decade to 2020 the contribution of creative and cultural activities to the Australian economy grew by 27.1% to $122.3 billion.[28] In the ACT, the creative economy makes a significant contribution to the ACT economy in terms of both employment and contribution to the GSP through value adding, as outlined below.

THE ACT CREATIVE ECONOMY LEADS THE NATION IN ECONOMIC CONTRIBUTION TO GROSS STATE PRODUCT

The ACT creative industries contribute approximately $2.9 billion to the ACT economy (Figure 2), which is 7.4% of the ACT's GSP (Figure 3). As we will show later, this data reflects the higher incomes in the ACT for most (but not all) creatives when compared with the Australian average. When the income of embedded creatives – those creatives employed in other industries – is added, the contribution in the ACT rises to 10.1%, making it even greater than all states and territories because of the high number of embedded creatives in the ACT.

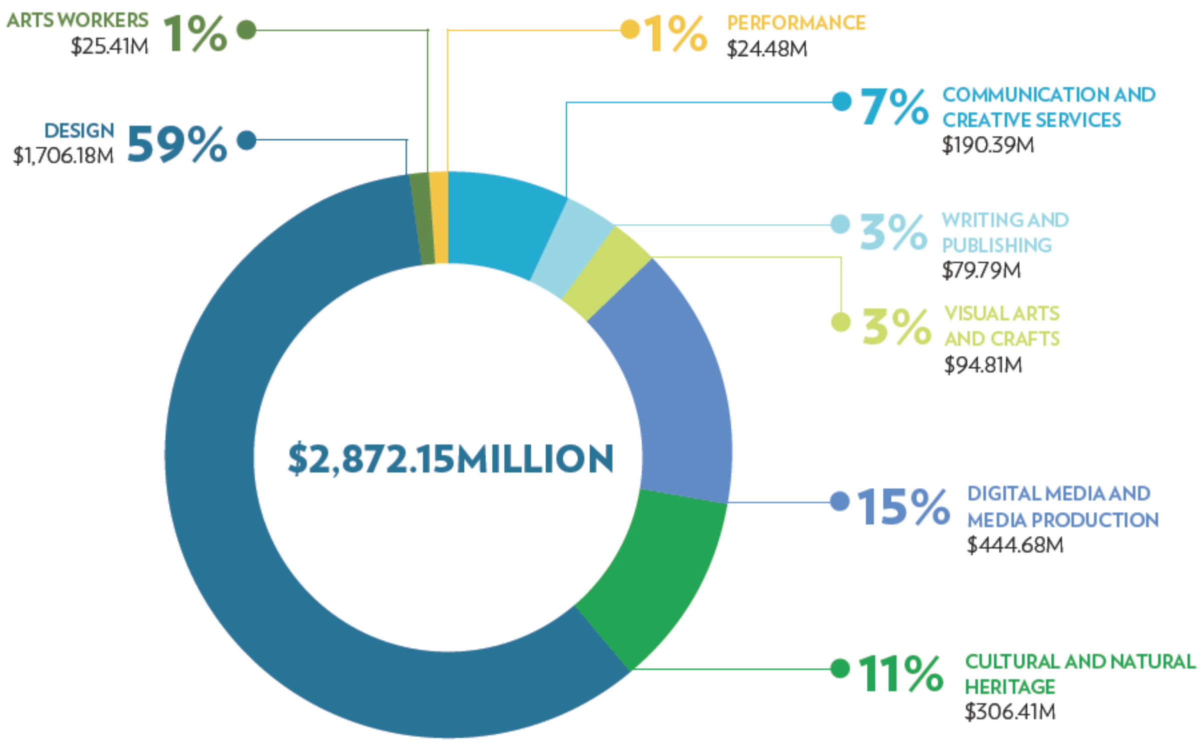

Figure 2: Contribution of each ACT Creative Domain (excepting Festivals and Public Events) to the Creative Economy Gross State Product, 2019–20
Source: ABS 2019/20 Input/Output data and 2021 Census

The contribution of each domain in the Creative Framework to GSP, except for festivals and public events,[29] is outlined in Figure 2. This includes the contribution of embedded creatives to each domain. Had data on festivals and public events been included in the creative and cultural activity satellite accounts that inform our framework, the overall contribution would necessarily be higher. This absence of data on festivals and public events in the ACT is a limitation of our research framework, and one which we will seek to rectify as part of the next environmental scan of the ACT creative industries.

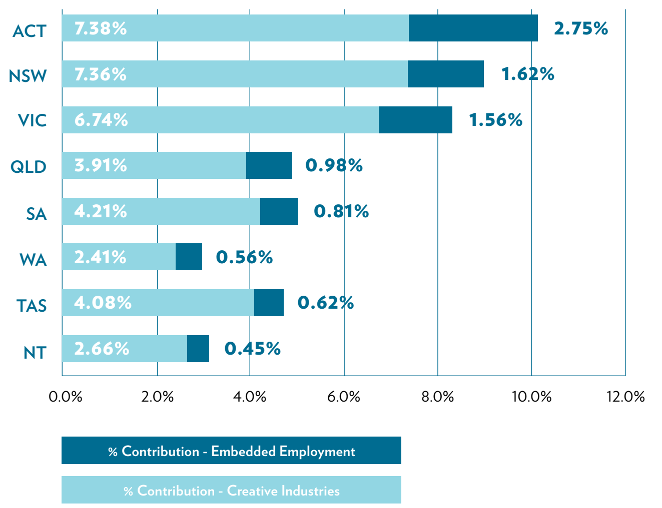

Figure 3: Contribution of the creative industries to GSP by State, 2019–20
Source: ABS 2019/20 Input/Output data and 2021 Census

GROWTH IN DESIGN

Design is by far the largest contributor to the ACT creative economy at 59% ($1.7 billion) in 2019–20 (Figure 2) and has experienced an increase from 50% in 2016–17. However, most of this contribution and growth is attributable to a single ABS classification, "computer system design and related services" (computer system design services).

This ABS classification, which is included in national and international creative and cultural activity models because it operates at the intersection of technology, innovation, creativity and intellectual property, is worth flagging for two reasons.[30] Computer system design services alone contributed 55% of the entire creative economy's GSP to the ACT economy. There was also significant growth in contribution by computer system design services to total ACT GSP in the four-year period from 2016–17 (2.8% or $971 million) of total GSP to 2019–20 (4.1% or $1.6 billion).[31]

If we remove computer system design services from the ACT creative industries, then the remainder of the ACT design industries contribute only around $140 million to GSP and fall from first to fourth largest contributor to the ACT creative economy. Any pursuit of UNESCO City of Design status should take the significant variations in this data into account when telling the design story of the ACT.

SMALL GROWTH IN VISUAL ARTS AND CRAFTS AND IN PERFORMANCE

One finding of note is the small growth in contribution to GSP in visual arts and crafts and performance in the four-year period from 2016-17 to 2019-20. Despite lockdowns, the visual arts and crafts grew from approximately 2% ($44 million) to 3% ($94.8 million) contribution to GSP; and performance from approximately 0.5% ($10.2 million) to 1% ($24.5 million) of GSP (Figure 2). While there may be many reasons for this small growth, it does reflect the growth in the number of active creative businesses in these industries.

NEUTRAL GROWTH IN DIGITAL MEDIA AND MEDIA PRODUCTION AND IN COMMUNICATION AND CREATIVE SERVICES

Digital media and media production remains the second largest contributor to GSP in the ACT creative economy at 15% ($444.7 million), with only a 1.27% decline in contribution since 2016–17. The fourth largest contributor to GSP, communication and creative services, also maintained its 7% contribution between 2016–17 and 2019–20 (Figure 2).

STRONG CONTRIBUTION FROM CULTURAL AND NATURAL HERITAGE BUT DIP IN GROWTH

Cultural and natural heritage remains the third most important contributor to GSP in the ACT creative economy, although there was a decline in real terms between 2016–17 to 2019–20 from 14% ($313 million) to 11% ($306 million) (Figure 2). Cultural and natural heritage makes a comparatively higher percentage of contribution to GSP in the ACT (0.8%) than the average contribution of cultural and natural heritage in all states and territories (0.2%)[32] and is a unique strength of the ACT creative economy.

SIGNIFICANT DECLINE IN WRITING AND PUBLISHING

Writing and publishing experienced a significant downturn in the four-year period, falling in real terms from 8.6% ($191 million) to 3% ($80 million) of contribution to GSP (Figure 2). Most of this downturn occurred in the traditional printing and publishing industries – a trend which is not unique to the ACT and reflects both increased global competition and the profound challenges these industries face as they migrate to digital platforms and content.[33]

ACT CREATIVE BUSINESSES CONTINUE TO GROW

The growth in the number of creative businesses from 2018–19 to 2019–20 was higher on average than growth in all other businesses in the ACT, although growth in all ACT businesses slowed in the 2019–2020 period, as shown in Figure 4.

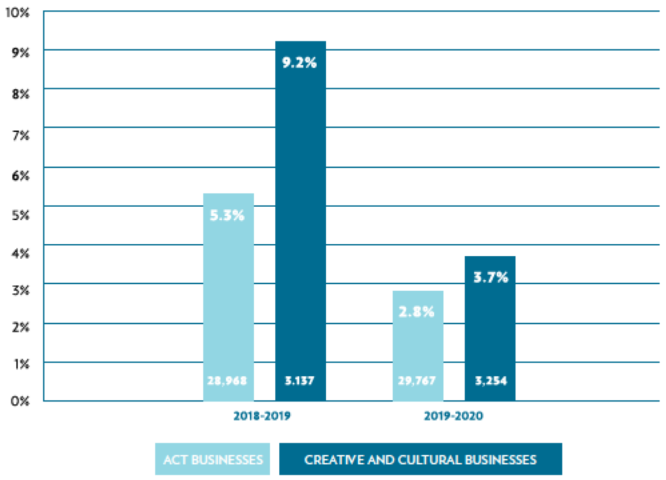

Figure 4: Contribution of the creative industries to GSP by State, 2019–20
Source: ABS 2019/20 Input/Output data and 2021 Census

The 2016–2021 data from the ABS 'Counts of Australian Businesses, including entries and exits'[34] shows that the largest growth in ACT active creative businesses is in computer system design services, which currently, and unsurprisingly given its contribution to GSP, constitutes 56% (2,005) of all active creative businesses in the ACT (3,898) in 2021.[35] Interestingly, the proportional growth of computer system design service businesses in the ACT since 2016 is significantly higher than any other state or territory at 44.5% growth (Figure 5) although the number of businesses remains smaller than many other jurisdictions. This reinforces the ACT's position as a leader at the intersection of the knowledge and creative economies, and technological innovation.

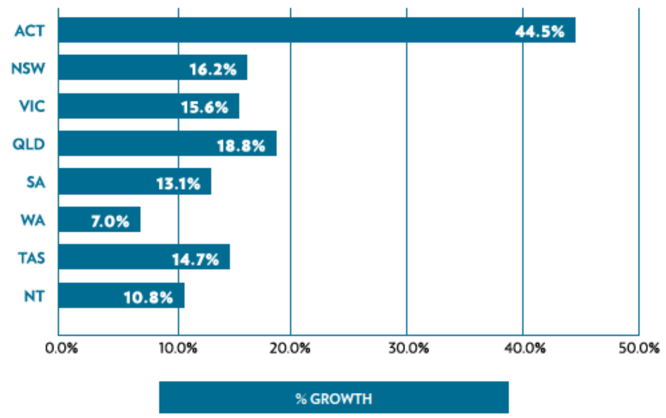

Figure 5: Percentage growth of active computer system design services businesses by state and territory. 2016 to 2021
Source: ABS Counts of Australian Businesses Annualised Employment Size Range including Entries and Exits, June 2017 to June 2021

In keeping with the small growth in visual arts and crafts and performance, there has been growth in active creative businesses in the arts, although the number of businesses remains small when compared with other jurisdictions.

Other creative industries – such as architecture, design and advertising – have experienced more modest growth in the number of active creative businesses over the 2016–2021 period, largely in line with growth in NSW and Victoria.[36]

ACT CREATIVE BUSINESSES CONTRIBUTE TO ECONOMIC DIVERSIFICATION

The ACT creative industries are not only a growth area within the ACT economy, but also contribute to economic diversification as small private sector businesses. In 2021, more active creative businesses (excluding computer system design services) were sole traders or partners (58%), followed by small business enterprises (40%). In contrast, 60% of computer system design services are small business enterprises, demonstrating the strength of this industry in the ACT.

Percentage of active creative businesses 2021 – excluding computer system design services

Percentage of active creative businesses 2021 - computer system design services

Globally, creative businesses contribute to the diversification of national and regional economies,[39] as well as the talent, skills and creativity that build regional entrepreneurial capacity.[40] This potential for the ACT creative industries to further diversify the ACT economy, bolster economic resilience and generate a wider range of job opportunities for Canberrans should not be surprising, given that creative industries have long been recognised as drivers of 'soft innovation', or artistic, intellectual, and aesthetic (rather than functional) innovation. This type of innovation encompasses changes in goods and services, including product and service innovation and differentiation,and is in significant demand.[41]

THE ACT CREATIVE WORKFORCE

In 2021 the ACT creative workforce consisted of more than 25,000 people:

- 5,920 were creative specialists (2.5% of total working population)
- 8,049 were embedded creatives (3.4% of total working population)
- 12,264 were creative support (5.1% of total working population)

This section describes the current status of the creative workforce, and the experiences and opportunities of members of that workforce.

THE ACT IS THE NATIONAL LEADER IN CREATIVE EMPLOYMENT

In 2021, the ACT creative economy – composed of creative specialists, embedded creatives and creative support – had the largest proportion of the workforce of all states and territories in Australia at 11%, up from 10.1% in 2016 (Figure 6). This was 2.3% points higher than the Australian average, and higher than all other jurisdictions. The key reason for this is the high percentage of embedded creatives in the ACT, which is a unique feature of the ACT creative economy as we discuss in greater detail below.

A city-level comparison shows that the proportion of employment in the Canberra creative economy (11%) is not as large as Sydney (12.27%) but is marginally higher than Melbourne (10.9%). The next largest creative employment city, Brisbane, is more than two percentage points lower at 8.2%, which suggests that Sydney, Canberra and Melbourne have notably stronger creative workforces than other major cities in Australia.

THE ACT IS THE NATIONAL LEADER IN CREATIVE INTENSITY

In addition to its proportionally large creative workforce, the ACT also has a higher percentage of creative intensity than any other state or territory in Australia. Creative intensity refers to the proportion of total employment in creative occupations (creative specialists and embedded creatives) across all industries. As shown in Figure 7, creative intensity in the ACT in 2021 was 5.8%, up from 5.6% in 2016, while the national average was 4.6%, up from 4.1% in 2016. This high creative intensity is due to the significant proportion of embedded creatives in the ACT.

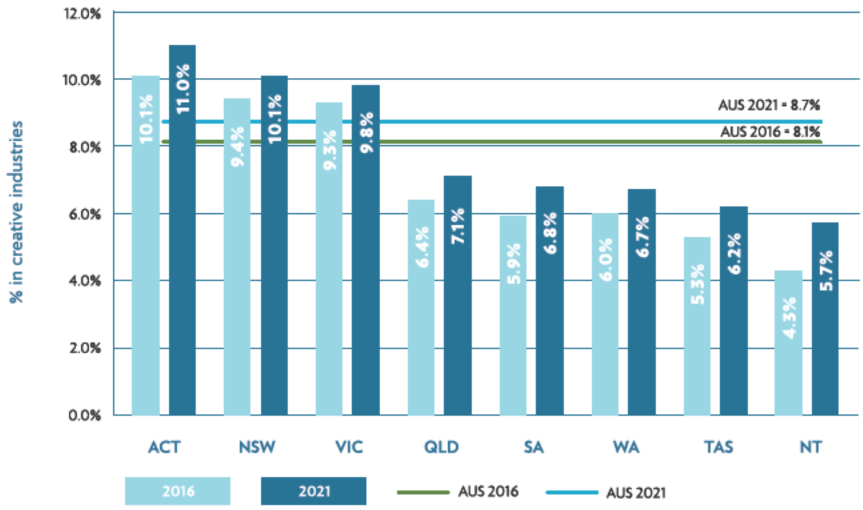

Figure 6: Proportion of people employed in creative industries by state and territory, 2016 and 2021 Census
Source: ABS, 2016 and 2021 Census

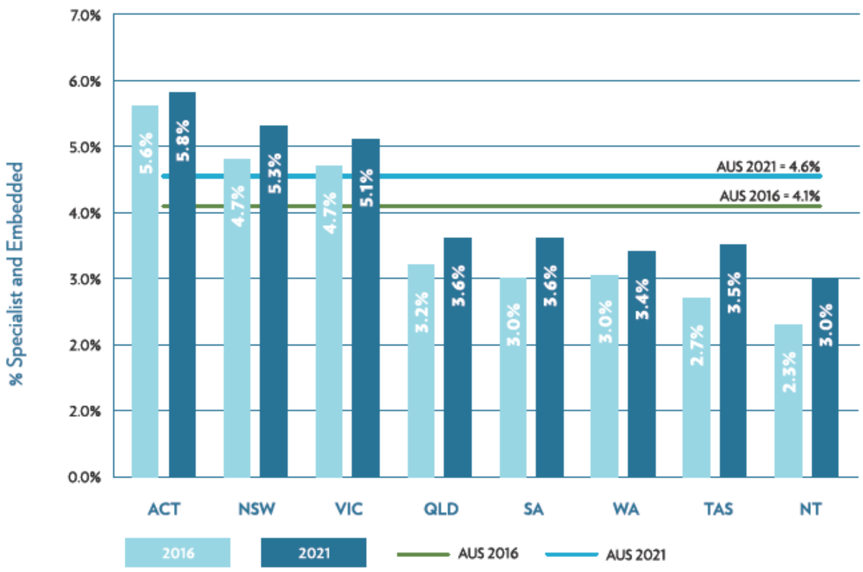

Figure 7: Comparison of creative intensity between states and territories.
Source: ABS, 2016 and 2021 Census

MOST ACT CREATIVES WORK IN THE INNER NORTH AND SOUTH

Most ACT creatives work in the inner city, mirroring the pattern for creatives worldwide. The following map (Figure 8) outlines the place of work for the ACT creative workforce in 2021. Over 60% of creatives identify their place of work in the two inner city regions on either side of the Lake, with 35% in the inner north and 26% in the inner south. Belconnen (9%) and Tuggeranong (8%) are the next largest creative centres, with Woden (6%) and then Gungahlin and Canberra East (5% each) respectively.

There are many reasons for the significant proportion of creatives in north and south Canberra, including the clustering of local and national arts and cultural institutions in these districts, as well as the location of many government departments connected with the creative industries including, by way of example, artsACT, the Federal Office for the Arts, and the City Renewal Authority.

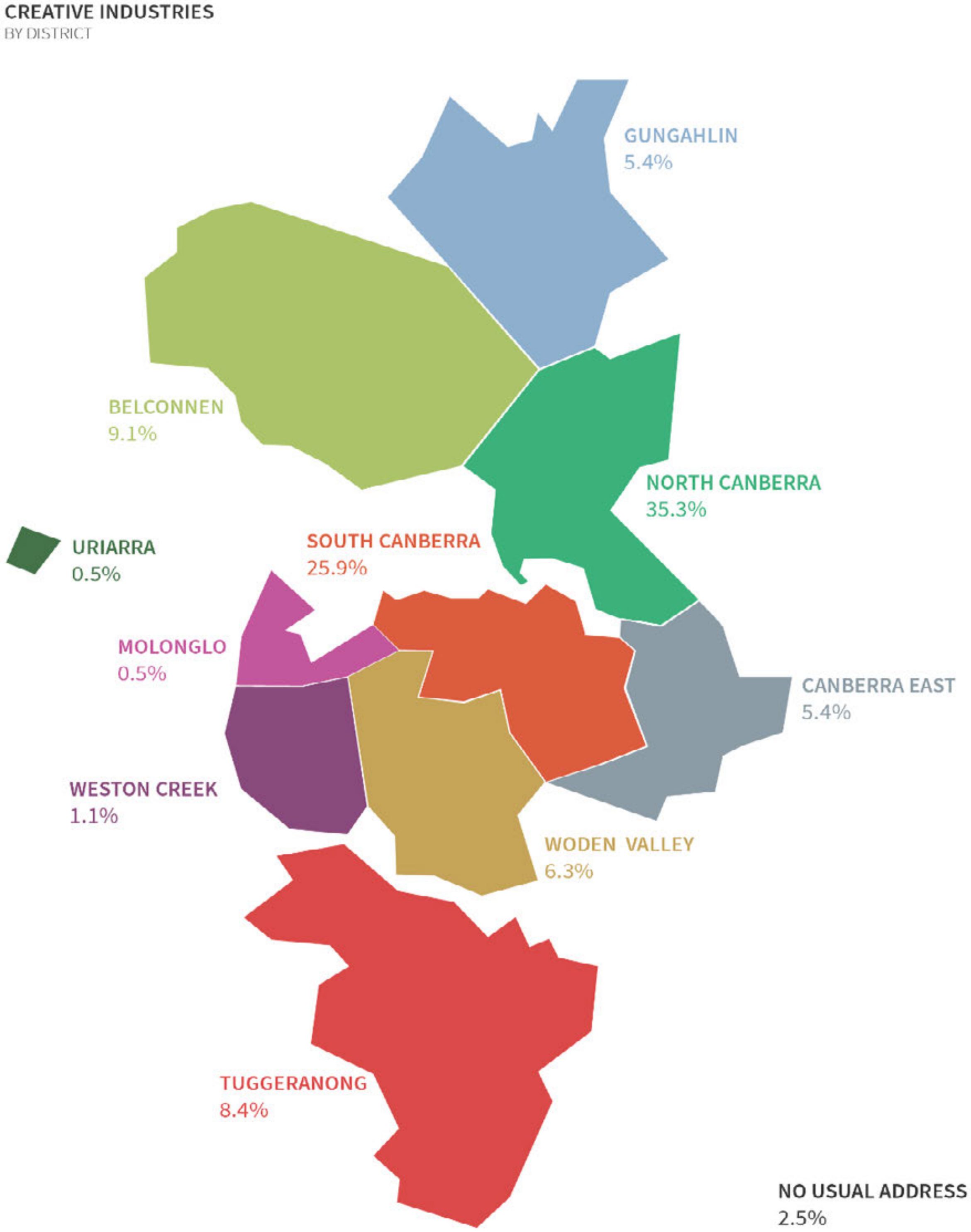

Figure 8: place of work for people in creative occupations by ACT district
Source: ABS 2021 Census

MORE CREATIVES LIVE IN THE NORTH THAN THE SOUTH

In 2021, 58% of ACT creatives lived in Canberra's north – with the Belconnen district marginally more popular (21%) than the inner north (19%) and Gungahlin (18%). This was followed by Tuggeranong (15%) and then the inner south (8%). Some creatives in this study reported being priced out of the inner north and inner south for home ownership and for rentals moving to outer districts away from the inner-city centres of creative activity. Creatives who live in Canberra's outer southern districts speak of the challenges of isolation from the cluster of creative activity and infrastructure in the inner north and inner south.

This distribution of creatives in the ACT reflects broader national and international trends: the late 20^{th} century experience of creatives living in clusters in inner cities has been changing, with creatives increasingly moving to suburban or peri-urban places of residence. One effect of this has been a new dynamism emerging outside the traditional inner-city environment.[42] Future analyses of the place of work and usual residence for ACT creatives can provide insights into the impact of this movement by creatives to the outer districts.

"Nearly all the Canberra studio spaces are northside: even M16 is inner southside. There's nothing in Tuggeranong. There's a few things in Queanbeyan, I think, but there's nothing... everything is sort of North-ish. That's really hard for people who live southside. There's nothing affordable, there's nothing cheap that you can rent."

Images: M16 Arts Space. Photo by Anna Mayberry.

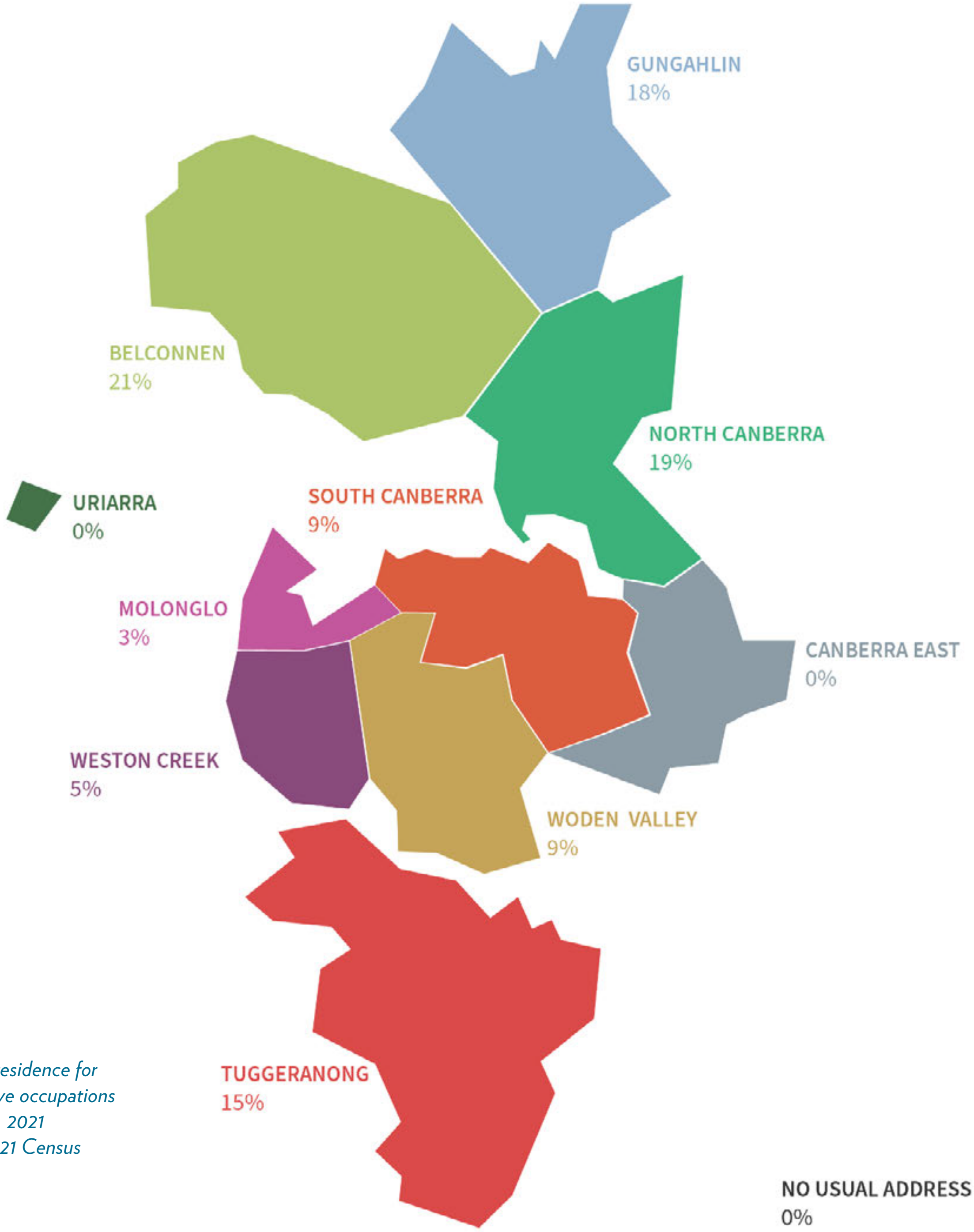

Figure 9: usual residence for people in creative occupations by ACT district, 2021
Source: ABS 2021 Census

THERE ARE SIGNIFICANT DIFFERENCES IN LEVELS OF PART-TIME WORK IN THE CREATIVE WORKFORCE

While the figures of the ACT creative workforce are nation-leading, the employment patterns of ACT creatives revealed through both the ABS data and our industry survey show clear and significant differences between those who work in arts industries and arts occupations, and those who work in other creative industries and occupations.

Figure 10 below uses the latest 2021 ABS Census data to show the proportion of people in the ACT working part-time in different occupations in different industries. This is a complex graph and can be understood as follows:

Occupations

Arts occupations: those occupations in the arts as defined in this study

Other creative occupations (exc. arts): those occupations not including the arts that constitute the rest of the creative workforce as defined in this study

All occupations: all occupations in the ACT

Industries

Arts industries: those industries in the arts as defined in this study

Other creative industries: those industries not in the arts that constitute the rest of the creative industries as defined in this study

All industries: all industries in the ACT

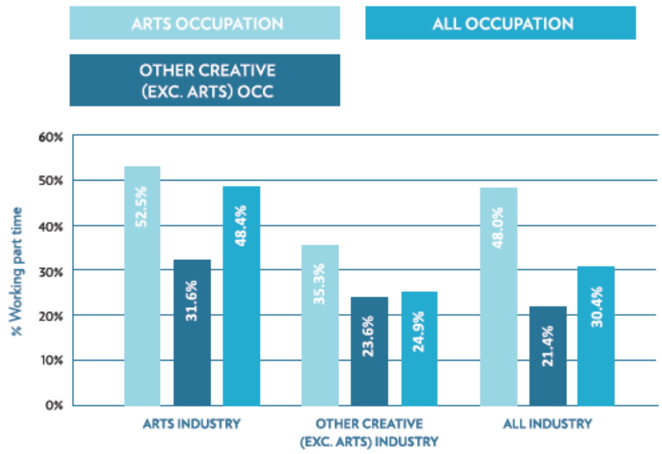

Figure 10: Proportion of people working part-time in ACT industries and occupations, 2021 Census
Source: 2021 Census

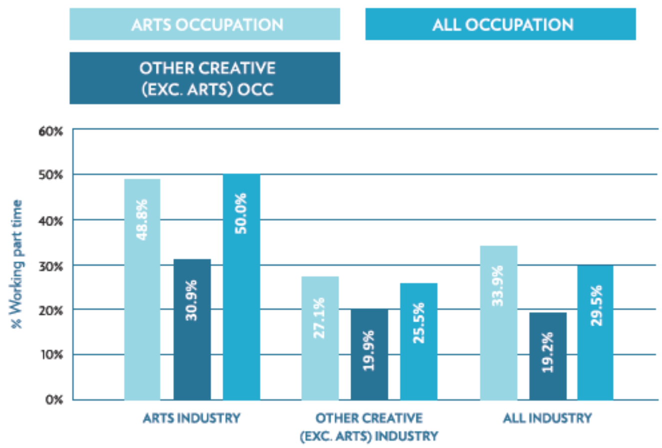

Figure 11: Proportion of people working part time in ACT industries and occupations, 2016 Census
Source: ABS Census, 2016

ACT ARTS PROFESSIONALS HAVE MORE PART-TIME WORK THAN OTHER OCCUPATIONS

ACT arts occupations are characterised by part-time employment when compared with other occupations in the ACT. According to the 2021 Census, arts professionals are more likely to have part-time roles than creatives working in other creative occupations, and indeed than people working in all other ACT industries. Arts professionals also experience higher rates of part-time employment in their own industry – the arts industry (52.5%) – than in other creative industries (35.3%) or all industries in the ACT (48%) (Figure 10).

These findings also come through in our industry survey, where less than a third of arts professionals said they held full-time arts roles and many worked only one to two days in that role. Interviews revealed that some arts professionals work as embedded creatives for four days and keep the fifth day for their creative practice.

The exception to the high level of part-time work in art occupations is digital media and media production. Only 26% of people with digital media production roles work part-time, and only 24% of people who work in the digital media industry are part-time – figures which are also reflected in our industry survey. Therefore, demand for digital media and media production is higher, and more opportunities for sustainable work exist in this industry, than in other arts industries.

COVID-19 LED TO MORE PART-TIME WORK ON FOR ARTS PROFESSIONALS

While almost all occupations in the ACT experienced a drop in full-time work in 2021, arts occupations were the hardest hit by COVID, with increases in part-time work experienced by people in arts occupations both in the arts industry and in all industries between 2016 (Figure 11) and 2021 (Figure 10).

RISE IN PART-TIME WORK FOR ACT ARTS PROFESSIONALS BETWEEN 2016 AND 2021

Arts occupations in arts industries **48.8%–52.5%**

Arts occupations in all industries **33.9%–48%**

At the same time, arts professionals who worked in other creative industries had lower levels of part-time work in 2021 (35.3%) than in 2016 (27.1%).

With the end of lockdowns and quarantine, these higher levels of part-time work for arts professionals are likely to decrease.

WORKING IN THE ACT ARTS INDUSTRIES PROVIDES LESS FULL-TIME WORK THAN ALL OTHER INDUSTRIES

People working in the ACT arts industries are more likely to work part-time than in any other industries in the ACT, no matter their occupation (Figure 10). These high levels of part-time employment across all occupations were also a feature of the ACT arts industries in 2016 (Figure 11).

OTHER ACT CREATIVES HAVE MORE FULL-TIME WORK THAN OTHER OCCUPATIONS

In stark contrast to arts professionals, people working in other creative occupations – in cultural and natural heritage, design and communication and creative services – are more likely to work full-time than all other occupations in the ACT on average, and across all industries in the ACT (Figure 10). However, other creatives experienced a slight increase in part-time work between 2016 and 2021 (Figures 11 and 10), which suggests some vulnerability to the impacts of COVID-19.

INCREASE IN PART-TIME WORK FOR OTHER ACT CREATIVES BETWEEN 2016 AND 2021

Other creative occupations in arts industries	30.9%–31.6%
Other creative occupations in other creative industries	19.9%–23.6%
Other creative occupations in all industries	19.2%–21.4%

ACT CREATIVE WORKFORCE MODELS

This section explores the key models of creative employment in the ACT and identifies the benefits and challenges of these models.

MANY ACT CREATIVES WORK AS FREELANCERS OR IN SMALL BUSINESSES

As noted earlier, many ACT creatives are non-employing – that is, sole traders or partnerships – or work in small businesses. In 2021 there were 1,893 active creative businesses in the ACT (excluding the category of computer system design services). Almost all active creative businesses (98%) employ less than 19 people. Of these businesses, 58% or the majority are non-employing, and 40% are small businesses of 1-19 employees.

While the ACT creative industries operate at a much smaller scale than in states such as NSW and Victoria, the predominance of sole traders, partnerships and small businesses in the ACT is broadly reflective of national and international trends in the creative industries.[43]

MOST ACT ACTIVE ARTS BUSINESSES ARE SOLE TRADERS

Arts businesses in the ACT are far more likely to be non-employing than other businesses in the creative industries. In 2021, 85% of active ACT arts businesses were sole traders and partnerships, and only 15% were small businesses.[44] As predominantly sole trader and partnership businesses, arts businesses often experience financial insecurity, and insecure employment within highly competitive market environments.[45] This precarious status is even more pronounced for arts professionals as a result of the infrequency of work opportunities, which can lead to unemployment or under-employment (by hours of work, or by work requirements relative to their expertise, or both).[46]

SOLE TRADER AND SMALL CREATIVE BUSINESSES CARRY LEVELS OF INSECURITY AND RISK

This can create a more volatile creative ecosystem – particularly in a smaller city like Canberra – and impact sustainable participation in the industries. Furthermore, creative sole-traders and small businesses are often reliant on fixed-term contract work, which requires them to take on additional risks and responsibilities[47] without receiving the employment benefits afforded to continuing employees.

MANY ACT CREATIVES HAVE PORTFOLIO CAREERS

Portfolio careers are identified as one key model of employment for ACT creatives. According to our industry survey, nearly 50% of participants identified as having more than one role at any given time, and arts professionals were more likely to have this type of work model than other creatives. We can identify this multiple-occupation work model as a *portfolio career*.

> ***A portfolio career:*** *refers to a work model that involves a mix of part-time employment generated by one or more income streams and derived from a range of related or unrelated occupations.*[48]

The difference between portfolio careers and project-driven careers, which are discussed later in this section, is that in portfolio careers a creative will assume a range of *occupations* (e.g., novelist, editor, teacher) to generate multiple income streams as part of a career, whereas in project-driven careers, creatives tend to operate primarily within one occupation (e.g., landscape architect) to generate one or more income streams. Portfolio careers are the dominant workforce model within creative economies, both in Australia and worldwide.[49]

AN ACT PORTFOLIO CAREER MAY CONTAIN ANY MIX OF THE FOLLOWING:

A core creative practice or practices (paid and unpaid)
Creatives have a core or set of core creative practices. This work may occur:

- In the same industry, such as an actor performing at a theatre
- In another creative industry, such as an actor performing as a roving performer at a Festival
- In a non-creative industry, such as an actor working as a clown doctor in a hospital, or teaching drama at an ACT college

Complementary creative work
Complementary skills associated with the creative practice, or a secondary or tertiary creative practice are used to generate work. This work may occur:

- In their primary creative industry, such as a novelist employed as a researcher by an historian writing a fictional history
- In another creative industry, such as a novelist running story-telling workshops for a marketing communication firm
- In a non-creative industry, such as a novelist editing a report for the ACT Government

Other non-creative work
Creatives also work in other non-creative occupations as part of their portfolio, such as a policy officer in the ACT or federal public service, or as a high school maths teacher.

ACT CREATIVES HAVE PORTFOLIO CAREERS FOR A RANGE OF REASONS.

There is not enough creative work available
Some ACT creatives want to work full-time on their creative practice, but there aren't enough opportunities available to achieve this. These creatives adopt a portfolio career model out of necessity because it enables them to work on their creative practice whenever opportunities arise.

I have other sources of financial security
Some ACT creatives have some form of alternative financial security that enables them to pursue a portfolio career with potentially irregular work and unstable or precarious income. This security generally stems either from a partner or family member with full-time employment and/or sufficient income to supplement their more precarious income stream, or from a significant inheritance such as a house.

They provide a pathway to reaching my career goal
Some ACT creatives use the portfolio career model to reach a career goal. They select opportunities that help them achieve this work goal when opportunities arise. Work across multiple targeted projects helps creatives build a niche role and develop a unique combination of skills and gain intellectual capital from different industries.

They are flexible
Some ACT creatives choose a portfolio career because of the embedded flexibility that this work model provides. Examples of this need for flexibility might include family or carer responsibilities, or study or health issues, with the portfolio career providing the capacity to cordon off time to pursue their creative practice or other life interests and obligations. Some pursue a portfolio career because they only want to work on their creative practice part-time and develop a career with a mix of work that enables this part-time creative engagement.

They are the right career for me
Some ACT creatives actively pursue a portfolio career because it meets their professional and personal needs. They enjoy project-driven work, or the diversity of employment opportunities that a portfolio career provides, or they find a portfolio career more liberating and satisfying when compared with other forms of possible employment in the ACT.

ESTABLISHED PORTFOLIO CAREERS OFTEN INVOLVE MORE 'WORK-OF-CHOICE' THAN EMERGING PORTFOLIO CAREERS

Another attribute of ACT portfolio careers is that the creative portfolio mix is likely to change over the course of creative working life. Portfolio careers for emerging creatives are more likely to involve work that is not part of their core creative practice, and/or is work in non-creative occupations or industries. This balance can change for established creatives who have a professional identity and history of creative outputs, and productive professional relationships, and are more likely to have a portfolio career with work of their choosing, including more of their creative practice.

MANY ACT CREATIVES HAVE PROJECT-DRIVEN CAREERS

A second key work model identified in this study is project-driven careers. Creatives in the industry survey make it clear that many ACT small creative businesses (or, in a small number of cases, medium businesses) across many creative industries – including those in design, cultural and natural heritage, festivals and public events, digital media and media production and communication and creative services – are project-based. While some businesses may have long-term clients who provide a steady income stream or streams, this tends to be supplemented with short- to mid-term project work.

MANY ACT CREATIVES HAVE EMBEDDED CAREERS

The ACT has the highest proportion of embedded creatives in any jurisdiction in Australia, and embedded creatives play a critical role not only in the ACT creative economy but also the broader ACT economy.[50]

EMBEDDED CREATIVES CONTRIBUTE TO MANY INDUSTRIES IN THE ACT ECONOMY

Embedded creatives contribute their creativity and intellectual capital to many industries in the ACT economy, including manufacturing, wholesale trade, information media and telecommunications, and rental hiring and real estate services (Figure 12, which shows results for the top 10 industries). A fair proportion of ACT embedded creatives work in industries in the ACT knowledge economy, including public administration and safety, of which 6.41% are embedded creatives; and professional, technical and scientific services, which employs 3.34% of creatives. At the same time, embedded creatives aren't clustered solely in public service roles but are instead found working in most industries in the ACT.

The fact that many creatives find work outside of their industry is a strength of the ACT economy, as it provides stable work for creatives and enables creatives to move across industries and diversify their practice. Embedded creative employment offers both higher income and more likelihood of full-time employment than work in many creative industries.[51] It is worth noting that, arts professionals constitute only 12% of the ACT embedded creative workforce.

Building and strengthening pathways into industries other than the creative industries provides greater job security for creatives and brings creativity and intellectual capital to other parts of the economy. The unique scale and distribution of embedded creatives in the ACT is also an attractor of creative talent.

ACT CREATIVE WORKFORCE INCOME

This section uses *median* income to summarise income levels across the different creative industries and occupations. Median income is the standard summary measure for incomes because it removes the impact that a few very high incomes have on the values of average income.

YOU EARN LESS IF YOU WORK IN THE ARTS

Much like employment patterns in the ACT, ACT creative incomes vary markedly across occupations and industries. This difference reflects the higher levels of part-time work in arts occupations and arts industries, and the higher levels of full-time work in other creative occupations and other creative industries in the ACT.

ACT ARTS PROFESSIONALS IN ARTS INDUSTRIES EARN LESS THAN THE AUSTRALIAN AVERAGE

Arts professionals who work in arts industries earn slightly less ($979) than the Australian median income for this group ($1,007), and approximately the same in other creative industries ($1,040) as the rest of the nation ($1,041). If you work as an arts professional in all industries in the ACT, you earn more ($1,173) than the national median ($1,063), which reflects the higher incomes found in most ACT industries (Figure 13).

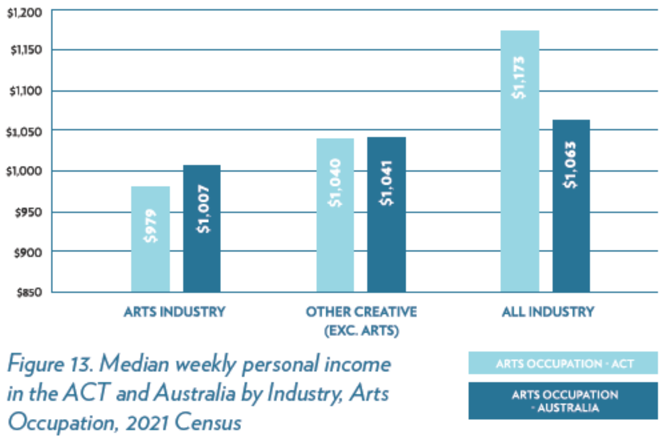

Figure 13. Median weekly personal income in the ACT and Australia by Industry, Arts Occupation, 2021 Census
Source: ABS 2021 Census

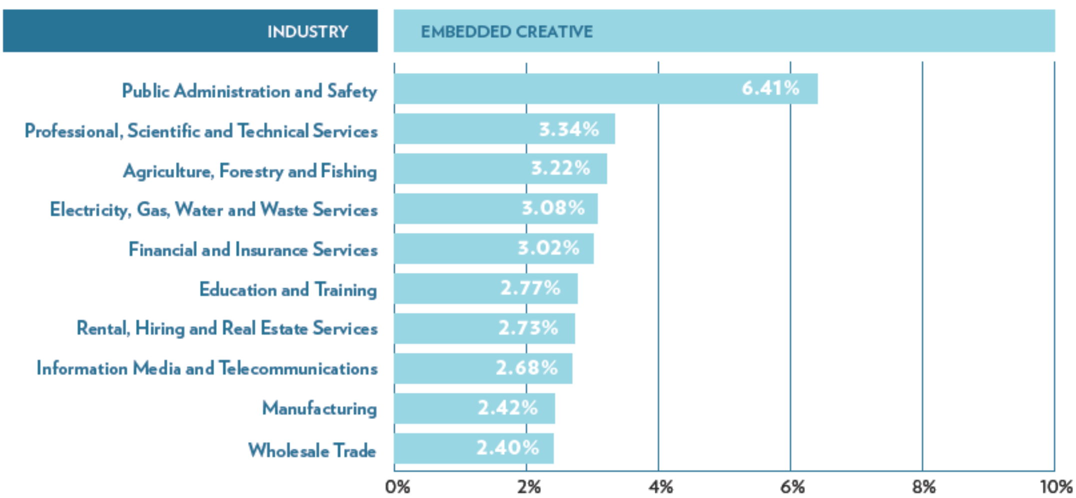

Figure 12: Top 10 industries for ACT embedded creatives, 2021 Census
Source: ABS, 2021 Census

Image: Strathnairn Arts Gallery and Cafe. Photo by Anna Mayberry.

IF YOU WORK IN ANY OCCUPATION IN THE ACT ARTS INDUSTRIES, YOU EARN LESS THAN THE NATIONAL WEEKLY MEDIAN INCOME

The arts industries in the ACT provide slightly lower than the median weekly income for all occupations in its workforce ($994 per week) than the national arts industry workforce median ($1,027) (Figure 14), which is again likely due to the higher rates of part-time work in the ACT arts industries.

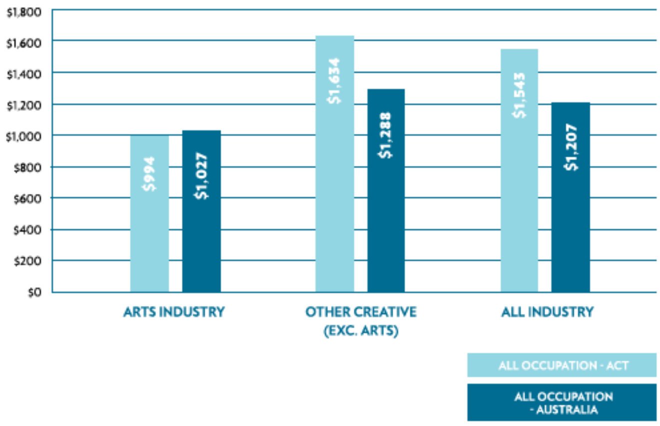

Figure 14: Median weekly personal income in the ACT and Australia by Industry, All Occupations, 2021 Census
Source: ABS 2021 Census

YOU EARN MORE WORKING IN OTHER CREATIVE OCCUPATIONS THAN THE NATIONAL MEDIAN

The higher levels of full-time work for other ACT creatives and the higher median weekly incomes in the ACT more broadly likely results in higher median weekly incomes than the national median for people working in other creative occupations in all industries (Figure 15). In contrast to ACT arts professionals working in arts industries, ACT creatives working in other occupation in their own (other creative) industries in the ACT earn 8% higher weekly incomes ($1,634) than the national equivalent median ($1,288).

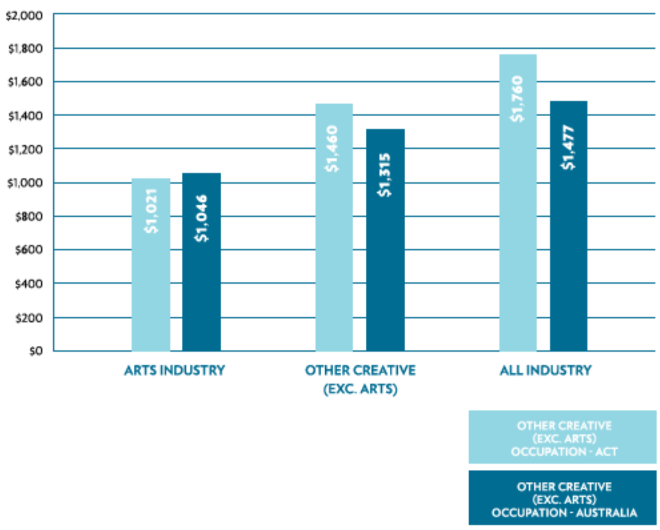

Figure 15: Median weekly personal income in the ACT and Australia by Industry, Creative Occupation, 2021 Census
Source: ABS 2021 Census

ACT CREATIVES EXPERIENCE DIFFERENT LEVELS OF ECONOMIC SECURITY AND INSECURITY

A more granular analysis of median weekly income in the ACT creative workforce by domain from the 2021 Census (Figure 16) reveals that almost every creative occupation, with the exception of performance, earns less working in the arts industries than in other creative industries. People in arts occupations in creative industries earn significantly less than those in other occupations. Arts workers earn the lowest median weekly income in the creative industries ($637.73) followed by performance at the second lowest ($707.35) and visual arts and crafts as the third lowest ($1,009.26). It is difficult to identify to what extent this is due to the greater volumes of part-time work in these occupations, or whether this is also due to lower hourly rates. Currently there is no available data on hourly rates for creatives, and this would be required to determine the reason for this difference in weekly incomes.

People who work in other occupations in the creative industries – creative support – earn the highest median weekly income in the sector ($1,744.19), followed by communication and creative services ($1,556.03), writing and publishing ($1,551.02) and design ($1,371.89). Note, though, that the writing and publishing domain includes professional writers, editors, journalists and publishers and therefore masks the earnings of authors and poets.

The majority of these median incomes are higher than they were in the 2016 Census, as expected given wage increases. Despite the increase in part-time work as a result of COVID, median weekly incomes in 2021 didn't seem to be negatively affected by COVID, as the patterns were in line with the 2016 figures (not published here).[52]

This disparity in income between arts professionals and other ACT creatives is supported by the data in the industry survey. Only 35% of arts professionals made their entire income from a single arts practice role, while 41% made 'some' to 'a small amount' of income from this role. We note here that our survey was conducted during the 2021 COVID pandemic when ACT lockdown prevented many creative and cultural activities from being delivered. However, this figure remains in stark contrast to the 80% of people in digital media and media production in our survey, as one example, who generated their entire income from their work during that same period.

This disparity is also reflected in the annual turnover data of ACT active creative businesses. By way of example, over 50% of artists, musicians, writers and performers, and 65% of music and other sound recording businesses, had a turnover of $50,000 or less. In comparison, even though nearly 50% of architectural services are non-employing, 38% of these

CREATIVE OCCUPATIONS	ARTS INDUSTRIES	OTHER CREATIVE INDUSTRIES	ALL CREATIVE INDUSTRIES
Arts Workers	$579.09	$1,458.33	$637.73
Digital Media and Media Production	$1,285.33	$1,625.00	$1,371.09
Performance	$713.46	$687.50	$707.35
Visual arts and crafts	$986.96	$1,178.57	$1,009.26
Writing and publishing	$1,540.76	$1,708.33	$1,551.02
Communication and creative services	$1,425.00	$1,583.33	$1,556.03
Cultural and natural heritage	$1,180.56	$1,284.51	$1,278.99
Design	$1,170.45	$1,398.44	$1,371.89
Other Occupations	$961.01	$1,902.04	$1,744.19

Figure 16: Median Weekly Incomes by creative occupations and Industries, 2021 Census
Source: ABS 2021 Census

businesses turned over between $50,000 and just under $200,000, and 34% of these businesses had an annual turnover of between $200,000 and $2 million. Among motion picture and video production businesses, 56% had a turnover of between $50,000 and just under $200,000.[53]

Many arts professionals in industry focus groups and interviews spoke of the economic precarity that comes from working in arts occupations, as well as the significant impacts this precarity has on their financial security and mental health. Examples include incapacity to purchase a home; rental stress; lack of savings and superannuation; and periods of significant insecurity and stress with no income streams from their work.

"A friend of mine, who's also a Canberra artist, has this philosophy on life, it's called DOOM: Days Out Of Money, and everything you do pushes DOOM further away. And so you're always calculating 'this is how much I need to live for six months,' and everything you do pushes that a bit further away into the future. So during COVID there were a few months when DOOM got a bit closer, but then it went away again. So that's the life of practicing artists, they usually have just got to make enough money to keep DOOM away. But I'd say for a lot of people, at the moment DOOM's pretty close."

Arts professionals and some other creatives also report a high proportion of unpaid work relative to other industries. Such unpaid activities may include rehearsals, grant writing and business administration, as well as volunteer or pro bono community work. Again, this negatively impacts on the perceived economic value of their creative practice and can lead to an acceptance among creatives that remuneration may not or should not be received for contracted work.[54] This data came through strongly in the industry interviews, focus groups and surveys for arts professionals.

I remember once someone from XXX wanted to make this promo and I told him the pay rates, and they were astonished. He said, 'It's expensive, isn't it?' I said, 'Hang on a minute. If you have a consultant coming in to help you with PR or marketing, what's the daily rate, I can tell you what the daily rate for that is. It's 900 bucks a day. And that's probably what you're paying. And you're jumping up and down about $350, for someone to come in and do 8 hours working on a film, you throw your arms up'.

This is quite distinct from other creatives – particularly established creatives – who work in communication and creative services, design, digital media and media production, cultural and natural heritage and the more commercial side of writing and publishing. These creatives either did not raise income as a challenge and/or were satisfied with their income and felt that their work provided them with adequate financial security.

LOWER INCOMES IMPACT CAPACITY TO PRODUCE CREATIVE OUTPUTS

As we discuss in more detail in the ACT creative ecosystem, for a proportion of ACT creatives who make creative works – including arts professionals and some creatives in design, film and games – income insecurity hinders the production of creative outputs. This is in part because these creatives dedicate significant time to securing income streams that enable the production of creative outputs, generally with very low rates of return for time spent. The flow-on effect of low incomes is that creatives cannot afford to secure or sustain a working space, or purchase the materials and equipment they need.

I saw artists really struggling with that balance to earn enough money to pay for their studio, but then still have enough time to make the work that they want to make.

Image: Ainslie Arts Centre. Photo by Anna Mayberry.

AUDIENCES AND MARKETS

Audiences and markets are the end-users, customers and consumers of creative goods and services and thus critical to the ACT creative economy. Audiences and markets also play an important role in the creative ecosystem because their engagement with creative outputs provides feedback to creatives about demand, tastes and interests.[55]

The current paucity of direct data about creative audiences and market expenditure in the ACT and Australia makes it difficult to identify trends in market growth, change and decline.[56] The following section outlines what we broadly know about ACT creative audiences and markets.

RECENT ACT HOUSEHOLD EXPENDITURE ON RECREATION AND CULTURE BROADLY MIRRORS THE ACT AVERAGE

Household expenditure from January 2019 to September 2022 from the ABS on Recreation and Culture in the ACT broadly tracks the average of all expenditure in the ACT, with large declines during each of the COVID waves and post-lockdown recoveries (Figure 17). Recreation and Culture arguably made a better recovery at the end of 2019, 2020 and 2021 compared with average individual consumption in the ACT.[57]

THE ACT IS THE STRONGEST LOCAL MARKET FOR CREATIVE ACTIVITY

The ACT is home to what is arguably the strongest local market for attendance at, and participation in, creative activity in Australia. For ACT creatives, these nation leading levels of appetite for and engagement with creative goods and service provides a positive local market environment with potential for development and growth.

The most recent ABS figures on cultural activity (2017-18) show that the ACT community has the highest overall attendance at cultural venues and events in Australia across the lifespan, with 92.5% of Canberrans 15+, and 97.3% of ACT children (5-14), attending a cultural venue or event during this period (Figure 18).[58]

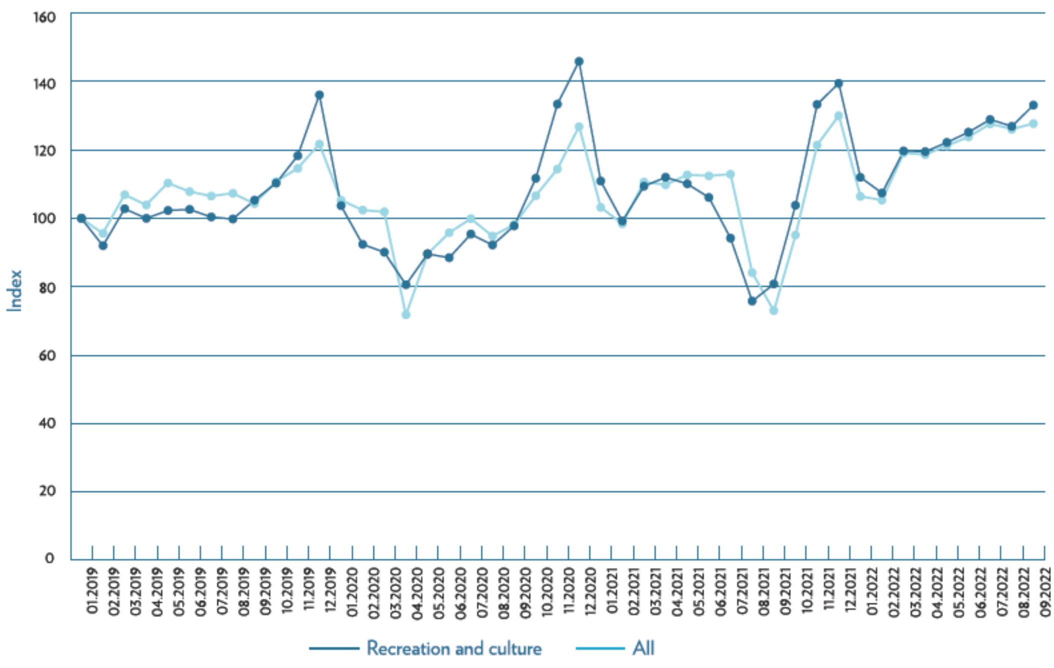

Figure 17: Expenditure on Recreation and Culture in the ACT, ABS
Source: ABS, Monthly Household Spending Indicator, September 2022

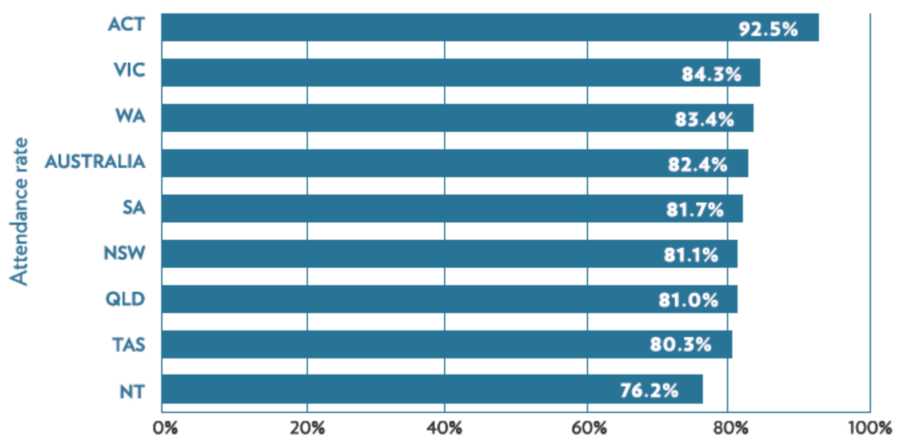

Figure 18: Attendance at selected cultural events by state and territory, people aged 15 years and over, 2017-18
Source: ABS, Participation in Selected Cultural Activities, 2017-18

THE ACT HAS THE HIGHEST PARTICIPATION RATE IN CREATIVE ACTIVITY

The Canberra community also has the highest rate of participation in creative activity in Australia, with 45% of all Canberrans 15+ participating in some form of cultural activity as defined by the ABS (Figure 19). These high rates of participation have spill-over effects into the economy, including, by way of example, more revenue for private arts education and suppliers of creative materials and equipment.

Furthermore, the ACT community engages in a broad cross-section of cultural activities, with participation in many types of cultural activities higher than the Australian average (Figure 20).

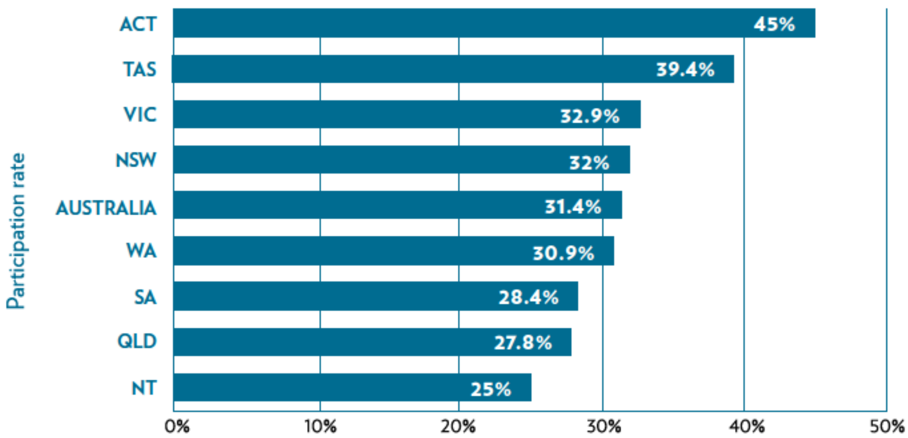

Figure 19: Cultural activity participation rates by state and territory, 2017-18
Source: ABS, Participation in Selected Cultural Activities, 2017-18

THE PARTICIPATION LEVEL OF CULTURAL ACTIVITIES IN ACT AND AUSTRALIA		
	Proportion involved	
Type of cultural activity undertaken in last 12 months	ACT	AUSTRALIA
Performed in drama, comedy, musical or variety act	1.9%	1.5%
Singing or playing a musical instrument	7.6%	4.6%
Dancing	5.9%	3.3%
Written song lyrics, or mixed or composed music	3.7%	2.6%
Written any fiction or non-fiction	9.2%	5.5%
Visual art activities	15.0%	10.1%
Craft activities	18.9%	13.6%
Photography, film-making or editing	7.1%	5.1%
Designing websites, computer games or interactive software	6.3%	3.8%
Fashion, interior or graphic design	3.5%	2.1%
Has not participated in any selected cultural activities in last 12 months	54.9%	68.6%

Figure 20: Comparative percentage levels of participation in cultural activities, ACT and Australia
Source: ABS, Participation in Selected Cultural Activities, 2017-18

THE ACT WAS A STRONG AND GROWING CULTURAL TOURISM MARKET BEFORE COVID-19

Domestic and international tourism is also a key market for many ACT creative industries. The ACT experienced year-on-year growth in both domestic[59] and international[60] tourism in the nine-year period from 2011 to 2019. Between 2014 and 2018 the ACT saw a 24% increase in daytime trips, and the largest increase in overnight stopovers in this same period (34%) for any state or territory in Australia.[61]

A key competitive advantage for the ACT is its cultural tourism. In 2018, 12% of domestic daytime stopovers and nearly a third of overnight stopovers included an arts activity, which was double and more than double the national average respectively.[62]

For international tourism, over two-thirds of the 243,000 tourists visiting the ACT in 2017 were international arts tourists.[63] International cultural tourists to Australia are most attracted to museums and galleries, but are increasingly attending festivals, fairs and cultural events as well, with a 61% increase in such tourism between 2013 and 2017.[64] International arts tourists are also increasingly engaging with Aboriginal and Torres Strait Islander arts, with a 41% increase in this type of tourism between 2013 and 2017.[65] This growth in what the UN World Tourism Organisation calls 'intangible heritage', including crafts, gastronomy, festivals, music and oral traditions and contemporary culture, is now boosting traditional cultural tourism in tangible heritage – national and world heritage sites, monuments, historic places and buildings, cultural routes – worldwide.[66]

Although the ACT experienced nearly a decade of tourism growth, the COVID-19 period from 2020-22 hit ACT domestic and international tourism hard, with greater declines in visitor numbers, stay and spend than the Australian average.[67] For the year to June 2022, the ACT experienced the largest drop in trips (35%) and in spend (34%) in the nation.[68]

Considering the pre-COVID strength of the ACT's domestic and international cultural tourism, and growing market interest in cultural tourism worldwide, there is an opportunity to leverage the ACT creative industries – including Aboriginal and Torres Strait Islander arts and culture, the arts, festivals and public events, cultural and natural heritage, and design and architecture – to assist in market recovery.

We know that a vibrant creative sector attracts tourists to heritage sites, festivals, museums, galleries and theatres, while the location's broader cultural ambience and creative industries in turn benefit from tourism through increased consumption of creative goods and services. We also know that strategic promotion of local cultural tourism leads to higher levels of growth in tourism.[69] Indeed, strategic investment in the creative industries can significantly boost tourism revenue and provide strong return on investment. Victoria, for example, saw an 88% increase in cultural tourism – worth $2 billion in 2019 - as part of their creative policy approach, *Creative State: 2016- 2020*.[70] Support and promotion of local arts and cultural experience is recognised by the *ACT Tourism Strategy 2023-2030* as one strategy for growing the ACT visitor economy by contributing to the promotion of Canberra's strengths and celebrating its distinctive character.[71]

Architectural tourism is a clear opportunity for the ACT, given its world-class collection of modernist architecture. This important niche market appeals not only to people who work within related industries, but to visitors more generally as architecture enables visitors to better understand, and immerse themselves, in the unique built environment of the ACT.[72]

Another potential tourism market for the ACT is the emergent field of creative tourism. Creative tourism "offers visitors the opportunity to develop their creative potential through active participation in courses and learning experiences, which are characteristic of the holiday destination where they are taken".[73] This type of tourism could further grow the ACT's strength in arts education, generate spill-over effects for suppliers of local creative equipment and materials, and reinforce our identity as a knowledge city and an Arts Capital.

The ACT's proximity to regional centres with unique cultural and natural heritage offerings (such as the coast, the snow, and inland NSW), as well as the convenience of travel within and between these regions, provides another opportunity to strengthen the ACT's cultural tourism proposition. Prior to COVID-19, regional arts daytrips and overnight arts stopovers from 2014 increased at a higher rate than metropolitan arts daytrips.[74] Between 2014 and 2018, arts day trips to regional areas increased by 22%, while arts day trips to metropolitan areas only increased by 7% over that same period.[75]

The ACT could achieve growth in regional cultural tourism in partnership with regional arts development organisations, like South East Arts, Southern Tablelands Arts and Arts Out West, as well as regional tourism agencies.

ACT CREATIVE PERSPECTIVES ON AUDIENCES AND MARKETS

ACT creative feedback on audiences and markets is mixed and complex, reflecting the differing levels of work and income streams within the creative industries discussed above. What is overarchingly clear is that for those industries where there is greater supply than demand (and thus lower incomes and more part-time work, as with visual arts, performance and writing), both the local and external markets are experienced as limited. There is demand for the diversification and stimulation of local markets and for external market development to support and grow these industries. For other creative industries where there is higher demand, creatives would like to expand into external markets to diversify their practice and be more competitive in other states and territories.

EXPERIENCE OF LOCAL AUDIENCES AND MARKETS IS MIXED

A proportion of creatives in the ACT experience the local market as beneficial. Some creatives in the arts, design and in cultural and natural heritage, for example, benefit from the high levels of creative attendance and participation by the ACT community. Other creative freelancers and small businesses who work with government clientele benefit from the proximity to government and have ample income streams and work opportunities. At the same time, the small scale of the ACT and the limited opportunities that result from this scale are experienced as a constraint on local market share and future growth. These conflicting experiences are reflected in the survey results.

18% OF CREATIVES IN OUR SURVEY IDENTIFIED AUDIENCES AND MARKETS AS A BENEFIT OF WORKING IN THE ACT

14% IDENTIFIED AUDIENCES AND MARKETS AS A CHALLENGE OF WORKING AS A CREATIVE IN THE ACT

THE SMALL SCALE OF THE ACT MARKET IS A CONSTRAINT

Many creatives who do not have regular government or other industry work point to the problems of market scale in the ACT. The smaller population in the ACT not only negatively affects the size, but also the diversity of local audiences and markets. Creatives whose practice is more niche or experimental, for example, can experience little to no market appetite for their goods or services in the ACT.

'LIMITED OPPORTUNITIES'
RANKED NUMBER 1 OF ALL CHALLENGES FOR ACT CREATIVES **1**

36% OF CREATIVES IN OUR INDUSTRY SURVEY IDENTIFIED LIMITED OPPORTUNITIES IN THE ACT AS A PROFESSIONAL CHALLENGE

OUR INDUSTRY HUBS ARE IN LARGER CITIES

This small local market scale is compounded by the fact that key infrastructure across some creative industry supply chains is amassed in the larger cities of Sydney and Melbourne.

Isolation from these industry hubs is a barrier to entry for ACT creative businesses and limits growth of interstate market share. Some creatives believe this barrier is exacerbated by the perception that the ACT creative industries are more insular and provincial and therefore not competitive. Creatives with small businesses in design, cultural heritage and communication and creative services experience challenges when competing with equivalent firms from Sydney and Melbourne for project-based work outside of the ACT.

These barriers are currently most keenly felt by the ACT writing and publishing industry. The significant decline in local writing and publishing businesses since 2016, coupled with the distance from the larger publishing houses and writers' festivals that provide access to markets, is experienced as the most significant challenge of working as an ACT writer.

34% OF WRITING AND PUBLISHING CREATIVES IN OUR INDUSTRY SURVEY FOUND ISOLATION FROM THE INDUSTRIES AND MARKETS IN LARGER CITIES THEIR MAIN CHALLENGE

WE NEED ACCESS TO NATIONAL AND INTERNATIONAL MARKETS

To address the negative impacts of scale and distance, many ACT creatives from across the creative industries want greater access to national and international markets. ACT creative sole traders and small businesses may struggle to gain access to markets outside their region because of the prohibitive costs of marketing and promotion, or of attending national and international festivals and trade fairs.

To stay in Canberra in a sustainable way, creatives need access to external markets and audiences so they can feasibly live here and bring in income streams from elsewhere.

Arts professionals want support to access national and international markets in order to grow and diversify markets and increase income streams. They note the positive "rates of return" when this has successfully occurred.

'PROMOTION AND MARKETING' RANKED NUMBER 4 OF 9 FEATURES THAT WOULD HELP CREATIVES ACHIEVE THEIR PROFESSIONAL GOALS – ONLY 0.1 PERCENTAGE POINT AWAY FROM NUMBER 3 – MORE WORK OPPORTUNITIES

TOP 3

PERFORMANCE, VISUAL ARTS, WRITING AND PUBLISHING AND CULTURAL AND NATURAL HERITAGE RANKED '**PROMOTION AND MARKETING**' IN THEIR TOP 3 NEEDS FOR THE FUTURE

Writers highlighted the need for stronger connections with the publishing industries in Sydney and Melbourne, and for access to and participation in larger writers' festivals in other states, for promotion and market share opportunities. They also want to improve their market knowledge of online publishing and self-publishing platforms to grow and diversify income streams.[76]

ACT creatives whose major local market is government also want more exposure in, and access to, national and international markets for market diversification, and also market share: to improve and diversify their practice; to demonstrate their level of excellence and expertise to these markets; and to secure work that enables more innovative and creative practice than with government and other local projects.

THE ACT IS ALSO A MARKET OPPORTUNITY

While the small scale of the ACT market is experienced by many creatives as a constraint, the "small pool" of competition in the creative industries, coupled with the fact that many ACT creative industries are yet to reach their full market potential, means that many nascent opportunities exist for ACT creatives that are no longer available in more developed and diversified creative ecosystems like Sydney and Melbourne.

> ***I've certainly found a degree of success that would have been a lot harder to achieve in more highly competitive cities. Because a lot of things weren't happening in Canberra, there's an opportunity for one to make an impact pretty quickly. And that's true across the creative sectors. Anyone from a painter, to a digital media artist, to a musician, if they're serious about their careers, will likely find a more rapid increase in the success in their career by staying in Canberra, than they would have if they were in somewhere like Melbourne.***

Image: Canberra Contemporary Art Space. Photo by Anna Mayberry.