



BRISBANE'S CREATIVE INDUSTRIES 2003

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“... one central variable in understanding the rise and fall of collectivities is creativity. This is counterpoised to imitation. Creativity leads to expansion, growth, more wealth, more power or inner development. Creativity comes from challenge and is gained through experience.”

Sohail Inayatullah
Futures, Vol. 30, Number 5, p. 393

“Creativity is not simply a way to make things better. Without creativity we are unable to make full use of the information and experience that is already available to us and is locked up in old structures, old patterns, old concepts, and old perceptions.”

Edward de Bono
Serious Creativity

“A large and growing share of employment in these industries is accounted for by the self-employed, freelancers and micro-businesses. These new Independents are often producers, designers, retailers and promoters all at the same time. They do not fit into neat categories.”

Charles Leadbeater and Kate Oakley
The Independents: Britains New Cultural Entrepreneurs

“I found little evidence that big-ticket attractions were very effective [for attracting talented people and high-tech industries]. Much better were the small things — vibrant street life, readily available outdoor recreation and a cutting edge music scene.”

Richard Florida
The Rise of the Creative Class

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EXECUTIVE SUMMARY

The BRISBANE'S CREATIVE INDUSTRIES 2003 report is a project commissioned by the Brisbane City Council. This report is divided into 5 sections:

1. Creative Industries – A Brief Overview
2. Employment in the Creative Industries
3. Financial Dimensions
4. The Brisbane “Hotspots”
5. Conclusions

The first section, “Creative Industries – A Brief Overview”, presents:

- A definition of the creative industries, building on sectors outlined by the UK Creative Industries Task Force, and based in the Australian Culture and Leisure Classifications produced by the Australian Bureau of Statistics.

The second section, “Employment in the Creative Industries”, assesses these dimensions of creative industries in Brisbane in comparison with state, national and global data. This section indicates that:

- Total employment in the creative industries in the seven main capital cities is 225,905.
- Brisbane has 25,324 workers employed in the creative industries, which corresponds to 11.2% of all creative industries workers in the seven main capital cities and 3.4% of the working population of Brisbane, compared to the national average of 4.2%.
- The relative size of each sector as a percentage of those employed in the creative industries in Brisbane is: Literature and Print Media (31.1%), Performing Arts (5.1%), Music Composition and Publishing (2.1%), Visual Arts and Crafts (5.1%), Design (26.3%), Broadcasting, Electronic Media and Film (17.4%), Other Arts (1.7%), and Heritage (11.2%).
- Creative occupations with the largest employment are 2121 Architects and Landscape Architects (1,230 persons), 2533 Designers and Illustrators (1,107 persons), and 2534 Journalists and Related Professions (914 persons).
- Creative industries workers on average earn higher incomes than non-creative industries workers.
- Median individual weekly incomes are much less for Brisbane creative industries workers (\$666) than their counterparts in Sydney (\$838), Melbourne (\$763) and Canberra (\$814).
- Broadcasting, Electronic Media and Film provides the highest individual weekly median income.
- Between 1996 and 2001, Brisbane experienced a decline in the numbers of persons employed in the Performing Arts (-2.7%), Heritage (-8.8%), and Music Composition and Publishing (-9.1%), and an increase in the numbers of persons employed in Other Arts (19.8%), Broadcasting, Electronic Media and Film (12.5%), Design (5.8%) and Visual Arts and Crafts (5.6%).

The third section, “Financial Dimensions”, describes the financial characteristics associated with the creative industries activities across all eight creative industries sectors and concludes with the following significant findings:

- Based on 1996-1997 data, the industry sectors with highest potential for financial growth were Film and Video Production and Distribution, and Music and Theatre Productions. The sectors with the highest potential for employment growth were Architectural Services, Film and Video Production and Distribution, and Music and Theatre Productions.
- The activities with the largest profit margin are commercial television services (24.6%), manufacture of recorded music (16.3%), studio sound recording (13.8%) and motion picture distribution (11.4%).

- Australia-wide, the creative industries attracted \$4,027.2m in funding from across the three levels of government in 2000-2001.
- The Queensland state government provided \$288.5m in funding to the creative industries in 2000-2001, of which 87.1% was allocated to Heritage, 6.9% to Performing Arts Venues, and 4.7% to Performing Arts.

The fourth section, “The Brisbane Hotspots”, outlines existing and emerging hotspots of Brisbane’s creative industries and indicates that:

- The data confirm that Brisbane does not have true creative industries clusters but does have the capacity for development and, given the appropriate forms of intervention and investment, true creative industries clusters are likely to form.
- The overall strengths of Queensland’s creative industries are seen as the presence of highly talented individuals, high levels of innovation, strong government support for the sector, competitive prices for creative output and a culture that values diversity and enthusiasm.
- Queensland’s creative industries weaknesses are identified as the small size of demand in the local market, lack of critical mass, weaknesses in some skills (such as script-writing, business and marketing), lack of an entrepreneurial culture, failure to network and collaborate, remoteness from major markets and limited access to capital.
- Brisbane has identifiable creative industries hotspots including: Craft, Design, and Visual Arts; Games and Leisure Software; Contemporary Music; Film and Television; and Performing Arts.

The fifth section, “Conclusions”, integrates the data presented on Brisbane’s creative industries:

- The creative industries in Brisbane are relatively small.
- The largest industries are based in Literature and Print Media; Design; and Broadcasting, Electronic Media and Film.
- The focus of Brisbane’s creative industries is primarily to the local market, whereas a stronger interstate and international focus is required for strong economic impact to develop.
- Current methodologies based upon ABS data to identify the creative industries under-report emerging industries, particularly those industries based in new media and IT.

SECTION 1: CREATIVE INDUSTRIES – A BRIEF OVERVIEW

Over the past several years the idea of creativity has assumed a new level of importance across a range of institutional settings. Studies demonstrate how ‘creativity indexes’ in cities impact upon economic development.ⁱ Social analyses link creativity to social capital.ⁱⁱ The creativity of cities is linked to attracting ‘grey-matter’ migrants and ‘independent’ cultural entrepreneurs. Rapid technological change and the growing role of large companies with global reach imbue creativity and entrepreneurship with increased significance.ⁱⁱⁱ

The cultural sector of nations, regions, and cities is characterised by a high proportion of freelancers and micro-companies. Small businesses now brand themselves as offering ‘creative solutions’; moreover, the emergence of ‘cultural entrepreneurs’ has been observed in several studies in Europe,^{iv} and is associated with a number of features. First, substantial growth in employment in the US and Europe has occurred in creative occupations over the past decade. For example, there was a 166.9% increase in employment in the US between 1980 and 1999 in the ‘consumer/citizen’ media information and cultural industries.^v Second, creativity has played a key role in contributing to social and economic regeneration in depressed areas by creating employment and enhancing the skills and career opportunities of people on the margins of the labour force.^{vi} Third, global creative cities – such as San Francisco, Cardiff, and Tokyo – have begun to emerge, with a ‘creative class’ representing an employment demographic that cuts across traditional occupational distinctions. According to Richard Florida, the economic function of the creative class is “to create new ideas, new technology, and/or new creative content”.^{vii}

Defining the Creative Industries

John Rimmer, in the most comprehensive analysis of the creative industries (CI) in Queensland, argues that “the creative industries sector does not have any meaning unless it can draw the various components together within an acceptable definition”. He notes that many firms surveyed in relation to creative industries had “‘identified favourably” with the concept of the creative industries.”^{viii}

An international search of creative industries policies^{ix} suggests a number of key ideas are encompassed in the term. The term ‘creative industries’ was first articulated as a way of integrating sectors of the British economy in which creative intangible inputs add significant economic and social value. Adopting the framework of the creative industries, then, presents a way of viewing the role of culture within economic development. Four characteristics combine to define activity within the creative industries perspective.

The creative industries:^x

- involve activities which have their origin in **individual creativity, skill and talent**;
- have the potential for wealth and job creation through generation and exploitation of **intellectual property**;
- have creative intangible inputs which **add more economic and social value than is added by manufacturing**;
- encompass and **link the traditional cultural industries** (such as the performing arts) **with the new economy ‘info-intensive communication and cultural industries’** (such as computer game design).

In the UK, the creative industries comprise the following sectors: advertising, architecture, arts and antique markets, crafts, design, fashion design, film, interactive leisure software, music, television and radio, performing arts, publishing, and software development. It is difficult to make direct comparisons between the UK and Australia of the economic and employment dimensions of the creative industries, as statistical collection methods of the Australian Bureau of Statistics (ABS) are yet to take account of

emerging industry sectors such as interactive leisure software and fashion design. The UK list of creative industries, therefore, should not be seen as authoritative in the Australian context.

The ABS has developed the Australian Culture and Leisure Classifications (ACLCL: ABS 2001 Cat: 4902.0), a useful basis for defining the creative industries within the Australian context. The ACLCL consists of four Divisions: 1 Heritage, 2 Arts, 3 Sport and Physical Recreation, and 4 Other Culture and Leisure. Under each division is a number of Groups, and at the finest level of classification, Classes. Of relevance to the creative industries are the Heritage and Arts divisions, plus one Group within the Other Culture and Leisure Division, as listed in Table 1.1. Unfortunately, to date, the ABS has not classified statistical data it collects with the ACLCL, and so it is necessary to use classifications of the Australian and New Zealand Standard Industry Classification (ANZSIC). The ABS provides a concordance between the ACLCL and the standard classification of businesses, ANZSIC, also shown in Table 1.1. Examination of the concordance reveals that some of the ANZSIC sectors have only partial (and in some instances, very small) inclusion in the ACLCL. Nevertheless building upon the ABS work provides the most consistent and comprehensive approach to defining the creative industries within the Australian context. This report is informed by international perspectives of the term ‘creative industries’, particularly that developed in the UK, but follows ACLCL and ANZSIC classifications. Within this report, Heritage is treated at the Division level, although the relevant ACLCL Groups are identified where important differentiation exists. Further, Group 46 is small, only administrative, not creative in function, and applicable to all other ACLCL Groups. This Group is, therefore, not explicitly covered in this report. The report thus covers eight creative industries which consist of the seven Arts groups and the Heritage Division, as defined in the ACLCL.

Table 1.1: Creative industries as defined by the Australian Culture and Leisure Classification (ACLCL) and the Australian and New Zealand Standard Industry Classification (ANZSIC)

ACLCL GROUP	ACLCL CLASS	ANZSIC
1. Heritage		
11. Museums, Antiques and Collectables	111 Art Museums	9220 Museums
	112 Other Museums	9220 Museums
	113 Antiques and Collectables Retailing and Restoration	9330 Other Recreation Services
12. Environmental Heritage	121 Nature Parks and Reserves	9239 Recreational Parks and Gardens
	122 Zoological Parks and Aquaria	9231 Zoological and Botanic Gardens
	123 Botanic Gardens	9231 Zoological and Botanic Gardens
13. Libraries and Archives	131 Libraries	9210 Libraries
	132 Archives	9210 Libraries
2. Arts.		
21. Literature and Print Media	211 Primary Literary Creation	9242 Creative Arts
	212 Newspaper Publishing and Printing	2421 Newspaper Printing or Publishing
	213 Periodical Publishing	2422 Other Periodical Publishing
	214 Book Publishing	2423 Book and Other Publishing
	215 Other Printing	2412 Printing
	216 Literature Wholesaling	4794 Book and Magazine Wholesaling
	217 Literature Retailing	5243 Newspaper, Book and Stationery Retailing

Table 1.1: Creative industries as defined by the Australian Culture and Leisure Classification (ACLC) and the Australian and New Zealand Standard Industry Classification (ANZSIC)

ACLC GROUP	ACLC CLASS	ANZSIC
22. Performing Arts	221 Music Performance	9241 Music and Theatre Productions & 9330 Other Recreation Services
	222 Drama	9241 Music and Theatre Productions
	223 Dance	9241 Music and Theatre Productions
	224 Music Theatre and Opera	9241 Music and Theatre Productions
	225 Other Performing Arts	9241 Music and Theatre Productions
	226 Performing Arts Venues	9252 Performing Arts Venues
23. Music Composition and Publishing	231 Music Composition	9242 Creative Arts
	232 Music Publishing	2423 Book and Other Publishing & 7730 Non-Financial Asset Investors
	233 Record Companies and Distributors	2430 Recorded Media Manufacturing and Publishing & 4799 Wholesaling n.e.c.
	234 Recorded Music Retailing	5235 Recorded Music Retailing
24. Visual Arts and Crafts	241 Primary Visual Arts and Crafts Creation	9242 Creative Arts
	242 Commercial Photography Services	9523 Photographic Studios
	243 Visual Arts and Crafts Retailing	5259 Retailing n.e.c.
25. Design	251 Architecture Services	7821 Architectural Services
	252 Advertising Design and Production	7851 Advertising Services
	253 Graphic Design	7852 Commercial Art and Display Services
	254 Other Design	7869 Business Services n.e.c.
26. Broadcasting, Electronic Media and Film	261 Radio Services	9121 Radio Services
	262 Television Services	9122 Television Services
	263 Film and Video Production	9111 Film and Video Production
	264 Film and Video Distribution	9112 Film and Video Distribution
	265 Motion Picture Exhibition	9113 Motion Picture Exhibition
	266 Video Hire Services	9511 Video Hire Outlets
	267 Interactive Content Creation	7834 Computer Consultancy Services
	268 Electronic Information Services	7120 Telecommunication Services
27. Other Arts	271 Musical Instrument Retailing	5259 Retailing n.e.c.
	272 Arts Education	8440 Other Education
	273 Copyright Collection Agencies	7869 Business Services n.e.c.
	274 Recorded Media Manufacturing	2430 Recorded Media Manufacturing and Publishing
	275 Arts n.e.c.	9251 Sound Recording Studios and 9259 Services To The Arts, n.e.c.
4 Other Culture And Leisure		
46. Other Culture and Leisure Services	461 Booking and Ticketing Agencies	9259 Services To The Arts

Table 1.1: Creative industries as defined by the Australian Culture and Leisure Classification (ACLCL) and the Australian and New Zealand Standard Industry Classification (ANZSIC)

ACLCL GROUP	ACLCL CLASS	ANZSIC
	462 Agent and Manager Services	7869 Business Services n.e.c. & 9259 Services To The Arts, n.e.c.
	463 Event Management	7869 Business Services n.e.c.
	469 Other Culture and Leisure Services n.e.c.	-

Source: Derived from the Australian Culture and Leisure Classifications (ACLCL: ABS 2001 Cat: 4902.0)

Key Infrastructure, Factor Inputs and Markets

The creative industries of Brisbane have not been well described to date. To begin this description, the key infrastructure, links, inputs and markets for the eight sectors are outlined below, making specific reference to Brisbane.

- **Key Infrastructures** in support of creative industries include physical objects such as buildings, studio spaces, (post)-production suites, offices, and the full range of technological artefacts contained in these physical locations, such as telecommunications and equipment used directly in the production of or support of creative activities.
- **Links** include the major supply chains and other interdependencies, both formal and informal, of the sector.
- **Factor Inputs** refers to the full range of associated human skills that collectively constitute the ecology of creative activity. By our own definition, these include intellectual property (IP), planning and other conceptual skills (pre-production), and technical skills that directly or indirectly flow into creative output in the form of tangible creative products.
- **Markets** for Brisbane's creative industries are fragmented and uneven and, therefore, must be considered in terms of individual sub-sectors.

Tables 1.2 to 1.9 identify Key Infrastructure, Factor Inputs and Markets for each of the eight sub-sectors of Brisbane's creative industries. The tables follow on the next page.

Table 1.2: Literature and Print Media

TYPES OF ENTERPRISE Operations undertaken	LINKS: interdependencies, supply chains and informal linkages	KEY INFRASTRUCTURE Specialised buildings, telecommunications	FACTOR INPUTS: Skills and Intellectual property	MARKETS Local national, and international
Primary literary creation Book publishing Newspaper publishing and printing Periodical publishing Other printing Literature wholesaling Literature retailing	Television and radio, music, interactive leisure software, software and computer services, film and video, internet and digital media Libraries and education, market research, management consulting, academic research, distribution Printing; paper and ink manufacture. Internet and digital media, disc based media production, electronic storage Exhibitions and Conferences	Libraries (BCC) TAFES Qld Writers Centre (Metro Arts) Judith Wright Centre Metro Arts Centre	Creative writing, marketing and distribution, editorial (proofreading and m/s preparation) Project management Online retail, design and layout, web-design Promotions and PR Universities (creative writing and professional communication courses)	International markets for creative fiction, non-fiction, and academic research Potential online subscriptions Markets for niche or speciality interests, including Australiana, Indigenous publishing

Source: Compiled by Creative Industries Research & Applications Centre, QUT, for this report

Table 1.3: Performing Arts

TYPES OF ENTERPRISE Operations undertaken	LINKS: interdependencies, supply chains and informal linkages	KEY INFRASTRUCTURE Specialised buildings, telecommunications	FACTOR INPUTS: Skills and Intellectual property	MARKETS Local national, and international
Music performance Drama Dance Music theatre and opera Other performing arts Performing arts venues	Tourism, hotels and restaurants, business sponsorship, festivals management, management of venues – theatres, halls, places of public entertainment, education, community music, merchandising, catering, sound tracks, program publishing Music, television and radio, design, film and video, publishing, special effects	Optus Playhouse, the Conservatorium Theatre, The Gardens Theatre, The Brisbane Powerhouse Judith Wright Centre Qld Performing Arts Trust (statutory body) Qld Conservatorium (Southbank) College of the Arts (Griffith University), QUT Creative Industries Precinct (2004), Arts Training Queensland, Ausdance (Queensland)	Performance theory and practice (music, drama, dance, music theatre, opera, traditional arts) Art history Arts management, venue management, publicity, online web-design, merchandising, set design, costume design, playwriting, directing, choreography	Export culture is not well advanced Small domestic markets International tourism – Brisbane is not an established creative city. However, festivals such as the River Festival and the Asia-Pacific Triennial increase profile internationally Indigenous performing arts have international profile

Source: Compiled by Creative Industries Research & Applications Centre, QUT, for this report

Table 1.4: Music Composition and Publishing

TYPES OF ENTERPRISE: Operations undertaken	LINKS: interdependencies, supply chains and informal linkages	KEY INFRASTRUCTURE: Specialised buildings, telecommunications	FACTOR INPUTS: Skills and Intellectual property	MARKETS: Local national, and international
<p>Music composition</p> <p>Music publishing</p> <p>Music performance</p> <p>Record companies and distributors</p> <p>Recorded music retailing</p>	<p>Music press, multimedia content, digital media, retailing and distribution of digital music via Internet, music for computer games, art and creative studios, production, distribution and retailing of printed music, production, retailing and distribution of musical instruments, jingle production, photography, education and training Internet/e-commerce, publishing, television and radio, film and video, advertising, performance arts, interactive leisure software, software and computer services. CD tape manufacturing and mastering; instrument makers, repairers and sales</p> <p>Equipment hirers and road crews, hotels and events</p>	<p>The Brisbane Powerhouse</p> <p>Industry networks (Q Music)</p> <p>Recording facilities</p> <p>Rehearsal studios</p> <p>Record companies</p> <p>Murri Radio Triple A</p>	<p>High level of casualised and intermittent involvement</p> <p>Business skills including distribution, management, legal services (copyright) publicity, networking</p> <p>Festival management and booking agents</p> <p>Performance skills</p> <p>Production skills: mixing, editing, special, music video production; graphic design, accountancy</p> <p>Road crews, lighting technicians, sound and mixers</p>	<p>International popular music: mainstream and alternative</p> <p>Domestic music markets</p> <p>Niche markets: Indigenous</p>

Source: Compiled by Creative Industries Research & Applications Centre, QUT, for this report

Table 1.5: Visual Arts and Crafts

TYPES OF ENTERPRISE Operations undertaken	LINKS: interdependencies, supply chains and informal linkages	KEY INFRASTRUCTURE Specialised buildings, telecommunications	FACTOR INPUTS: Skills and Intellectual property	MARKETS Local national, and international
<p>Primary visual arts and crafts creation</p> <p>Commercial photography services</p> <p>Visual arts and crafts retailing</p>	<p>Supply of materials, distribution, retail, online retail, packaging and display, craft fairs, craft magazines and books, tools and machinery</p> <p>Print media (Magazines and public relations), advertising</p> <p>Fairs and exhibitions, shipping, restoration, printing, photography, insurance, banking, law, tourism, design, fashion, antiques, market, merchandise, tourism</p>	<p>Training institutions and colleges (Universities and TAFEs), community and volunteer workshops</p> <p>Weekend markets (Southbank, Riverside, South Pine etc)</p> <p>Regional galleries Association of Queensland, National Trust of Queensland</p>	<p>Craft skills</p> <p>Industry training as provided by universities, TAFEs and community networks</p>	<p>Markets primarily domestic and local</p> <p>Exploitation of passing international tourist trade</p> <p>Specialist art and craft able to target international markets (e.g. Indigenous art and craft)</p>

Source: Compiled by Creative Industries Research & Applications Centre, QUT, for this report

Table 1.6: Design

TYPES OF ENTERPRISE Operations undertaken	LINKS: interdependencies, supply chains and informal linkages	KEY INFRASTRUCTURE Specialised buildings, telecommunications	FACTOR INPUTS: Skills and Intellectual property	MARKETS Local national, and international
<p>Architecture services</p> <p>Advertising design and production</p> <p>Graphic design</p> <p>Other design</p>	<p>Advertising agencies and services, newspapers, printing, and publishing, film and video production companies</p> <p>Architecture, packaging, designer fashion, advertising, furniture and furnishings, personal care products and design, electronics, fashion/luxury goods, telecommunications, pharmaceuticals, consumer goods, retail</p> <p>Design consultancies (services include: e.g., brand identity, corporate identity, information design, new product development)</p>		<p>Fine art and graphic design, fashion design</p> <p>Public relations and management consultancy</p> <p>Research and development within industry, modelling and prototype making</p>	Primarily domestic in scope

Source: Compiled by Creative Industries Research & Applications Centre, QUT, for this report

Table 1.7: Broadcasting, Electronic Media and Film

TYPES OF ENTERPRISE Operations undertaken	LINKS: interdependencies, supply chains and informal linkages	KEY INFRASTRUCTURE Specialised buildings, telecommunications	FACTOR INPUTS: Skills and Intellectual property	MARKETS Local national, and international
<p>Radio services</p> <p>Television services</p> <p>Film and video production</p> <p>Film and video distribution</p> <p>Motion picture exhibition</p>	<p>AM/FM radio companies, Internet and digital radio</p> <p>Digital media broadcasting, digital and interactive television, video on demand, art and creative studios, PR companies, TV commercials production, photography, manufacture of hardware, video sequences (using actors, directors, crew), music soundtracks, computer manufacture, distribution and retail</p> <p>Media ratings and selling services, advertising agencies</p> <p>Music soundtracks, promotion, set design building, catering, equipment manufacture, video rental, photography, lighting, sound recording, costume design, selling film and video distribution rights, film and tape delivery and storage, videos on demand, digital film distribution, film web sites, post-production/special effects computer games, multimedia and digital media</p> <p>Computer games, multimedia and digital</p>	<p>Critical mass of specialised firms in film and video production; industry support bodies such as Qpix, DigiArts, and PFTC</p> <p>Training institutions such as QUT, Griffith University, QANTM</p> <p>Multimedia industry associations such as AIMIA</p> <p>Value web facilitated through Hookup network</p> <p>Broadband telecommunications through identified nodes and corridors</p> <p>Potential for wireless communications</p> <p>Corridors of growth: Milton and Toowong has IT and KBI capacity</p>	<p>Creativity: Writers, directors, producers, actors, script-developers, screenwriting</p> <p>Finance raising</p> <p>Project management</p> <p>Location scouting</p>	<p>Export culture is strong in film and video production, although penetration of mainstream markets is difficult. Television markets are domestic, particularly the low-end production found in Queensland (Brisbane)</p> <p>Internationally recognised events such as the Multimedia Art Asia-Pacific Festival (this year held in Beijing)</p>

Table 1.7: Broadcasting, Electronic Media and Film

TYPES OF ENTERPRISE Operations undertaken	LINKS: interdependencies, supply chains and informal linkages	KEY INFRASTRUCTURE Specialised buildings, telecommunications	FACTOR INPUTS: Skills and Intellectual property	MARKETS Local national, and international
Video hire services Interactive content creation Electronic information services	media, games console manufacture, distribution and retail, merchandise, e.g. t-shirts Business and legal services, journalism and news media, web content (ISPs), broadband content industries	Strong government support for attracting firms		

Source: Compiled by Creative Industries Research & Applications Centre, QUT, for this report

Table 1.8: Other Arts

TYPES OF ENTERPRISE Operations undertaken	LINKS: interdependencies, supply chains and informal linkages	KEY INFRASTRUCTURE Specialised buildings, telecommunications	FACTOR INPUTS: Skills and Intellectual property	MARKETS Local national, and international
Musical instrument retailing Arts education Copyright collection agencies Recorded media manufacturing Arts n.e.c.	Music performance (contemporary and classical) Performing arts. Artist management and legal services Film, television and multimedia content production (including all aspects of design, scriptwriting, direction, financing) Advertising services and public relations	Educational institutions: Griffith University, QUT, TAFE, Australian Film, Television and Radio School	Retailing, teaching, educational institution administration, accounting, public relations, project management, marketing	Not applicable

Source: Compiled by Creative Industries Research & Applications Centre, QUT, for this report

Table 1.9: Heritage

TYPES OF ENTERPRISE Operations undertaken	LINKS: interdependencies, supply chains and informal linkages	KEY INFRASTRUCTURE Specialised buildings, telecommunications	FACTOR INPUTS: Skills and Intellectual property	MARKETS Local national, and international
Museums, antiques and collectables Environmental heritage Libraries Archives	Universities, conferences, research, academic and other publications Educational curricula Documentary and film making		Arts management, curatorial, public relations, art history, environmental management, retailing, restoration, archival skills	International markets for heritage-related commodities and visual arts

Source: Compiled by Creative Industries Research & Applications Centre, QUT, for this report

These tables demonstrate that the creative industries within Brisbane are multifaceted and have a complex set of links. The markets of Brisbane's creative industries are primarily local and national of nature, with international markets limited to only Music Composition and Publishing, Broadcasting, Electronic Media and Film, and some Literature and Print Media.

SECTION 2: EMPLOYMENT IN THE CREATIVE INDUSTRIES

This section of the report describes the pattern of employment in the creative industries as defined in the previous section. Four aspects of employment are described. The first aspect is the numbers of persons employed in the various sectors which comprise the creative industries, based upon ANZSICs. The second aspect is the types of occupations in which creative industries workers are employed based upon the Australian Standard Classification of Occupations (ASCO). The third aspect is the income of those employed within the creative industries. Finally, a comparison is made between 1996 data and 2001 data. For each of these aspects, data pertaining to Brisbane is provided and compared to six other Australian capital cities (Sydney, Melbourne, Perth, Adelaide, Canberra, and the Greater Hobart Area). The geographic locations are defined as per the Australian Standard Geographical Classification, 2001, of the ABS.

All data in this section are drawn from the 2001 and 1996 ABS Census of Population and Housing. The numbers of persons employed in the creative industries are based on the ABS Australian Culture and Leisure Classifications (ACLC: 4902.0). As outlined in Section 1, statistics collected by the ABS, including the census data, are not classified by the ACLC, but rather by ANZSIC. The ABS has a concordance between the two systems, and while some ANZSICs fall entirely within the creative industries, some have only very small or partial concordance. Employment data within those ANZSICs with small overlap are not listed individually, but are built into overall numbers of persons employed within the creative industries. On the basis of the ANZSIC and ACLC category descriptions, 5% of these small overlap sectors were allocated to the creative industries. Data pertaining to total numbers of persons employed in the creative industries or the total number in particular sectors are, therefore, estimates.

The ANZSICs which are affected are as follows: 4791 Photographic Equipment Wholesaling; 4799 Wholesaling n.e.c., 5259 Retailing n.e.c., 7120 Telecommunication Services, 7834 Computer Consultancy Services, 7869 Business Services n.e.c., and 8440 Other Education.

Numbers of Persons Employed in Creative Industries Sectors

Table 2.1 provides the numbers of persons employed in 33 ANZSICs in seven capital cities of Australia, including Brisbane (and excluding Darwin). Total employment in the creative industries across the seven cities is estimated to be 225,905 persons, including an estimated 13,773 persons employed in ANZSICs with only small or partial coverage from the creative industries.

Figures 2.1 and 2.2 illustrate the pattern of employment across the creative industries in the seven capital cities. (Note: the total employment figures include the 5% of persons employed in the ANZSICs with only small coverage within the creative industries. It is not possible to allocate this 5% to individual sectors, nor are they present in the figures based upon individual ANZSICs.)

Figure 2.1 shows the numbers of persons employed in the eight creative industries sectors in each of the capital cities. Figure 2.2 presents this data in terms of the percentage of persons employed in each sector (see Table 2.2 for the associated data). Figure 2.3 shows the numbers of persons employed in each of the main ANZSIC sectors which comprise the creative industries across the capital cities.

Within Australia, the Literature and Print Media sector has the greatest number of employed persons (62,953 persons employed), which accounts for an estimated 29.7% of the employment in the creative industries (see Table 2.2 and Figure 2.2).

The ANZSIC sectors with relatively large numbers of persons employed are 5245 Newspaper, Book and Stationary Retailing (25,057 persons employed), and 2421 Newspaper Printing and Publishing (16,890 persons employed). The Design sector also employs substantial numbers of persons across the seven main capital cities (55,919 persons employed, 26.4% of employment in the creative industries), primarily in 7851 Advertising Services (22,137 persons employed), 7821 Architectural Services (21,954 persons employed), and 7852 Commercial Art and Display Services (11,828 persons employed). The third sector with large employment is Broadcasting, Electronic Media and Film (40,975 persons employed, 19.3% of employment in the creative industries). The ANZSIC sectors within this creative area with the largest numbers of persons employed are 9122 Television Services (13,943 persons employed), 9113 Motion Picture Exhibition (7,729 persons employed), and 9511 Video Hire Outlets (7,133 persons employed).

In comparison with the three largest sectors, all other creative industries sectors exhibit much smaller employment levels. Heritage employs a modest 22,101 persons (10.4% of employment in the creative industries), while the remaining sectors exhibit only small levels of employment. The Performing Arts employs 9,832 persons (4.6%), Visual Arts and Crafts employs 10,434 persons (4.9%), Music Composition and Publishing employs 5,924 persons (2.8%) and Other Arts employs 3,994 persons (1.9%). In keeping with the national trend, Brisbane has the largest number of creative industries workers in Literature and Print Media; Design; and Broadcasting, Electronic Media and Film.

Figure 2.4 shows the numbers of persons employed in the creative industries in each capital city. Employment is greatest in Sydney, with 90,600 persons employed. As Figure 2.5 shows, this number represents 40.1% of all creative industries workers in the seven capital cities. In comparison, 33.5% of total employment in the seven capitals is in Sydney. Sydney is the only capital city showing a notable difference between the percentage of persons employed in the creative industries and the percentage of total numbers of persons employed in all industries in the seven capital cities.

The other capital cities have slightly smaller proportions of persons working in the creative industries compared to the percentage of total employment in the seven capital cities. For example, Melbourne, which has the second highest numbers of persons employed (63,453 persons), accounts for 28.1% of creative industries persons employed (compared to 28.5% of all persons employed in the seven capital cities).

Brisbane (25,324 persons employed in the creative industries) and Perth (21,211 persons employed in the creative industries) have sizeable numbers of persons employed in the creative industries. Adelaide has somewhat fewer numbers of persons employed in the creative industries (15,345 persons). Canberra (6,916 persons) and the Greater Hobart Area (3,055 persons) have relatively low employment in the creative industries.

Table 2.1: Numbers of persons employed in 33 creative industries ANZSICs in seven Australian Metropolitan Statistical Divisions

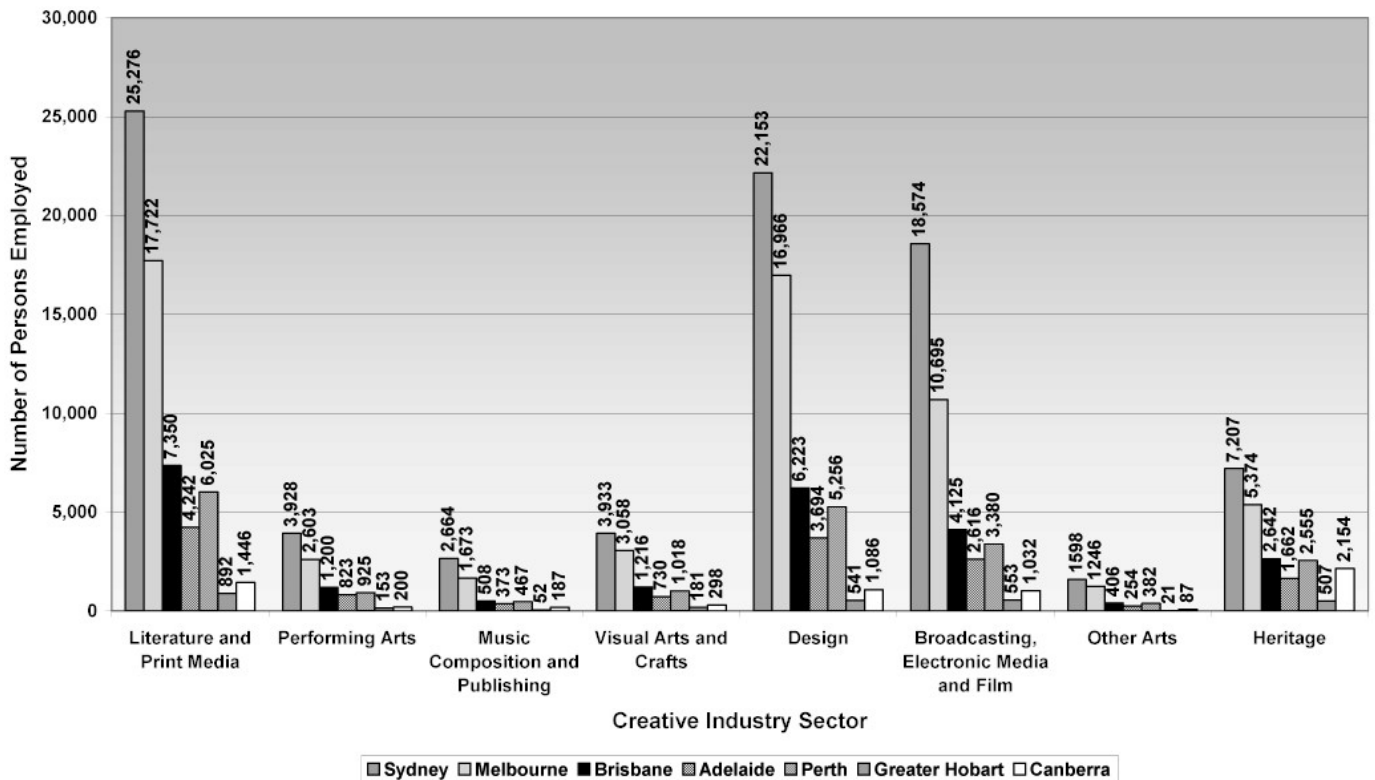
ANZSIC	Sydney	Melbourne	Brisbane	Adelaide	Perth	Greater Hobart	Canberra	Total
2420 Publishing, undefined	1,009	557	163	94	150	18	123	2,114
2421 Newspaper Printing or Publishing	6,086	4,460	2,307	1,339	2,026	305	367	16,890
2422 Other Periodical Publishing	5,101	1,683	447	162	334	36	58	7,821
2423 Book and Other Publishing	3,370	3,073	453	498	330	36	121	7,881
2430 Recorded Media Manufacturing and Publishing	1,202	617	95	55	42	6	55	2,072

Table 2.1: Numbers of persons employed in 33 creative industries ANZSICs in seven Australian Metropolitan Statistical Divisions

4794 Book and Magazine Wholesaling	1,334	957	360	216	274	15	34	3,190
5235 Recorded Music Retailing	1,302	996	388	297	410	46	123	3,562
5243 Newspaper, Book and Stationery Retailing	8,376	6,992	3,620	1,933	2,911	482	743	25,057
7730 Non-Financial Asset Investors	160	60	25	21	15	0	9	290
7821 Architectural Services	7,879	6,577	3,050	1,380	2,338	206	524	21,954
7851 Advertising Services	9,752	6,549	1,989	1,459	1,855	203	330	22,137
7852 Commercial Art and Display Services	4,522	3,840	1,184	855	1,063	132	232	11,828
9110 Film and Video Services, undefined	206	36	12	12	9	3	0	278
9111 Film and Video Production	3,533	1,710	523	289	318	45	97	6,515
9112 Film and Video Distribution	486	250	51	43	70	0	3	903
9113 Motion Picture Exhibition	2,692	2,438	942	600	772	85	200	7,729
9120 Radio and Television Services, undefined	333	111	55	33	65	17	63	677
9121 Radio Services	1,434	1,022	416	355	352	90	128	3,797
9122 Television Services	7,517	3,361	1,088	679	773	222	303	13,943
9210 Libraries	2,192	2,172	907	730	976	221	1 031	8,229
9220 Museums	1,469	875	378	166	339	47	854	4,128
9231 Zoological and Botanic Gardens	515	466	89	151	200	35	60	1,516
9239 Recreational Parks and Gardens	1,124	819	460	192	441	73	103	3,212
9240 Arts, undefined	180	163	78	51	94	3	36	605
9241 Music and Theatre Productions	3,464	2,317	977	657	777	135	185	8,512
9242 Creative Arts	2,446	2,075	767	468	618	123	221	6,718
9250 Services to the Arts, undefined	57	42	21	15	15	3	3	156
9251 Sound Recording Studios	411	234	47	47	61	3	6	809
9252 Performing Arts Venues	464	286	223	166	148	18	15	1,320
9259 Services to the Arts, n.e.c.	950	807	260	141	212	12	42	2,424
9330 Other Recreation Services	1,907	1042	808	423	599	131	106	5,016
9511 Video Hire Outlets	2,373	1,767	1,038	605	1,021	91	238	7,133
9523 Photographic Studios	1,487	983	449	262	400	58	77	3,716
Total CI	85,333	59,337	23,670	14,394	20,008	2,900	6,490	212,132
Total CI including 5% from small CI ANZSICs	90,600	63,453	25,324	15,345	21,211	3,055	6,916	225,905
Total Employment	1,815,776	1,544,187	739,893	466,996	606,272	79,587	160,583	5,413,294
% CI	5.0	4.1	3.4	3.3	3.5	3.8	4.3	4.2

Source: ABS 2001 Census

Figure 2.1: Numbers of persons employed in creative industries sectors in seven Australian capital cities, 2001.



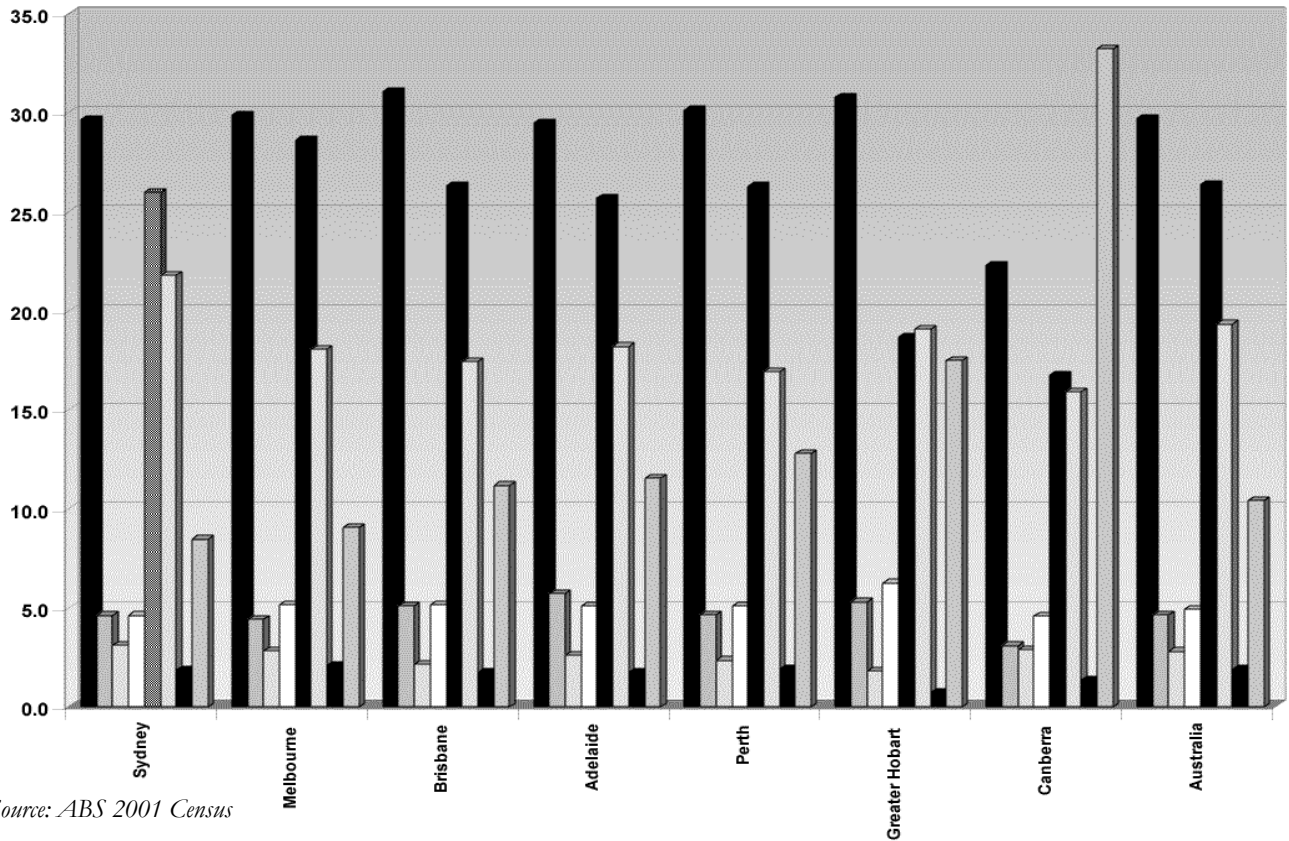
Source: ABS 2001 Census

Table 2.2: Size of each creative industries sector in 7 capital cities as a percentage of numbers of persons employed in the creative industries

Creative industries sector	Sydney	Melbourne	Brisbane	Adelaide	Perth	Greater Hobart	Canberra	Australia
Literature and Print Media	29.6	29.9	31.1	29.5	30.1	30.8	22.3	29.7
Performing Arts	4.6	4.4	5.1	5.7	4.6	5.3	3.1	4.6
Music Composition and Publishing	3.1	2.8	2.1	2.6	2.3	1.8	2.9	2.8
Visual Arts and Crafts	4.6	5.2	5.1	5.1	5.1	6.2	4.6	4.9
Design	26.0	28.6	26.3	25.7	26.3	18.7	16.7	26.4
Broadcasting, Electronic Media and Film	21.8	18.0	17.4	18.2	16.9	19.1	15.9	19.3
Other Arts	1.9	2.1	1.7	1.8	1.9	0.7	1.3	1.9
Heritage	8.4	9.1	11.2	11.5	12.8	17.5	33.2	10.4
Total Creative Industries	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0

Source: ABS 2001 census

Figure 2.2: Size of each creative industries sector in 7 capital cities as a percentage of numbers of persons employed in the creative industries, 2001

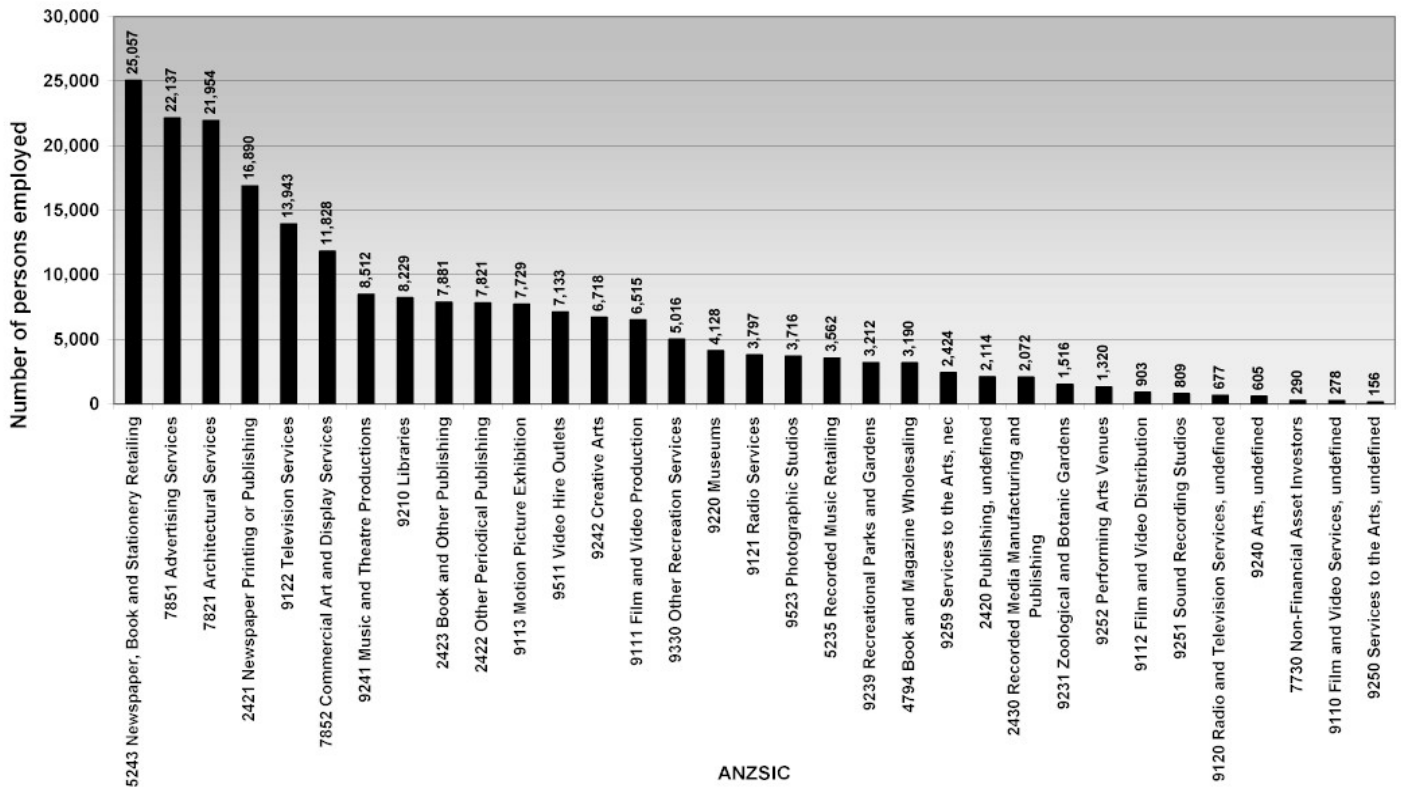


Source: ABS 2001 Census

- Literature and Print Media
- Visual Arts and Crafts
- Other Arts
- Performing Arts
- Design
- Heritage
- Music Composition and Publishing
- Broadcasting, Electronic Media and Film

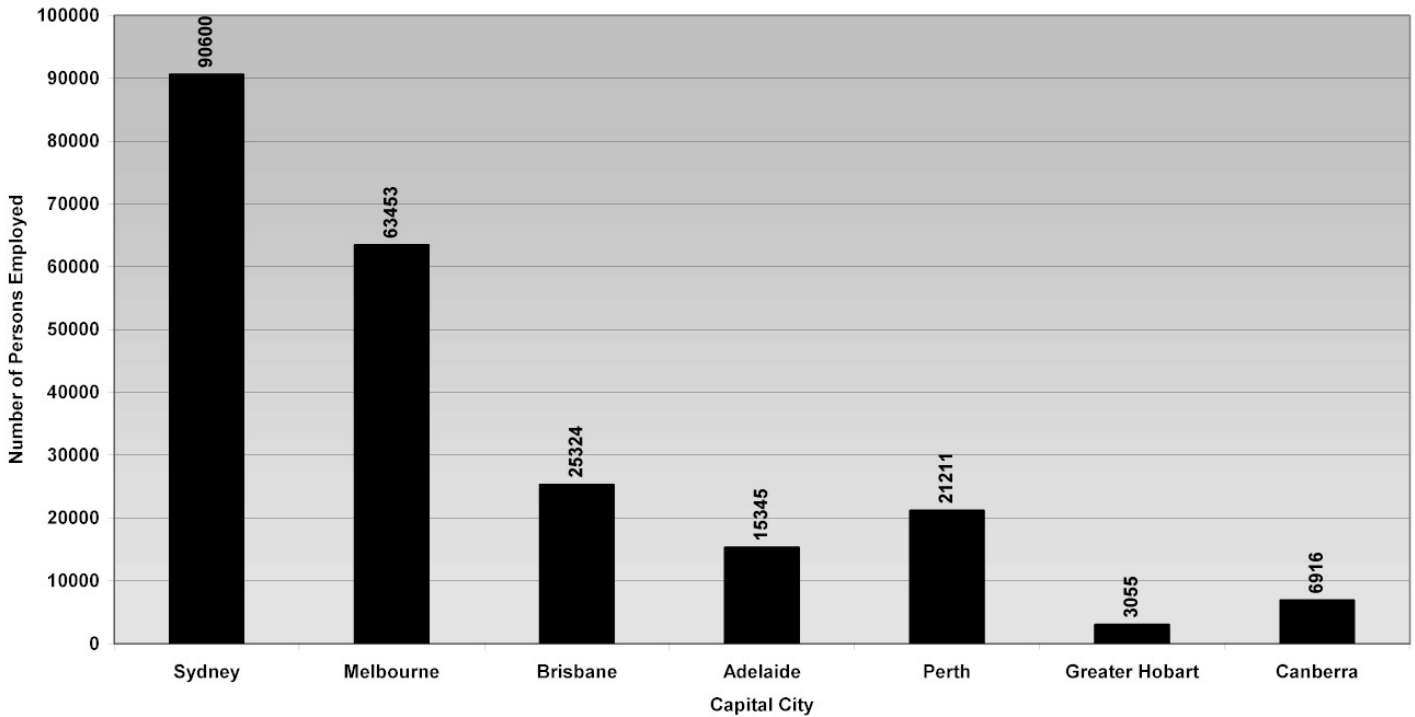
Note: Figures 2.3 and 2.4 follow on the next page.

Figure 2.3: Numbers of persons employed in each creative industries ANZSIC aggregated across seven Australian capital cities



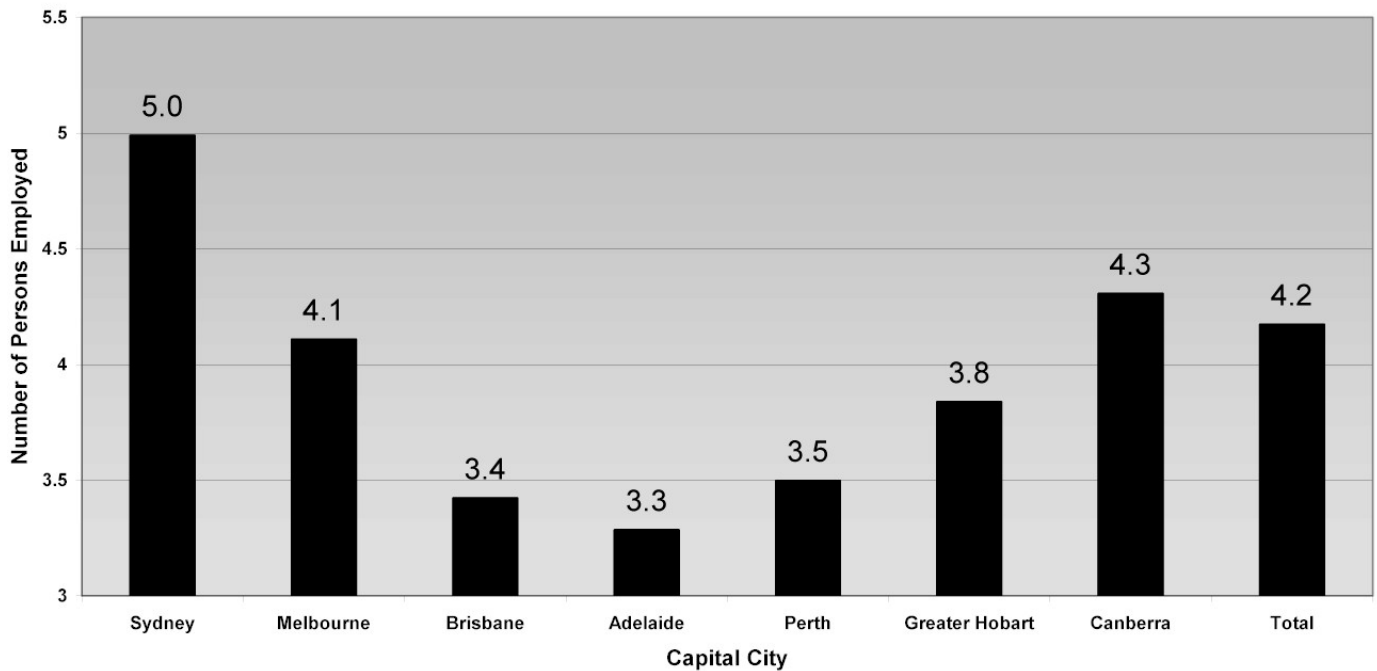
Source: ABS 2001 Census

Figure 2.4: Numbers of persons employed in creative industries ANZSICs in seven Australian capital cities



Source: ABS 2001 Census

Figure 2.5: Percentage of national creative industries employment versus percentage of all industry sector national employment for each city



Source: ABS 2001 Census

ANZSIC Sectors with the Highest Level of Employment within Brisbane

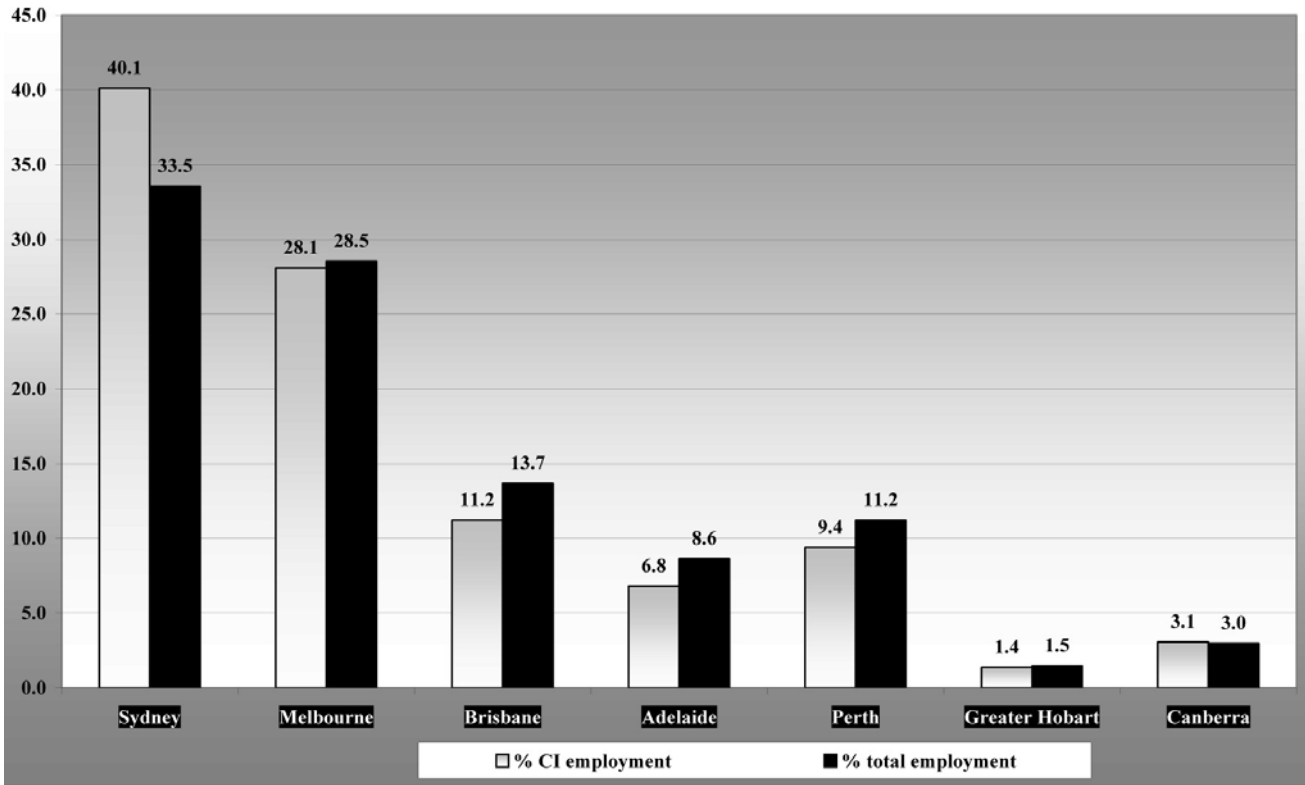
When employment in the creative industries is expressed as a percentage of total numbers of persons employed in each city, a different pattern is revealed, as illustrated in Figure 2.6. Figure 2.6 shows the numbers of persons employed in the creative industries as a percentage of total employment in each capital city.

Across the seven capital cities, employment within the creative industries as a percentage of total employment within each city is 4.2%, with Sydney having a greater proportion of creative industries workers (5.0%) when compared to the other capital cities. Brisbane has a lower proportion of people employed in the creative industries (3.4%) compared to all other capital cities except Adelaide (3.3%).

There is only a marginally greater percentage of persons employed in Perth (3.5%) and the Greater Hobart Area (3.8%) than in Brisbane. The proportion of persons employed in the creative industries in Canberra is relatively high because of the high numbers of persons employed in Heritage, specifically in 9210 Libraries, and 9220 Museums, for the relatively small total workforce. (This pattern is also identifiable in Figure 2.1.)

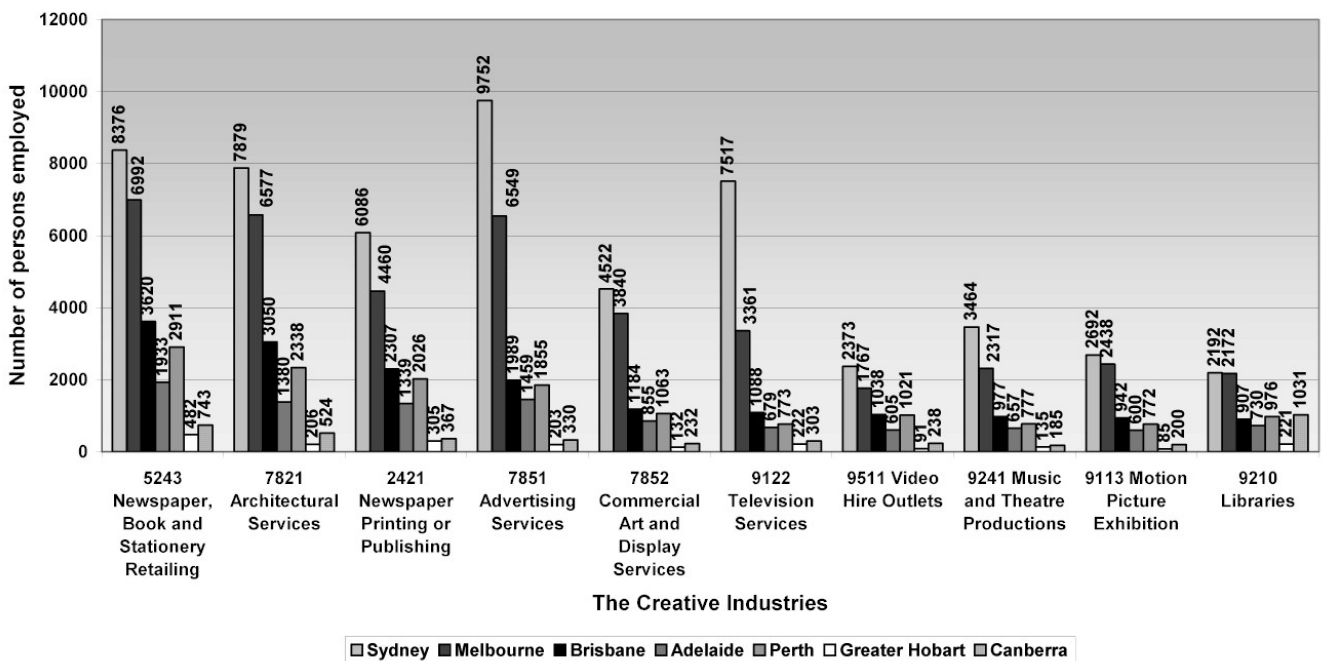
Figure 2.7 shows the numbers of persons employed in each capital city in the ten creative industries ANZSIC sectors with the highest level of employment within Brisbane. The pattern clearly indicates the far greater numbers of persons employed in each sector in Sydney and Melbourne than in Brisbane and the other capital cities.

Figure 2.6: Employment within the creative industries as a percentage of total employment within each city across seven Australian capital cities



Source: ABS 2001 Census

Figure 2.7: The numbers of persons employed in each capital city in the 10 creative industries



Source: ABS 2001 Census

Occupations within the Creative Industries

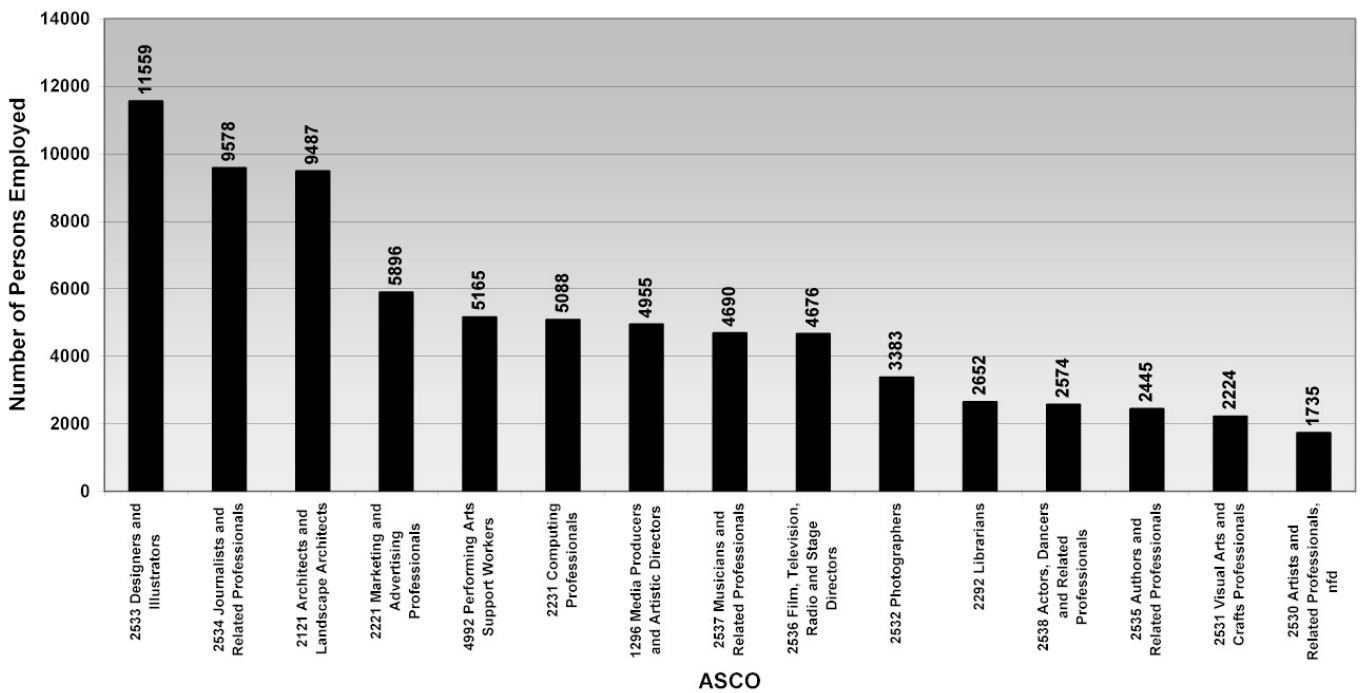
The 2001 census occupation data were examined to provide indications of occupations exhibiting highest employment within the creative industries. Table 2.3 provides data on the numbers of persons employed in the 15 creative occupations with the highest employment across the seven capital cities. Figure 2.8 shows the numbers of persons employed in these 15 creative occupations aggregated across the seven capital cities.

Three occupations have higher numbers of persons employed compared to the others: 2533 Designers and Illustrators (11,559 persons employed), 2534 Journalists and Related Professionals (9,578 persons employed), and 2121 Architects and Landscape Architects (9,487 persons employed).

Many people are employed in occupations that are not necessarily creative occupations, but are located within the creative industries. This is particularly pronounced with sales-related occupations in which large numbers of persons are employed (8211 Sales Assistants with 20,249 persons employed; 3311 Shop Managers with 8,896 persons employed; and 6211 Sales Representatives with 7,143 persons employed).

The pattern of employment within Brisbane does not differ substantially from that of Australian capital cities overall.

Figure 2.8: Numbers of persons employed in creative occupations in seven Australian capital cities



Source: ABS 2001 Census

Table 2.3: The numbers of persons employed in creative occupations with the highest employment across seven Australian capital cities

ASCO	Sydney	Melbourne	Brisbane	Adelaide	Perth	Greater Hobart	Canberra	Australia
1296 Media Producers and Artistic Directors	2,854	1,187	290	227	282	57	57	4,955
2121 Architects and Landscape Architects	3,755	2,771	1,230	556	840	96	237	9,487
2221 Marketing and Advertising Professionals	2,912	1,672	544	277	353	39	99	5,896
2231 Computing Professionals	2,304	1,511	450	238	292	29	265	5,088
2292 Librarians	790	789	299	182	259	77	256	2,652
2530 Artists and Related Professionals, nfd	734	505	159	109	152	26	50	1,735
2531 Visual Arts and Crafts Professionals	781	740	212	148	229	50	64	2,224
2532 Photographers	1,283	1,042	383	243	295	52	84	3,383
2533 Designers and Illustrators	4,943	3,494	1,107	769	832	117	297	11,559
2534 Journalists and Related Professionals	4,577	2,344	914	502	773	153	315	9,578
2535 Authors and Related Professionals	1,030	847	203	121	138	36	69	2,445
2536 Film, Television, Radio and Stage Directors	2,269	1,211	407	297	314	75	102	4,676
2537 Musicians and Related Professionals	1,828	1,311	523	350	485	88	105	4,690
2538 Actors, Dancers and Related Professionals	1,112	726	296	154	226	15	44	2,574
4992 Performing Arts Support Workers	2,385	1,291	543	344	420	60	123	5,165

Source: ABS 2001 Census

Incomes of Persons working within the Creative Industries

The median individual weekly income of persons working in the creative industries is provided in Table 2.4. This table provides statistics for persons working in 33 ANZSICs in each of the seven capital cities examined. Figure 2.9 graphs median individual weekly income in seven capital cities aggregated across the ANZSICs which comprise the creative industries.

As shown in Figure 2.9, of the seven Australian capital cities (excluding Darwin), persons working in the creative industries in Sydney have the highest median individual weekly income (\$838). Creative industries workers in Perth (\$660), Adelaide (\$653), and the Greater Hobart Area (\$630), earn lower median individual weekly incomes than Brisbane creative industries workers (\$666). Creative industries workers in both Melbourne (\$763) and Canberra (\$814) have considerably higher weekly incomes.

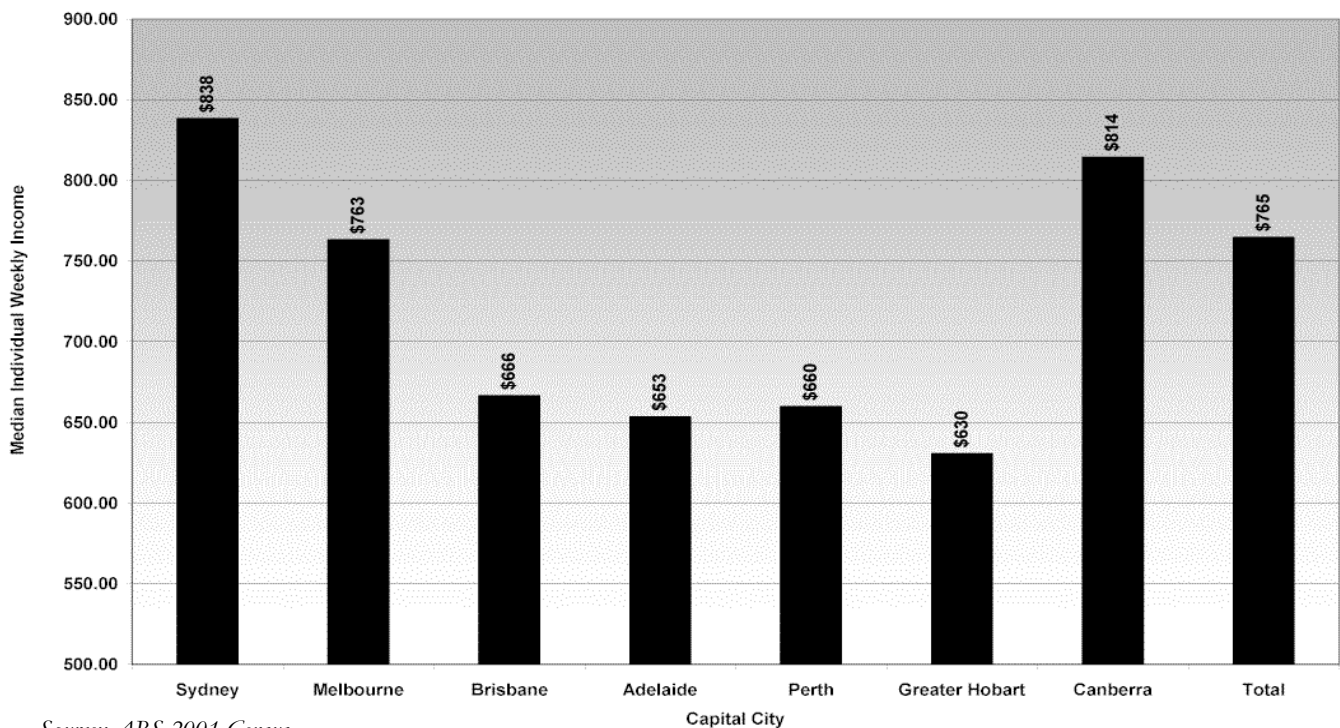
Table 2.4: Median individual weekly income compared to Brisbane creative industries workers

ANZSIC	Sydney	Melbourne	Brisbane	Adelaide	Perth	Greater Hobart	Canberra	Total
9110 Film and Video Services, undefined	\$854	\$929	\$775	\$938	\$777	\$250	\$0	\$855
9113 Motion Picture Exhibition	\$495	\$441	\$438	\$393	\$345	\$380	\$296	\$442
9121 Radio Services	\$945	\$860	\$796	\$838	\$761	\$895	\$811	\$873
9122 Television Services	\$996	\$874	\$894	\$860	\$882	\$812	\$891	\$941
2420 Publishing, undefined	\$875	\$753	\$660	\$702	\$669	\$975	\$768	\$799
2421 Newspaper Printing or Publishing	\$844	\$817	\$716	\$718	\$762	\$778	\$811	\$798
2422 Other Periodical Publishing	\$883	\$804	\$722	\$565	\$679	\$501	\$779	\$839
2423 Book and Other Publishing	\$803	\$756	\$685	\$582	\$618	\$530	\$712	\$754
2430 Recorded Media Manufacturing and Publishing	\$910	\$763	\$843	\$719	\$763	\$1,000	\$901	\$855
4794 Book and Magazine Wholesaling	\$634	\$622	\$593	\$521	\$511	\$592	\$486	\$606
5235 Recorded Music Retailing	\$515	\$465	\$433	\$455	\$377	\$348	\$417	\$466
5243 Newspaper, Book and Stationery Retailing	\$472	\$447	\$389	\$420	\$426	\$396	\$410	\$440
5259 Retailing, n.e.c.	\$501	\$437	\$409	\$417	\$430	\$429	\$406	\$451
7730 Non-Financial Asset Investors	\$853	\$793	\$768	\$614	\$830	\$0	\$833	\$814
7821 Architectural Services	\$869	\$814	\$793	\$765	\$838	\$714	\$838	\$830
7851 Advertising Services	\$901	\$803	\$698	\$648	\$652	\$692	\$627	\$810
7852 Commercial Art and Display Services	\$770	\$693	\$589	\$596	\$605	\$557	\$664	\$695
9112 Film and Video Distribution	\$777	\$738	\$705	\$488	\$456	\$0	\$180	\$721
9120 Radio and Television Services, undefined	\$1,059	\$996	\$851	\$877	\$883	\$1,003	\$1,098	\$1,008
9210 Libraries	\$614	\$550	\$564	\$576	\$522	\$707	\$782	\$601
9220 Museums	\$776	\$656	\$674	\$705	\$623	\$539	\$768	\$721
9231 Zoological and Botanic Gardens	\$707	\$609	\$511	\$638	\$587	\$505	\$757	\$640
9239 Recreational Parks and Gardens	\$764	\$681	\$674	\$617	\$626	\$549	\$761	\$697

Table 2.4: Median individual weekly income compared to Brisbane creative industries workers

ANZSIC	Sydney	Melbourne	Brisbane	Adelaide	Perth	Greater Hobart	Canberra	Total
9240 Arts, undefined	\$581	\$552	\$561	\$516	\$464	\$1,500	\$451	\$544
9241 Music and Theatre Productions	\$660	\$585	\$494	\$520	\$496	\$619	\$398	\$588
9242 Creative Arts	\$630	\$533	\$481	\$428	\$487	\$408	\$572	\$550
9250 Services to the Arts, undefined	\$704	\$743	\$593	\$1,190	\$696	\$650	\$1,250	\$755
9251 Sound Recording Studios	\$736	\$614	\$503	\$671	\$710	\$180	\$1,075	\$682
9252 Performing Arts Venues	\$646	\$546	\$525	\$526	\$441	\$440	\$274	\$559
9259 Services to the Arts, n.e.c.	\$676	\$592	\$622	\$638	\$473	\$483	\$436	\$617
9330 Other Recreation Services	\$523	\$450	\$479	\$468	\$422	\$426	\$423	\$479
9511 Video Hire Outlets	\$328	\$318	\$307	\$331	\$284	\$422	\$252	\$315
9523 Photographic Studios	\$600	\$526	\$438	\$474	\$462	\$427	\$495	\$532
Total Median for all CI Industries	\$838	\$763	\$666	\$653	\$660	\$630	\$814	\$765
Total Median for all Industries	\$722	\$665	\$634	\$619	\$637	\$605	\$762	

Source: ABS 2001 Census

Figure 2.9: Median individual weekly incomes for persons employed in the creative industries

Source: ABS 2001 Census

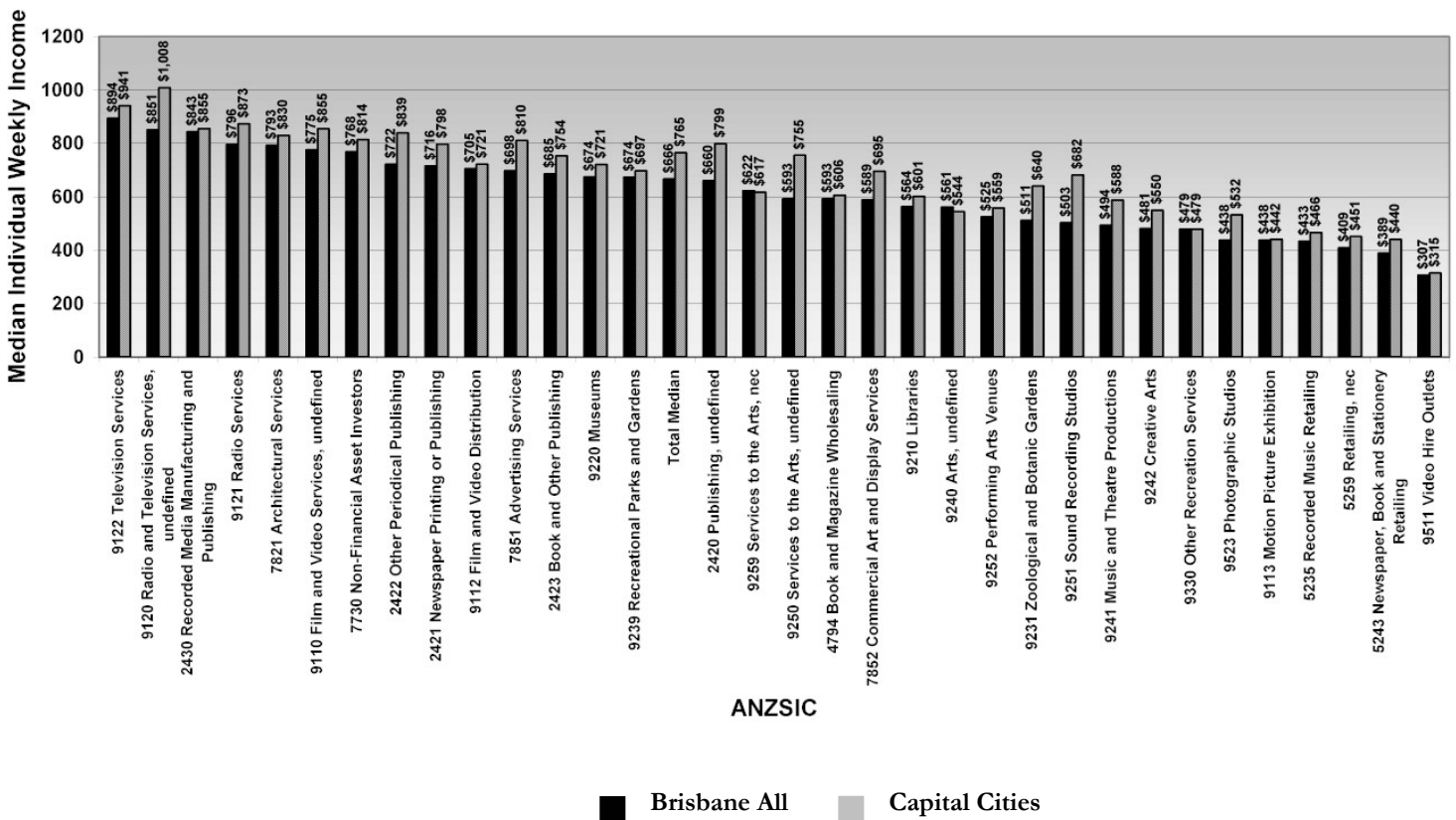
In Brisbane, as with all seven subject cities, median individual weekly incomes are higher for those working in the creative industries (\$765) compared to all industry incomes (\$634).

Figure 2.10 presents the median individual weekly income for the 34 ANZSICs of the creative industries for Brisbane and the total of the seven capital cities. In general, while Brisbane workers earn much less than workers in Sydney, Melbourne and Canberra, the pattern of income across the creative industries within Brisbane follows that of the rest of the capital cities.

The highest incomes are represented in Broadcasting, Electronic Media and Film. Within Brisbane, persons working within 9122 Television Services have the highest median individual weekly incomes (\$894). Other sectors with relatively high incomes are: 2430 Recorded Media Manufacturing and Publishing (\$843), 9121 Radio Services (\$796), and 7821 Architectural Services (\$793).

The Performing Arts (9241 Music and Theatre Productions; 9252 Performing Arts Venues), Visual Arts and Crafts (9242 Creative Arts; 9523 Photographic Studios), and Arts, Music Composition (a component within 9242 Creative Arts) all have a median income lower than that for the creative industries overall. This suggests that the newer forms of the creative industries, such as those based in electronic media, design, and publishing produce higher median incomes.

Figure 2.10: Median individual weekly incomes for persons employed in the creative industries comparison between 1996 and 2001



Source: ABS 2001 Census

Comparison Between 1996 and 2001

To establish growth in the number of people employed in the creative industries, a comparison between 1996 and 2001 census data was conducted. As shown in Table 2.5, across the capital cities, there was growth of approximately 12.3% in the creative industries, while for Brisbane; growth was only approximately 7.3%. Melbourne (16.3%) recorded the strongest growth in the numbers of persons employed in the creative industries, followed by Sydney (13.6%) and Canberra (11.1%). Adelaide (4.4%) and Hobart (3.6%) recorded only low levels of growth relative to the other capital cities.

The pattern of growth across the various creative industries sectors was not uniform within either Australia as a whole or Brisbane more specifically. As shown in Table 2.5, between 1996 and 2001, strong growth was recorded across Australia in Music Composition and Publishing (26.7%), Design (20.4%), and Broadcasting, Electronic Media and Film (19.5%). In contrast, Heritage experienced a moderate fall in numbers of persons employed (-8.6%), and Visual Arts and Crafts recorded a very small decrease in the numbers of persons employed (-2.4%).

The pattern of growth in the sectors comprising the creative industries differed in some ways in Brisbane compared to the other capital cities. Brisbane experienced a decline in the numbers of persons employed in the Performing Arts (-2.7%), and Heritage (-8.8%), and in contrast to the growth in Australia more generally, a strong decline in Music Composition and Publishing (-9.1%).

Table 2.5: Percent growth from 1996 to 2001 in the numbers of persons employed in creative industries sectors in Australian capital cities

Industry sector	Sydney (SD)	Melbourne (SD)	Brisbane (SD)	Adelaide (SD)	Perth (SD)	Greater Hobart (SD)	Canberra (SD)	Australia
Literature and Print Media	9.8	10.7	9.4	9.4	8.3	-5.8	-5.9	9.2
Performing Arts	0.4	-1.3	-2.7	9.7	6.8	27.5	29.9	1.7
Music Composition and Publishing	36.1	28.0	-9.1	32.3	26.9	-25.7	39.6	26.7
Visual Arts and Crafts	-6.8	-3.0	5.6	-14.1	6.7	39.2	29.0	-2.4
Design	25.1	28.3	5.8	12.7	8.5	-0.6	12.5	20.4
Broadcasting, Electronic Media and Film	23.0	20.5	12.6	1.4	23.9	4.5	27.4	19.5
Other Arts	3.1	14.2	19.8	-0.8	24.8	-50.0	61.1	9.8
Heritage	-13.7	-4.2	-8.8	-20.4	-8.6	21.9	6.7	-8.6
Total CI	13.6	16.3	7.3	4.4	9.1	3.6	11.1	12.3

Source: ABS 1996 and 2001 Census data.

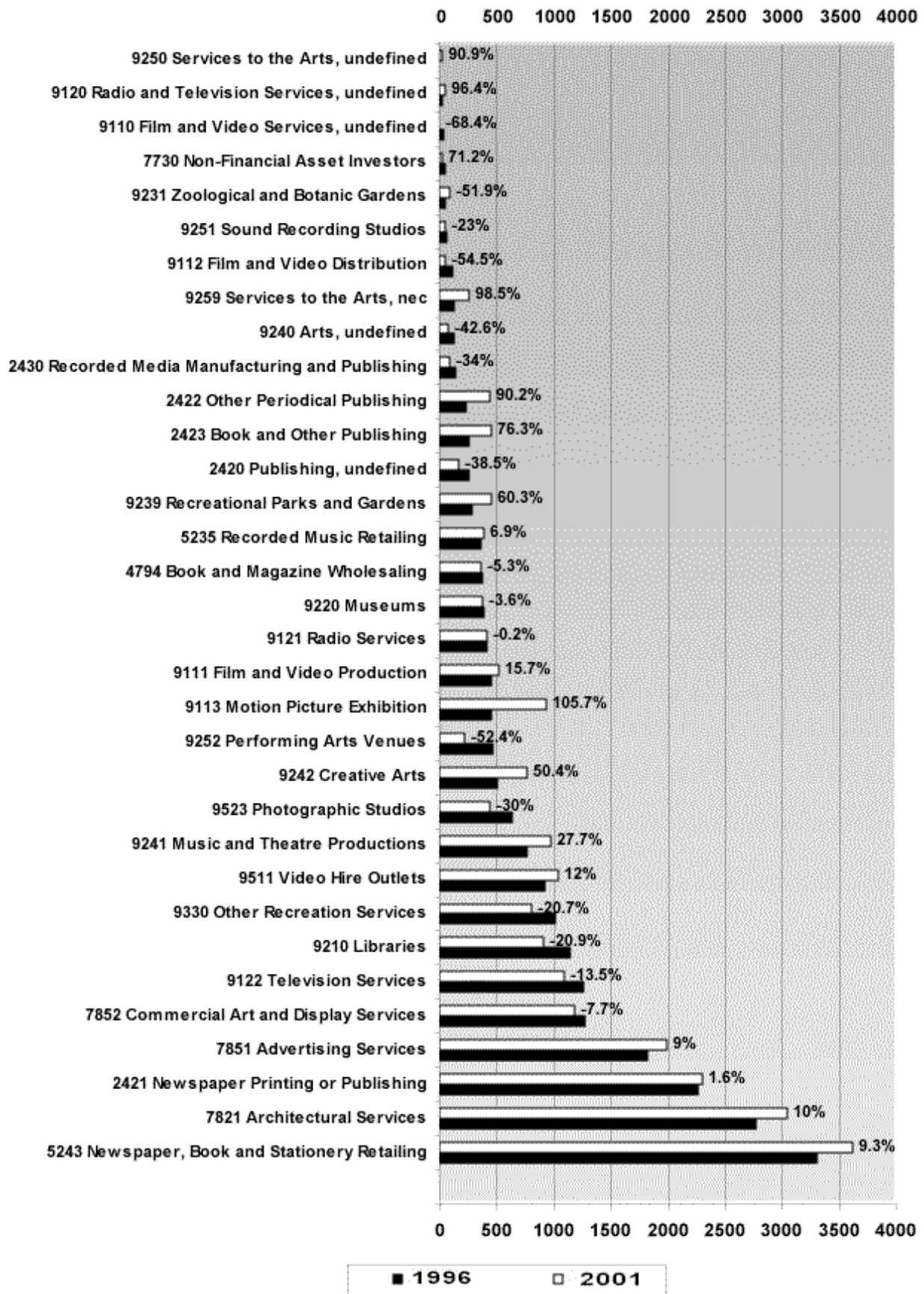
The strongest growth was recorded in Other Arts (19.8%), although this only corresponds to an increase from 339 persons employed in 1996 to 406 persons in 2001. Brisbane also recorded a substantial increase in the numbers of persons employed in Broadcasting, Electronic Media and Film (12.5%), and a more moderate increase in both Design (5.8%) and Visual Arts and Crafts (5.6%). The latter change contrasts with the general pattern throughout the other capital cities. The numbers of persons employed in Brisbane in each ANZSIC in 1996 and 2001 is shown in Figure 2.11. This figure also shows the proportional change in the numbers of persons employed in each ANZSIC. It is only useful to examine changes in industry sectors of a sufficient employment size to make proportional changes meaningful. As a guide, only those sectors with approximately 500 persons employed will be discussed in terms of proportional changes from 1996 to 2001.

Very large growth is apparent in 9113 Motion Picture Exhibition, with a 105.7% increase in the numbers of persons employed between 1996 and 2001. Although the relatively low employment base in 1996 (458 persons) means that proportional growth can be large with relatively few people, the growth in this sector has nevertheless been significant.

It is likely that this figure, which is reflected throughout Australia, is due to the rapid increase in the number of multiplex cinemas throughout Australia. Strong growth was also recorded in 9242 Creative Arts (50.4%) and 9241 Music and Theatre Productions (27.7% growth). More moderate growth occurred in 9111 Film and Video Production (15.7%), 9511 Video Hire Outlets (12.0%), 7821 Architectural Services (10.0%), 5243 Newspaper, Book and Stationary Retailing (9.3%) and 7851 Advertising Services (9.0%). Some industry sectors exhibited a substantial decrease in the numbers of persons employed. The largest falls in proportional terms were in 9523 Photographic Studios (-30.0%), 9210 Libraries (-20.9%), and 9330 Other Recreation Services (-20.7%). It should be noted that these three sectors have only relatively low levels of employment and, therefore, the magnitude of the proportional changes should be treated cautiously.

Two other sectors also recorded modest decline in the numbers of persons employed: 9122 Television Services (-13.5%) and 7852 Commercial Art and Display Services (-0.7%). Many other industry sectors exhibited substantial proportional growth or decline but the absolute numbers of persons employed makes these figures unreliable.

Figure 2.11: Numbers of persons employed in Brisbane in creative industries ANZSICs in 1996 and 2001¹



Source: ABS 1996 and 2001 Census data.

¹ The percent change between 1996 and 2001 in numbers of persons employed is given for each ANZIC code.

SECTION 3: FINANCIAL DIMENSIONS

This section of the report describes what is currently known about the financial and economic situation of the creative industries in Brisbane, Queensland and Australia. The geographic focus of this section is not as consistent as in the previous section, as there is limited, and in many cases no, data available at the state or city level. This is particularly so when describing the creative industries in Brisbane.

Information is presented on four aspects of economic and financial data. The first part presents the best available data on economic multipliers for a range of creative industries. The second part presents comparative key financial data for the creative industries for the whole of Australia, including the total value of income and expenses, operating profit, profit margins and industry value-added amounts. Third, comparative state data on income is provided. Due to the substantial government subsidies the creative industries collect, comparative state data are provided on the amount of government subsidy provided for each industry sector. This is provided for the three tiers of government (Commonwealth, state, and local). Finally, where available, sources of income for each industry sector are provided, along with historical data which maps changes over time in total industry income.^{xi xii}

Economic Multipliers for the Creative Industries

The ABS has provided an input-output table for selected creative industries in Australia. The data are based on now dated national accounts and other survey data (1996-97), and also follow the ANZSICs, not the ACLCs. Further, the tables are based on Australia-wide data. Despite these limitations, this data appears to be the best currently available. The estimates calculated by the ABS are reproduced in Table 3.1.

The gross value-added multiplier shows the relationship between the initial output in an industry and the total increase in gross value-added by all industries. (Gross value-added is defined as the value of output at basic prices minus the value of intermediate consumption at purchasers' prices. Basic prices valuation of output removes the distortion caused by variations in the incidence of commodity taxes and subsidies across the output of individual industries^{xiii}). This value can be viewed as an estimate of the increase in Australia's GDP that would occur if demand for goods and services in that industry increased by \$1m. The full time equivalent employment multiplier estimates the increase in employment over a period of one year that a \$1m increase in expenditure would promote.

The industry sectors with highest gross value multiplier are Film and Video Production and Distribution (1.80), and Music and Theatre Productions (1.79). The sectors with the highest employment multipliers are Architectural Services (38), Film and Video Production and Distribution (37) and Music and Theatre Productions (34).

Table 3.1: Estimated multipliers for selected creative industries, Australia, 1996-97

ANZSIC sector	Gross value-added multiplier	Full time equivalent employment multiplier
Printing	1.29	22
Newspaper printing/publishing	1.33	19
Other periodical publishing	1.31	18
Book and other publishing	1.29	17
Architectural services	1.6	38
Advertising services	1.41	19
Commercial art and display services	1.49	24
Film and video production and distribution	1.8	37

Table 3.1: Estimated multipliers for selected creative industries, Australia, 1996-97

Motion picture exhibition	1.28	19
Radio and TV services	1.39	19
Libraries and museums	1.74	30
Parks and gardens	1.64	25
Music and theatre productions	1.79	34
Creative arts	1.55	28
Services to the arts	1.4	21
Video hire outlets and photographic studios	1.38	26
All cultural industries	1.39	22

Source: Based on ABS data, including the Australian National Accounts and the Service Industry Surveys.²⁰

Key Financial Data for the Creative Industries

The ABS has produced financial data for a number of creative industries activities. Key financial data, which includes total income, total expenses, operating profit before tax, profit margin and industry value-added are presented in Table 3.2. The data do not encompass all creative industries sectors; for example, there is no data available for those activities which comprise the design sector. The activities described do not coincide with the ACLC, although in many cases, a rough approximation can be inferred.

The activities with the largest profit margin are commercial television services (24.6%), manufacture of recorded music (16.3%), studio sound recording (13.8%) and motion picture distribution (11.4%). In general, Broadcasting, Electronic Media and Film have achieved quite high profit margins, as has Music Composition and Publishing. The figures for music publishing should be treated cautiously as they refer to 1995-1996. The Performing Arts and Book Publishing recorded relatively low profit margins (4.8% and 4.6% respectively).

Commercial television services recorded a net worth far greater than any other sector or activity (\$3,617.9m). Film and video production recorded an industry value-added amount of \$606.8m, which is the second highest amount after commercial television services – although much smaller.

Compared to other sectors, activities in the Broadcasting, Electronic Media and Film sector, make the largest operating profits before tax by a magnitude of up to ten. In 1995-1996 the music industry generated moderate operating profits before tax (\$80.1m), over half of which is derived from record companies and distributors (\$48.5m). Book publishing generated an operating profit before tax of \$62.7m. The Performing Arts collectively has a reasonably large total income (\$1,633.8m), but because of high expenses the operating profit is only \$50.4m, with a profit margin of 4.8%.

Table 3.2: Key financial data for creative industries activities, Australia

Creative industries activity	Total income	Total expenses	Operating profit before tax	Profit margin	Industry value-added
	\$m	\$m	\$m	%	\$m
Literature and Print Media					
Book Publishing ^c	1,361.2	1,321.7	62.7	4.6	382
Performing Arts					
Music and Theatre Production ^d	505.5	477.6	27.8	8	206.9
Performing Arts Venues ^d	315.9	308.7	7.2	3.7	86
Services To Performing Arts ^d	709.8	698.4	11.7	2.5	50.5
Festivals ^d	102.7	99.1	not provided	not provided	14.1
Total Performing Arts ^d	1,633.8	1,583.7	50.4	4.8	383.8
Music Composition and Publishing					
Record Companies and Distributors ^e	792.4	751.5	48.5	6.1	162.1 ^a
Manufactures Of Recorded Music ^e	95	82.2	15.5	16.3	46.2 ^a
Music Publishers ^e	119.9	112.1	8.3	6.9	17.2 ^a
Sound Recording Studios ^e	56.6	48.8	7.8	13.8	29.9 ^a
Total Music Industry ^e	1,064.0	994.6	80.1	7.5	255.4 ^a
Visual Arts and Crafts					
Australian Commercial Galleries ^f	131.8	77.7	8.8	7	not provided
Broadcasting, Electronic Media and Film					
Commercial Television Services ^g	3,271.0	2,467.5	803.5	24.6	3,617.9 ^b
Pay Television Services ^g	910.9	1,615.7	-675.8	n.a.	-807.8 ^b
Total Television Services ^g	4,181.9	4,083.2	127.7	n.a.	2,810.1 ^b
Film and Video Production ^h	1,473.8	1,397.9	76.5	5.4	606.8
Film and Video Distribution ^h	1,141.8	1,038.4	103.6	9.3	281.1
Motion Picture Exhibition ⁱ	1,046.1	934.3	113.3	11.4	347.7
Video Hire Industry ^j	595.2	558.7	42	7.2	281.9

a Business gross product.

b Net worth.

c Source: ABS 2002: 1363.0 Book Publishers Australia 2000-2001.

d Source: ABS 2001: 8697.0 Performing Arts Industries, Australia, 1999-2000.

e Source: ABS 1997: 4143.0 Business of Music, Australia, 1995-96.

f Source: ABS 2001: 8651.0 Commercial Art Galleries, Australia, 1999-2000.

g Source: ABS 2001: 8559.0 Television Services, Australia, 1999-2000.

h Source: ABS 2001: 8679.0 Film and Video Production and Distribution, Australia, 1999-2000.

i Source: ABS 2001: 8654.0 Motion Picture Exhibition, Australia, 1999-2000.

j Source: ABS 2001: 8562.0 Video Hire Industry, Australia, 1999-2000.

Creative Industries Income by State

Table 3.3 reports total income for a range of creative industries activities, broken down by state. Across all creative industries, NSW and Victoria generated the majority of income. In most activities, these two states account for a greater proportion of industry income than expected by the population size relativities among states. The most concentrated activity is book publishing, for which NSW and Victoria account for 93.7% of the total income in Australia. The activities which produce a reasonable income in Queensland are those which are dependent upon a resident population: performing arts venues (17.9%), commercial art galleries (15.4%), motion picture exhibition (17.7%) and the video hire industry (17.4%). Queensland also accounts for a reasonable proportion of the national income for television services (15.6%), despite quite marked centralisation of services provided by the major networks in Sydney and Melbourne. Television services generate the highest income in Queensland (\$509.4m), followed by film and video production (\$146.1m). As discussed earlier, both of these industries generate a significant value-added dollar value, and television services has a high profit margin. On this basis the presence of these two industries in Queensland is desirable. The video hire industry also generates a large income in Queensland (\$103.6m). Although this industry has relatively little creative input of its own, it is a large market for the creative output of the associated production industries.

Table 3.3: Total income for creative industries sectors by state

Sector		NSW	Vic	Qld	SA	WA	ACT	Tas	NT	Aust
Literature and Print Media										
Book Publishing ^e	\$m	851.3	424.2	59.2	15.9	9.6	0.9 ^a	-	-	1,361.2
	%	62.5	31.2	4.3	1	0.7	> .1 ^a	-	-	100
Performing Arts										
Music and Theatre Production ^f	\$m	281.9	133.1	44.2	28.9	25.6	2.8	6.9	1.8	505.5
	%	55.8	22.4	8.7	5.7	5.1	0.6	1.4	0.4	100
Performing Arts Venues ^f	\$m	113.9	69.6	56.7	50.8	15.3	6.5	np	np	315.9
	%	36.1	22	17.9	16.1	4.8	2.1	np	np	100
Services To Performing Arts ^f	\$m	371.1	124.3	90.2	82	20.3	np	np	np	709.8
	%	52.3	17.5	12.7	11.6	2.9	np	np	np	100
Festivals ^f	\$m	24.7	38.6	7.1	15.9	12	2.2	np	np	102.7
	%	24.1	37.6	6.9	15.5	11.7	2.1	np	np	100
Visual Arts and Crafts										
Commercial Art Galleries ^g	\$m	52.2	36.5	20.3	3.7	3.5	0.5	0.4	14.6	131.8
	%	39.6	27.7	15.4	2.8	2.7	0.3	0.4	11.1	100
Broadcasting, Electronic Media and Film										
Television Services ^h	\$m	1,229.5 ^b	909.3	509.4	198	354.8	b	69.5 ^c	-	3,271.0
	%	37.6 ^b	27.8	15.6	6.1	10.8	b	2.1 ^c	-	100
Film and Video Production ⁱ	\$m	916.6	339.4	146.1	31.2	32.3	4.1	2	2.2	1,473.8
	%	62.2	23	9.9	2.1	2.2	0.3	0.1	0.1	100

Table 3.3: Total income for creative industries sectors by state

Sector		NSW	Vic	Qld	SA	WA	ACT	Tas	NT	Aust
Film and Video Distribution ⁱ	\$m	694.8	309	87.6	np	31.3	0	np	0	1,141.8
	%	60.9	27.1	7.7	np	2.7	0	np	0	100
Motion Picture Exhibition ^{d,j}	\$m	243.7	176.7	120	40.5	71.9	14.3	np	np	678.9
	%	35.9	26	17.7	6	10.6	2.1	np	np	100
Video Hire Industry ^k	\$m	181.2	139.2	103.6	52.1	81.8	14.4	14.8	8.2	595.2
	%	30.4	23.4	17.4	8.8	13.7	2.4	2.5	1.4	100

a includes ACT, Tasmania and NT.

b includes ACT and NSW.

c Includes Tasmania and NT.

d Box office receipts.

np Not published.

e Source: ABS 2002: 1363.0 Book Publishers Australia 2000-2001

f Source: ABS 2001: 8697.0 Performing Arts Industries, Australia, 1999-2000;

g Source: ABS 2001: 8651.0 Commercial Art Galleries, Australia, 1999-2000.

h Source: ABS 2001: 8559.0 Television Services, Australia, 1999-2000.

i Source: ABS 2001: 8679.0 Film and Video Production and Distribution, Australia, 1999-2000.

j Source: ABS 2001: 8654.0 Motion Picture Exhibition, Australia, 1999-2000.

k Source: ABS 2001: 8562.0 Video Hire Industry, Australia, 1999-2000.

Table 3.4: Government funding of creative industries 2001-2001 by creative industries sector (\$m)

		Literature and Print Media	Performing Arts	Performing Arts Venues	Visual Arts and Crafts	Broadcasting, Electronic Media and Film	Other Arts	Heritage	TOTAL
NSW	\$m	1.4	17.8	30.4	1.2	7.8	3.7	591.1	653.4
	% of funding	0.2	2.7	4.7	0.2	1.2	0.6	90.5	100
Victoria	\$m	0.5	17.9	26.3	3.4	16.2	1	316.3	381.6
	% of funding	0.1	4.7	6.9	0.9	4.2	0.3	82.9	100
Qld	\$m	1	11.1	10.5	1.5	11.2	1.9	251.3	288.5
	% of funding	0.3	3.8	3.6	0.5	3.9	0.7	87.1	100
SA	\$m	0.3	15.3	10.9	1.2	3.9	3.7	139.5	174.8
	% of funding	0.2	8.8	6.2	0.7	2.2	2.1	79.8	100
WA	\$m	0.5	8.7	10.1	1.4	7.6	0	212.7	241
	% of funding	0.2	3.6	4.2	0.6	3.2	0	88.3	100
Tasmania	\$m	0.2	1.7	0.1	0.3	0.2	0.1	51	53.6
	% of funding	0.4	3.2	0.2	0.6	0.4	0.2	95.1	100
ACT	\$m	0.2	2.6	2.6	1.3	0.2	0	21.2	28.1
	% of funding	0.7	9.3	9.3	4.6	0.7	0	75.4	100
Total State	\$m	4.1	75.1	90.9	10.3	47.1	10.4	1,583.1	1,821.0
	% of funding	0.2	4.1	5	0.6	2.6	0.6	86.9	100
Commonwealth	\$m	22	95.9	5.5	15.7	853	61.6	501.5	1,555.2
	% of funding	1.4	6.2	0.4	1	54.8	4	32.2	100
Local Govt	\$m	2.6	28.6	48.8	2.8	2.2	8.7	602.8	696.5
	% of funding	0.4	4.1	7	0.4	0.3	1.2	86.5	100
AUSTRALIA	\$m	28.7	199.6	145.2	28.8	902.3	80.7	2,687.4	4,072.7
	% of funding	0.7	4.9	3.6	0.7	22.2	2	66	100

Sources: ABS 4183.0 Cultural Funding By Government 2000-01 and based upon data contained within ABS 4183.0 Cultural Funding By Government 2000-01.

Government Funding of the Creative Industries

Governments within Australia provide substantial funding of the creative industries. Table 3.4 presents the amount of government cultural funding throughout Australia. The table provides data on the amount of funding provided by each state government, as well as total Commonwealth and local government funding of each creative industries sector for which data is available. Data on government funding is not available for all creative industries sectors. Table 3.5 provides the proportion of funding of each sector by each level of government.

It is estimated that, in total, the creative industries within Australia were allocated \$4,072m in government funding in 2000-01. Combined, the state governments provided \$1,821.0m in funding (44.7% of the total funding – see Table 3.5) and the Commonwealth government provided \$1,555.2m (38.2% of total the funding). Local government contributed a much smaller amount: \$696.5m, which accounts for 17.1% of total creative industries funding by governments in Australia.

Heritage attracted \$2,687.4m of creative industries funding, which accounted for 66.0% of all creative industries funding. The state governments provided the greatest proportion of funding to Heritage (58.9%). Out of a total funding allocation across the three levels of government of \$902.3m, the Commonwealth allocated \$853.0m to Broadcasting, Electronic Media and Film. The majority of this funding was provided to radio and television services (\$777.2m), out of which the Australian Broadcasting Commission is funded. Film and video received \$74.1m, and multimedia only \$1.7m. The Performing Arts and Performing Arts Venues also attracted significant government funding, \$199.6m and \$145.2m respectively. The state governments provided the majority of funding for venues (\$90.9m, 62.6% of all funding), while the Commonwealth (\$95.9m) and state governments (\$75.1m) share funding of the Performing Arts per se. Other arts attracted moderate funding (\$80.7m), while Literature and Print Media (\$28.7m), and Visual Arts and Crafts (\$28.8m) attracted comparatively low levels of government funding.

As shown in Table 3.4, local and state governments in Australia allocated the great majority of their creative industries funding to Heritage. Local governments allocated 86.5% of their total funds to Heritage, almost identical to the state governments (86.9%). Both these levels of government allocated most of the remaining creative industries funding to the Performing Arts and Performing Arts Venues. The ABS (ABS 2002: Cat 4183.0) reports that multimedia funding was provided by only three state governments in 2000-01: NSW (\$0.2m), Victoria (\$0.4m) and Queensland (\$0.1m).

Table 3.5: Proportion of funding of each creative industries sector by each level of government

Creative industries sector	Literature and Print Media	Performing Arts	Venues	Visual Arts and Crafts	Broadcasting, Electronic Media and Film	Other Arts	Heritage	TOTAL
Total State	14.3	37.6	62.6	35.8	5.2	12.9	58.9	44.7
Commonwealth	76.7	48.0	3.8	54.5	94.5	76.3	18.7	38.2
Local	9.1	14.3	33.6	9.7	0.2	10.8	22.4	17.1
AUSTRALIA	100	100	100	100	100	100	100	100

Source: Based upon data contained within ABS 2002: 4183.0 Cultural Funding By Government, Australia 2000-01.

Sources of Income and Historical Data for Creative Industries

There is a range of other financial data available for the creative industries sectors. The final part of this section reports sources of income for each sector where data is available, plus any time series data, where available.

Literature and Print Media

The ABS calculates the value of book sales in 2000-2001 (retailing and wholesaling) in Australia as \$1,260.6m, based on the sale of 104.3 million books (see Table 3.6). This amount included \$512.9m (40.7%) from imported titles and \$747.7m (59.3%) from Australian titles. In 2000-01 book export sales were valued at \$162.5m, which accounted for 13% of total book sales.

Between 1999-2000 to 2000-01, the total number of books sold decreased by 19% (from 129.4 million books to 104.3 million books). During the same time period, operating profit of businesses involved in book selling fell from \$105.6m to \$62.7m, with an associated fall in the profit margin from 7.8% to 4.6%. Since 1994, the total sale of books (including both Australian and imported titles) has risen from \$841.7m to \$1,270.4m in 1999-2000 before decreasing slightly in 2000-01 to \$1,260.6m. This is in contrast to the number of books sold, which peaked in 1995-96 (130.6 million books sold) and fell to 104.3 million in 2000-01. The value of export sales of books has steadily increased from over \$81.1m in 1994 to \$162.5m in 2000-01. This reflects a doubling of the value of export book sales since 1994.

Table 3.6: Key figures for book publishing in Australia

	Unit	1994	1995-96	1997-98	1999-00	2000-01
Number of books sold	million	124.8	130.6	111.5	129.4	104.3
Sales of all books	\$m	841.7	950.0	1,035.6	1,270.4	1,260.6
Sales of Australian titles	\$m	487.7	561.1	623.5	756.1	747.4
Sales of imported books	\$m	354.0	388.9	412.1	514.3	512.9
Export sales of books	\$m	81.1	80.3	109.8	151.1	162.5

Source: ABS 2002: 1363.0 Book Publishers Australia 2000-2001.

Performing Arts

Table 3.7 shows the proportion of funding of the Performing Arts that is derived from box office receipts and government subsidies. Performing Arts Venues derive the largest proportion of income from government subsidies, while both music and theatre productions and festivals derive nearly half of their income from ticket sales.

Table 3.7: Sources of income for performing arts industries, Australia, 1999-2000.

Sector	Box office \$m	% of total funding	Government funding \$m	% of total funding
Music and theatre production	233.1	46.1	116.7	23.1
Performing arts venues	40.8	12.9	93.5	29.6
Festivals	42.2	41.1	27.1	26.4
Services to arts	144.3	20.3	232.7	32.8

Source: ABS 2001: 8697.0 Performing Arts Industries, Australia, 1999-2000.

Music Composition and Publishing

There is little current Australian data pertaining to the music business specifically. The most recent data was collected by the ABS in 1995-1996. This data, presented in Table 3.8, needs to be used cautiously. Music businesses grossed \$1,064.0 billion in 1995-1996, to which sales of goods and services contributed 84% (\$897.5m).

Of the sales of goods and services, record companies and distributors generated \$725.5m (81%), while manufacturers of recorded music generated a further \$94.5m (11%). Publishing and sound recording royalties accounted for \$135.6m (13%) of total income. Of these royalties, \$93.8m was earned by music publishers and \$41.8m by record companies and distributors.

Total income for organisations whose main business was operating a recording studio was \$56.6m. Most of this was from advertising and jingle composition and production (28%), the hire of sound recording studios (24%) and sound production and recording for television and film (21%).

Table 3.8: Sources of income for recorded music industry Australia 1995-1996

	Record companies and distributors	Manufactures of recorded music	Music publishers	Sound recording studios	Total
Sales of goods and services	725.5	94.5	22.5	54.9	897.0
Publishing and sound recording royalties	41.8	0.0	93.8	0.0	135.6
Other income	25.1	0.5	3.6	1.7	30.9
Total	792.4	95.0	119.9	56.6	1,064.0

Source: ABS 1997: 4143.0 *Business of Music, Australia, 1995-96*.

Visual Arts and Crafts

There has been a large increase in the income of commercial art galleries in Australia between 1996-1997 and 1999-2000, as shown in Table 3.9. In 1999-2000, the value of art work sold by Australian commercial art galleries was \$217.5m. Of this, Aboriginal and Torres Straight Islander artists accounted for \$35.6m (17% of sales), and other Australian artists accounted for \$167.9m (77% of sales). Overseas artists accounted for \$14.0m (6%) worth of sales. These figures suggest that the bulk of the creative input of work sold in Australian commercial art galleries originates within Australia.

Table 3.9: Sources of income for Australian commercial galleries

Source	1996-1997	1999-2000	% change
Commission income from the sale of artworks	25.7	43.4	68.9
Income from the sale of artworks owned by the business	49.5	72.7	46.9
Other income	12.1	15.6	28.9
Total Income	87.3	131.8	51.0
Expenses	51.7	77.7	50.3

Source: ABS 2001: 8651.0 *Commercial Art Galleries, Australia, 1999-2000*.

Broadcasting, Electronic Media and Film

Television services

Income in television services grew considerably in the late 1990s, as Table 3.10 shows. This growth has occurred in all income areas, with subscriptions experiencing the greatest increase, in proportional terms, due to the increased coverage and buying of pay television services. Most of the content of pay television services is sourced internationally, meaning there is little local creative input.

Table 3.10: Sources of income for Australian television services

Income \$m	96-97	99-2000	% change
Gross from sale of airtime	2,374.6	2,821.1	18.8
Subscription	311.4	789.1	153.4
Other	340.8	571.6	67.7
Total	3,026.8	4,181.9	38.2

Source: ABS 2001: 8559.0 *Television Services, Australia, 1999-2000*.

Film and video production

Income from film and video production in Australia has increased 24.4% from 1996-97 to 1999-2000 (see Table 3.11). This strong growth occurred in activities with high creative inputs, such as, the production of television programs (25.0% increase), provision of production services to other businesses, such as training videos (90.6% increase). Concurrently, income from the production of commercials fell substantially (-27.9%).

Table 3.11: Sources of income for Australian film and video production

	1996-1997	1999-2000	% change
Income from the production of television programs	377.8	472.2	25.0
Income from the production of commercials	258.1	186.2	-27.9
Income from the production of other completed works	216.3	191.5	-11.5
Income from the provision of production services to other businesses	122.3	233.1	90.6
Income from the provision of post-production/film laboratory services	146.6	262.6	79.1
Other income	63.4	128.2	102.2
Total Income	1,184.5	1,473.8	24.4

Source: ABS 2001: 8679.0 *Film and Video Production and Distribution, Australia, 1999-2000*.

Film and video distribution

Income from the distribution of film and video has also increased substantially during the 1990s (see Table 3.12). The majority of income associated with the rental or leasing of products is derived from video (as shown in Table 3.13 in which data pertaining to the video hire industry is presented). As in other industries within the film sector, income from film and video distribution has also exhibited substantial growth in the 1990s.

Table 3.12: Sources of income for Australian film and video distribution

	1993-1994	1996-1997	1999-2000	% change 1996-97 to 1999-2000
Income from the rental/lease of pre-recorded video tapes, DVDs, films and video games	324.5	434.1	580.8	33.8
Income from the sale of pre-recorded video tapes, DVDs, films and video games	227.1	254.3	260.3	2.4
Income from the provision of channels to Pay TV operators	6.1	156.0	169.2	8.5
Other income	83.0	129.5	131.5	1.5
Total	640.7	973.9	1,141.8	17.2

Source: ABS 2001: 8679.0 Film and Video Production and Distribution, Australia, 1999-2000.

Table 3.13: Sources of income for Australian video hire industry

Income from the rental of videos, DVD's and video games	488.0
Income from the sale of videos and related goods	36.3
Other income	70.9
Total	595.2

Source: ABS 2001: 8562.0 Video Hire Industry, Australia, 1999-2000.

Motion picture exhibition

The gross box office of cinemas in Australia increased 23.0% between 1996-1997 and 1999-2000, as shown in Table 3.14. This increase in admission income occurred with the number of cinema sites remaining almost constant, but with a substantial increase in the number of screens. Multiplex and Megaplex cinema complexes have been built in this time, with more screens leading to higher attendances and greater income.

Table 3.14: Sources of income and associated data for Australian motion picture exhibition

Income \$m	93-94	96-97	99-00	% change 96-97 to 99-00
Gross box office	4,447.5	551.8	768.9	23.0
Other income	187.7	280.5	367.2	30.9
Total income	635.3	832.2	1 046.1	25.7
Number of cinema sites	329	325	326	0.3
Number of cinema screens	754	1 050	1 513	44.1

Source: ABS 2001: 8654.0 Motion Picture Exhibition, Australia, 1999-2000.

Heritage

As shown in Tables 3.15 and 3.16, government sources provide the majority of funding for Australian museums (68.0%) and nearly all income for public libraries (91.5%). Local government provides most of the funding for public libraries within Australia.

Table 3.15: Sources of income for Australian museums, 1999-2000

	Art museums/ galleries	Historic properties	Other museums	Total
Income source:				
Government funding	124.0	35.5	327.7	487.2
Admissions income	7.6	10.1	34.7	52.4
Other income	65.7	18.8	92.3	176.8
Total	197.2	64.4	454.8	716.4

Source: ABS 2001: 8560.0 Museums, Australia, 1999-2000.

Table 3.16: Sources of income for Australian public libraries

	Local government libraries		National and state libraries		National and state archives		Total	
	1996-97	1999-2000	1996-97	1999-2000	1996-97	1999-2000	1996-97	1999- 2000
Government funding	379.3	455.7	116.0	190.9	57.0	78.2	552.2	724.8
Income from services to clients	14.3	17.1	13.7	11.4	5.9	8.2	33.9	36.6
Other income	5.4	5.3	18.1	24.7	-0.4	0.8	23.0	30.7
Total	398.9	478.0	147.8	227.0	62.5	87.2	609.2	792.2

Source: ABS 2001: 8561.0 Public libraries, Australia, 1999-2000.

SECTION 4: THE BRISBANE “HOTSPOTS”

Hotspots and Other Relevant Locations: National and International

John Rimmer^{xv} argues persuasively that Queensland, and Brisbane in particular, does not have true creative industries clusters. He instead points to a capacity for development, detailing a selected shortlist of hotspots in Brisbane that may, given the appropriate forms of intervention and investment, come to form true creative industries clusters. An important plank in the development of creative industries hotspots (or clusters), therefore, lies in increasing infrastructure capacity and fostering value network relationships, such as production and consumption linkages.

According to Rimmer, the overall strengths of Queensland’s creative industries are seen as:

- Highly talented individuals.
- High levels of innovation.
- Strong government support for the sector.
- Competitive prices for creative output.
- Cultural values of diversity and enthusiasm.

Weaknesses are identified as:

- Small demand in the local market.
- Lack of critical mass.
- Weaknesses in some skills (such as script-writing, business and marketing).
- Lack of an entrepreneurial culture.
- Failure to network and collaborate.
- Remoteness from major markets.
- Limited access to capital.

International comparisons with content clusters – such as the Toronto new media cluster – are useful, and demonstrate the value of strong infrastructure in information technology and broadcasting, although as Richard Florida^{xvi} has argued, infrastructure alone is not enough to engender creativity.

The *Brisbane IT and KBI Clusters Action Plan – Market Potential Report* has identified three existing corridors for IT and electronics development. These are the western suburbs corridor centred around Milton; the inner southern suburban node of South Brisbane, West End and Woolloongabba; and the Fortitude Valley/New Farm/Bowen hills northern suburbs node.

The western suburbs IT/KBI corridor (Milton, Toowong) will be significantly enhanced by the development of QUT’s Creative Industry Precinct at Kelvin Grove, scheduled for completion in 2004. The co-location of many leading Brisbane creative industries firms will establish this precinct as a true cluster. The western suburbs corridor is also home to:

- QANTM
- ILab

The Southbank/West End precinct has a significant cultural infrastructure, encompassing traditional cultural practice, training, and film and television production in:

- The Gallery of Modern Art (extension to the Queensland Art Gallery)
- The Queensland Performing Arts Trust
- The proposed Musgrave Park Centre for Indigenous Culture
- Queensland Theatre Company
- Queensland Museum
- Queensland College of Art

- Conservatorium
- Southbank College of TAFE
- Cutting Edge-Post
- Design Institute of Australia

Moreover, a locus for creative industries content creation has been identified in the Fortitude Valley/New Farm and Southbank/West End area. The new Judith Wright Centre in Fortitude Valley has brought together a diverse range of creative industries. This 'region' now is home to:

- Brisbane Powerhouse
- National Indigenous Radio Service
- Liberty and Beyond Television Production Company
- Queensland Artworkers Alliance
- Ausdance
- Regional Galleries Association of Queensland
- Craft Queensland
- Museums Queensland
- Public Art Agency
- Institute of Modern Art
- Arterial
- Australian Film, Television, and Radio School
- Elision Music Ensemble
- Rock'n'Roll Circus
- Expression Dance Company
- Kooemba Jdarra Theatre Company
- Queensland Community Arts network (QCANN)
- Queensland Potters Association
- Playlab
- Youth Arts Queensland
- Access Arts Inc.
- Auran (Teneriffe)
- Arts Training Queensland

A further focal point for the creative arts in Brisbane is the Metro Arts Building in Edward Street, currently housing:

- Queensland Writers Centre
- Digiarts
- Arts Law Centre of Queensland
- Theatre Arts Network Queensland
- Backbone Youth Arts
- Contact Inc.

Describing Brisbane's Hotspots

Identifiable Hotspots

The definition of creative industries hotspots is broadly conceived as a capacity in certain enterprises, which may or may not be organised in clusters. According to Rimmer, Brisbane has identifiable creative industries hotspots in Craft, Design, and Visual Art; Games and Leisure Software; Contemporary Music, Film and Television; and Performing Arts.

Craft, Design and Visual Arts: Fashion design, graphic design, industrial and furniture design are fast-growing sectors within Brisbane's (and Queensland's) creative industries. Infrastructure training support is supplied by the Queensland College of Art (graphic design) and Southbank College of TAFE (fashion design). The craft sector has undergone professionalisation over the past five years.

Games and Leisure Software: Brisbane is Australia's second most important centre for games and leisure software (under the Victorian government's Game Plan assistance program Melbourne is an identified cluster). Rimmer notes that it is hard to quantify the scale of games and leisure software development as statistical data is currently embedded within the IT sector as a whole. He notes that the number of people employed by Queensland ICT industries grew by 11.5% in 1997/98 to 14,890, higher than the national growth rate of 6.9%. Software development is the main business activity undertaken by 13.8% of ICT companies in Queensland. Interactive games and software development companies whose main offices are currently located in Brisbane include:

- Krome Studios
- Wildfire Studios
- Auran Technologies
- Eyecon
- Georeality
- Evolution
- GeeWhizElectronic
- Arts Pty Ltd (EAGames)
- Pandemic
- Ark Angles
- Greygum
- Sojourn

Contemporary Music: Contemporary music is a key growth area in the creative industries. Brisbane has a vibrant contemporary music sector, demonstrated by the national and international success in recent years of artists like *Ponderfingher*, *Regurgitator*, and *Savage Garden*. The vitality of the Brisbane scene has been helped by events such as the Livid Festival, as well as government support through Arts Queensland, totalling \$667,000 in 1999-2000. According to Flew et al.,^{xvii} Fortitude Valley can be viewed as a creative industries cluster, with a network of live music venues, hotels and dance clubs, co-located with restaurants, cafes, take-away food outlets, and 24-hour convenience stores. The Brisbane Powerhouse Centre for the Live Arts in New Farm has emerged as an important venue and incubator for jazz and experimental music.

Film and Television: In the film sector Queensland competes with NSW, and more recently Victoria, for a share of 'runaway' productions (overseas productions utilising local facilities and personnel). Production is based on low-cost international feature film and low cost television production. Major providers of post-production services in Brisbane, such as Cutting Edge Post and Beeps, are also located at Oxenford in the proximity of the Warner Roadshow Studios. Major productions of Cutting Edge Post include *Big Brother*, and the forthcoming reality television series *Eden*. Cutting Edge Post's new studio complex to be built at West End will further strengthen local production, an area identified by the Pacific Film and Television Corporation as a weakness. An increasing number of Queensland

domestic productions feature Queensland-based creative workers. The relocation of Liberty and Beyond to Brisbane means that two of Australia's seven largest television producers are located in Queensland. Industry support is provided by QPIX (the Queensland Screen Resource Centre), while training is provided through QUT and Griffith University, and the Australian Film, Radio and Television School (AFTRS).

Performing Arts: Rimmer notes that Brisbane has a strong established infrastructure for the performing arts. In addition to long-established flagship companies such as QTC, Opera Queensland, Queensland Ballet, and the Queensland Symphony Orchestra, a number of newer companies such as Kooemba Jdarra, Rock n' Roll Circus, and the Elision Ensemble have appeared. Brisbane has new and refurbished performance venues, including the Optus Playhouse, the Conservatorium Theatre, the Gardens Point Theatre, the Brisbane Powerhouse, and the Judith Wright Centre.

SECTION 5: CONCLUSIONS

This final section integrates the employment, economic and financial data for each of the creative industries. Some tentative conclusions are drawn about the focus of each industry and potential for growth which comes from an interstate or international focus for Brisbane's creative industries.

The data reveal a set of relatively small industries which are focused primarily on the local market. There are strong creative pockets, such as the local music scene. The data further indicate that the video, film and television industry makes the highest economic contribution of the creative industries. These workers have the highest salaries, aspects of these industries have the highest profit margins, and ABS estimates indicate they have the highest economic multiplier effects.

The data indicate that Sydney and Melbourne are substantially larger employers of creative workers. Sydney in particular has a stronger claim for being a creative hub than any other city in Australia. Developing substantial creative industries in Brisbane therefore requires careful investigation into the value and supply webs that can support creative endeavour.

Film and Video Production

Economically, film and video production performs very strongly in terms of both effect on employment (37 full-time equivalent jobs created for each \$1m invested) and the value-added multiplier (1.80). Reasonable growth from 1996-2001 was apparent in film and video production (15.7%), although the numbers of persons employed is quite low (523 persons employed in Brisbane in 2001). The broader classification - Broadcasting, Electronic Media and Film (4,125 persons employed) - is however the third largest creative industries sector in Brisbane by employment. Within this classification the ANZSIC categories with highest employment in Brisbane are Television Services and Motion Picture Exhibition, each of which account for approximately 25% of those employed in the sector.

Motion Picture Exhibition is of course at the end of the creative supply chain, and entails little creative input. It also exhibits the lowest median weekly incomes for those employed (\$438 in Brisbane), reflecting the part-time nature of much of the work in cinemas. On the other hand, those working in Television Services generate high median incomes. This sector is the location of many creative inputs. Growth in employment in Brisbane in this creative industry has been moderate compared to other capital cities. Large growth has been limited to Motion Picture Exhibition, while there has been a quite marked decline in employment in Television Services of 13.5% from 1996 - 2001. This pattern suggests that the creative and high income sectors may be moving out of Brisbane.

Although profit margins for film and video production are modest (5.4%), as a whole, data suggest that the economic effects of the sector are valuable. The Gold Coast is most likely a larger employer of persons in this sector than Brisbane, but it is likely that the economic multiplier effects flow to Brisbane. As highlighted in Section 1 of this report, although there is a strong export culture in film and video production, penetration of mainstream markets internationally is difficult. The strong economic effects from this sector make it worthwhile pursuing, although the largest infrastructure is located at the Gold Coast.

Design

Design is also a relatively large source of employment in Brisbane's creative industries (6,223 persons employed). Within Design, Architectural Services account for almost 50% of those employed, with Advertising Services accounting for almost another third of persons employed. Both of these sectors exhibited quite strong growth in employment (around 10%) between 1996 and 2001. The creative components of these sectors is relatively high, with 'creatives' (architects and designers) accounting for approximately 50% of those employed. Median incomes of those working in this sector are above the median for the creative industries overall, particularly those working in Architectural Services. The Architectural Services sector is estimated to have a large employment multiplier (38 full-time equivalent jobs created for each \$1m invested), the highest in the creative industries. The sector also has a reasonably high value-added effect. Other sectors within design (Advertising Services, Commercial Art and Display Services) do not exhibit the same level of economic multipliers. Architectural Services may perform so well due to the value-added effects associated with the building industry. The market for these services is generally local with limited opportunity for economic activity to flow from other geographic markets.

Book Publishing

Employment within the creative industries is largest in Literature and Print Media (7,360 persons employed in Brisbane). Within this sector, large numbers of persons are employed within retailing of literature and print media (3,620 persons employed). The numbers of persons employed in retailing increased by 9.3% between 1996 and 2001. These jobs are not creative in their content, as defined in this report, although they exist as a result of the creative jobs in the sector. Employment also grew in other areas of publishing, but as the absolute levels are small, the changes are not reliable. When this sector is examined from an explicit economic perspective, printing is estimated to have an employment multiplier which is average for the creative industries (22 full-time equivalent jobs created for each \$1m invested). The employment multiplier is somewhat lower for various sub-sectors of literature and print media, particularly book publishing, arguably the sub-sector with the highest creative component (17 full-time equivalent jobs created for each \$1m invested).

The gross value-added multiplier for printing and publishing is lower than that for the whole creative industries. One reason for this lower gross value-added effect is the lower than average incomes for those working in the ANZSIC sector with the largest employment, retailing. Whereas those ANZSICs with stronger creative components generally exhibit higher than average incomes, those employed in retailing have very low weekly incomes (\$389 versus an average for the creative industries of \$666 in Brisbane in 2001). Associated with the relatively smaller value-added contribution of this sector, book publishing has a relatively low profit margin of 4.6%. Data on other publishing is not available.

This data suggests that book publishing is currently unlikely to provide significant economic returns if development is promoted. Based on income and employment data, newspaper printing and publishing appears to be the strongest performing sector. To realise even these small economic effects without diminishing the effects in other parts of the economy requires growth which is not at the expense of the other areas of the economy. In the creative industries, this necessitates developing interstate and particularly international markets. Newspaper publishing and printing is locally focussed. Book publishing is the activity which theoretically can be more international in its focus. Within Australia, the majority of book publishing occurs in Sydney and Melbourne, with Brisbane a limited location of book publishing. This scenario suggests Literature and Print Media does not provide clear opportunities for developing a strong presence in Brisbane beyond local markets.

Heritage

Heritage has relatively modest employment in Brisbane (2,642 persons employed), although between 1996 and 2001 this number has substantially decreased in nearly all capital cities including Brisbane. This diminution is particularly pronounced for libraries (down 20.9%). The numbers of persons employed in environmental heritage has increased in Brisbane. Although this growth is large in relative terms (for example, up 60.3% in recreational parks and gardens), this represents small numbers of persons. Median incomes for those working in Heritage are variable depending upon the specific sector, but those working in libraries, still the sector with the highest numbers of persons employed, have low weekly incomes (\$564 in Brisbane).

The Heritage sector is heavily subsidised by government funding, particularly at the state and local government levels. In Queensland, \$251.3m was allocated to Heritage in 2000-01, which represented 87.1% of all state government funding to the creative industries. Despite the relatively low incomes, the effects on employment of spending on libraries and museums are estimated to be quite substantial. The employment multiplier is estimated to be 30 full-time equivalent jobs created for each \$1m invested, and the value-added multiplier is 1.74. Investment in libraries and museums appears to have substantial economic effects relative to other creative industries. By necessity, Heritage is largely local in focus, although interstate and international visitors provide economic inputs. The economic effects from investment in Heritage appear significant. While heritage-based cultural tourism is a focus of Brisbane, it is a focus of most cities vying for the international tourist.

Other Sectors

The three remaining creative industries sectors represent the traditional cultural arts: the performing arts, including music; visual arts; and craft. These three sectors have relatively low levels of employment in Brisbane. The change in employment numbers between 1996 and 2001 in these sectors appears quite volatile, with a diminution of 9.1% in Music Composition and Publishing, and an increase of nearly 20% in Other Arts. These changes represent less than 100 persons in actuality. Median incomes of persons employed in most ANZSICs associated with these creative industries are much lower than the median for all creative industries and indeed all industries including non-creative industries. Music and theatre productions are estimated to produce substantial economic multiplier effects. The value-added estimate is 1.79, the highest out of all the creative industries for which values have been estimated. This is consistent with estimates from both Broadway and the West End in London. These full multiplier effects may not be apparent in Brisbane, however. The largest productions of Brisbane are touring events, and while there are probably substantial effects from patron spending on the night of the event, and venue hire, many of the production costs will be located in either Sydney or Melbourne, the origin of these events. Currently, the traditional cultural arts in Brisbane are primarily local in focus. There is a vibrant local music scene as described in Section 4, and while there have been very successful international acts originating from Brisbane, the main offices of companies which can assist with national and international release of music are in Sydney and Melbourne. Maintaining a strong local music scene is necessary for the ultimate development of a creative city.

ENDNOTES

- ⁱ Florida, Richard (2002). *The Rise of the Creative Class*. New York: Basic Books; Landry, Charles (2000). *The Creative City*. Stroud: Comedia.
- ⁱⁱ Bloom, David. E, and River Path Associates (2000). Social capital and human diversity. In OECD, *The Creative Society of the 21st Century* (pp. 25-78). Paris: OECD; Mulgan, G. (2000). The Prospects for Social Renewal. In OECD, *The Creative Society of the 21st Century* (pp. 133-172). Paris: OECD.
- ⁱⁱⁱ Taylor, P., Walker, D. R. & Beaverstock, J. V. (2002). Firms and their global service networks. In Saskai Sassen (Ed.), *Global Networks: Linked Cities* (pp. 93-116). London: Routledge; Mercer, C. (2000). 'Urban Electricity' Creativity in twenty-first century commerce. Nottingham Ambassadors Millennium Banquet, retrieved from <http://www.nottinghamambassadors.co.uk/>
- ^{iv} Leadbeater, Charles & Oakley, Kate (1999). *The Independents: Britains New Cultural Entrepreneurs*. London: Demos; MKW (2001). Exploitation and development of the job potential in the cultural sector in the age of digitalisation. Report commissioned by the European Commission DG Employment and Social Affairs June 2001.
- ^v Preston, Paschal (2001). *Reshaping Communications*. London: Sage. This almost doubling in employment is contrasted to a very modest rise (117.9%) in employment in the Information and Communication Sector.
- ^{vi} MKW (2001). Exploitation and development of the job potential in the cultural sector in the age of digitalisation. Report commissioned by the European Commission DG Employment and Social Affairs, June 2001; Leadbeater, Charles & Oakley, Kate (1999). *The Independents: Britains New Cultural Entrepreneurs*. London: Demos.
- ^{vii} Florida, Richard (2002). *The Rise of the Creative Class*. New York: Basic Books, 9.
- ^{viii} International Definitions of creative industries. The term has also been applied to Creative New Zealand, to Singapore, and (in a different form) has attracted analysis by US economists (CITF, 2001; OECD, 1998; Caves, 2000). However, the UK is generally considered as demonstrating the prototype of contemporary creative industries policy frameworks and initiatives. In the UK, the creative industries comprise the flowing sectors: advertising, architecture, arts and antique markets, crafts, design, fashion design, film, interactive leisure software, music, television and radio, performing arts, publishing, and software. Obviously an attempt to capture emerging sectors previously unrepresented in cultural statistics, the UK list of sectors is representative of the core definition of the creative industries, as established by the UK Creative Industries Task Force. Activities which have their origin in individual creativity, skill and talent and which have the potential for wealth and job creation through generation and exploitation of intellectual property (UK Creative Industries Task Force, 1997). This characterization of creative industries as a bridge between the older cultural industries and the new economy 'info-intensive communication and cultural industries' (Preston, 2001) is especially informative and has been influential in the migration of creative industries concepts to other policy and emerging industry jurisdictions. In fact, in the most recent update of the UK report (2001), British Secretary of State Chris Smith notes: "Today, the term is more widely used and understood . . . in a knowledge economy the importance of these industries to national wealth is more commonly recognised; and the special needs of these industries are reflected more in policy development at national, regional and sub-regional levels. The creative industries have moved from the fringes to the mainstream" (retrieved from <http://www.culture.gov.uk/creative/>). It is also worth noting that an alternative short list also exists elsewhere in the UK Export Development Bureau. Creative and media in this jurisdiction includes content; design; heritage, museums, and tourism; and the performing arts (UK *Creative Industries Promotion and Export Group*, retrieved from <http://www.tradepartners.gov.uk/creative/profile/index/overview.shtml>).
- ^{ix} Other perspectives: the EU, China, Singapore and Japan. In other European countries and in parts of Asia the uptake of creative industries is noteworthy, although definitional clarity is a victim of competing development agendas, elsewhere in the EU the term 'creative industries' co-exists with its predecessor 'cultural industries'. However, the creative industries have come to represent a robust, dynamic approach to commercialization, marking the incorporation of the new technologies into the more traditional cultural sectors. Also to the forefront is the theme of interaction between traditional culture and media/technology content – as well as cross-sectoral linkages. In a recent report entitled *Exploitation and development of the job potential in the cultural sector in the age of digitalisation* (CTW, 2001) commissioned by European Commission DG Employment and Social Affairs, the authors adopt the acronym TIMES (Telecommunication, Internet, Multimedia, E-Commerce, Software and Security), rather than creative industries. The application of the term 'digital culture' is used to cover the wide "spectrum found at the intersections between audio-visual, multimedia and cultural industries". In addition to the obvious TIMES industries, sectors that are considered to fall under the acronym DIGICULT are already very closely related to multimedia sector, e.g., the film industry, and those that have received expanded possibilities from including new technologies, namely museums and libraries. In Singapore the creative industries/creative city term is very much apparent. New policy developments such as 'Singapore New Asia', 'Singapore 21' and Singapore dot.com are aimed at tourism, broadcasting, new media, urban renewal and film. Recently Raymond Lim, Singapore's Minister for Trade and Industry and Foreign Affairs spoke of the need for Singapore to become "more comfortable with untidiness" in an effort to stimulate creative impulses. Creative industries are also evident in China where the 2008 Beijing Olympics has led to a governmental push to showcase to the world a 'Digital Beijing'. The result has been investment in the ideas of creativity and innovation, long redundant under Chinese communism. In the case of Japan, one major aspect of Japan's post-war recovery and social transformation can be attributed to the creativity and industriousness of that nation. In post-bubble Japan, there has been a significant shift in the authority of the technocrat and bureaucrat to artists, designers, and aesthetes. Increasingly, Japan's

economic and social crisis is perceived as a crisis of creativity, with post-war paradigms having stagnated and in need of rejuvenation. At the city level, Sapporo, with a population comparable to that of Brisbane, has formulated a comprehensive *Vision for the Future* in a document that includes a ninety-page chapter on the roles of creative industries for the survivability and liveability of future generations.

^xCreative Industries Task Force (1998). Retrieved from http://www.culture.gov.uk/creative/creative_industries.html and UK Creative Industries Promotion and Export Group <http://www.tradepartners.gov.uk/creative/profile/index/overview.shtml>

^{xi} Note: ABS statistics only capture enterprises with employees e.g., museums, galleries, radio, film, and television. Individual operators, part-time creative workers, and micro-businesses fall through the cracks. These latter operations are the majority of creative industries enterprises. Likewise, businesses located in Brisbane whose head offices are interstate will be recorded at 'state of origin', thus further skewing the financial analysis. Creative extrapolation or synthetic estimations of existing data should be undertaken with caution and corroborated with industry analysis of spatial location, as provided in Section 2.

^{xii} The advice to 'proceed with caution' is further reinforced when we observe that available Queensland figures are in many cases extrapolations based on national figures. These calculations are not appropriate across all sectors, particularly given the recent growth in new industry sectors not captured in ABS categories such as interactive content and software, or in State government figures. For instance, the Australian Bureau of Statistics valued Queensland Cultural Goods and Services (excluding creative industry activity in new media) at \$3 383 million in 1993/4. The following ABS survey (1996/7) did not account for cultural goods and services in Queensland. However, estimates by the ABS concluded Queensland's share to be 15% of the national figure, a highly speculative construct when taken across the board. Indeed, accounting for Queensland cultural goods and services by extrapolation was the order of the day as early as 1994. According to John Rimmer, a 2000/2001 figure of \$5 432 million was predicted as early as 1994 based upon 7% growth in the cultural goods and services sector. State government funding is something that we can put a figure on; state government cultural funding rose from \$195.5 m. in 1994-5 to \$285.1 m. in 1998-99, an increase of 45.9%. Film and television funding increased 474% over the same period from \$5.1 m. to 24.2 m. in 1998-99 (Rimmer, 2000).

^{xiii} Multipliers for Culture-Related Industries: <http://www.dcita.gov.au/swg/publications/multipliers.html>

^{xiv} See previous note.

^{xv} Rimmer, John (2000). *CIP Report*. Commercial-in-confidence, JTP Pty Ltd.

^{xvi} Florida, Richard (2002). *The Rise of the Creative Class*. New York: Basic Books.

^{xvii} Flew, Terry, Ching, Gillian, Stafford, Andrew, Tacchi, Jo (2001). Music Industry development and Brisbane's future as a creative city. Brisbane: CIRAC, Q.U.T.