Great South Coast Creative Ecology Survey Topline Report

Prepared for Regional Arts Victoria by Future Tense

FUTURE TENSE

CONTEXT

The creative ecologies survey was one of the data gathering methods used in the project to map the Great South Coast's creative ecology. The purpose of the survey was to:

- Collect hard data about the region's creative and cultural actors, their activities and behaviours
- Capture community aspirations for themselves, their locale and the region
- Gain insight into how the creative ecology functions, and
- Provide a community engagement vehicle for the project stakeholders

The data collected will feed into the preparation of the final Creative Ecology report, which will map the region's actors and activities and provide a health check against the Creative Ecology Domains[1].

Target respondents were divided into four categories:

- Individual creatives (professional and amateur)
- Creative professionals (working within creative and non-organisations)
- Arts workers (from arts organisations and businesses that support creative activities)
- Consumers of creative output (the wider community and advocates)

The survey was housed on the dedicated website for the Creative Industries Strategy. It was open between 8 July and 13 September 2019. It was promoted by the Project Control Group stakeholders through their networks, with supporting digital and print advertising undertaken by Regional Arts Victoria.

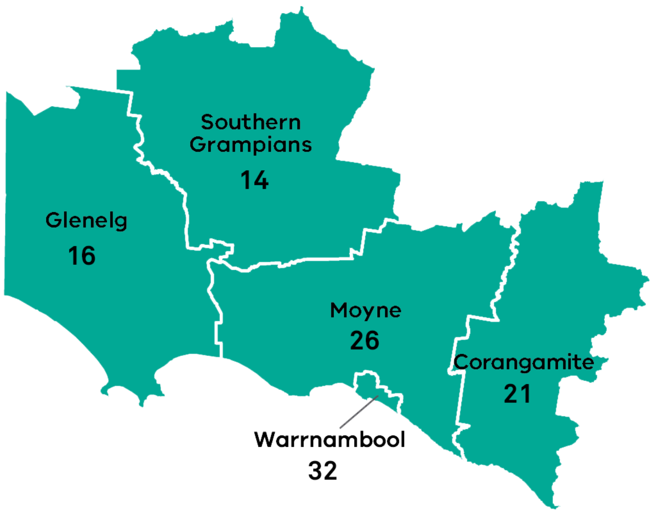
This report provides an overview of the responses and highlights key notable findings.

1 *Creative Ecologies: An Investigation*, Future Tense (2018)

RESPONSES AND RESPONDENTS

A total of 139 responses were collected during the survey period, with 109 included in the analysis. The records removed included 21 incomplete responses (where next to no information was inputted) and nine records which were from respondents located outside the Great South Coast. Nine partially completed records were included in the final analysis as they were mostly complete and contained relevant information.

The following graphic shows the volume of responses from each local government area.



Half of the respondents were aged 55 years and over. While this weighting is reflective of the population distribution of the region, it does mean the perceptions of younger participants in the creative ecology are not captured in the survey data. The following list shows the complete breakdown by age group:

- 65+ – 21
- 55–64 – 30
- 45–54 – 22
- 35–44 – 17
- 25–34 – 17
- 19–24 – 2
- 14–18 – 0
- Under 14 – 0

Three quarters of respondents were female (78%) with an overwhelming majority identifying as Ausrtalian (96%).

The survey asked respondents if they identified as belonging to any particular subculture. The intent was to uncover evidence of underground and informal artistic communities present within the region. However, the question did not produce the desired outcome. 74% of respondents said they did not identify with a subculture. Those that said they did identify as belonging to a particular cultural community, identified them in vague non-specific terms like ‘contemporary arts’ or ‘whimsical/naive’.

There was broad consensus about the contribution of the arts and creative activities to the wider society:

- 98% agreed they contribute to community wellbeing
- 96% agreed they attract tourist activity to the region
- 96% agreed they build a sense of belonging within the community
- 96% agreed expressions of different cultures and traditions are good for our community, and
- 90% agreed telling local stories was important to them

The only area of real disagreement related to the standing of creatives within the community:

- Only 62% agreed that creative practitioners are well respected members of our society

In terms of their role within the creative ecology, most respondents identified as individual creative practitioners. Only four creative professionals were captured by the survey. This severely limits the insights that can be drawn from their responses. The table below shows the complete breakdown by survey type.

ROLE IN THE CREATIVE ECOLOGY	NUMBER OF RESPONDENTS
An individual creative practitioner	43
An interested member of the community	35
An arts worker, manager, or volunteer	27
A creative professional	4

Each of these four categories of respondent were asked a different set of questions relevant to their role in the creative ecology. The following sections outline the key findings for each.

INDIVIDUAL CREATIVE PRACTITIONERS

- Visual artists are the most represented practice type
- Primary activities are producing items for sale (77%), staging exhibitions (70%) and running workshops or classes (51%)
- A wide range of incomes were reported, as outlined in the following table:

INCOME RANGE	NUMBER OF RESPONDENTS
$100,000+	2
$50,000–99,999	1
$25,000–49,999	4
$10,000–24,999	2
$5000–9999	0
$1000–4999	11
$1–1000	4
Break even or loss	6

- No creative practitioners reported employing any staff.
- Most collaboration happens locally.
- Creatives were split down the middle between agreeing and disagreeing on whether they were connected enough to networks and opportunities (both locally and outside the region).
- Most were satisfied with their access to local and regional opportunities, but do not feel as though they have access to national and international opportunities. For instance, no one agreed they had adequate access to international opportunities.
- With regard to audiences, most (37%) are focused on the local community; many (33%) they don't define a primary audience. Only a handful were primarily focused on tourists.
- 95% said working as a creative was important for their wellbeing.

- 69% are confident they will be able to continue working in the creative industries. However, they are evenly split on the question of whether a supportive creative community was critical to their work.

- The following table lists the factors critical to their success, as well as the number of respondents who felt they could access them locally.

	CRITICAL FACTOR	HAS ACCESS
Availability of space in which to produce, exhibit or perform work	30	18
Connections with creative networks outside my local community	25	8
Income generated from my practice	24	18
An engaged audience within my local community	24	13
Income generated from other sources	19	16
Relationships with arts organisations	18	9
Access to education and learning opportunities	17	8
Opportunities outside my local community	17	11
Access to grant funding	14	6
Engagement with tourists to the region	14	10
Availability of government support and investment	13	1
A critical mass of creative practitioners	12	7
Access to supporting technical services	8	1
Availability of private sector investment	8	1
An engaged audience within my heritage or cultural community	5	2

- 64% said it was important to take risks, but respondents were evenly split on whether their current environment supported them to do so.

- They were also evenly split on whether they could access the resources they need.

CREATIVE PROFESSIONALS

- As there were only four respondents in this category, it is not possible to make definitive assumptions about this group.
- The range of reported annual incomes from their creative activities ranged from $10,000 to $150,000, with between 40–75% going out through expenses. One respondent spent between 80–100% within the region, while the others spent between 80–100% outside of the Great South Coast.
- One respondent employed two people, while the others were all solo operators.
- Half of respondents said they wouldn’t leave the area to further their career.

ARTS WORKERS

- Respondents came from a range of organsiations:
  - Festival or touring agency – 22%
  - Arts organisation – 15%
  - Library or community space –11%
  - Performance space – 11%
  - Gallery or museum – 7%
  - Local government – 7%
  - Provider of specialist services and technical support – 7%
  - Consultancy – 4%
  - Pub or bar – 4%
  - Retail outlet – 4%
  - Allied health service – 4%
- The top three contributions their organisations made the creative ecology were to program or present events (67%), provide space for creatives to network or socialise (63%), and provide space to develop creative work (48%).
- There was a wide range of revenues reported, totalling $395,500 per annum. Respondents reported a total of 33 full time equivalent jobs.

- Collaborations included with people or organisation within their towns (85%), the wider region (67%), the rest of Australia (48%) and internationally (30%).

- 75% of respondents saw their local community as the primary customer or client for their organisations.

- 85% agreed that it was important for their organisation to experiment or innovate in their work. However, only 59% agreed that they supported creatives to take risks.

- Only 30% of felt they could access the resources they need.

- The following table lists the factors critical to their success, as well as the number of respondents who felt they could access them locally.

	CRITICAL FACTOR	HAVE ACCESS
An engaged audience within my local community	20	11
Access to grant funding	17	15
Income generated from creative activities	17	10
Relationships with arts organisations	14	10
Availability of government support and investment	13	5
Connections with creative networks outside our local community	11	3
A critical mass of creative practitioners	10	4
Access to education and learning opportunities	10	7
Access to supporting technical services	10	3
Availability of private sector investment	10	3
Income generated from other activities	9	5
Engagement with tourists to the region	8	5
Access to suitably qualified staff	7	3
Opportunities outside our local community	3	0
Volunteers	1	0

COMMUNITY MEMBERS

- Visiting galleries and attending festivals were the most popular creative activities for the community to participate in. The following table outlines the full list of identified activities, alongside their local availability.

	DESIRED ACTIVITIES	HAVE LOCAL ACCESS
Visit galleries and museums	29	26
Attend festivals	30	22
Watch live music	29	23
Go to the cinema	27	26
Attend speaking events or panel discussions	16	12
Go to the theatre or other live performance	28	25
Participate in classes or workshops	24	18
Undetake their own art practice	5	4

- 69% of respondents had purchased a locally produced creative product in the past 12 months, with most spending between $100–499 on each item.

CONFIDENCE IN THE CREATIVE SECTOR

- Finally, all respondents were asked for their perception of their local creative community. There were mixed responses to these questions. While 69% believed there was a thriving creative community in their area, only 56% felt confident about its future.

FUTURE TENSE

Leith Thomas
Director, Future Tense
leith@futuretense.com.au
+61 411 055 299