



***BUILDING AUSTIN'S CREATIVE CAPACITY:
CREATIVE SECTOR NEEDS ASSESSMENT***

Report to the

City of Austin
Economic Development Department
Cultural Arts Division

By Christine Harris and John Carnwath

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808A Oak St., San Francisco, CA 94117
tel 415.796.3060 wolfbrown.com

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Steering Committee

Ellen Bartel, Ellen Bartel Dance Collective
Jennifer Chenoweth, Fisterra Studio / Austin Arts Commission
Laura Esparza, Museums and Cultural Programs, PARD, City of Austin
Lulu Flores, Hendler Lyons Flores / Austin Arts Commission
Lyman Grant, Arts and Humanities Division, Austin Community College
Clifford Gillard, Capitol View Arts
Brent Hasty, mindPOP
Holly Herrick, Austin Film Society
James Jarrett, Bureau of Business Research and IC2, University of Texas at Austin
Shea Little, Big Medium / EAST & WEST Austin Studio Tours / Texas Biennial
Joy Miller, Small Business Program, EDD, City of Austin
Kelli Montgomery, Austin Visual Arts Association/Austin Art Space
Francie Ostrower, LBJ School of Public Affairs and Department of Theatre and Dance, University of Texas at Austin
John Riedie, Austin Creative Alliance
Barry Silverberg, Texas Association of Nonprofit Organizations / Center for Nonprofit Studies, Austin Community College
Craig Tounget, Texas Accountants and Lawyers for the Arts

Consultants

Christine Harris, Christine Harris Connections
John Carnwath, WolfBrown
Alan Brown, WolfBrown



Executive Summary

Introduction

Austin has recognized that the lines between the work of nonprofit arts and culture organizations, individual creatives, and for-profit creative enterprises are becoming increasingly blurry. The economic and social values that derive from cultural engagement are not limited to a specific business model. The recommendations from the Create Austin Cultural Master Plan, the Imagine Austin Plan, and the mission and goals of the Cultural Arts Division (CAD) all highlight the importance of providing creatives and arts/cultural organizations with resources that will increase their creative capacity and improve their business development acumen. In the past, CAD has continually sought to improve its support programs, but the confluence of several planning efforts at the moment make this an ideal time to step back and complete a comprehensive analysis of the existing support services, service gaps, and overlaps.

The objectives of this Creative Sector Needs Assessment are to

- a) gather input from Austin’s nonprofit arts/culture organizations and individual creatives to identify their support needs;
- b) identify gaps between the support services needed and those currently offered by service providers in Austin;
- c) prepare a report of the findings and a set of recommendations to guide CAD’s future economic support and capacity building services.

Throughout this study, the term “creatives” is used to refer to individuals, who

- have received extensive training in a creative field or have otherwise acquired creative skills;
- are actively engaged in creative work and presenting it to the public;
- AND either derive income or attempt to derive income from their creative activity (whether in the for-profit or nonprofit sector).

The term “arts/cultural organizations” refers to nonprofit and public sector arts, culture, and heritage organizations, including 501(c)3 organizations, state and municipal institutions, and entities that are affiliated with universities.

A Steering Committee was formed to oversee this project. Committee members contributed their deep understanding the cultural landscape of Austin, provided input on the project strategy, assisted in developing the research approach, helped engage their community contacts in the research, and commented on a draft of the gap analysis. In addition, some Steering Committee members reviewed the survey protocols and beta-tested the online survey. The members of the Steering Committee are listed on the acknowledgements page.



Four reports were submitted to the City of Austin as part of the *Building Austin's Creative Capacity* creative sector needs assessment:

- An Interim Report (consisting of a progress update and the topline results of the survey data) was submitted to CAD on March 31, 2015
- “Creative Sector Needs Assessment: Gap Analysis Report” was submitted to CAD on June 22, 2015
- “Building Austin’s Creative Capacity: Recommendations and Conclusions” was submitted on February 18, 2016.
- “Building Austin’s Creative Capacity: Community Focus Groups” was submitted to CAD on February 18, 2016.

This executive summary provides an overview of the research that was conducted as part of *Building Austin's Creative Capacity* and presents key findings and recommendations. The individual reports are available from CAD upon request.

Research Methodology

In order to identify gaps in the available support services for creatives in Austin it was necessary to examine the availability and effectiveness of existing services on the one hand, and the support needs of creatives and arts/cultural organizations on the other.

Two online surveys were launched in January 2015. One survey was to be completed by representatives of arts, culture, and heritage organizations; the other was intended for individual creatives. The survey protocols were developed in close collaboration with CAD staff and tested by several members of the Steering Committee in December 2014. The surveys were opened to the public on January 14 and closed on March 14, 2015.

Respondents were recruited through public announcements, flyers, emails, social media, and networks. Self-identified individual “creatives” (see definition above) had to be over 18 and reside within the Austin-Round Rock MSA to participate in the survey. For the survey of organizations, respondents had to be qualified representatives of an arts/culture organization located within the Austin-Round Rock MSA (one per organization).

A total of 528 individual creatives completed the full survey. An additional 190 individuals provided usable data for at least one section of the survey. The survey for organizations received 67 complete responses and 19 usable partial responses. A breakdown of the demographics of the survey respondents can be found in the full report (“Creative Sector Needs Assessment: Gap Analysis Report”).

In addition to the online survey, CAD hosted an open community meeting and a series of focus groups with members of the Hispanic, African American, and Asian Communities, which provided opportunities for qualitative input and “ground truthing” of the survey results.



The open community meeting was held on May 20, 2015. CAD issued an open invitation to individual creatives and nonprofit arts organizations to attend this meeting through its website, email blasts, social media, and outreach through networks. Twenty community members took advantage of the opportunity to discuss the research with CAD staff and the research consultants. After a brief presentation that outlined the composition of the survey sample and major findings, attendees were divided into small roundtables to discuss “what rings true or and what doesn’t” in the findings and prioritize the findings for further action.

To address concerns that Austin’s communities of color might be underrepresented in the survey results, CAD decided to host focused community conversations with Hispanic/Latino, Asian American, and African American creatives. The three focus groups were held on September 30 and October 1, 2015, and each was attended by between nine and fifteen creatives from the respective communities. CAD staff asked leaders in each community to recommend participants for the convenings and sent personal invitations to individuals who were nominated. The participants received a copy of the survey findings (*Building Austin's Creative Capacity: Gap Analysis Report*) in advance of the focus groups, and the discussions were held in a facilitated roundtable format.

Summary of Survey Findings

Assessment of Existing Resources

- a) Respondents appreciate and take advantage of the variety of support services available in Austin, but they nonetheless report considerable barriers in accessing the resources they need (many of which are described below).
- b) Both individual creatives and representatives of arts/cultural nonprofits report that there is not enough information about the available support resources, so that they often miss opportunities they would like to take advantage of.
- c) Among individual creatives, there is a sense that insufficient marketing, publicity, and branding makes it difficult for creatives to get noticed. A compounding factor in this may be that the amount of activity in Austin makes it challenging to have desired publicity levels for all creatives and events.
- d) Staffs of nonprofit arts organizations say that they don’t have the time to take advantage of opportunities because of their workload.
- e) The costs of organizational staff development are often prohibitive. Smaller organizations are particularly concerned about this.



Assessment of Austin

- a) Respondents agree that there is an exciting creative 'vibe' and a strong creative community in Austin.
- b) The costs of living and working in Austin are a major concern, particularly among individual creatives.
- c) Individual creatives in the visual arts expressed concern that not enough people are motivated to buy art in Austin, so that demand is weak in the local market.
- d) Individual creatives and representatives of Austin's arts/cultural nonprofits only tentatively agree with the statement "Austin is a great place for artists and creatives to live and work" (Mean score: 3.5 out of 5), and they are even more reserved in expressing their agreement with the statement "I feel nurtured and supported by the community of artists and creatives" (Mean score: 3.3 out of 5).
- e) On average, representatives of arts/cultural nonprofits tend to disagree with the statement "In general, the arts and cultural sector is well supported in Austin" (Mean score: 2.7 out of 5). Moreover, they are ambivalent about the statement that "arts and cultural organizations have ready access to programs, information resources, and opportunities that build their administrative capacity and support their long-term financial stability." Small organizations are generally less satisfied with the overall level of support than larger organizations. (These questions were not asked of individual creatives.)

Service Preferences

- a) Among individual creatives, there is a strong desire to connect with other creatives locally through networking and mentoring. They are more eager to pursue connections within the creative industries than in the small business community or the nonprofit sector.
- b) Both individual creatives and staff members from arts and cultural nonprofits are most attracted to informal and self-directed learning opportunities, such as mentoring, networking, peer learning, and online resources, which don't have set starting and ending times. Nonetheless, many also take advantage of more conventional educational formats, particularly among the respondents from organizations.
- c) There is considerable interest in centralized information and professional development resources, whether those are online or physical resource centers that provide drop-in services.
- d) On average, individual creatives consider opportunities to continue honing their creative skills more important for the development of their careers than learning business management skills.



- e) As their top priority, arts/cultural nonprofit organizations list ongoing financial support. Some respondents noted that such support tends to go to established institutions rather than newer organizations.
- f) The topics that organizations most want to learn about are directly related the generation of earned and contributed income: fundraising/donor cultivation, marketing/advertising, and communications/public relations.

Overall, among the individuals who participated in the survey there is a strong desire for resources that will help them build their creative practices themselves. They desire mentors, networks, centralized resources, self-directed learning opportunities, ongoing creative training, and not least of all recognition for what they do. Yes, they want more funding, access to affordable living and working space, and better pay, but they primarily seem to be looking for services and opportunities that will help them chart their own future.

Due to tight budgets and limited staff capacities, arts/cultural organizations are often not able to access the development resources they need. Along with stronger financial support (public, philanthropic, and market-based), they desire centralized information resources, flexible learning opportunities, and access to professional services. Since many organizations expect their budgets for staff training to grow over the coming years, there may be an increased demand for such development opportunities in the future.

While the needs of individual creatives and arts/cultural organizations are not necessarily linked to each other, there are a number of similarities between the two:

- There is strong interest in self-directed learning.
- Accessing resources and learning opportunities is challenging.
- There is a desire for centralized services.
- Affordability is an issue in Austin.

While the similarities may outweigh the differences, individual creatives appear to be more concerned with networking (a top priority) and the ongoing development of their creative skills, whereas the representatives of Austin's arts/cultural organizations are more concerned with developing skills that are related to revenue generation.



Creative Community Focus Groups

This project included face-to-face meetings with members of Austin's creative community. The purpose of these sessions was to contextualize the survey findings and solicit feedback from communities that were under-represented in the survey, in particular from Hispanic/Latino, Asian American, and African American creatives. CAD extended an open invitation to all members of the creative community to discuss the survey findings in an open community meeting in May, 2015. More focused discussions were held with representatives of each of the ethnic communities listed above in the fall of the same year.

Open Community Meeting

The discussion at the open community meeting generally supported the survey findings, but in many instances the attendees' comments added nuance to the interpretation of the results. The individual creatives in the open session shared the concerns about the crowded marketplace that are seen in the survey results; however, they believe that increasing the visual art market in Austin is not a marketing issue, per se, but the result of diminished arts education, community values, and lack of awareness about the arts. While participants agreed that more skill development was necessary among Austin's creatives, they went a step further, saying that many creatives don't even know what they have to learn to be successful. Finally, attendees at the open session were more pessimistic about the state of support for Austin's creative sector than the survey indicated.

As with the individual creatives, the representatives of nonprofit arts organizations who participated in the open session generally agreed with the survey's findings. Responding to the survey, the representatives of organizations cautioned against overcorrecting away from program formats with fixed starting and ending times and urged service providers to ensure a healthy mix of traditional face-to-face and online learning formats. These participants shared the individual creatives' belief that Austin is less supportive than the survey results suggest. Finally, the executives and staff members of nonprofits at the meeting were very concerned about the financial resources available to small and mid-sized arts organizations in Austin.

Cultural Community Focus Groups

In general, the participants in the three cultural community focus groups (Hispanic/Latino, Asian American, African American) agreed with the results of the survey. They did, however, add some significant contextual information and voiced some alternative opinions on what needs to be done to support the vitality of the cultural community.

In terms of existing resources, the focus group participants expressed that they often don't have the time or money to take advantage of the available programs. The programs need to be very practical and low cost. In all three of the focus groups, participants talked about the difficulty of accessing spaces for rehearsals, teaching, exhibitions, and



performances. Their first priority would be to have more access to their cultural centers (the Emma S. Barrientos Mexican American Cultural Center, Asian American Resource Center, and George Washington Carver Museum and Cultural Center) but they also want to present their work more widely across Austin. In the area of existing resources, issues about financial support loom much larger for the community members who participated in the focus groups than the survey results indicate. People of color in Austin's creative community feel disconnected from mainstream funding sources and therefore find themselves unable to serve their communities as deeply as they would like.

With respect to service and resource preferences, the focus group participants expressed a desire for more self-directed learning opportunities, which is consistent with the survey findings. However, they also remarked that having a mix of different program and learning formats is desirable. Discussants were primarily interested in early career skill development, and some requested more individual, personalized services. The Hispanic/Latino group, in particular, requested more programs in Spanish. All three focus groups were very enthusiastic about the idea of a central 'hub' where creatives of all disciplines and backgrounds could access services and build their professional networks.

While the focus group participants appreciate the creative 'vibe' in Austin, they were even less enthusiastic than the survey respondents and the attendees at the open community meeting about the level of support that the creative community receives in Austin. The focus group participants were in total agreement with the survey participants that the cost of living and working in Austin is a major concern. Discussants commented on needing a larger market for their work, the difficulty of attracting audiences, and the lack of support for their cultural contributions to Austin.

In summary, the key takeaways from the focus groups were the desire for:

- more intensive and extensive use of their respective cultural centers;
- more opportunities to interact with and learn from other creatives both within their cultural communities and in the wider creative community of Austin;
- better understanding of how they serve their communities within the philanthropic sector; and
- more basic infrastructure support (money, staff assistance, services support, fundamental business education).



Recommendations

The city seems to be at a 'creative crossroads,' with several large strategic creative projects underway both at CAD and the Music and Entertainment Division, increasing numbers of creatives moving to Austin, and a city that is growing rapidly. CAD and many other service providers are offering a wide variety of support services and resources for the creative sector. This is an opportune time to optimize the effectiveness of those resources and leverage the available assets into an ecosystem that is highly efficient, not just in serving the current needs, but also in supporting the continued growth of a sustainable and vibrant creative economy.

Many of the shortcomings of Austin's support structures for creatives result from a lack of communication within the sector. There are lots of opportunities and resources, but they are not well coordinated with each other and both individual creatives and arts/cultural organizations find it difficult to stay informed about the many programs offered by various service organizations and support networks. By establishing tighter relations and two-way dialogue with the creative community as a whole (in particular with underserved portions of the community), coordinating the available resource providers, and improving communications about the available resources, CAD has an opportunity to increase its impact on the creative field considerably with relatively modest levels of investment. Ideally, CAD would pursue these opportunities in conjunction with the Music and Entertainment Division, the History, Arts and Nature Program in the Parks and Recreation Department, and the Small Business Program.

A. Establish Ongoing Creative Sector Dialogue

The conversation that was initiated through the *Building Austin's Creative Capacity Creative Sector Needs Assessment* and the comprehensive list of organizations that provide services to the creative community that was generated for this project constitute significant steps towards greater communication and coordination among the service providers. Furthermore, CAD reached out to a number of organizations, hubs, and networks in the cultural community to assist with the dissemination of the survey. The value of these lists of contacts and partners should not be underestimated. All efforts should be made to capitalize on the work that has been done in these areas by facilitating communications, continuing to build these alliances, and making these directories available to the sector. The first two recommendations relate directly to these findings.



Recommendation A.1: Convene all of the service providers listed in the survey on a regular basis (quarterly or semi-annually) to review program details, discuss opportunities for partnerships, limit duplicative efforts, and to ensure that programs are meeting the needs of today's creative sector.

- Develop a taxonomy of support services to uniformly classify the services that are currently available.
- Develop a system of coding support programs based on eligibility criteria, disciplinary focus, experience level (introductory, intermediate, advanced), and form of engagement (online video tutorial, hands-on workshop, panel discussion, etc.).
- Assess the availability of development opportunities in areas identified as top priorities.
- Establish a unified publicity campaign with common language to increase the awareness of service opportunities within the creative sector.

Recommendation A.2: Continue to engage networks and build alliances across the creative sector. The survey demonstrated that CAD is highly respected and that its support programs are greatly appreciated by practitioners in the field. However, the challenges faced in soliciting participation from certain portions of the creative community suggest that there are limitations to CAD's current networks. Both the survey and the community meetings that were held as part of this study suggest that there is demand for more ongoing dialogue between CAD and the creative sector at grassroots levels.

A useful model for this type of dialogue may be found in the focus groups that CAD convened with Hispanic/Latino, Asian American, and African American creatives. All of the focus group participants were appreciative of the opportunity for open dialogue with CAD and were eager to continue the conversation. The success of these meetings highlights the need to engage with the creative community through multiple communication channels, since no single channel (e.g., online surveys, program evaluations, social media, town hall discussions) will reach all segments of Austin's creative sector.

Such convenings will engage networks and help build alliances across the sector.

- Schedule regular creative sector dialogues on specific topics, alternating between events held at CAD and events hosted by community partners.
- Establish expanded drop-in "office hours" of the sort that CAD offers through the Cultural Funding Programs and Public Places Program.
- While some of these opportunities should be open to the public, others might convene specific groups (such as major philanthropies, small arts and cultural nonprofits, art collectors, etc.).
- Provide opportunities for cross-sector dialogue that bring together nonprofit organizations, for-profit creative businesses, and individual creatives.
- Explore how CAD's existing social media outlets can be leveraged to increase capacity and relevance.
- Gather contact information and build databases of creative community members.



B. Refine Program Delivery Strategy

In commissioning this Gap Analysis, CAD sought to identify how it could better serve the creative sector through its programming. While CAD is among the most highly utilized service providers and survey respondents ranked the significance of its services in advancing their careers and organizations quite highly, the research suggests that increasing awareness and accessibility could further extend CAD's impact.

Recommendation B.1: Expand online services and programming. Such online resources would not only meet the demand for low-cost information, they would also fulfill the desire for more self-directed learning and informal development opportunities. They could be presented in a variety of formats—articles about best practices, interviews with practitioners, instructional videos, webinars, full online courses, etc.—to suit the content and the needs of various audiences.

Recommendation B.2: In developing online resources, CAD should consider content areas that are highly sought after by individual creatives and arts/cultural organizations. Based on the Gap Analysis, this would include publicity and gaining critical recognition for individuals, and fundraising/donor cultivation, marketing/advertising, and communications/public relations for organizations.

Recommendation B.3: Many participants in this study indicated a desire for mentoring in their professional and creative development. To meet the need for this type of peer-to-peer professional connection, CAD could consider sponsoring a guided mentoring program.

C. Develop Centralized Online Resource

Both among individual creatives and arts/cultural organizations there is a strong desire for a central web-based resource that serves as a repository for all programs that offer support services for the creative sector. This is echoed in the findings about major barriers that prevent people from accessing the services they need: many individuals and arts/cultural organizations don't know what resources are available or where to find out about them.



Recommendation C.1: Build a centralized online resource database for services and programs available across all providers. In effect, create a 'knowledge hub' of services available for the creative economy. This should be separate from any current website, easily branded and regularly promoted. This resource could include the following:

- Information on all of the training and development programs offered by local service providers that can be searched and filtered by content area, format, etc. as outlined in Recommendation A.1 above.
- A variety of on demand resources, such as videos, webinars, and lectures, on topics such as fundraising, marketing, financial planning, career development, etc. These can be collated and cataloged from a variety of sources. Rather than just relying on links, CAD may develop original content or negotiate agreements with other websites and organizations to republish their existing resources.
- Curated lists of links to resources in areas such as financing, legal matters, and permitting for activities in the creative sector.
- User-generated content such as job postings.

There are several different ways in which such a centralized source of information could be implemented, ranging from a simple directory of service providers to a complex, interactive website, with all of the features outlined above. It may be possible to 'franchise' a website (both the architecture and portions of the content) from another community and adapt it to local needs. Building this resource will take staff time and web development expertise. CAD may be able to co-manage this resource with other service providers in the region, rather than maintaining it on its own. Some useful examples of such web resources might include the Chicago Artists Resource (www.chicagoartistsresource.org), NYFA Source (Source.NYFA.org), and the much more rudimentary ArtsLinks page of the Georgia Council for the Arts (gaarts.org/resources/arts-links).

D. Continue to Address Access to Space – performance, housing, studio

This is a perplexing and longterm issue. Concerns about the affordability of living and working in Austin have been prevalent for some time, and is perceived as a major threat to the creative community in Austin. The topic of affordability and cost of living was listed as a key challenge in the 2015 *Austin Music Census*, and the findings from the Gap Analysis Report largely echo those of the *Survey of Artists' Space Needs and Preferences* and the *Survey of Arts, Creative and Cultural Organizations and Businesses* conducted by Artspace Projects, Inc. and Swan Research and Consulting in 2013. In addition to the concerns about space availability, participants in the open community meeting spoke of zoning, permits, and other city regulations as impediments to promoting their businesses. CAD understands the seriousness of these issues.



Austin is currently undergoing a Land Development Code Revision.¹ As part of the process, CAD is reviewing the zoning codes and other relevant city regulations to reveal any impediments to creatives finding suitable space for housing, work, or the display and sale of their work. CAD has contributed language to the Long-Range CIP Strategic Plan to set up potential public/private partnerships in the development of artist live/work spaces, incubators, and cultural districts for future bond elections. The Imagine Austin Creative Economy Priority Program is currently contributing thinking towards the Land Development Code Revision, reimagining city development tools for creative sector development, and generating a white paper on creative space development. CAD's partnership in the ArtPlace America grant-funded project, thinkEAST is creating a template for future creative developments across the City.

In addition to these efforts, the following recommendation would be a relatively low-cost undertaking that might compliment existing strategies.

Recommendation D.1: The City should review the available software options for a searchable online directory of spaces that are available for creative activities. Providing a centralized online inventory of available spaces would add value to a comprehensive online resource (Recommendation C). While this recommendation will not do anything to reduce the costs of accessing space in Austin, development and promotion of such a site could help people on the margins of the creative community find out about available spaces and help maximize the utilization of the existing space resources.

E. Develop an Integrated Vision and Physical Space to Unify Austin's Creative Sector

Building upon the individual measures discussed above, Recommendation E outlines a holistic vision that has the potential to absorb some of the growing pains that Austin's booming creative sector is experiencing and secure the city's competitive advantage in this field.

Recommendation E1: CAD should consider developing a physical gathering space for the creative sector that would function as a real-world compliment to the online information hub described under Recommendation C1. The development of this integrated resource center would constitute a strong, visible statement of the City's commitment to its creative community, and co-branding the physical and virtual resource centers would establish a unified presence within Austin's creative sector.

Every creative sector planning effort since the 2003 Mayor's Task Force Economy/Creative Economy Subcommittee has recommended an incubator-like space for creatives. However, this proposal goes far beyond a mere incubator space for a

¹ www.austintexas.gov/codenext



limited number of creative businesses or organizations. A physical space that is dedicated solely to supporting the creative community with knowledgeable staff members, classrooms, reference materials, free wifi, computers, printers, copiers, and perhaps performance and/or exhibition space and a café would go above and beyond the support structures seen in other cities, and make a bold statement of support. Activities that could be available in the physical space include: regular meeting hours with City of Austin (CAD, Small Business Development, etc.) and other service provider staff, computer access to the centralized online resource, professional development workshops and seminars, meeting rooms, and other services as developed by CAD and the community. This gathering space would make manifest the centralized online resource as well as provide opportunities for networking, mentoring and peer learning. It would be important for this space to be specialized and advanced enough to be useful to professional arts administrators, but also welcoming to emerging creatives and even engaged hobbyists.

This recommendation is similar to a suggestion articulated in *The Austin Music Census: A Data-Driven Assessment of Austin's Commercial Music Economy* (Titan Music Group, LLC, May, 2015). The report suggested a key policy consideration be the *creation of a commercial music industry hub with affordable co-working space*. This focus on one commercial industry along with co-working space is materially different from the recommendation for an integrated creative sector resource. However, if CAD pursues this idea, it would make sense for the city to discuss potential development of both facilities together.

The creative sector has made it very clear that it believes there is room for improvement in how nurtured and supported it feels by the greater Austin community. Co-branding the virtual and physical space would directly improve that perception and, more importantly, provide Austin's creative sector with access to each other and resources that potentially would be unparalleled around the country. This in turn will continue to build the excellent reputation of the creative sector in greater Austin and increase the sector's economic value.