



Government of
South Australia

Creative Industries Strategy

An industry-led Strategy produced by the
Department for Innovation and Skills, in collaboration with
Department for Trade and Investment and various industry representatives.

2020

GROWTH STATE

*Spider-Man: Far From Home - Visual effects by Rising Sun Pictures.
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The Department for Innovation and Skills acknowledges Aboriginal people as the state's first peoples and Nations of South Australia. We recognise and respect their cultural connections as the traditional owners and occupants of the land and waters of South Australia, and that they have and continue to maintain a unique and irreplaceable contribution to the state.

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Message from the Minister



I acknowledge Aboriginal and Torres Strait Islander people as the state's first people and nations, who have been creating and innovating on these lands for generations.

We know that creativity is a major driver of innovation.

As a Government, we believe that the creative industries play a critical role in South Australia's future.

The sector is already bringing enormous economic value to our state, with South Australian creative businesses directly contributing \$1.2 billion to the local economy and employing more than 15,000 workers in 2019. It also contributes significantly to our state's vibrancy, attracting thousands of tourists each year.

We brought creative industries into the Department for Innovation and Skills because we wanted to harness this value and focus on the elements of the sector that are driven by commercial outcomes.

Growth State is the South Australian Government's plan for prosperity.

We want to build a new economy that is shaped by innovation and resilience. In the wake of the devastation wrought by the COVID-19 pandemic,

we believe that no industry has demonstrated this resilience – not to mention proven its immense cultural value – more than the creative industries.

And now we want to make it even stronger.

We will do this by working with industry to create the optimal environment for creative innovation, diversifying revenue and developing new, locally owned intellectual property.

We spoke to more than 500 industry stakeholders to find out how we can best work with you to drive growth.

You told us that we need to take a more holistic and collaborative approach to education, attracting investment and encouraging exports, and nurturing our creatives in regional areas as well as the city.

And you told us that you want to see a stronger identity for the creative industries, and better ways to communicate and innovate together.

This Strategy sets out a comprehensive plan for how we're going to work with you to achieve these goals over the next 10 years.

It means growing employment, foreign direct investment, revenue and exports.

It means increasing technology use and boosting the 'CreaTech' sector, which converges creativity and technology.

It means reaching new markets and new audiences.

And it means diversifying education and skills pathways so more people have the opportunity to be part of the creative industries.

This is your strategy – it was developed from your passion, knowledge and enthusiasm, and it articulates your vision for a stronger sector.

I look forward to working with you in the coming years so that, together, we can ensure creativity continues to thrive in South Australia.

Hon David Pisoni MP

Minister for Innovation and Skills

Message from the Creative Industries Ministerial Advisory Group

Creativity lies at the very heart of human existence.

It gives us the ability to solve problems, to innovate, dream, entertain, educate and to inspire change.

Creativity powers the stories that form the fabric of our families, our friendships, our communities, and connect us to the world.

South Australia's long-celebrated creative sector has evolved to become a globally renowned collective of artists, innovators, producers and business leaders. Through music, performance, festivals, cinema, design, advertising, fashion, architecture and games, we've earned our place on the world stage with the innovation, dedication, passion, skills and determination of our state's best and brightest creative talent.

From Adelaide's world-renowned festivals to Hollywood blockbusters, from iconic fashion brands to our globally awarded tourism marketing, South Australia's creative industries form a vital pillar of economic, cultural and artistic strength for our state.

However, creative industries have also navigated many challenges over the years, which has meant that our growth, scale and prosperity have not yet reached their full potential. While we have built an incredibly diverse set of creative sectors, we need

to design and build a holistic, integrated and self-sustaining ecosystem to truly play our part in powering the future growth of South Australia's economy.

The Creative Industries Strategy is focused on creating an ecosystem that identifies and educates new talent, provides long term sustainable careers, builds thriving businesses, is export-focused, works seamlessly across all creative mediums, develops intellectual property and increases its financial performance to grow our state's economy.

Our Strategy comprises three overarching priorities: to accelerate industry growth; forge a collective identity; and strengthen skills and career pathways to develop a vibrant workforce.

With our combined strategic drivers of creativity, innovation, technology and an industrious mindset, South Australia's creative industries are set to grow significantly. We are at an exciting point where we can accelerate our sector's growth with certainty, continuity and momentum, placing our creative industries in the hearts of customers across the globe, and playing our part in powering South Australia's future.

Comprising industry leaders, the Creative Industries Ministerial Advisory Group led the development of the Creative Industries Strategy.

Section 1 Background

South Australia. Creativity thrives here.

Executive summary

Growth State

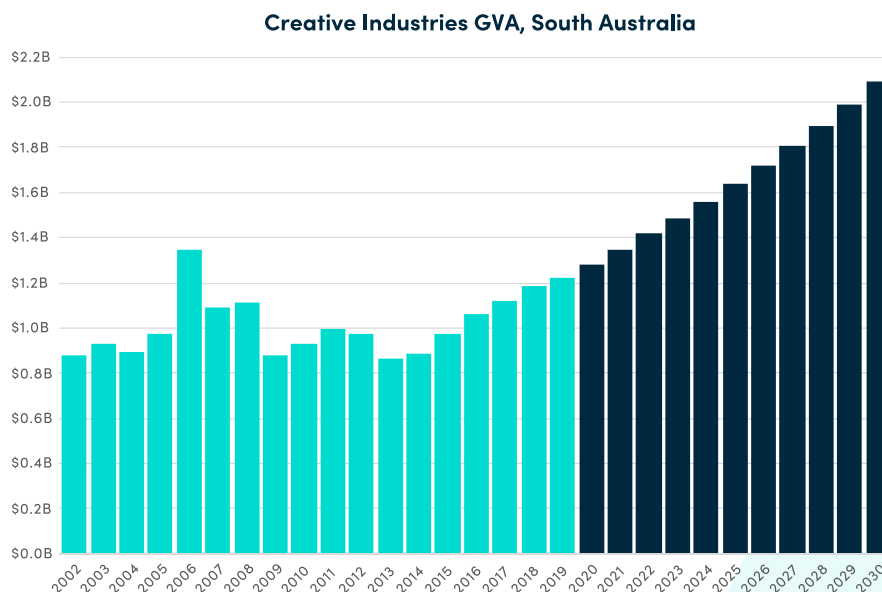
Growth State: our plan for prosperity is South Australia's plan for economic growth. It is a partnership between **industry and government** to agree on goals that will accelerate our state's growth and transformation, leading the way to a new economy shaped by innovation and resilience. Under the Growth State initiative, industry-led sector strategies have been developed for nine priority sectors.

South Australia's creative industries are one of these priority sectors – and this is our plan for growth.

This Creative Industries Strategy sets a target average of 5 per cent growth per annum to 2030. This target will see the gross value added (GVA) for the sector nearly double, from the current level of \$1.2 billion to reach \$2.1 billion by 2030.

This impact will be borne out in increases in a range of areas, including contribution to gross state product (GSP), revenue, employment, investment, export, and wage growth.

The underlying philosophy of this Strategy is that government and industry commit to working together to realise these opportunities for growth.



Historic and target GVA Growth for the Creative Industries, 2002 to 2030¹

¹ ABS BLADE 2018/19, Department for Innovation and Skills calculations (source for all graphs in document). GVA calculations have been derived from firm level data using BLADE for the purpose of the strategy, and may differ from other sources/methodologies. **Data only measures GVA of enterprises which have their main business address in South Australia.**

The Creative Industries Strategy

South Australia has world-class creative industries. Our best-selling games, internationally recognised television and films, world-renowned festivals and performing arts, and lauded craft, design and fashion brands provide significant value to South Australia. They create jobs and exports, attract investment, drive innovation, entertain audiences, boost tourism, enhance our wellbeing, and showcase our unique culture to the world.

The Australian Government acknowledges the importance of the sector, stating that “a creative economy contributes to cultural diversity, social inclusion, environmental sustainability and technological advancement. Creativity is key to innovation, driving sustainability and prosperity.”²

The development of this Creative Industries Strategy has been led by a Ministerial Advisory Group comprising industry leaders. It has also had expert input from the independent SA Creative Industries Think Tank, and more than 500 industry stakeholders.

Industry has identified that, in order to make South Australia a state where creative businesses can thrive, a holistic and collaborative approach should be taken to developing and strengthening key elements, from education through to export.

- This ranges from embedding creative skills development into all levels of education, through to businesses collaborating with universities and VET providers to ensure courses are flexible enough to meet future workforce capability needs.
- It includes attracting young wealth creators and skilled migrants to the state, while ensuring our homegrown talent is equipped with the skills needed to succeed.
- It includes attracting new investment into South Australia as well as supporting local businesses to develop intellectual property, access new customers, and grow their share of global markets.
- It includes supporting creative businesses in our regions as well as amplifying Adelaide as a creative city.

Both industry and government must commit to taking action across these critical areas.

This collaborative, whole-of-ecosystem approach will strengthen South Australia as a growth state for creative industries, and ultimately lead to more businesses selling more creative products and services.

This Strategy is industry's 10-year plan for how to achieve this.

² <https://www.austrade.gov.au/International/Buy/Australian-industry-capabilities/creative-industries>

A note about COVID-19

The global pandemic of 2020 has wreaked immense disruption on many sectors of the creative industries, with the live music and festival sectors, artists and arts organisations hit particularly hard. Film and TV production, VFX and game development have been affected by a halt in global screen production and a drop in investor confidence. Other businesses across the creative spectrum have also been impacted in multiple ways.

At the time of developing this Strategy, we are yet to see what the longer-term effects on the economy might be, or how the most deeply impacted sectors will emerge. However, what has become clear is the importance of the creative industries to our economy and to our wellbeing.

Since the pandemic, people across the globe are spending more time online, consuming more digital content and buying more products from online retailers than ever before. In Australia, the public appetite for locally-sourced products has strengthened, as has interest in our unique local stories and culture – bringing new audiences and customers to those businesses that are able to

adapt quickly and connect in new ways. For South Australia's screen sector, this brings opportunities to double down on the increased public demand for streamed media and video games.

As an affordable, safe and well-appointed capital city that consistently ranks among the world's most liveable cities, Adelaide's reputation as a destination for global businesses to invest and set up offices is on the rise. This brings opportunities to attract skilled migrants, creative thinkers and other wealth creators to South Australia. Additionally, the increased 'normalisation' of working from home enhances the potential for international companies to take on remote employees, leading to new job opportunities in regional and remote areas.

The pandemic is also bringing about a heightened awareness of the need for collaboration. A plan for how government and industry can work in partnership to grow South Australia's creative industries is now more essential than ever.

What are the creative industries?

The UK Department for Digital, Culture, Media and Sport defines the creative industries as “those industries which have their origin in individual creativity, skill and talent, and which have a potential for wealth and job creation through the generation and exploitation of intellectual property”.

The creative industries ecosystem is continually evolving, with sub-sectors increasingly intersecting. The recently defined ‘CreaTech’, which describes the convergence of creativity and technology, is further blurring the boundaries between sectors.

South Australia’s creative industries are a broad ecosystem of sub-sectors linked by their ability to use design-thinking, or creativity, to develop and produce unique, innovative and highly sought-after intellectual property.

For the purposes of this Strategy, industry has identified **10** distinct (but often intersecting) sectors as making up South Australia’s creative industries:

- Advertising and Communication Design
- Broadcasting: TV, Radio and Podcasts
- Design: Urban, Architectural, Interior, Landscape, Industrial and Product
- Fashion
- Festivals (Creative and Cultural)
- Music
- Performing Arts
- Screen: TV and Film, Post-Production, Game Development
- Visual Arts and Craft
- Writing and Publishing

Some international definitions include ICT as a distinct creative sector. For this Strategy, the definition of creative industries does not include jobs in this sector unless the employment is within creative industries (for example, a software developer in games or advertising).

"We provide the branding, design, public relations, digital and traditional marketing communications for South Australia's food and wine, tourism, education, tech, defence, medical, mining and space industries. South Australia is home to an army of small, resilient, independent communication companies, providing extraordinary value."



Jamie Scott
Adelaide Advertising
and Design Club.



*Elderslie Wines Designer Kellie Campbell-Illingworth Artwork
Kellie Campbell-Illingworth Photographer Steve McCawley
Printer Multicolour Australia.*

Advertising and Communication Design

South Australia's advertising and marketing communications sector brands and helps bring to market some of our state's most iconic exports. The industry has undergone digital transformation over the last two decades, with social media and real-time data collection first disrupting and now enhancing traditional channels. Traditional marketing and communications delineations around public relations, digital marketing, design and advertising are converging.

South Australia has a successful history in the sector and our agencies and design studios continue to be acknowledged with international industry awards. Companies such as Parallax, KWP!, Voice, MASH, Showpony, Brighter, Detour and Nation have demonstrated a longevity of excellence, and new creative companies are continuing to emerge, innovating across the key areas of strategy, creative and technology.

Due to the changes in the graphic design sub-sector over the last 25 years, the Australian Graphic Design Association (AGDA) website now refers to graphic designers as "communication designers". This is also now the internationally recognised term for this profession. Our communication designers work hand in hand with marketing, media, advertising and digital to shape and deliver the right visual messages for Australian products and services.

Broadcasting: TV, Radio and Podcasts

"Over a million podcasts have been produced globally by mid-2020. The challenge is finding your audience. The most successful podcasts are well-thought-out, well produced and appeal to your target audience. It's a big industry and continues to grow."

Martine Banks, COO, Podcast Media (Pocket Casts).

While the past two decades have seen traditional broadcast channels in Australia consolidate the bulk of administration and production to the eastern seaboard, this industry sector remains a significant employer in South Australia.

South Australia has a small and diverse community radio sector. A standout example is Adelaide-based youth and community radio station Fresh 92.7, which has been in operation since 1998 and is the most listened to community broadcaster in South Australia.

Podcasting is growing rapidly and now sits alongside traditional radio and television as a sector in its own right. Like home-produced video platforms, the industry produces its own stars and success stories, with monetisation through advertising being the main source of revenue for successful broadcasters.



Community Media Training Organisation Trainee Hannah Murray

Design

“Design is a collaborative process that connects creativity, knowledge and technology, resulting in valuable intellectual property with the power of delivering substantial economic value across multiple sectors.”

Joint submission from Design Institute of Australia, Good Design Australia, and Adelaide Design Network.

South Australia has a long history of world class design-led innovation over many generations. Value-added estimates for 2019/2020 show that design contributes more to the South Australian creative economy than any other sector of the creative industries. Design is an enabler across all creative industries. It encompasses the following sub-sectors:

Design - Urban, Architecture, Interior and Landscape

“South Australia’s architecture is a feature of its cultural identity, providing a sense of place and pride for residents as well as an attractor for visitors. Architecture brings people together and supports a vibrant and healthy community.”

Nicolette Di Lernia, Executive Director, Australian Institute of Architects, SA Chapter.

South Australia has one of the strongest architectural and urban design histories in the nation, commencing with Colonel William Light’s visionary layout of a city surrounded by parks, and continuing with three of Australia’s largest firms (GHD Woodhead, Woods Bagot and Hassell) having their beginnings in Adelaide. It should be noted that architecture is one of Australia’s few consistently positive (in terms of balance of trade) export earners in the creative industries.³

³ [https://www.abs.gov.au/ausstats/Cat 5302 Tables 8 & 9](https://www.abs.gov.au/ausstats/Cat%205302/Tables/8%20&%209)

Material and form testing of 3D printing at University of South Australia. Credit: UniSA.



Design - Industrial and Product

There are many examples of successful South Australian industrial designers, including Icarus, Supersuite and Andrew Rogers Industrial Design (ARID) - which has developed more than 300 products, from specialist hand-crafted single items, to full mass-produced products.

Furniture design is an important sub-sector in South Australia, often integrated into local manufacturing businesses - from internationally acclaimed bespoke furniture by Khai Liew Design through to Workspace Commercial Furniture, now recognised as Australia's largest diversified commercial furniture manufacturer.

JPE Design Studio's rebuild for The Mayfair Hotel. Credit: Jack Barnes

Fashion

“The South Australian fashion sector... includes designers, wholesalers, retailers (online and bricks and mortar), manufacturers, importers, exporters, distributors and a wide range of related sectors (educators, stylists, hair and beauty, media, photographers and influencers).”

Marni Cook, Fashion Industries SA (FISA).

The South Australian fashion industry is internationally recognised and is home to some of Australia's most prestigious and successful brands. In fact, three of the country's most important fashion brands trade from South Australia. Paolo Sebastian has famously dressed celebrities in his couture gowns, gracing red carpets all over the world, his most recent collection in collaboration with Disney. Australian Fashion Labels employs and designs locally and exports merchandise to the value of tens of millions of dollars annually, and R.M Williams remains an enduring national icon.

Resort-wear wholesaler Holiday is proving that a regional location is no impediment to creating, driving and growing a thriving fashion business. Designs are created in the small coastal town of Robe, while its garments are sold in boutiques across the world. Exercise-wear innovators Ryderwear have exploded onto the world stage, marketing via Instagram and their bespoke PUSHH app.





WOMADELAIDE,
Credit Jack Fenby.



Wiggle Wiggle collection by
mifufufu, Aggie Semets, Bachelor
of Creative Arts (Fashion)
graduate. Credit: TAFE SA

Festivals (Creative and Cultural)

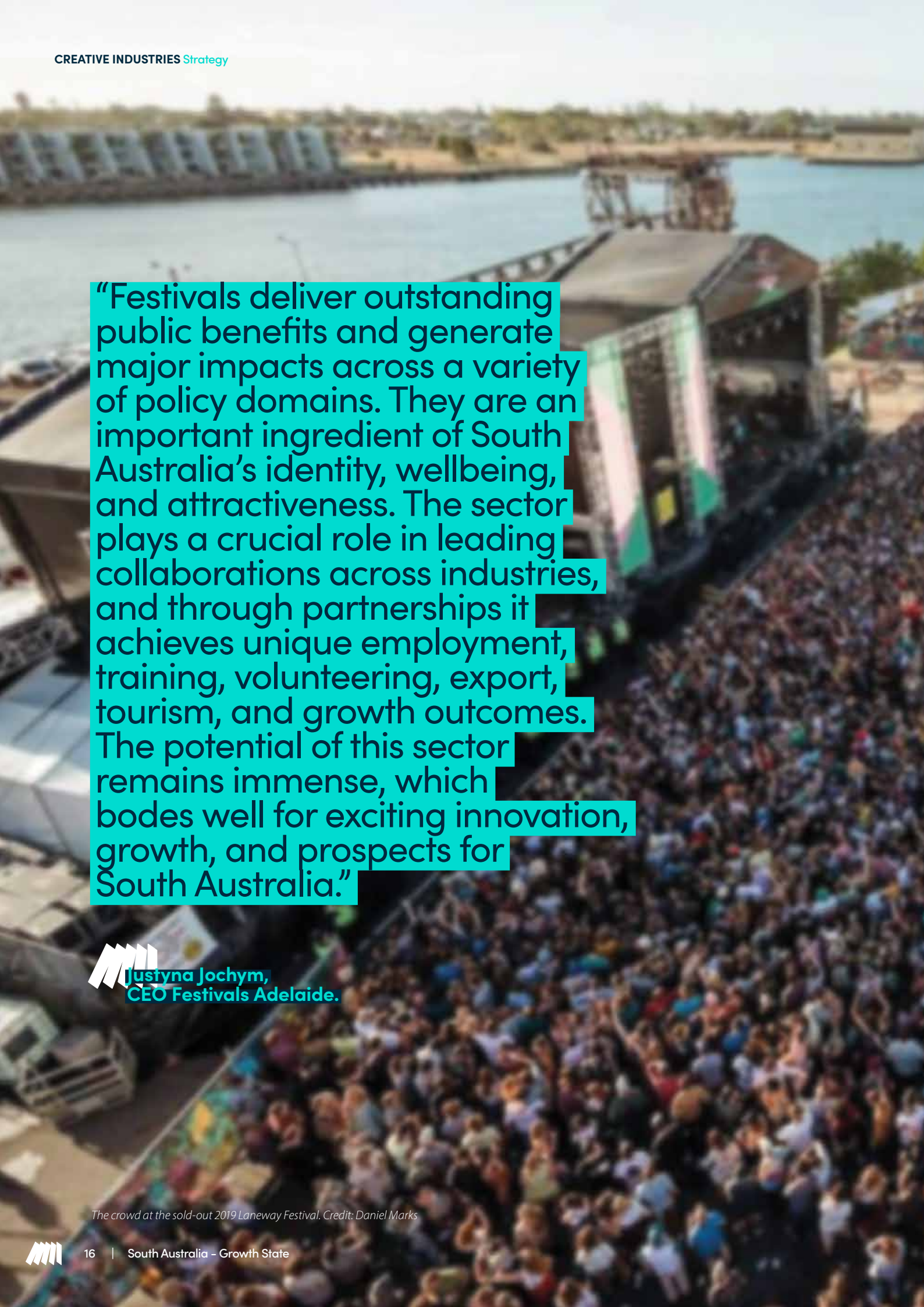
South Australia is known as the Festival State for good reason. Its festivals are internationally renowned for their quality, ambition, and contribution, and collectively recognised as providing Australia's best cultural festival experience. Festivals are also unique platforms for the career development and employment of South Australia's artists, creatives, and specialists across a variety of adjacent industries. They are access points to the national and international arts marketplace, creating export pathways and acting as a 'trade show' for South Australia's creative workforce. Festival management and production requires logistical, operational, and organisational skills from diverse trades and technical staff, which in turn benefit a multitude of businesses in South Australia, from catering to security, sound and lighting to transport services.

Festivals Adelaide is the strategic peak body for 11 of Adelaide's major festivals – WOMADELAIDE, Adelaide Festival, Adelaide Fringe, South Australia's History Festival, DreamBIG Children's Festival, Adelaide Cabaret Festival, South Australian Living Artists Festival (SALA), Adelaide Guitar Festival, OzAsia Festival, Feast Festival, and Adelaide Film Festival.

In 2019, it was estimated that Adelaide's 11 major festivals contributed \$116.7 million in new money to the state's economy and 1,089 full-time equivalent (FTE) jobs. Gross expenditure was a total of \$379.5 million in the same year. Moreover, festivals are significant draw cards for cultural tourism. In 2019, the 11 major festivals created 383,322 visitor nights and the estimated 80,985 visiting tourists spent \$114.7 million during their stay (excluding ticket expenditure).

Recent Deloitte Access Economics research shows that if Adelaide's festivals achieve their growth targets, gross state product (GSP) would be \$59 million higher over a 10-year period. This estimate captures the impacts of additional and induced visitation to South Australia on top of the sector's already significant results. Employment would also be higher overall, with an additional 44 full-time equivalent (FTE) jobs on average annually, peaking at 63 FTEs in 2029-30 as visitation increases year-on-year.

For the purposes of this Strategy, only festivals with a clear creative or cultural theme have been included in the economic measurement.

A high-angle, wide shot of a massive crowd at an outdoor festival. In the background, a stage with large, colorful, translucent panels is visible. Beyond the stage, a body of water stretches across the horizon under a clear sky. The foreground and middle ground are filled with a dense sea of people, many with their arms raised, suggesting a lively atmosphere.

“Festivals deliver outstanding public benefits and generate major impacts across a variety of policy domains. They are an important ingredient of South Australia’s identity, wellbeing, and attractiveness. The sector plays a crucial role in leading collaborations across industries, and through partnerships it achieves unique employment, training, volunteering, export, tourism, and growth outcomes. The potential of this sector remains immense, which bodes well for exciting innovation, growth, and prospects for South Australia.”



Justyna Jochym,
CEO Festivals Adelaide.

The crowd at the sold-out 2019 Laneway Festival. Credit: Daniel Marks



SALA Festival SALA Finissage Closing Party
Credit: Sam Roberts



OzAsia Festival. Credit: Adelaide Festival Centre.



Music

“The strategic investment that has been made into developing the music sector in South Australia through the State Government’s Music Development Office has not only seen significant tangible results for the participating artists, it has also lifted the national recognition of the South Australian industry. This realised growth has been a pleasure and a privilege to witness.”

Millie Millgate, Executive Producer, Sounds Australia.

South Australia has produced some of the most renowned figures in the Australian music industry, with Sia, Hilltop Hoods, Masters Apprentices, Bart Willoughby, Jimmy Barnes, Slava Grigoryan, Paul Kelly, Graeme Koehn AO, Guy Sebastian and Tkay Maidza among some of the top performers hailing from the state.

South Australia is fast becoming a creative hotspot for music industry entrepreneurs to not only create but to thrive. Adelaide was recognised internationally as a UNESCO City of Music in 2015, a designation which places the city into a network of creative cities around the world. This is an acknowledgment of the breadth, depth and vibrancy of the city’s music culture, its international reach, its history and its aspirations.

Adelaide supports a diverse range of independent musicians, a developing and entrepreneurial music industry, a series of world-class music and arts festivals, the world-renowned Adelaide Symphony Orchestra, and leading music education and performance institutions⁴. The sector is supported by Music SA, a not-for-profit organisation committed to developing the state’s contemporary music sector.

South Australia is in the enviable position of having a dedicated Music Development Office (MDO) embedded within the State Government. Established in 2014, the MDO’s focus is to develop policy to support, build and grow the local music industry.

Deloitte Access Economics research shows that over the past five years, the music production sector (production by musicians, live music venues, and music businesses) has seen an increase in total economic contribution (direct and indirect) to the state of \$8 million in real terms.

The live performance aspect of the music industry has been particularly impacted by the COVID-19 global pandemic. This disruption has caused industry to continue to transform and digitise to adapt, with new models of monetisation. This is changing global consumption patterns and providing opportunities for South Australian artists to commercialise product and build global audiences.

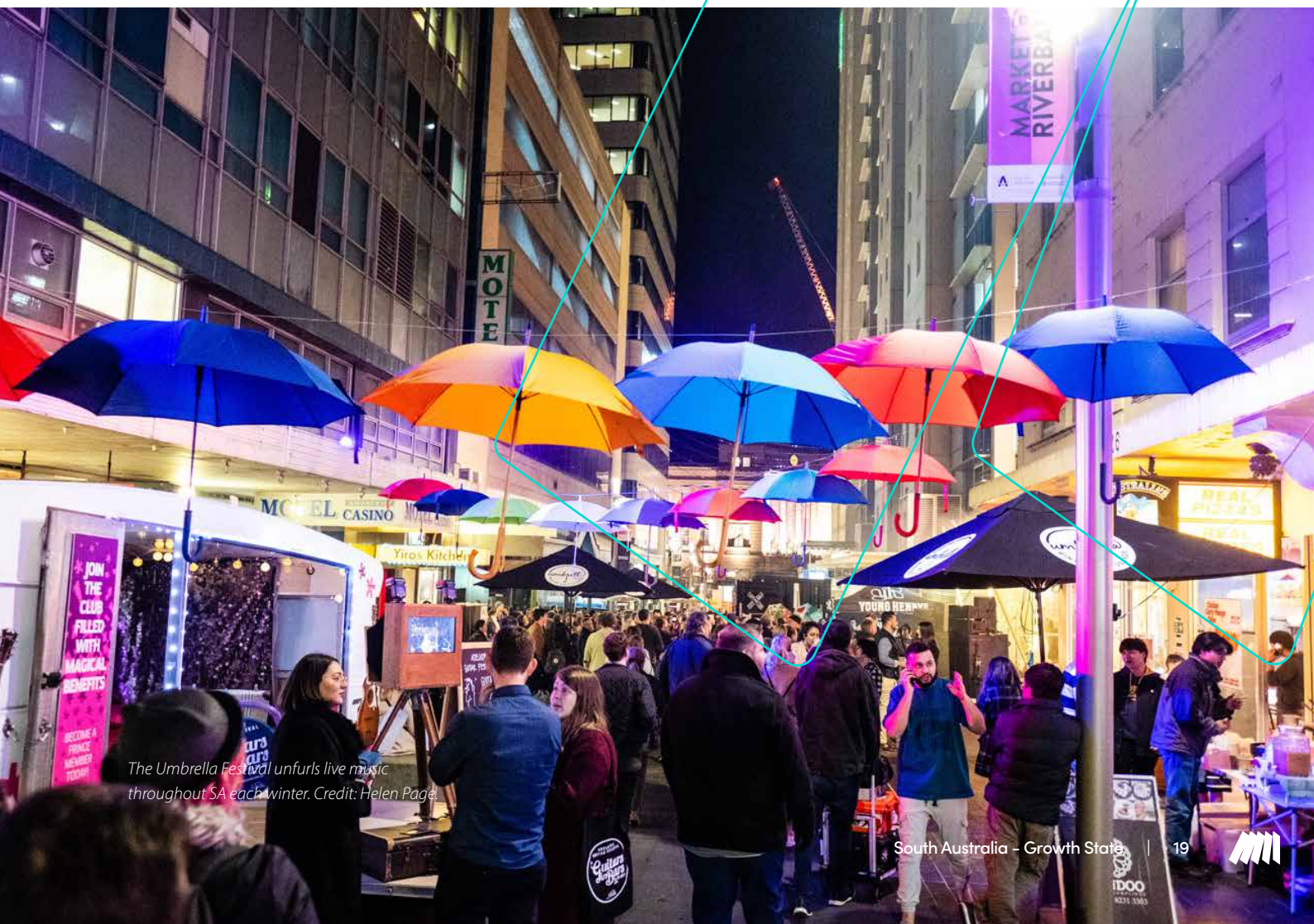


Motez - Fleurieu Support Act. Credit: Danny Howe.

⁴ <https://www.adelaidefestivalcentre.com.au/about-us/adelaide-unesco-city-of-music/>



Artist and mentor Jimblah with students at Carclew. Credit: Morgan Sette.



The Umbrella Festival unfurls live music throughout SA each winter. Credit: Helen Page.



*JamFactory furniture designer Nicholas Fuller.
Credit: Andre Castellucci.*

Performing Arts

“South Australia is defined by an exceptional breadth of creative expression and storytelling. Its distinctive work in the disability arts sector is supported by Access2Arts. The artistic works of South Australia’s Aboriginal population showcase extraordinary sophistication. Adelaide hosts the largest Fringe festival in the southern hemisphere. Adelaide Festival Centre’s OzAsia Festival is Australia’s leading contemporary arts festival engaging with Asia, attracting 200,000 attendances in both 2018 and 2019.”

Evelyn Richardson, CEO, Live Performance Australia.

South Australia punches above its weight in the performing arts. Our Aboriginal and Torres Strait Islander cultural performers embody the spirit of the nation. We boast world-leading expertise in theatre, including theatre for young people and theatre by deaf and disabled people. Our performing arts companies include State Theatre Company South Australia, State Opera South Australia, Australian Dance Theatre, Windmill, Patch, Slingsby, Gravity and Other Myths, and Restless Dance Theatre, all of which have growing reputations Australia-wide and internationally.

The intellectual property within dance, theatre and opera has clear trade potential. Theatre has a long history as adaptable IP, primarily for cinema, but also for publishing. Additionally, international touring opportunities for live performance should not be underestimated and continue to be significant contributors to the creative economy.

Visual Arts and Craft

“Craft...speaks to deep human connections to, and interest in, making and the handmade as offering something seemingly authentic in a seemingly inauthentic world.”

Professor Susan Luckman, University of South Australia, Craft and the Creative Economy © 2015.

The craft sector in South Australia encompasses world-renowned jewellery, furniture, ceramics and glass-blowing artists, and the JamFactory – an internationally regarded organisation completely unique to South Australia. The visual arts and craft sector is supported by dedicated not-for-profit organisation Guildhouse.

Small visual arts enterprises and independent artists in South Australia are significant producers of exportable IP, making a sizeable contribution to our cultural economy. GAGPROJECTS (previously known as Greenaway Art Gallery) is one example of an independent South Australian gallery that has established relationships with artists and galleries at an international level, including opening a gallery in Berlin.

Aboriginal and Torres Strait Islander art and artists continue to provide a substantial contribution to this sector, particularly regionally. Our renowned Aboriginal and Torres Strait Islander arts initiatives include Tarnanthi and the international work of the APY Art Centre Collective. Their work highlights Australia’s most unique and important culture and adds enormous value to our state and regional tourism offering.

For the purposes of this Strategy, photography is included within visual arts and craft.

Screen

“From Hollywood blockbuster films to ground-breaking Australian features and TV series, South Australia’s screen sector is absolutely thriving off the back of several years of unprecedented growth. It’s no surprise many are talking about these times as the start of a new golden age of screen production in the state.”

Kate Croser, CEO, South Australian Film Corporation.

Since the establishment of the South Australian Film Corporation (SAFC) in 1972 – the first and longest-running state screen agency in the nation – South Australia has been at the forefront of film and television production, forging bold new directions in Australian screen.

South Australia is internationally renowned as a premier destination for quality film production. Filmmakers are drawn to the state for multiple reasons – world class crews, purpose-built, state of the art production facilities at the SAFC’s Adelaide Studios, Australia’s most competitive suite of government screen incentives and rebates, which can be coupled with Australia’s Commonwealth incentives, and easy access to diverse and stunning locations.

South Australia’s globally recognised VFX sector provides post-production digital and visual effects (PDV) for some of the world’s biggest productions.

More recently, South Australia’s screen sector has evolved to encompass game development, with a new State Government incentive offering a 10 per cent rebate on qualifying production expenditure in South Australia to further grow the creative industries.

Screen production is thriving in South Australia. According to Screen Australia’s 2018/19 National Drama Report, a record-breaking high of \$110 million was spent in the state on production and post-production in 2018/19, up more than 25 per cent from \$85 million in 2017/18, with South Australia the only state to show continued growth over the last four financial years.

From blockbuster movies and hit TV shows to apps and console games, screen content produced in South Australia is watched, played and purchased by audiences around the world.

South Australia’s screen sector is also supported by the Adelaide Film Festival, internationally recognised as a platform for exciting new Australian talent, and Mercury CX (formerly the Media Resource Centre), a centre of excellence dedicated to elevating screen talent and stories.

‘Social media entertainment’ is a growing part of the screen sector. These creators usually start out as amateurs but those who are successful have the potential to evolve into media professionals who make money from content they publish on social media platforms. They are incubating their own media brands, building global fan communities, and enhancing Australia’s profile among young people across the world.⁵

⁵ Cunningham and Craig 2019

Screen – TV and Film Production

South Australia has an international reputation as the home of some of Australia's most iconic independent films. From Australian New Wave masterpieces of the 1970s and 80s such as *Picnic at Hanging Rock* and *Breaker Morant*, through to Academy Award and Golden Globe winning *Shine*, horror classics *Wolf Creek* and *The Babadook* and ground-breaking recent releases such as box office hit *Top End Wedding*, thriller *Hotel Mumbai* and Netflix science fiction thriller *I Am Mother* as well as Hollywood blockbuster *Mortal Kombat*.

Television production in South Australia is thriving, with locally shot and produced successes including the Cate Blanchett-led drama series *Stateless*, ratings hit *The Hunting* and children's series *First Day* and *Are You Tougher Than Your Ancestors*.

South Australia is home to many award-winning production companies working across features, documentary and television.

Locally-owned companies include Closer Productions (*The Hunting*, *Animals*) SLA Films (*Embrace*, *I Am Mother*), Epic Films (*First Day*, *Goober*), Corner Table Productions (*The Flip Side*, *Recipe For Love*), Triptych Pictures (*The Babadook*, *Wake in Fright*), Jetty Films (*Stateless*, *Storm Boy*), Cyan Films (*Red Dog*, *Hotel Mumbai*), 57 Films (*If Time Flows Back*, *Barefoot Through Australia*), The Kino Film Group (*The Boys Are Back*, *Highly Strung*), and Kojo Productions, which completed three feature films in 2019, including the number two box office hit *Top End Wedding*.

Interstate companies with SA-based offices include Screentime (*Wolf Creek* TV series, *Anzac Girls*) which is one of Australia's most successful television production companies, and Matchbox Pictures, which is owned by global media and entertainment conglomerate NBC Universal.



Crew on the set of *Hotel Mumbai*. Credit: SAFC



KOJO's Marty Pepper colour grading at Adelaide Studios. Credit: SAFC

Screen – Post-Production, Digital and Visual Effects (PDV)

South Australia's globally recognised VFX sector includes companies such as Rising Sun Pictures, KOJO, Resin, Artisan Post Group and more recently Technicolor's Mr X, putting South Australia at the cutting edge of the global film and TV industries.

Post-production, digital and visual effects (PDV) expenditure in the state has risen, with \$66 million in expenditure in 2018/19, up 50 per cent from \$44 million in 2017/18⁶. Employment in the sector has also risen, with South Australia providing post-production for some of the world's biggest productions.

A 10 per cent state-based PDV (post-production, digital and VFX) rebate, which complements the Commonwealth 30 per cent incentive, makes South Australia a competitive place for VFX and other PDV business. Many foreign features, such as Tomb Raider (US/UK) and Animal World (China) have been attracted to South Australia specifically for the PDV part of the production process.

⁶ Source: Screen Australia's 2018/19 National Drama Report

Screen - Game Development

“Whether we are talking about challenging action-adventure platformers like Hollow Knight, unique, brain-melting puzzlers such as Hacknet, or fulfilling the dream of (virtual) horse ownership via Horse Riding Tales, it is clear that South Australian developers are particularly inventive and outstanding in their ability to appeal to domestic and global audiences.”

Jens Schroeder, Director of Industry and Member Relations, Interactive Games and Entertainment Association (IGEA).



VR experience launched by gamers in northern Adelaide at Northern Sound System, City of Playford, and supported by Mighty Kingdom.

The state has a growing independent games industry. Companies such as Mighty Kingdom, whose Shopkins World™ games have been downloaded millions of times around the world, count household names such as Lego, Sony and Disney as their clients. Others gaining international success include ODD Games, developers of the international best-selling Monster Truck Destruction™, and Team Cherry, whose BAFTA-nominated game Hollow Knight is one of the world's most critically acclaimed indie games. Game Plus, a collaborative workspace for game developers and related specialist technology startups, provides a hub for the sector in the Adelaide CBD.

The global games sector is growing, with billions of gamers around the world creating massive demand for new content. South Australia's game developers are well-placed to take advantage of this growing global demand for games for entertainment, as well as 'serious games' integrated with diagnostics and training across a spectrum of industries including health, defence, resources and education.

In June 2020 the South Australian Government announced the extension of the 10 per cent state-based PDV (post-production, digital and VFX) rebate to include a 10 per cent rebate for eligible game development expenditure. This new games rebate will drive greater investment and employment in the South Australian game development sector as well as increased exports to global platforms and consumers.

Writing and Publishing

“South Australia has an abundance of creative talent hungry for vibrant careers in writing and publishing – from graduates of creative industries and creative writing degrees, to sole trader freelance writers, to business owners of small publishing presses.”

Jessica Alice, Writers SA, submission from writing and publishing.

Social media and the digitisation of content have proved a significant disruptor to the newspaper and media industry this century. South Australia’s share of the overall Australian market has also declined in this sector.

However, e-books have not cornered the book publishing market to the extent predicted in the 2000s. With local institutions like Writers SA, Wakefield Press and Adelaide Writers’ Week providing the existing foundation of skills, production and promotion, there is opportunity to take advantage of technological advances, grow the local literary industry and export more South Australian books, content and literary services. There may also be further opportunities in our writing and publishing sector through increasing collaborations with the screen and games sectors.



Writers' Week credit - Featuring speaker Tory Shepherd. Credit: Adam Forte.

Technology and Intellectual Property

Technology

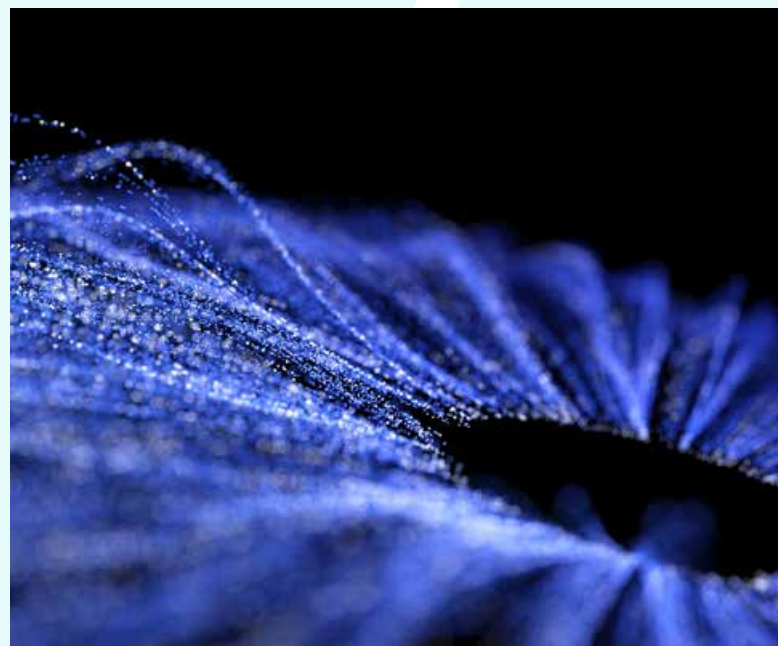
Industry 4.0 technologies are transforming and disrupting many sectors of the creative industries. Examples include wearable technologies in fashion design, the use of machine learning and artificial intelligence by script developers and designers, and blockchain for music rights protection.

A 2018 report by the World Economic Forum and McKinsey & Company into the impact of emerging technologies on the creative economy⁷ finds that these technologies present many promising opportunities for the creative economy, including:

- artificial intelligence changing value chains for creative content
- immersive technology (augmented and virtual reality) transforming storytelling and the way content is experienced
- the convergence of the creative economy and the platform economy, which is redefining the relationship between creators, publishers and technology companies
- blockchain's potential to change the control artists have over their work, such as remuneration, production rights, third-party monetisation and data transfer
- creative businesses increasingly using these tools to refine content in a personalised and professional way, distribute it to wider audiences and recuperate production costs more quickly.

The 'CreaTech' sector describes the convergence of creativity and technology (for example, immersive entertainment such as VR, AR and mixed reality, the use of artificial intelligence in games, etc). In the UK, CreaTech is growing 10 times faster than the sector average and has the potential to account for nearly 40 per cent of employment in the sector by 2030.⁸

These trends will continue to accelerate, and will drive growth for some sectors, while others will continue to create using traditional methods – the quality, authenticity and tradition of which may be increasingly valued in these times of rapid and not always welcome change.



⁷ http://www3.weforum.org/docs/39655_CREATIVE-DISRUPTION.pdf

⁸ https://cfsd.org.uk/wp-content/uploads/2020/04/UCA_CI_Foresight2030_RevA.pdf

Intellectual property

Intellectual property (IP) is at the heart of the creative industries – through its development, the sector creates wealth and jobs. The sector has been described as having an “irreducible core” that is “the exchange of finance for rights in intellectual property”.⁹

Exchange of finance for IP in the creative industries occurs through a range of transactions, including contracted services, entrepreneurship (startups), intrapreneurship (collaborations, business units), and through copyright/licensing and sales of products and services.

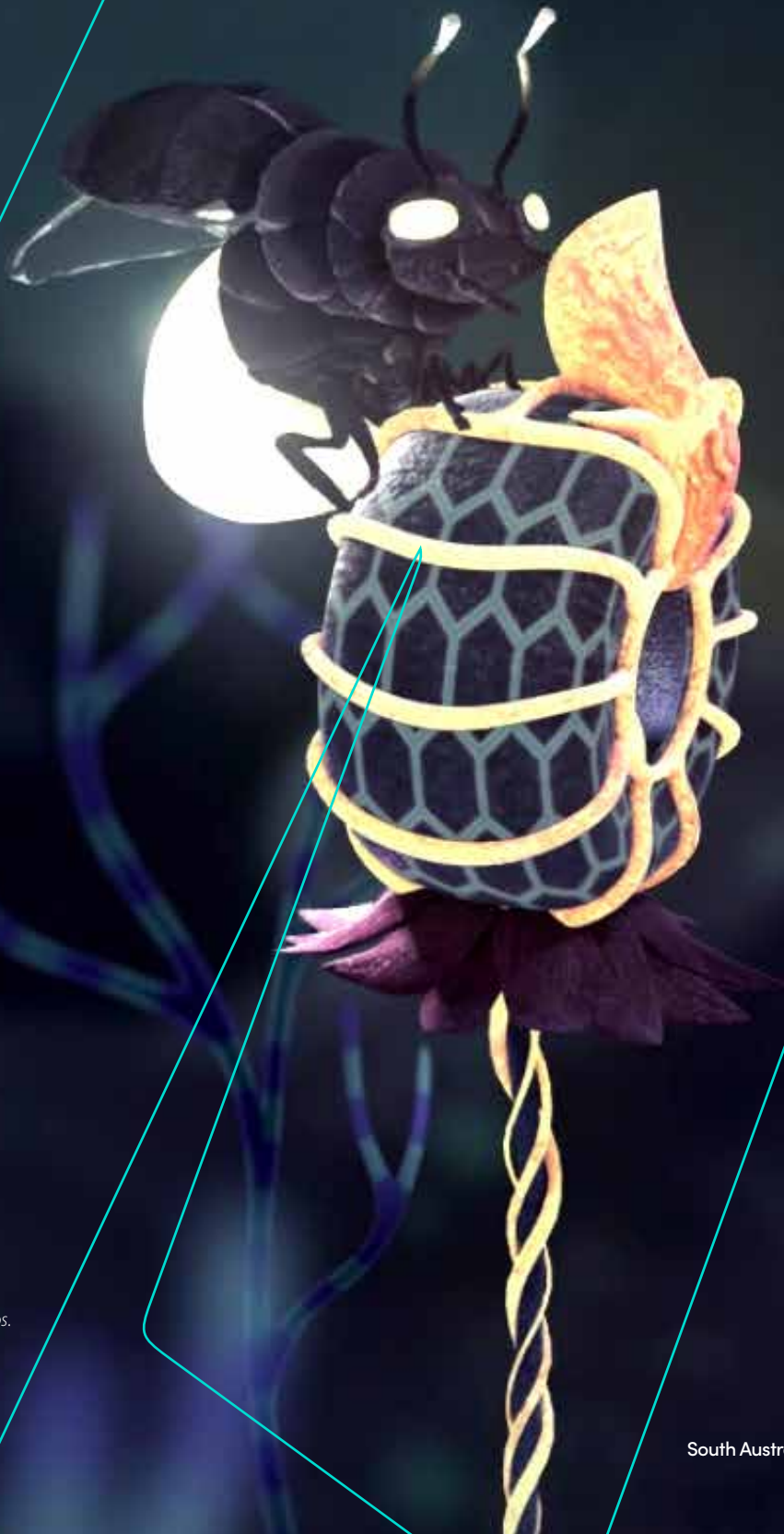
Creative IP is not only generated from content, but also from process and product innovation. Several South Australian companies are working in this area, including Cospective, which won an Academy Award for cineSync, a software tool designed for viewing video content in sync with anyone, anywhere in the world. The tool is used by film and television practitioners worldwide, including Steven Spielberg. Jumpgate VR works with a variety of sectors, including music, tourism and training providers, to explore innovative applications of virtual reality (VR) technology. Companies such as Monkeystack, ModelFarm and Convergen are experimenting with the boundaries of technology.

Through development of this Strategy, industry has suggested that enhanced investment to enable an optimal environment for increased creative IP generation (the spark) and commercialisation would ‘double down’ on the government’s existing investment into innovation and entrepreneurship.

Such an environment would support the core principles of creativity as an enabler to drive innovation through cross-industrial collaborations. This approach goes to the heart of recognising the value of creativity as a domain that stretches across the breadth of the economy, rather than purely for the economic value that our creative businesses generate.

Creative industries also have the potential to grow through adding value to other sectors. The skills and technology needed to create games are also in demand from industries that use simulation, visualisation and virtual reality, such as defence, mining, health, education and manufacturing. Providing these capabilities to other industries presents an opportunity for South Australia’s creative industries. This works both ways, with some entrepreneurs beginning their careers in non-creative industries then transferring those skills to the creative sector. For example, Foxie Ventures, developers of bestselling mobile games such as *Horse Riding Tales*, was started by an aerospace engineer working in Adelaide’s defence industry.

⁹ Lash, S; Urry, J (1994), *Economies of Sign and Space*, SAGE



*Credit: Monkeystack.
Double Happy Vs The
Infinite Sadness: Pharos.*

Competitive advantages

In addition to the sector-specific advantages outlined above, South Australia has many broader competitive advantages. These include:

Liveability

- Adelaide is cost-competitive among Australian capitals, with wages and real estate costs tracking lower.
- South Australia's desirable lifestyle and reputation as being a safe, clean, green and sustainable state means Adelaide consistently ranks among the world's most liveable cities.
- Adelaide's simple, planned urban design, located between the hills and the ocean and with its city centre surrounded by 760 ha of parklands is much admired around the world.
- The state's population size enables connectivity between industry, innovators and academia, enhancing collaborative opportunities.

Culture

- A deep, long-standing culture that values creativity and the arts historically distinguishes South Australia and Adelaide from other states.
- Adelaide is a UNESCO Creative City through the City of Music designation.
- Our state demonstrates excellence in Aboriginal and Torres Strait Islander art, including visual arts and crafts, performance, screen and literature.
- Our festivals are world-renowned.
- Strong support is available through highly respected cross-sector not-for-profit organisations such as the Helpmann Academy, Carclew and Guildhouse.
- Adelaide has world class theatres in the Adelaide Festival Centre and Her Majesty's Theatre. It also has many iconic live music venues, such as the Thebarton Theatre, the Governor Hindmarsh, the Grace Emily, the Exeter, the Wheatsheaf and many more.



Business

- The state has strong complementary sectors such as food and wine, tourism and hi-tech.
- Our location affords us good access to Asia-Pacific markets.
- Creative and innovation precincts such as Lot Fourteen, St Paul's Creative Centre, the Lion Arts Centre, Game Plus, Adelaide Studios and others facilitate collaboration and clusters of expertise in a supportive, low-risk environment.
- South Australia has dedicated infrastructure for creative production, such as Adelaide Studios for screen and JamFactory for craft and design.
- South Australia is an excellent destination for film production, with easy access to some of the most diverse locations in the world for filming only a few hours from the CBD.

Education

- South Australia's noted excellence in creative tertiary education, particularly in the fields of film, visual effects, game development, architecture and design mean we have a growing pool of skilled, work-ready graduates.
- We have a strong reputation for music education – in 1898, the University of Adelaide, through the Elder Conservatorium, was the first in Australia to establish regulations for the degree of Doctor of Music (DMus).
- Comprehensive creative tertiary programs, specific to industry sub-sectors, are offered by education providers, including the University of South Australia, the University of Adelaide, Flinders University, Torrens University, TAFE, CDW Studios and the Academy of Interactive Entertainment (AIE).
- Adelaide College of the Arts (AC Arts) is a purpose-built facility in the Adelaide CBD for the study of performing arts, visual arts and design, and offers industry-standard performance and exhibition spaces, workshops and studios.
- Creative education programs for all levels and ages are offered by organisations including the Art Gallery of South Australia, South Australian Museum, Adelaide Festival Centre, History Trust of South Australia, Carclew, Windmill Theatre and JamFactory.

Economic snapshot of South Australia's creative industries

Between 2002 and 2015, **the global creative economy more than doubled in size**, increasing annual revenues from US\$208 billion to US\$509 billion. United Nations economic data shows the creative sub-sectors driving that worldwide growth were design, fashion and film, with game development and digital animation identified as 'on the rise'.¹⁰

The creative workforce is highly skilled, productive, and resistant to automation. In the UK, more than half of all workers in the creative economy hold a degree, compared to 31 per cent in the wider economy.

This workforce is growing, with **creative employment increasing at nearly twice the rate of the Australian workforce**¹¹. Around one third of people working in creative occupations were employed ('embedded') in industries other than the creative industries, including finance, government, hospitality, education and manufacturing.

The critical role that creative industries have on influencing our wellbeing should also be acknowledged. This can contribute significantly to the economy and community through improving our sense of place and belonging. It is also immeasurable as an attractor, and through reductions in crime and enhanced mental health outcomes.

JPE Design studio. Credit S Noonan

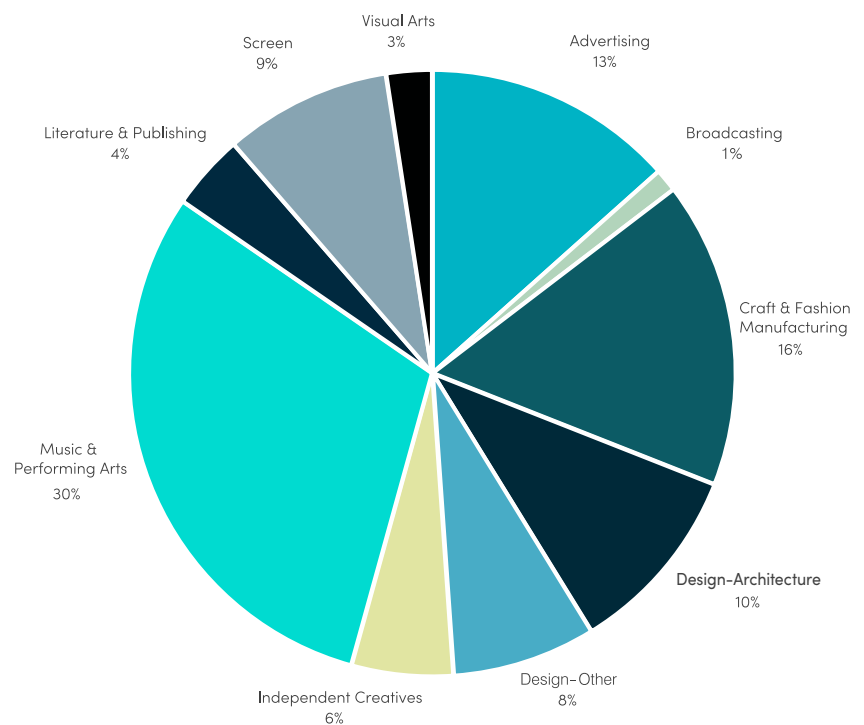
¹⁰ United Nations Creative Economy, 2018

¹¹ <https://research.qut.edu.au/dmrc/wp-content/uploads/sites/5/2018/03/Factsheet-1-Creative-Employment-overview-V5.pdf>

The economic activity of the creative economy occurs across Australia, not just our capital cities and metropolitan areas. The latest census data suggests that regional Australia accounts for 19 per cent of all creative jobs¹².

The creative industries are a significant economic contributor to South Australia. Creative enterprises with their main business addresses in South Australia added GVA of around \$1.2 billion in 2019.

Creative Industry Sector by Share of Employment, South Australia - 2019*

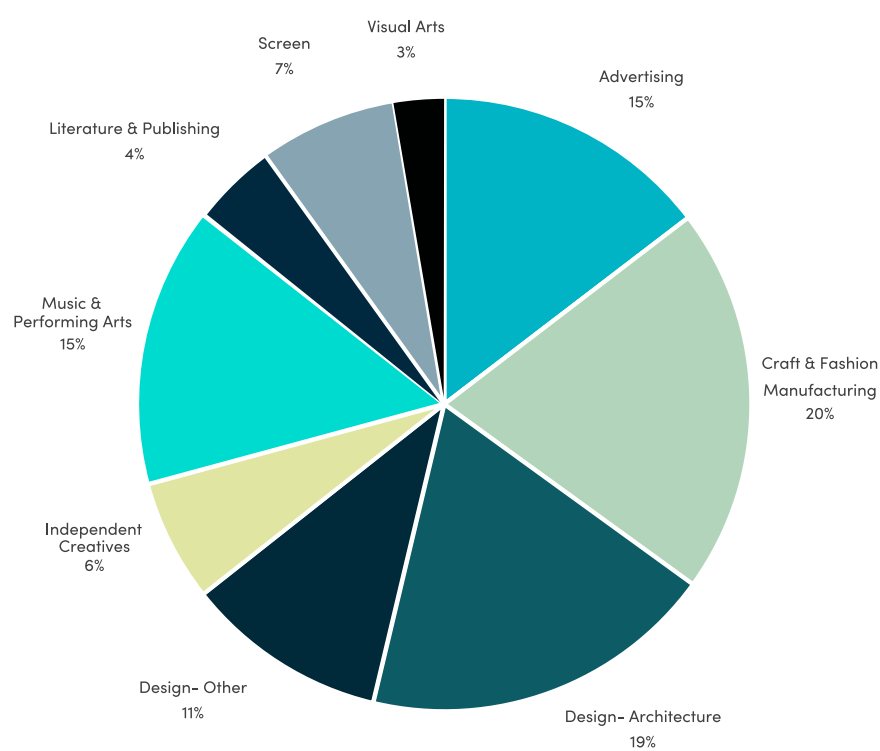


¹² <https://www.paulfletcher.com.au/portfolio-speeches/speech-to-the-creative-regions-summit>

* The source for all graphs in this section is ABS BLADE 2018/19, Department for Innovation and Skills calculations. GVA calculations have been derived from firm level data using BLADE for the purpose of the Strategy, and may differ from other sources/methodologies. Data only measures GVA of enterprises which have their main business address in South Australia.

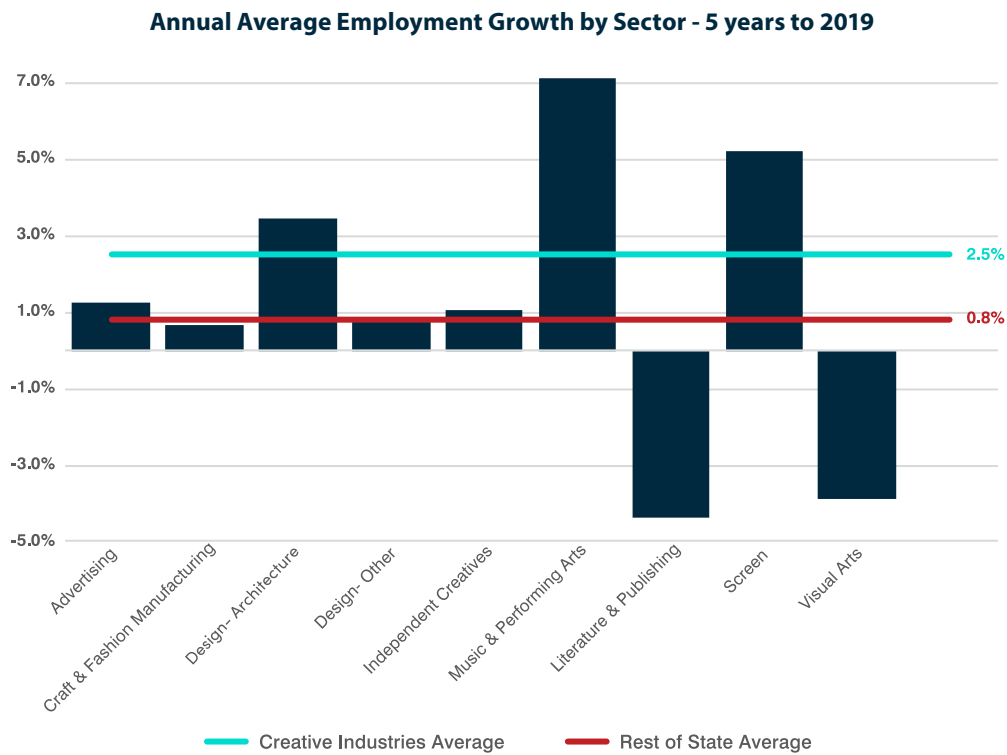
Sectors in which the creative industries have exceeded South Australian employment growth between 2001-02 and 2019-20 include screen (up 42.9 per cent), architecture (up 31.6 per cent), and software and games publishing (up 472 per cent). Our signature and much-beloved performing arts sector has also exceeded the state average with growth of more than 65 per cent over the same period, as has the dynamic independent creative artist sector, up over 40 per cent.

Creative Industry Sector by Share of GVA, South Australia - 2019



The number of businesses contributing to the creative economy in South Australia declined across all the creative sub-sectors over the 2002 to 2016 period at the same time as revenues increased. Employment therefore dropped relative to revenue over this timeframe. This was largely due to the effect of digitisation, automation and outsourcing on productivity, particularly within creative production and manufacturing.

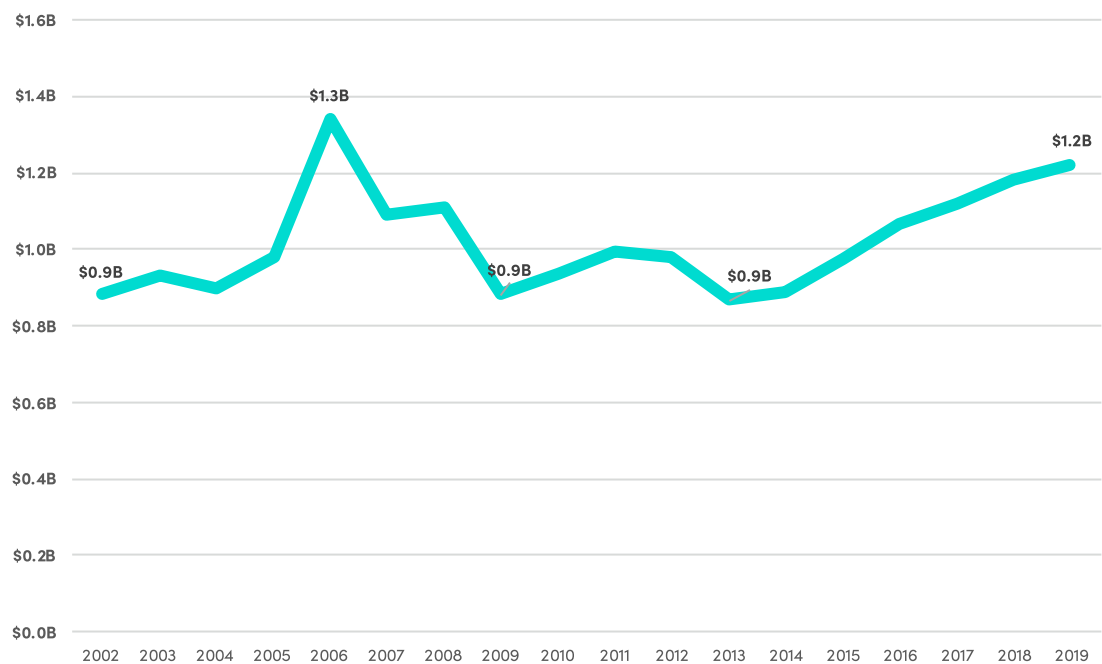
ABS data on South Australian creative businesses from 2002 to 2019 suggests South Australia has followed global growth trends in most creative sub-sectors. However, there have been significant falls in areas which have moved to centralise production to the eastern seaboard, most notably broadcast media, publishing and advertising. According to a submission to this Strategy from the South Australian advertising industry, since the turn of the century, “(corporate) executive decision making has moved east and with it the marketing departments that procure creative industry services”.

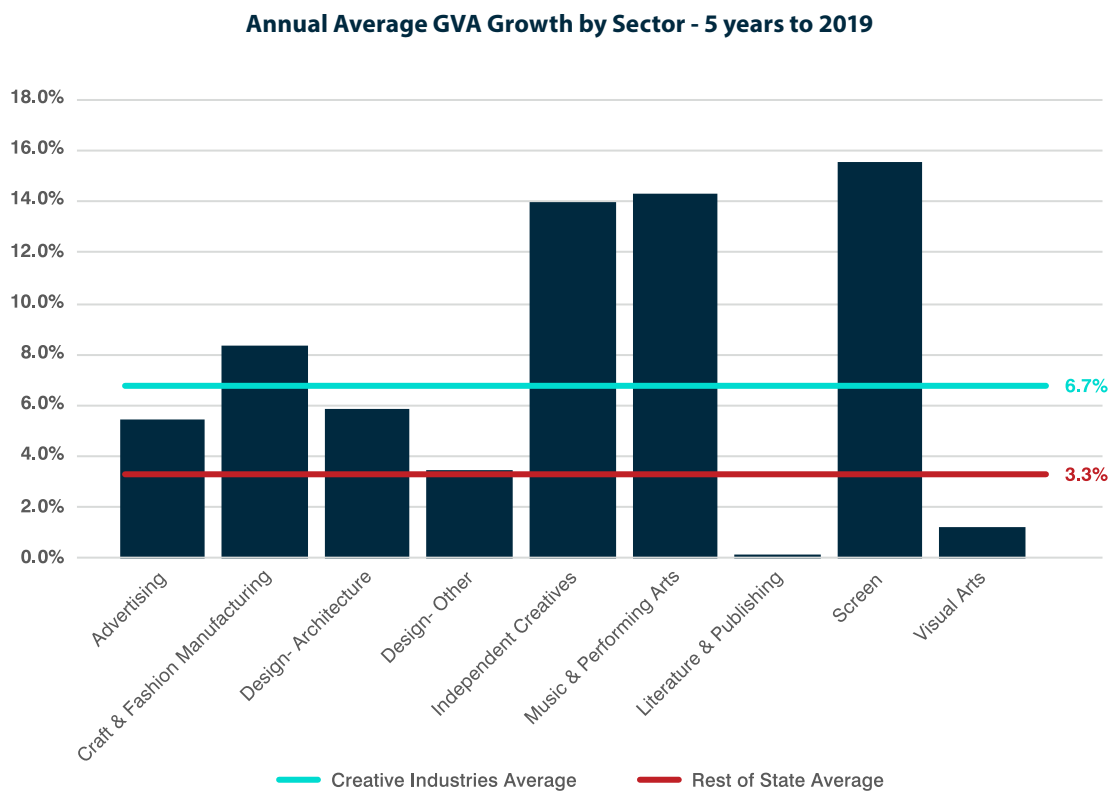


Aside from growing our existing world-class businesses and supporting more start-ups to establish, future employment growth will depend on growing business opportunities from **new intellectual property for our local South Australian creative businesses**, at the same time as attracting established creative enterprises to invest and establish operations in the state.

While all creative sectors have the potential to grow with the right settings in place, elements of the screen sector, including games and VFX, have particularly high growth potential, driven by increased global demand for screen content and technology advancements, and by the fact that these sectors provide digital exports which are effectively ‘weightless’ – i.e. cost very little to export. It is expected that the June 2020 extension of the current state-based 10 per cent post-production, digital and visual effects (PDV) rebate to include game development will accelerate growth in that sector, much as it has done for the film PDV sector.

Creative Industries GVA, South Australia





Process of developing the Creative Industries Strategy

Representatives from South Australia's creative industries were invited to provide feedback through an extensive engagement process undertaken by the Department for Innovation and Skills, which took place from October 2019 to February 2020. This included 17 roundtables, an online survey, and a YourSAy engagement.

Many artists and arts organisations took part, and, while this Strategy focuses on creative sectors that are primarily driven by commercial outcomes, opportunities for growth are not limited to this. There is significant crossover between the arts, cultural and industrial creative sectors, and Arts South Australia will use feedback from this engagement to inform its work in delivering the Arts and Culture Plan South Australia 2019 – 2024, particularly in relation to developing an export and investment strategy for the arts and cultural sector.

In addition to some 500 individual entrepreneurs, artists, educators and businesses that took part, the SA Creative Industries Think Tank participated and provided a collective voice across a range of sectors, research, academia and startups. By the end of the engagement, 34 formal strategies for growth were submitted, identifying multiple opportunities for, and barriers to, growth.

This substantial contribution from industry, driven by passion, enthusiasm and deep sector knowledge, is gratefully acknowledged.

Given the diversity of viewpoints and number of stakeholders who took part, it would be impractical to represent every individual suggestion expressed during the engagement. However, in keeping with the economic development purpose of Growth State, the industry-identified actions outlined in this Strategy incorporate the majority of industry's feedback that directly responds to economic growth.

Following the release of this Strategy, Government will respond to industry's recommendations through annual operational action plans, which will be iterative and flexible to enable responsiveness to a rapidly changing business environment.

As noted by McKinsey and Company¹³, "While the specific means to achieve these goals may change—after all, the global economy is continually reshaped by more sophisticated automation, shifting trade patterns, and changing demographics—innovative governments and competitive companies can find a way to move forward."

¹³ <https://www.mckinsey.com/industries/public-sector/our-insights/how-governments-in-emerging-economies-can-help-boost-and-sustain-growth>

Lee Thomson, Film and Television student, on location in the University of South Australia's Television Studio at the Magill campus. Credit University of South Australia.



Section 2

Strategy to grow South Australia's creative industries

This Strategy sets out industry's vision, targets and priority areas of action to drive growth.

It aims to maximise and leverage strengths, take advantage of opportunities, and address areas of improvement to ensure that the creative industries are at the forefront of economic growth for South Australia over the next 10 years and beyond.

*Five Four Entertainment's 2019 Spin Off Festival.
Credit: Daniel Marks.*

Vision

South Australia is home to a highly skilled and innovative creative ecosystem with an integrated strategy to power intellectual property creation, deliver an agile workforce, and position our world class creative sector to prosper in the global market.

South Australia. Creativity thrives here.

Targets

The overall goal of Growth State is three per cent growth in gross state product (GSP), across all nine priority sectors. Within the creative industries, growth will be reflected in employment, foreign direct investment, revenue and exports throughout the 10-year timeframe for this Strategy.

This Creative Industries Strategy sets a target of an average of 5 per cent per annum growth to 2030.

Outcomes will be measured through economic data to be regularly reported on through an online dashboard.

The value of the creative industries goes well beyond a purely economic value. This Strategy will therefore also monitor growth and development of the sector through metrics such as:

- growth of 'CreaTech'
- increased innovation, revenue diversification and new intellectual property developed
- new markets reached and new audiences engaged
- diversified education and skills pathways

These will be monitored through ongoing research, surveys and interviews with key stakeholders.

Priority actions for growth

For South Australian creative industries to achieve significant growth, **both industry and government must commit to actions**. These are captured under three priority action areas:

- **Accelerating industry growth**
- **Forging a collective identity**
- **Strengthening skills and career pathways**

The establishment of a cross-sectoral **creative industries peak body** to deliver programs and provide a collective voice for the sector is an overarching industry recommendation.

While this recommendation is specific to priority action area two, it is an industry action which will drive growth across all three priority areas.

This model has been highly successful in the UK through the Creative Industries Federation, a membership body which represents, champions and supports the UK's Creative Industries. Its priorities are: creative careers and skills, entrepreneurship and growth, and international. The Federation is led by a Board of high-level executives from across all sectors of creative industries and technology.

The Federation's policy, research and advocacy priorities are determined by its members through active engagement on working groups, Councils, and through events, surveys, industry roundtables and workshops.

Should such a model be developed for South Australia it will provide a mechanism for industry and government to partner for direct response to many of the growth actions outlined in this Strategy.

The matrix below sets out a series of mechanisms which sit within these priority areas and indicates how these will lead to growth.

Mechanisms for growth	GROWTH TARGETS		
	Employment & jobs	Increased investment	Increased exports
Increase the export capabilities of South Australian businesses to improve the state's share of global markets - increasing creative industries exports and associated jobs.	X		X
Enhance the investment attractiveness of South Australia - increasing reinvestment, foreign direct investment and associated jobs.	X	X	
Enable a competitive business environment, for example through incentives – attracts investment and increases exports and associated jobs.	X	X	X
Attract talented migrants, innovators and young wealth creators to live and work in South Australia to increase the scale and breadth of the state's capabilities, to increase the state's population of highly skilled citizens and make the state more globally competitive - increases exports and investment and associated jobs.	X	X	X
Attract tourists to visit and spend money in the state - increasing exports through the visitor economy and associated jobs.	X		X
Incentivise innovation, collaboration, entrepreneurship, and business diversification to drive growth through increased locally owned IP, increasing the state's competitiveness - increases exports and attracts investment opportunities.		X	X
Promote and celebrate our creative businesses and excellence, to increase awareness of capabilities and drive business opportunities – leads to jobs growth, increases investor awareness of goods and services for export.	X		X
Reduce barriers to entry by making it easier for South Australian businesses to become suppliers to government, leading to more government investment in South Australian businesses - growing employment and enabling business to scale and export.	X		X
Build an appropriately skilled workforce for industry's current and future needs, increasing the state's creative capabilities and competitiveness - increases jobs, makes the state more attractive to investment and opens markets for exports.	X	X	X

Accelerating industry growth

Generating investment and exports through South Australian-created intellectual property

What industry said:

- Navigating lucrative export markets is becoming increasingly difficult in this rapidly changing geopolitical era.
- Intellectual property development and commercialisation assistance needs to be tailored to the nuances of the creative sector.
- The 'CreaTech' sector is growing globally, and there are opportunities to build South Australia's capabilities in this area.
- Investment attraction is key to rapidly gaining new projects that increase the scale and sustainability of the sector.
- Creative businesses need help to become 'investment-ready' to attract private investment.
- The VFX and games sectors need stable and supportive government policy settings to attract more international and interstate work.
- Increasing screen production investment will ensure a consistent pipeline of production activity, enabling upskilling and retention of crew and private investment in businesses and infrastructure.
- There is the need to create stability in the festivals calendar by supporting biennial festivals to be presented annually. Over the years, investment in a number of festivals becoming annual has resulted in exponential growth (attendances, visitation, ticket sales, economic contribution). Growth would be further expanded if all festivals were annual.
- As a significant purchaser of goods and services, government procurement could be a driver of growth if policy changes are made and processes are simplified, such as:
 - » using procurement budgets to influence the utilisation and development of innovative and creative products and services
 - » redesigning government 'request for quotation' processes in consultation with industry to make it more accessible, especially for creative SMEs
 - » increasing the requirement for South Australian content in government projects from 15 per cent to 30 per cent, to help achieve growth targets
 - » amending policies that lock out local creative SME businesses from competing for government business

Industry's recommended actions

Industry recommends that the following actions should be taken to accelerate growth:

Industry actions:

- Leverage government rebate schemes for industry growth, considering sector and ABS projections:
 - » The game development sector projects that an ongoing rebate of 10 per cent for its sector will drive an increase of annual GVA to around \$250 million by 2030.
 - » ABS data suggests that an ongoing rebate of 10 per cent for the post-production, digital and VFX (PDV) sector could drive an increase of annual GVA to around \$68 million by 2030.
- Actively work to increase gross state product (GSP):
 - » The festivals sector aims to increase GSP by \$59 million over a 10-year period. This includes an additional 44 full time equivalent (FTE) jobs on average annually, estimated to peak at 63 FTEs in 2029-30 as visitation increases year-on-year (subsequent to recovering from the impacts of COVID-19).
- Explore international market and finance partnerships, and participate in overseas trade missions.
- Share international market intelligence with other businesses.
- Work with government agencies to achieve best practice when procuring from creative businesses.
- Invest in the creation of South Australian owned intellectual property with market partners.

Government actions:

- Assist businesses to become export-ready through support tailored to the nuances of the creative industries.
- Build South Australia's brand and connections with key international markets identified by industry, and locate business development resources within these markets.
- Recognise the successes of South Australian creative businesses in reaching global markets, and the substantial economic impact that this has for the state.
- Support businesses to implement e-commerce to grow sales in local, interstate and international markets.
- Support South Australian businesses with digital transformation to take advantage of shifting dynamics, markets and opportunities.
- Support businesses to become investment-ready.
- Facilitate opportunities for creative businesses to attend conferences and trade shows to reach new customers, and bring business leaders to the state to inspire and connect with our own firms.
- Ensure creative businesses across the state are recognised and supported, through aligning State Government programs with those of local governments.
- Support Aboriginal and Torres Strait Islander artists and businesses to connect with international audiences and markets.
- Provide longer-term market certainty to the VFX and games sectors around existing government support, including extending existing rebate schemes.
- Continue investing in the creation of South Australian creative content and green-lighter talent to enable screen businesses to compete in global markets.
- Improve government procurement processes and build awareness of South Australian creative business capabilities within government agencies.

Forging a collective identity

Form a united and collaborative sector that is uniquely recognised and internationally valued.

What industry said:

- The absence of a unified voice is inhibiting growth and collaboration for the creative industries. While sector-specific peak bodies are highly valued, a peak body that represents the breadth of the creative industries would support growth and increase cross-sectoral collaboration.
- The creative sector should align its marketing with South Australia's positive brand qualities to drive investment and tourism and attract new customers.
- South Australia's creative excellence should be championed and celebrated, and successes shared around the world.
- Marketing the state's creative brand to South Australians working abroad in the creative industries could attract them to return, bringing their experience and international networks with them.
- There is currently very little sector-wide economic data about the creative industries in South Australia to inform decisions about future investment and growth. The creative ecosystem needs to be mapped to help policy makers better understand the sector, and businesses to connect with each other.
- Collaborations between the creative industries and complementary sectors such as health and wellbeing, food and wine, and tourism would bring new local collaborations and enable businesses to collectively market themselves to international customers.
- Museums are major tourist attractors and innovators of new products and experiences. The collision of cultural tourism and digital media, including gamification, is at the cutting edge of placemaking.
- Festivals are significant contributors to state tourism, employment, and economic growth. They bring about social, wellbeing, and community impact with considerable financial return to South Australia. Their role as platforms for artistic, creative, and tech innovation spark new opportunities for IP development.
- Various sectors within the creative industries need to collaborate better in order to collectively bid for international opportunities.
- Creative hubs are highly valued by the sector, and provide collaborative, low-risk environments that support creative entrepreneurs and startups.
- Regional creative precincts are significant tourist attractors and bring creative businesses together with complementary sectors. The JamFactory shop in the Barossa wine region was mentioned as an example of best practice.
- The UN Sustainable Development Goals are a potential framework to position South Australia in a global conversation, and to provide a cohesive measurement for growth of the sector in comparison with other global markets.
- The UNESCO City of Music designation puts Adelaide into a network of internationally recognised creative cities around the world. This is an untapped opportunity.

Industry's recommended actions

Feedback from industry was that the following actions should be taken to develop a collective identity for South Australia's creative industries:

Industry actions:

- Formalise and collaborate across all creative sectors by forming a creative industries peak body to advocate for the sector, and to deliver capability development programs.
- Partner with government to develop and host creative industries events, conferences and awards.
- Work collectively to market South Australia with a definitive, unifying and accessible brand that cuts across all creative sectors to reach international and interstate customers.
- Work with government to develop a Creative Tourism Strategy to attract more cultural tourists to South Australia.
- Work with the UNESCO City of Music Office to further leverage the power of the UNESCO Creative City designation across creative sectors other than music.
- Associations to share data and insights about the sectors they represent, to support development of a creative industries online directory and economic dashboard for the state.

Government actions:

- Support the development of a creative industries peak body to provide a collective voice for the sector and to deliver capability development programs.
- Market the creative capabilities of the state internationally and interstate, and champion the successes of our creative entrepreneurs and businesses.
- Continue to invest in creative precincts to foster clustering and collaboration, support entrepreneurs and startups, and build scale within the sector.
- Host networking and learning events through creative precincts, providing opportunities for creative sectors to build collaborations both with each other, and with complementary sectors.
- Work with industry to establish a creative industries online directory to showcase capabilities and support cross-sectoral collaborations.
- Undertake economic analysis of the sector to develop an economic baseline, map the creative ecosystem, and make this information available to industry.
- Monitor growth to identify future areas of opportunity and analyse change within sectors.

Strengthening skills and career pathways

Equipping industry with the skills and capabilities required to strengthen and ensure the state has a highly skilled creative workforce.

What industry said:

- Highlight the importance of introducing creative and design thinking from an early age in schools by equipping teachers with an appreciation of and skills in these disciplines.
- 'STEM' should be replaced with 'STEAM' in all contexts (i.e. the addition of 'arts' to science, technology, engineering and mathematics). This could be broadened to 'STEAMED' with the addition of entrepreneurship and design.
- Explore opportunities to influence the restructure of the education system. If we were to rewrite the curriculum to incorporate STEAM starting with year 1, this would be a 10-year investment that would set the state apart as a leader in the field.
- Change parents' perception of creative subjects and careers – creative skills are becoming increasingly important across a range of sectors, both within and beyond the creative industries.
- High school students should have the opportunity to learn creative tech skills, such as app and game design, as part of a STEAM curriculum.
- There needs to be a stronger focus on entrepreneurship in high schools and beyond, to identify and support the next generation of creative entrepreneurs. This should include dedicated support for Aboriginal and Torres Strait Islander artists and creative entrepreneurs.
- Embed business skills such as financial management into creative education to ensure that our creatives are equipped with the right skills to commercialise their products and services.
- Existing training formats (for example, the apprenticeship model) are out of step with industry needs in many creative sectors.
- South Australia is losing its most talented graduates to interstate opportunities, leaving gaps in the development pipeline for skilled middle and senior management.
- For some creative sectors (such as film, TV and VFX) more students are being trained than early career employment opportunities exist. Education providers need to ensure that graduate output meets job needs, and that courses match industry needs. For the PDV sector, education beyond VFX artists is needed - the sector needs more post-production producers, editors, business managers and business affairs skills.
- Digital upskilling, including in business-enabling technologies such as e-commerce, would support diversification and evolving of business models.
- Mentoring - both for, and within, the creative sector - would support emerging businesses to build new capabilities and grow the next generation of creative entrepreneurs.
- The current skilled visas are not well suited for many sectors within the creative industries, inhibiting businesses from sourcing specialist skilled workers from overseas.
- Explore the potential for South Australia to become a global centre of excellence for creative education and attract more international students.
- Micro-credentials could be a key skilling mechanism for creative industries, allowing upskilling of staff and accessing talent from other sectors.
- A calendar of festivals and events in South Australia across the year will retain the necessary festivals workforce within the state, strengthening event delivery.

Industry's recommended actions

Feedback from industry was that the following actions should be taken to strengthen skills and career pathways:

Industry actions:

- Continue to partner with the vocational and tertiary education sectors to provide up-to-date, industry-relevant education programs in specialist skills (such as game development, festivals and VFX) to build a workforce equipped with the skills for the future.
- Continue to provide expert advice to government on skills and workforce needs, to support training and skills reform and future policy development.
- Invest in upskilling the future generation of creative and technical talent.
- Leverage the entrepreneurial success of established creative professionals to build the capabilities of emerging creatives through mentoring.

Government actions:

- Develop creative industries skills strategies that encompass all elements of industry needs, from micro-credentials to vocational training and workforce upskilling.
- Work with industry to develop a mentoring program that pairs creative businesses with experienced mentors, including technology mentors, to help grow their business.
- Support emerging creative entrepreneurs to start and scale successful businesses from South Australia.
- Provide targeted career development and entrepreneurship support to help build the careers of Aboriginal and Torres Strait Islander artists and entrepreneurs.
- Facilitate industry to engage with education providers to incorporate more business, finance and project management skills into tertiary creative education courses.
- Develop creative education pathway programs for high schools to ensure students are aware of the full range of creative careers.
- Investigate opportunities for a state-specific creative industries visa which recognises the unique requirements of the sector and enables creative businesses to flexibly hire skilled international talent.
- Work with the festivals sector to deliver a calendar of festivals and events in South Australia across the year.



Miranda Tapsell filming Top End Wedding. Credit: SAFC

Next steps

The future of the creative industries in South Australia is exciting. Across the varied sectors that comprise this robust, enterprising and rapidly transforming sector, we have emerging talent, experience and the vision to grow our presence on the world stage.

Industry and government are intertwined in South Australia's creative economy, and a successful long-term partnership between the two holds the key to achieving our vision of creating a world-class creative sector that will power the state's growth for decades to come. The path we have set for ourselves is bold, but our community stands ready to rise to the challenge.

If we work together, the next 10 years will position us to lead for the rest of the century.

South Australia. Creativity thrives here.

Case Study

Screen – post-production, digital and visual effects

Rising Sun Pictures – Jennie Zeiher

A list of Rising Sun Pictures (RSP) projects reads like a roll call of Hollywood blockbusters.

Game of Thrones, Harry Potter, The Wolverine, X-Men, The Hunger Games, Thor, Spider-Man and Captain Marvel are among more than 150 titles featuring RSP's visual effects.

The key to 25 years of success for RSP is strong relationships, according to the company's Head of Business Development Jennie Zeiher. Proving your credentials and building trust on one project snowballs into others.

"To be a trusted partner you need the right mix of a solid brand, great creative leadership and customer service, at a competitive rate," she says.

"A happy, repeat client is the most important factor to organic growth due to the freelance nature of the industry."

With such a need for highly specialised staff, RSP established its own education program to ensure it has a pipeline of skilled graduates equipped to work both locally and globally.

These strategies are paying off for the award-winning company, which has grown 40 per cent over the past four years.

*Rising Sun Pictures'
Head of Business
Development
Jennie Zeiher.
Credit: Tony Clark.*

Case Study

Industrial design

ARID Design – Andrew Rogers

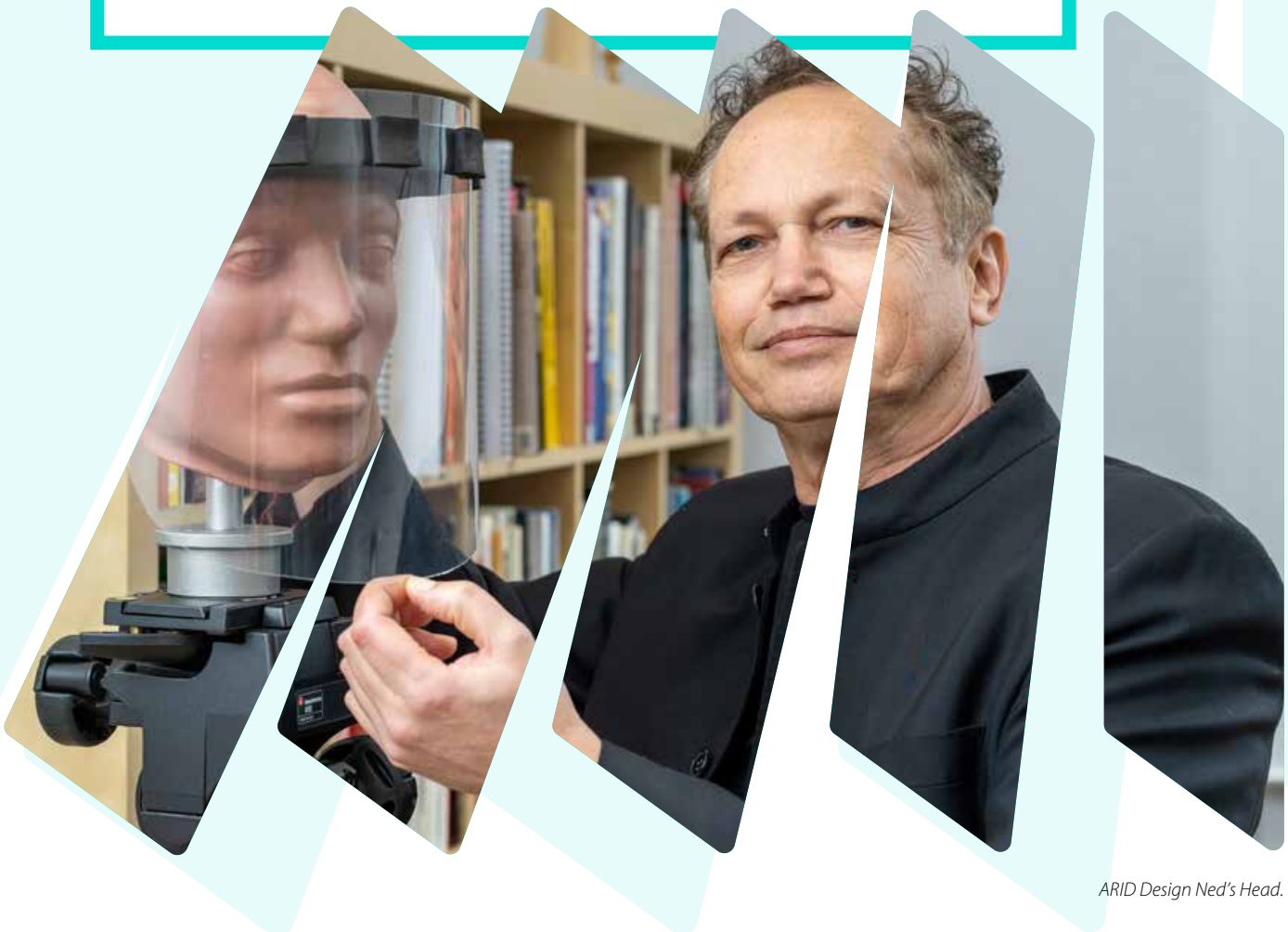
If there was a COVID-19 small business silver lining success story, ARID Design would be it. After carving a successful niche in designing more than 300 different industrial products and exporting to countries around the world, Andrew Rogers faced a few quiet months for his product design business.

That all changed when a conversation with fellow designer Lee Gray of Kyron Audio, which designs extreme high-fidelity loudspeaker systems, sparked the idea of making their own specialised face masks.

Named after infamous helmeted bushranger Ned Kelly, the Ned's Head shields are now being exported to Victoria, and there are orders pending from the United Arab Emirates, United States and Western Australia.

Next up for ARID are exciting new projects in the wine and defence sectors – the perfect marriage of creativity and hi-tech innovation.

“The creative industries can add so much to the manufacturing industry that will contribute significant value to the capabilities of the state,” Andrew says.



ARID Design Ned's Head.



The Brougham - visualisation by ModelFarm

Case Study

Architectural visualisation

ModelFarm – Shane Aherne

Pushing the boundaries of new technology is at the core of everything ModelFarm does.

The architectural visualisation studio is the brainchild of Shane Aherne, who saw the potential, while working at Rising Sun Pictures, to branch out into the property, tourism and education sectors.

Having built his firm from two to 30 staff in its first three years, Shane is relishing being a testing ground for the latest technology and applying it to new clients.

“If it hasn’t been built yet, and if it hasn’t been created yet – that’s our client,” he says.

“What’s really exciting about working in visuals is that we are the test ground of a lot

of new technology that film and television is only just starting to pick up. We get to test run brand new software and find out how far we can push it.”

“It’s very important not to be just a cog in a mechanism and have projects that come off a conveyer belt. ModelFarm is just the opposite of that. The artists that we have in-house, we can continually pull in the very best in the world, there’s a lot that’s going to happen in the next few years.”

An animated children’s series and a project for an international toy company are just two projects set to become the next South Australian creative industries’ export to the world.



The team at ModelFarm architectural visualisation firm. Credit: Scott Hart

Case Study

Screen – game development

Mighty Kingdom – Ella Macintyre

Thinking big has never been a problem for Mighty Kingdom. The fast-growing game development company's Head of Product, Ella Macintyre, says Mighty Kingdom's plan is to develop a billion-dollar brand in Adelaide.

Established in 2010, Mighty Kingdom has grown from a team of three people to a studio of more than 70 creatives, developing games for global brands such as Lego, Disney and Shopkins. Mighty Kingdom also runs a graduate program to ensure graduates have the specific skills to be job ready.

"We want to use the medium of games to tell stories and engage our audience. It's never been easier to make and release a game and there are more gamers than ever," Ella says.

"The games rebate is really excellent because it allows us to further diversify – to leverage our experience with world class brands to extend and offset our own IP through games that we are creating ourselves."



Mighty Kingdom game developer Keachie Manalastas. Credit: Iain Dalrymple.

The team at Architecture firm studio -gram
Credit: Josh Geelen.

Case Study

Architecture

studio -gram – Graham Charbonneau

Carving out a niche in restaurant and bar fit-outs has proven a recipe for success for boutique architecture firm studio -gram.

A funky bar in Bali and a hotel redesign in Sydney provided the springboard for Graham Charbonneau and fellow director Dave Bickmore to establish their own private practice in Adelaide in 2014.

"It's been great. Hospitality projects move quite fast, so we were able to build a portfolio of complete work quite quickly to show prospective clients," Graham says.

Social media has also been key to the firm's success.

"We've done work in Dubai on the strength of what people have seen on our Instagram feed."

Graham and his team of seven find hospitality projects particularly rewarding.

"They really look to us for creative direction, and one of the most satisfying things is so many people get to experience our work.

"Adelaide has carved out a really interesting identity in bar design and restaurants. There is so much attention on what Adelaide is doing in this space."

And with hotel design projects in Bali and Byron Bay next on the agenda, that attention is paying export dividends for studio -gram.

Founders and co-directors of Australian Fashion Labels Dean and Melanie Flintoft.
Credit: Alistair Nicholls.

Case Study

Fashion

Australian Fashion Labels – Melanie Flintoft

Like most successful businesses, fashion exporter Australian Fashion Labels was working to a five-year plan. That became a five-week plan, when COVID-19 hit and millions of dollars of export orders evaporated overnight.

With their hallmark creativity, Melanie and Dean Flintoft re-engineered their business model, offloading their wholesaling arm and relaunching their online platform www.fashionbunker.com.

“COVID presented us with a magnificent opportunity to accelerate our business plan and pivot to the high margin direct-to-consumer part of the business that currently exports to 60 countries,” Melanie says.

With all the design undertaken in Adelaide, from sketching out designs to tweaking samples, Melanie and Dean are happy to be generating local employment for 45 creatives and are buoyant about the future.

“All our design talent (except one person) is from Adelaide, with many different backgrounds and cultures and the creative energy is incredible. We have young girls and guys producing beautiful apparel that is worn all over the world.”

Case Study

Craft

Agostino & Brown - Samantha Agostino

Samantha Agostino's work is a labour of love. Making spaces look beautiful through intelligent design and handmade furniture is something Samantha and her partner Gareth Brown have been devoted to for 10 years at their city-based business Agostino & Brown.

The duo focus on residential and commercial fit outs, collaborating with designers and architects to create furniture pieces. A large proportion of pieces go interstate for clients, such as Westpac in Sydney and Hub Australia co-working spaces.

Samantha's dream project would be the opportunity to design for a local place maker community project with other South Australian designers.

In the meantime, "working with hotels is good because we get to use our furniture ourselves and see how it works in public spaces", Samantha says.

The Stretton Centre and the Salisbury Community Hub are among local project highlights.

"Buying local should just be second nature to South Australian local and state governments," Samantha says.

Next on the agenda is saving for a technologically advanced 3D composite cutter – expensive but a game-changer according to Samantha.

"The hi-tech teamed with the craftsmanship and knowledge of the natural materials would give us a real edge."



Co-owner of furniture design firm Agostino & Brown, Sam Agostino.
Credit: Jane Cameron

Case Study

Music

Five Four Entertainment

Craig Lock attributes the success of his music business Five Four Entertainment to his willingness to put his own ideas and money on the line. "You need to believe in what you are doing and be willing to risk something. For us it's been viewing things through a business lens but in a creative space. It's no different to running any other business," Craig says.

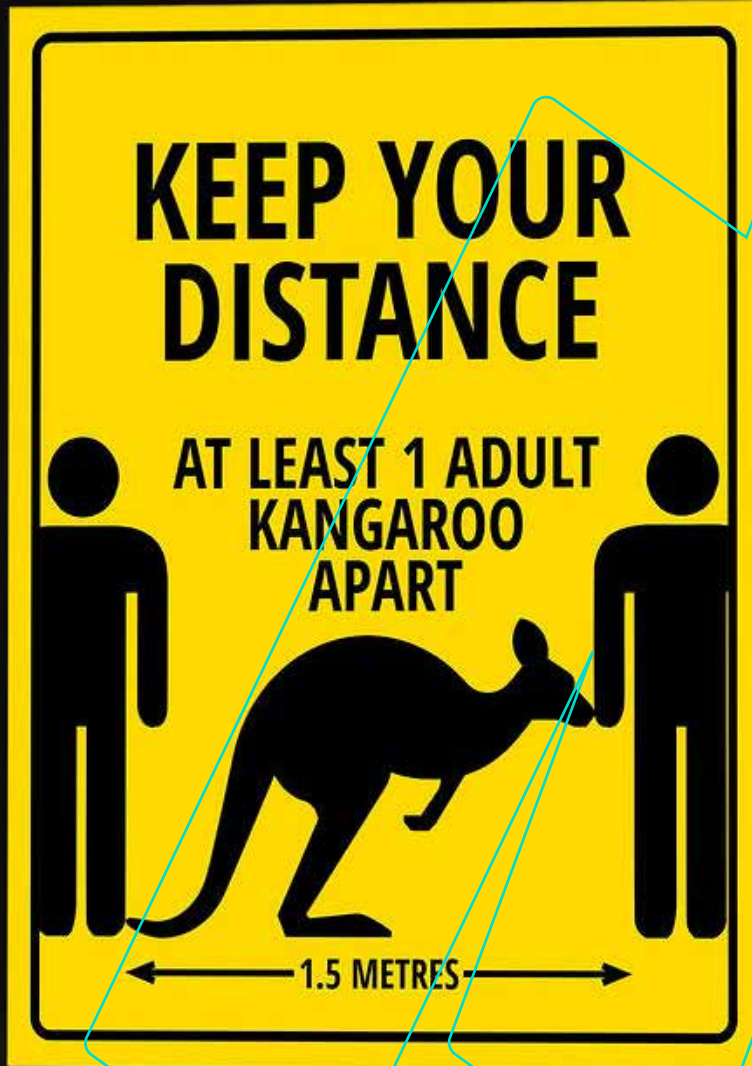
Five Four is the music management and events company responsible for the sold-out music festival Spin Off, as well as the hugely popular Laneway Festival. They also co-own and manage the Lion Arts Factory and manage programming at venues including Flinders University and the Exeter.

It's an ethos that has seen Five Four weather the COVID-19 storm, largely due to the diversity of its business model.

"We haven't just focused on one stream. We're artist managers, promoters, run festivals, have club nights and manage venue bookings, so if the eggs fall out of one basket we focus on the others. You need to be willing to invest in what you want to do."



Five Four Entertainment co-director Craig Lock. Credit: supplied



Case Study

Advertising

Showpony Advertising – Jamie Scott

When your ads become memes and feature in the UK Daily Mail and the Irish Times, you know you're doing something right. Such was the case for Adelaide creative agency Showpony's advert for National Parks, featuring a socially-distanced COVID kangaroo.

Managing Director Jamie Scott says reading the market was also key to Showpony's decision to establish a Melbourne office five years ago, where 10 staff are now based.

"We read that Victoria accounts for 27 per cent of the nation's advertising spend, so now we are exporting South Australian creative talent into Victoria," Jamie says.

Showpony, whose clients span several state government agencies, Flinders University, Adelaide Football Club, Coopers and Bridgestone, has a target of 300 per cent growth over the next 10 years.

"Having to work so hard to achieve cut-through in Melbourne sharpened our focus on chasing work and cutting through the noise."

Showpony's striking COVID-19 social distancing advertising campaign. Credit: supplied

Acknowledgements

The development and creation of the Creative Industries Strategy has been driven by market insights and intelligence shared by stakeholders from across the 10 sectors.

The South Australian Government would like to extend appreciation and gratitude to those who offered valuable time, experience and expertise. This includes the 500+ artists and industry representatives who contributed through roundtables, emailed feedback, an online survey, and a YourSAy engagement.

To the members of the Creative Industries Ministerial Advisory Group, the SA Creative Industries Think Tank, the Department of the Premier and Cabinet, Arts South Australia and those industry leaders who provided submissions on behalf of sub-sectors and businesses, we offer additional thanks.

Creative Industries Ministerial Advisory Group (past and present)

Alex Reid - Chief Executive, Office of the Training and Skills Commission

Alexandra Daunt Watney - Head of Studio, Mr X (formerly Mill Film Adelaide)

Anna Vincent – Producer, SLA Films

Ben Marsh – Managing Director, ODD Games

Brian Parkes – CEO, JamFactory

Christie Anthoney – former CEO, Festivals Adelaide

Dale Roberts - Managing Director, KOJO

Dan Thorsland – formerly Mighty Kingdom, now Business Development Manager, Flinders University

Gail Kovatseff – Chair, Arts Industry Council of South Australia

Justyna Jochym – CEO, Festivals Adelaide

Kate Croser – CEO, South Australian Film Corporation

Mark Thorley – former Managing Director, Mill Film Adelaide (now Mr X)

The Right Honourable The Lord Mayor of Adelaide, Sandy Verschoor

Tony Lawrence – COO, Mighty Kingdom

The SA Creative Industries Think Tank

The SA Creative Industries Think Tank is an independent, ideas-based collective of industry leaders, thinkers, educators, entrepreneurs and creative practitioners collaborating to reveal and develop the creative industries sector.

The Think Tank represents a broad range of creative businesses and enterprises, including architecture, design, fashion, art, craft, festivals, film, literature, museums, media, urban renewal and creative tech and research.

The Think Tank provided a submission as well as ongoing feedback into this Strategy throughout the process of its development.

Industry submissions

Advertising sector
 Architecture sector
 Art Gallery of South Australia
 Arts Industry Council SA (AICSA)
 Australian Institute of Urban Studies SA
 Barossa Valley Region
 Carclew
 City of Adelaide
 City of Onkaparinga
 Craft sector
 Esports – from Adelaide Crows
 Fashion sector
 Festivals Adelaide
 Graphic Design sector
 Industrial Design sector
 Interactive Games and Entertainment Association (IGEA)
 KOJO
 Legatus Group (regional councils)
 Live Performance Australia
 Mighty Kingdom
 MonkeyStack
 Music sector
 ODD Games
 Performing and Visual Arts sector
 Play Pause Play (podcasting)
 Renew Adelaide
 SA Creative Industries Think Tank
 Screen South Australia Advisory Committee
 South Australian Tourism Commission
 University of Adelaide
 University of South Australia
 Visual Arts and Crafts sector (ACE Open)
 Wakefield Press
 Writing and Publishing sector



Crew on the set of Closer Productions' Aftertaste. Credit: Ian Routledge



**Government of
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