CREATIVE BRISBANE

CREATIVE ECONOMY

CREATIVE SECTOR SURVEY
SUMMARY REPORT 2017

Dedicated to a better Brisbane
Brisbane City Council sees an exciting future for the creative industries in Brisbane and is committed to working with the creative sector to deliver new lifestyle and leisure opportunities. The Creative Brisbane Creative Economy 2013-22 strategy was developed to further this goal and ensure Brisbane will be the premiere location for talented people to live, work and play. From cultural producers engaging minds and building unique cultural experiences, to artistic enterprises producing world-class products and services for local, national and international markets, the creative sector enriches lives, connects communities and helps grow the local economy.

In late 2016, Council commissioned an independent research provider to undertake a survey of Brisbane’s creative sector. The survey was the first industry-specific research undertaken by Council. This report provides some key findings and insights from the survey.

This research is part of the Creative Brisbane Creative Economy 2013-22 strategy and aims to unlock the potential of Brisbane’s creative economy to provide conditions where local creative talent can thrive. It is also about how Council can better serve, support and enable our city’s creative talent and entrepreneurs.

Nearly 700 Brisbane-based creatives completed the survey. The gathered information includes demographic and industry details, reasons for working in Brisbane, trading partners and regions, access to talent and space. It raises awareness and take-up of Council services. The insights gained from the survey are already informing Council support for the sector.

Council will continue its research and engagement with the creative sector and will seek input into the development of services and support. To find out how you can be involved, email creative.communities@brisbane.qld.gov.au or phone Council on 3403 8888.

For information about Council services and opportunities for the creative sector, including grants and expressions of interest, visit brisbane.qld.gov.au/creativebrisbane
SURVEY RESPONDENTS

Sample size
698 respondents

Age of respondents

- 12% 18-24
- 50% 25-39
- 32% 40-54
- 4% 55-64
- 1% 65+

Gender

- 60% Female
- 40% Male
- 1% Other

Speak a language other than English at home

- 12% YES
- 88% NO

Identify as Aboriginal or Torres Strait Islander

- 3% YES
- 95% NO
- 2% PREFER NOT TO SAY

Highest level of education achieved

- 42% Postgraduate degree - PhD
- 18% Postgraduate degree - Masters
- 16% Graduate diploma or graduate certificate
- 9% Bachelor degree
- 5% Advanced diploma or diploma
- 5% Certificate III/IV
- 1% Year 12
- 1% Year 11 or below
- 1% Year 10 or below
- 1% Other

Figures may not sum to 100% due to rounding.
Many cultural production respondents find it challenging to work in Brisbane. Employment opportunities, limited frequency of work and career pathways are some of the major obstacles.

Council recognises the importance of supporting both creative service and cultural production workers. Improving Council’s relationships with the city’s creative sector will help to better promote career pathways to attract and retain cultural production workers.
**PERCEPTIONS OF SECTOR HEALTH**

**Comparison to two years ago how would you rate Brisbane’s creative sector?**

- Substantially worse: 5%
- Somewhat worse: 13%
- About the same: 31%
- Somewhat better: 9%
- Substantially better: 6%
- Don’t know/unsure: 10%

*Figures may not sum to 100% due to rounding.*

**How would you rate your confidence in the creative sector in Brisbane going forward?**

- Not at all confident: 4%
- Very confident: 43%
- Somewhat confident: 32%
- Don’t know/unsured: 10%

*Figures may not sum to 100% due to rounding.*

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**INSIGHT**

57% of creative businesses expect their sales to grow over the next 12 months and there are high levels of confidence in both cultural production and creative services. Businesses with five or more employees are more likely to have a positive outlook for the future.
Brisbane’s creative sector is dominated by sole traders and businesses of medium longevity.

Sole traders are more likely to work in cultural production and find it more challenging to create a sustainable business.
For those not home-based, what are the key motivators for working from your current location?

- **59%** Lease affordability
- **51%** Distinct location atmosphere
- **42%** Proximity to markets/customers
- **41%** Access to public transport
- **39%** Availability of parking
- **34%** Technical infrastructure
- **31%** Proximity to customers or suppliers
- **26%** Access to co-share work space
- **21%** Proximity to cultural venues
- **18%** Proximity to academic institutions
- **17%** Lease flexibility
- **11%** Other
- **7%** Heritage area
- **4%** I own the premises

n= 71 (Business owners with separate premises)

**INSIGHT**

Making more spaces available for a variety of creative projects is important. These need to be affordable, flexible spaces with short-term lease options.
TRADING PARTNERS AND REGIONS

Who do you/your business trade your goods or services with?

- Business to business (B2B)
- Both
- Business to consumer (B2C)

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<thead>
<tr>
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<tbody>
<tr>
<td>B2B</td>
<td>69%</td>
<td></td>
</tr>
<tr>
<td>Both</td>
<td>33%</td>
<td></td>
</tr>
<tr>
<td>B2C</td>
<td>63%</td>
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</tbody>
</table>

n= 698 (all respondents)

Where do you/your business trade your goods or services?

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<thead>
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<tbody>
<tr>
<td>Internationally</td>
<td>41%</td>
<td></td>
</tr>
<tr>
<td>Nationally</td>
<td>58%</td>
<td></td>
</tr>
<tr>
<td>Queensland</td>
<td>68%</td>
<td></td>
</tr>
<tr>
<td>Locally – Brisbane</td>
<td>80%</td>
<td></td>
</tr>
</tbody>
</table>

n= 698 (all respondents)

ASIA PACIFIC is our strongest international trading region.

INSIGHT

80% of respondents trade locally however, almost half of respondents trade nationally and internationally.

Creative services and businesses that have been trading for more than ten years are more likely to trade interstate and internationally.
## Fundraising and Growth Strategies

Most businesses are using a mix of strategies to grow their businesses.

### What are your current strategies for growing your business?

<table>
<thead>
<tr>
<th>Strategy</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Exploring new partnerships</td>
<td>58%</td>
</tr>
<tr>
<td>Investing in marketing and branding</td>
<td>55%</td>
</tr>
<tr>
<td>Developing new products and services</td>
<td>50%</td>
</tr>
<tr>
<td>Exploring new markets (e.g. international markets)</td>
<td>50%</td>
</tr>
<tr>
<td>Exploring business improvements/efficiencies</td>
<td>33%</td>
</tr>
<tr>
<td>Investing in personnel capability development</td>
<td>24%</td>
</tr>
<tr>
<td>Investing in research and development</td>
<td>21%</td>
</tr>
<tr>
<td>Investing in capital equipment or assets</td>
<td>20%</td>
</tr>
<tr>
<td>Increasing staff numbers</td>
<td>19%</td>
</tr>
<tr>
<td>Other</td>
<td>5%</td>
</tr>
</tbody>
</table>

* n= 294 (Business owners)

### Insight

The creative sector is more likely to invest in non-tangible strategies to grow its businesses. Council can play a large role in facilitating these activities by connecting businesses, improving creative networks and advocating for local products.
33% of business owners are actively seeking funding from a variety of sources to grow their business.

24% of all respondents have applied for funding from Council.

If yes, what funding are you currently seeking?

- 68% Grants from government or other bodies
- 29% Crowd-sourced funding
- 20% Investment/equity from other private investors
- 17% Credit/loan from a bank or other financial institution
- 10% Investment/equity from other businesses e.g. venture capital
- 10% Investment/equity from owners/friends/family
- 2% Other
- 1% An Initial Public Offering

n= 107 (Business owners who are seeking funding)

INSIGHT

67% of respondents who have not applied for funding were not aware of Council’s funding opportunities. Business owners are more likely to apply for funding from Council but almost three quarters of business owners want more information on Council grants and awards.
People, lifestyle and weather attracted respondents to Brisbane and keeps them working there.

### Work in Brisbane

**People, lifestyle and weather attracted respondents to Brisbane and keeps them working there.**

<table>
<thead>
<tr>
<th>Reason</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Family/friends live in Brisbane</td>
<td>75%</td>
</tr>
<tr>
<td>Lifestyle/social life/recreation</td>
<td>64%</td>
</tr>
<tr>
<td>Climate</td>
<td>49%</td>
</tr>
<tr>
<td>Cultural life</td>
<td>34%</td>
</tr>
<tr>
<td>Cost of living</td>
<td>33%</td>
</tr>
<tr>
<td>Partner works in Brisbane</td>
<td>33%</td>
</tr>
<tr>
<td>Growth potential</td>
<td>26%</td>
</tr>
<tr>
<td>Existing clients</td>
<td>24%</td>
</tr>
<tr>
<td>Access to suitable premises</td>
<td>24%</td>
</tr>
<tr>
<td>Established business reputation</td>
<td>24%</td>
</tr>
<tr>
<td>Employment opportunities</td>
<td>19%</td>
</tr>
<tr>
<td>Business opportunities</td>
<td>16%</td>
</tr>
<tr>
<td>Pay rates</td>
<td>6%</td>
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<tr>
<td>Access to skilled workers</td>
<td>6%</td>
</tr>
<tr>
<td>Other</td>
<td>5%</td>
</tr>
</tbody>
</table>

*What attracts you to and keeps you working in Brisbane?*

n = 698 (all respondents)

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**INSIGHT**

Respondents highlighted the need to retain a skilled workforce and the availability of venues for creative use.

There is an opportunity for Council to help creatives become sustainable and to foster a shared identity amongst the creative sector.
**COUNCIL SUPPORT FOR THE SECTOR**

What should Council focus on to enable and support the creative sector in Brisbane?

<table>
<thead>
<tr>
<th>Activity</th>
<th>Respondent Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Promotion of local creative products and services</td>
<td>64%</td>
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<tr>
<td>Advocating on behalf of the creative sector</td>
<td>64%</td>
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<tr>
<td>Making Council facilities available for use by the creative sector</td>
<td>63%</td>
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<tr>
<td>Supporting and delivering festivals and events</td>
<td>56%</td>
</tr>
<tr>
<td>Employment opportunities</td>
<td>52%</td>
</tr>
<tr>
<td>Increasing the number of cultural venues</td>
<td>45%</td>
</tr>
<tr>
<td>Working with other levels of government</td>
<td>44%</td>
</tr>
<tr>
<td>Providing networking opportunities</td>
<td>40%</td>
</tr>
<tr>
<td>Facilitating entry into international markets</td>
<td>39%</td>
</tr>
<tr>
<td>Simplifying Council licensing and compliance</td>
<td>39%</td>
</tr>
<tr>
<td>Business information and development opportunities</td>
<td>38%</td>
</tr>
<tr>
<td>Other</td>
<td>13%</td>
</tr>
</tbody>
</table>

n= 698 (all respondents)

**INSIGHT**

Respondents believe Council can support and enable them in a variety of ways, most importantly, by promoting and advocating on behalf of the sector and by providing access to Council facilities.
Council will continue its research and engagement with Brisbane’s creative sector throughout 2017. To get involved, email creative.communities@brisbane.qld.gov.au or phone Council on 3403 8888.

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