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The Pulse of Creativity in South Australia

Research Report

A qualitative analysis of the creative industry in South Australia

Doing the work is what makes the work good.

a brand strategist, on a colleague who let an AI mock-up stand in for real design decisions

A qualitative study, not a survey

Between May and August 2026, Human Intel conducted semi-structured conversations with practitioners across South Australia's commercial creative industry on behalf of Adelaide Advertising & Design Club. All participants were guaranteed anonymity; findings are reported by theme, not by individual.

24	21	3	6
total industry people involved	conversations	small group discussions	corroborated themes

Sample: agency and studio leadership; freelance creative direction and copywriting; strategy and planning; production and audio; in-house and government communications; academic and vocational design education.

Sometimes 1 + 1 equals fish. Claude's never going to do that.

a creative director, on the lateral leaps AI still can't make

Six findings from the research

1. A structural gap between population and advertising spend

2. AI: valuable in production, absent from ideation

3. Talent attrition reflects labour market volume, not quality

4. A small, cohesive community

5. “Strategy” applied inconsistently; effectiveness rarely measured

6. A gap between training and industry investment in juniors

A structural gap between population and advertising spend

For participants, the fact that South Australia makes up 8% of the population but an advertising/marketing spend of only 3% nationally, wasn't just an abstract statistic. Several of them described, step by step, exactly how that gap plays out in practice, a specific chain of cause and effect that has the potential to gradually wear down the local industry over time.

A small-studio designer explained why the gap squeezes pitch economics specifically: larger agencies can justify investing heavily in unpaid pitch work because they're chasing proportionally larger accounts, but "the economics don't stack up" for a small studio to give away the same free strategic thinking to win comparatively small jobs – "if the job's 20 grand and I've only got $1,000 to spend on a pitch."

A structural gap between population and advertising spend

A creative director laid out the more alarming long-run version of the same mechanism, using his agency's interstate office as a cautionary parallel: as the interstate office advertising market shrank, agencies closed, the local graphic design course shut down for lack of students, and clients began telling themselves "there's no talent here" and moving their accounts to larger interstate-based agencies – a self-reinforcing decline he explicitly warned South Australia needs to avoid.

He pointed to it already happening locally: Mitsubishi has moved its account, and BankSA is now serviced by Saatchi, an interstate agency with only "a person on the ground" in Adelaide.

In this telling, the population-spend gap isn't just a smaller pie, it actively drives the agency departures and consolidation that shrink the pie further.

AI: valuable in production, absent from ideation

Participants were emphatic, independently and in different words, that AI cannot originate a creative idea. One creative lead put it most vividly: “it’s so bad at coming up with ideas”, concept work, in her agency, still happens the old-fashioned way, sitting down together to “spitball” before AI is ever opened.

A design-and-branding participant illustrated what happens when that order is reversed: AI can spit out a “fully formed mock-up” almost instantly, but the result is routinely worse than what a human would have produced, because the tool “hasn’t used their eyes to look” – it renders a technically plausible image without ever judging whether the idea actually works.

Where participants consistently found AI genuinely valuable was in the unglamorous production and research layer underneath the idea: turning interview recordings into transcripts, surfacing themes across large volumes of material, and handing the resulting conclusions back to a human to interpret.

AI: valuable in production, absent from ideation

A newer, second-order friction emerged repeatedly around this same production/ideation boundary: clients increasingly running agency work back through AI before responding.

A freelance creative director described a client feeding his agency's poster into ChatGPT, asking it to "fix" what they didn't like, and returning the AI's version as feedback.

Two other participants described near-identical experiences independently, one now recognises AI-generated client feedback by its telltale Oxford commas and formatting; another regularly receives transcript-highlight notes that have obviously been run through AI unchecked, containing lines participants "never actually said."

If you’re using AI, you’re pulling away from the creative journey. A bunch of prompts in a row isn’t a creative journey – failing is a creative journey.

an audio engineer

They’re creating it with an AI bot incorrectly, hands with six fingers, and it doesn’t reflect our community at all. It looks like a USA feel rather than an Australia feel.

a graphic designer

The answer to our AI issues is always going to be not losing our ability for critical thinking. Every time we use AI, we lose that ability a little more so we need to practise it.

an agency co-owner and creative director

A client ran our poster through ChatGPT and sent it back as feedback. This isn't an isolated incident...it's going to become the norm.

a freelance creative director, on clients editing agency work through AI before it comes back

Talent attrition reflects labour market volume, not quality

No participant considered South Australian creative work inferior to interstate output, and several argued the opposite.

A creative director put it in plain and powerful terms: the best work coming out of Adelaide is “as good as anyone,” and as a benchmark, the state’s overall standard is “better than most places” – the industry “punches above its weight.”

A senior account lead made the same point from the client side, saying it “irks” her when clients take business interstate assuming they’ll get better creative there, calling that assumption flatly untrue: “I don’t think that’s a thing at all.”

Talent attrition reflects labour market volume, not quality

Instead, attrition was consistently explained in terms of scale, not skill. One executive creative director laid out the arithmetic: as mentioned previously, South Australia holds roughly 8% of the national population but only about 3% of national marketing spend, while Melbourne and Sydney between them carry 30–50% of national ad spend against a smaller share of the population, meaning “ten times the opportunities,” and enough churn that a junior can “jump up quite quickly” in two or three years.

He described losing a promising junior this way without resentment: “I don’t blame a young person for going interstate, chasing the job... the job was in Melbourne. There wasn’t a job here, that’s the point.”

A junior designer’s account of a friend’s graduating cohort echoed this from the other end: “there’s no jobs in Adelaide,” while noting she wasn’t convinced the work itself was any better interstate, “just more agencies and more design studios.” The pattern was a volume-of-roles gap pulling talent out, not a quality gap pushing it out.

A small, cohesive community

Participants described Adelaide's commercial creative industry as a genuinely small, referral-driven community, and several examples of that generosity recurred.

An independent creative director recalled meeting a stranger at a local networking night, discovering they did the same freelance role, and now referring overflow work to him directly when she's too busy, "Adelaide's such a small community."

A brand and marketing consultant described new-business relationships built almost entirely on trust and word of mouth: with budgets tight and outcomes hard to verify upfront, "referral becomes so much bigger... a token of trust... rather than starting from zero."

A freelance producer put the community's ethic even more simply: "share knowledge, that's what networking is for."

A small, cohesive community

Alongside that generosity, several participants saw a real opportunity to make flagship networking events more welcoming to members that are early in their careers. One graphic designer had stepped back from attending, describing the events as geared toward those already embedded in Adelaide's agency circles, and contrasted this with a more deliberately inclusive meetup she'd experienced overseas, where people traded tools, advice and feedback, even with those that were newly acquainted.

Her sense was that existing connections currently open more doors than they should, pointing to real value in better onboarding or networking guidance for early-career talent, so participation depends on ability rather than who you already know. At least two other participants described a near-identical experience independently, suggesting the aforementioned account was not a one-off but a fixable pattern.

Share knowledge, that’s what networking is for, man.

a graphic designer, early career

It’s not an industry that will just give you a role. You have to chase it no matter what... if you want it, you’ve got to go get it.

a graphic designer, early career

It’s up to us, and no one else. If we don’t stand up for our industry, we will lose it.

a design studio co-owner

That rebrand was designed by committee and no one would critique it publicly, because everyone wanted the project work.

a senior brand strategist, on why the industry rarely criticises visibly flawed work in public

“Strategy” applied inconsistently; effectiveness rarely measured

Participants used the word “strategy” constantly but defined it inconsistently, and several pushed back on how loosely it gets applied.

A director of strategy at an independent agency put it bluntly: “putting down a copy deck is not strategy,” describing how agencies routinely present sequencing and messaging documents as strategic thinking when they are closer to execution plans; noting government clients as an exception, since public money means lower risk tolerance and genuine upfront research.

This inconsistency connects to a related gap participants raised unprompted: the absence of any effectiveness category in the state’s principal creative awards. A creative director said he’d welcome one, potentially even feeding into national Effie entries but named the practical barriers: assembling six to ten qualified judges, educating entrants on the standard of evidence required, and needing a measured benchmark before a campaign runs to prove impact after it.

“Strategy” applied inconsistently; effectiveness rarely measured

He illustrated the problem with a live example: a campaign that had performed well for a client, where the client still declined to fund the post-campaign research needed to demonstrate that result formally, because they were already satisfied informally.

A media and communications specialist raised the identical structural gap independently, describing effectiveness measurement as something creative work is rarely paired with, and creative awards that omit it as a channel that “weakens accountability for outcomes.”

The consistent picture, across industry and academia alike, was of a community confident in its creative judgement but without a shared, evidenced language for proving what that creativity achieves.

A gap between training and industry investment in juniors

Design educators and industry participants converged on the same structural gap from opposite ends of it.

A creative director argued that “juniors” is itself a demeaning label agencies apply too casually, keeping capable young people boxed in as “training wheels” hires rather than being trusted and invested in, while acknowledging, from decades of hiring, that the connection between industry, universities and TAFEs is “really weak,” and that entry-level roles are rarely advertised anywhere a student would think to look, including mainstream job boards.

From the design-studio side, one participant described the same disconnect as a widening capacity problem: agencies are increasingly either very large or very small, and it’s the small studios, most likely to take on a junior, who lack the runway to mentor someone “for the next three years,” while few agencies of any size currently offer more than a token three-month placement.

A gap between training and industry investment in juniors

She was explicit this isn't something universities can fix alone, but warned that without industry taking responsibility, "there's a problem with the industry succession planning overall."

A university lecturer corroborated this from the training side: even with a purpose-built student agency and a capstone aimed at making internships "higher quality," industry exposure for younger students remains limited, and graduate-to-role conversion isn't currently tracked.

Two participants described bridging the gap personally, hiring TAFE graduates directly, or pointing them toward openings but characterised these as individual, not systemic, responses to a pipeline that formal training and paid industry entry don't yet connect.

That’s what messages in ads are like: if you try to say everything to everyone at once, no one catches anything. But if you’re single-minded, they will.

a freelance creative director and copywriter

We've seen marketing plans and briefs totally made through AI ... it's all organised, structured information, but there's this unsettling feeling: is this really coming from you? From your understanding of your business?

a director of strategy, independent agency

Local market size, not AI, is the primary driver of change

Read together, the six findings point to a single explanatory structure. A market operating at roughly a third of the scale its population would predict has, over time, absorbed that gap through consolidation, unsustainable pitch economics, an informal talent pipeline, and sustained pressure on smaller studios and early-career practitioners.

Artificial intelligence functions as an accelerant of these pre-existing dynamics; increasing production efficiency and introducing new client-side friction, rather than as an independent cause of structural change in the sector.

Why are we buying a machine to do it? Why are we giving all our money to these millionaires when we could pay some kid down the street? I don't understand the logic ...it's not cheap.

a brand strategist and designer, independent agency owner

Things are a lot less fun. They want more for less money.

a producer, production house

I wrote the invoice up for the hours I actually spent, then discounted it back down to the budget , just so the producer knew: if you'd briefed it properly the first time, we wouldn't have taken anywhere near that long.

an audio engineer

Everyone can be a designer nowadays... no, you can't. It's still a skill. You need to know what good design looks like and who it's for. If you put a mediocre input into AI, you get a mediocre outcome.

a design studio co-owner

Clients are looking for the stability that agencies need to provide, which is ironic, because the networks themselves haven't been stable at all.

a creative director, independent agency

There’s no jobs in Adelaide. My heart broke for her – you have to be so brave to break into this industry.

an agency owner, overhearing a design graduate describe her job prospects

For further industry discussion...

1. Effectiveness recognition

Should the state's principal advertising awards include a category that specifically recognises effectiveness, not just creative execution?

FOR DISCUSSION

Most awards today celebrate work that looks striking or breaks new creative ground. This point raises whether we should also recognise campaigns proven to have worked, ones that measurably shifted sales, behaviour or brand outcomes.

In practice, this would mean agencies (and their clients) submitting evidence alongside creative work – sales data, brand tracking, or independent effectiveness studies – raising real questions about cost and whether smaller agencies could compete on equal footing.

Worth discussing: what standard of proof would be fair, and who would assess it?

2. A structured graduate-to-industry bridge

Should there be a more formal, funded pathway connecting graduates from training, vocational and university courses into paid entry-level roles?

FOR DISCUSSION

Right now, that first step into a paid role is largely informal, shaped by who you know, unpaid experience, or luck. This point asks whether the industry should build a proper, funded bridge instead.

A more structured pathway could mean subsidised placements, guaranteed interviews for graduates of accredited courses, or a shared industry fund that spreads training costs across agencies rather than leaving it to whoever hires first.

The open question is who coordinates it – a single body, a consortium of agencies, or government – and how it's paid for.

3. Sector guidance on AI-mediated feedback

Would shared, sector-wide guidance help agencies respond to AI-generated client feedback more consistently, and with clearer rationale?

FOR DISCUSSION

As AI tools increasingly shape how client feedback is generated and delivered, agencies are largely working out, on their own, how to respond.

Shared guidance might cover when to flag that feedback was AI-generated, how to push back on it constructively, or how to keep a client relationship personal when a tool is doing some of the talking.

The question is whether this benefits from a common playbook, or whether every agency's client relationships are different enough that one size won't fit all.

4. Policy engagement on creative-sector investment

Should the industry engage government on creative sector investment as one coordinated voice, rather than agency by agency?

FOR DISCUSSION

Individually, agencies have limited influence over funding decisions that affect the whole sector, including investment in creative industries and design education.

Coordinated engagement could look like a joint submission to government, a standing industry taskforce, or a shared advocacy calendar tied to state budget cycles. The question for the room: is there enough common ground across agencies to speak with one voice, or would a coordinated approach risk flattening genuinely different priorities?

Everyone bangs on about AI, and it is going to change things. But at the end, the idea, the concept, the great copywriting idea or the great creative visual, the brain, that's not going to change.

a creative director, 30+ years in the industry

Concluding thoughts...

The industry’s most consequential challenge is structural, not technological

Across every theme identified in this research, the durable constraint on the industry’s performance was structural and economic rather than technological in nature. New tools have changed how work gets made, delivered and even priced, but they have not touched the deeper issue participants kept returning to, unprompted and across otherwise very different conversations: how funding, opportunity and market access are distributed across the sector. That consistency, across a wide range of participants and contexts, is itself part of why this finding carries weight.

The imbalance is not abstract to those living it

The gap between an 8% population share and a 3% share of spend was not, for participants, a statistic to note in passing. It was something they described having watched play out directly, in the briefs that did or didn't come their way, in which parts of the industry attracted investment, and in whose work got seen and rewarded. For many, this wasn't a top-down policy conversation; it was a lived, everyday reality of the industry they work in.

Reduced spend limits investment and visibility for that part of the industry. Limited investment and visibility, in turn, narrows the pipeline of work, talent and opportunity flowing into it. A narrower pipeline slows the growth of the local industry serving that population, which then further reduces its share of investment and visibility, a self-reinforcing cycle rather than a static imbalance. Left alone, this kind of cycle does not tend to correct itself; it tends to deepen, because each stage feeds the next.

Technology may have changed the tools but not the source of value

One participant, reflecting on an earlier period of disruption, offered a framing consistent with the report's overall conclusion: that the underlying determinant of value in the sector has remained the quality of the creative idea itself.

While technology continues to change how creative work is produced, the challenge remains demonstrating its value to clients in an environment where technology is increasingly shaping perceptions of what that work is worth.

In the end, it still comes down to the idea...

Every shift this research surfaced, in funding, in structure, in the tools people now reach for – sits on top of something that hasn't moved. Ask anyone in this industry why they do it, and eventually, the answer comes back to the same thing: a good idea, well made, that actually reaches someone. Technology can speed that idea up, test it, distribute it further than ever before. It cannot feel it, want it, or know when it's right.

That still belongs to people.

If this industry gets the harder, structural things right, it won't be trading away what makes the work matter, it will be protecting the conditions for more of it and giving more people the chance to make work worth remembering.



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