WORKING PAPER—RESET

AUSTRALIAN CULTURAL EMPLOYMENT AN ANALYSIS OF THE AUSTRALIAN CENSUS AND LABOUR FORCE SURVEY DATA

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RESET

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Australian Cultural Employment
An analysis of the Australian Census and Labour Force Survey Data

A Reset Working Paper

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Summary Headlines

Defining cultural employment

Many definitions of employment in the arts and the culture pursued by academics and policymakers have focused on expansive definitions of the "creative economy" and the "cultural and creative industries." But these definitions contain large numbers of jobs in software and marketing.

This paper uses a more traditional definition of the "cultural industries" and "cultural occupations", developed by the Australian Bureau of Statistics in 2011. By this definition, employment in the arts and culture is much smaller.

Employment

Total cultural employment for the ABS definition of cultural occupations on Census night in 2021 was 347,007 persons, or 2.7 percent of the total of 12.9 million workers with an occupation.

Total employment for the ABS definition of cultural industries in 2021 was 367,335, or 2.8 percent of the total employed persons in the labour force of 13.004 million.

Compared to high-employing sectors like health care and social assistance, education or construction, the cultural industries are not a particularly large sector.

Cultural employment has grown more slowly than overall employment. Employment growth across the total labour force was 27.6% over the fifteen years 2006-2021. For cultural occupations, growth was 21.8% over this period. For cultural industries, growth was just 6.1%.

Jobs did grow in certain cultural industries. There was reasonably healthy growth in architecture, advertising and the design industries, with advertising services and other specialised design services both adding more than 10,000 jobs between 2006-2021. Architectural services also grew, reflecting the exposure of this industry to Australia's construction sector.

Other industries saw job losses. The worst hit cultural industries were the printing and newspaper publishing industries, both losing more than 15,000 jobs in the period 2006-2021. Cultural retail also suffered a sharp employment decline, especially in newspaper and book retailing, entertainment media retailing, and video and other electronic media rental hiring.

Geography

Cultural employment is highly localised to the capital cities of Australia. The greater capital city areas of Sydney, Melbourne and Brisbane had 204,967 jobs in the cultural industries in 2021, representing 55.8% of total cultural industries employment.

Inner Melbourne is the largest region in Australia for cultural employment, followed by inner Sydney, particularly on the north shore, inner Brisbane, central Adelaide, the Gold Coast, and inner Perth.

Cultural employment is highly concentrated. Of 89 "statistical area 4" (SA4) regions in mainland Australia, five regions in inner Sydney, inner Melbourne, inner Brisbane and central Adelaide contain more than one-third of cultural jobs (35.5%), while the top 10% of these regions contain 44.9% of all cultural employment. Not only are most of the jobs in capital cities, but they are also in the inner core of these capitals.

In contrast, cultural employment in regional Australia is small and sparse, making up less than a quarter (24.2%) of cultural employment across the nation. Of the states and territories, only Queensland, with its large population centres outside Brisbane, reported more cultural industries employment outside its capital city.

Workforce Characteristics

Cultural work in Australia is insecure, fragmented and poor. Cultural workers in Australia are on average slightly younger, more female and much more insecure than the broader Australian labour force. Their wages are lower, while their income inequality is higher. They have higher proportions of independent contractors and lower proportions of workers with employment entitlements, such as paid leave, than the labour force as a whole. They have low union density, which suggests they have little labour power (consistent with their lower-than-average wages). As mentioned, employment growth for culture is much slower than the broader economy across the past decade and a half.

The cultural labour force is majority female, and feminising rapidly. This is evident when looking at majority-female occupations such as interior design, but also in the notable entry of women into previously masculine occupations such as "below the line" film crew and backstage performing arts crew. Given the continuing gender pay gaps observable across all Australian wages, including in culture, this feminising trend is not a good sign for the future of cultural workers' incomes.

Cultural work is highly urbanised, even in Australia, one of the most urbanised nations in the world. The vast majority of cultural jobs are still located within a few kilometres of one another in the inner urban cores of Sydney, Melbourne and Brisbane. Given the very difficult housing conditions of Australian inner cities, it is therefore likely that many cultural workers suffer considerable housing stress, either paying high rents and mortgages close to their jobs, or commuting long distances from cheaper housing located further away from the inner cities. Such stresses can only add to the insecurity faced by cultural workers we were able to measure in terms of their employment conditions.

Cultural employment is highly heterogenous. There are very marked divergences between particular industries and occupations. Cultural industries that are well-placed to sell their wares in the digital economy, or that provide services to broader sectors of the economy such as housing and construction, are doing better than the so-called "core" cultural industries like the performing arts, publishing or music, which have not fully recovered from the disruptions of the COVID-19 pandemic. While architecture, advertising and design are adding jobs and report above-median incomes, much of the cultural workforce earns below-median incomes and is growing slowly or even shedding jobs. The job destruction in cultural retail since 2006 is very significant – an entire industry, video hire, has almost completely vanished, while conditions for booksellers and music retailers are deteriorating rapidly.

Definitions

1a. General Considerations

The statistical data in this paper is taken from the Australian Bureau of Statistics.[1] The key datasets are the Census and the Labour Force Survey, two of the Bureau's largest and most rigorous statistical exercises (See Appendix 1).[2] The statistics we use are concerned with cultural employment, including the characteristics of the workforce and the industries in which workers are employed, as well as their geographical distribution across Australia.

A key distinction made throughout this paper is that between 'cultural industries' and 'cultural occupations'. The ABS collects this data in the Census and through the Labour Force data through its "INDP industry of employment" and "OCCP occupation" data series. These data series are available through the Bureau's TableBuilder application, which gives access for authorised researchers to Census microdata and other specialised ABS data sets.[3]

Some academics and policymakers have put forward a different conceptual model of cultural employment, known as the "creative trident" model.[4] The "trident" includes three workforces: creative workers in creative industries (e.g. a sound recording technician in a music studio); non-creative workers in creative industries (e.g. an accountant in a film company); and creative workers in non-creative industries (e.g. a graphic designer in a bank).[5]

This paper does not use the 'trident' method. "Creative workers in Non-Creative Industries" overwhelmingly adds software, design and marketing to the jobs figures, as these do not get captured by "cultural occupations". This will be discussed more below but in short, the trends we identify are clear enough from these two sets of industrial and occupational statistics.

We have used a definition of cultural employment first defined and published by the Australian Bureau of Statistics. The 2012 ABS publication *Employment in Culture, 2011*[6] is the last time that the Bureau explicitly attempted to categorise a list of what it called "cultural industries" and "cultural occupations" (the word "creative" is rarely mentioned in the 2011 document). This publication provided a list of industries developed from the Bureau's work to develop a series of Australian Culture and Leisure Classifications.[7]

We must be clear from the outset that, firstly, we make no distinction here between publicly funded or not-for-profit, and commercial culture. All are included. However, secondly, we suggest that the cultural sector as a whole should not be seen as a coherent 'industry', even though it includes highly "industrialised" sectors. Thirdly, we do not consider software to be a cultural industry, which means that our employment figures are much lower than those who bundle this sector into "creative industries". **We are concerned here with cultural employment, and the public policies required to promote it.**

Unsurprisingly, there are many debates concerning what is included and excluded in the ABS definition of "culture". We discuss this further below. We have stuck to the 2011 ABS definition because, as a standardised definition, it provides us the ability to engage in robust longitudinal comparisons.

The ABS "cultural industries" definition includes some cultural retail, cultural goods wholesaling, printing, publishing, broadcasting, libraries, museums and galleries, the performing arts, the recorded and performing music industries, screen production, distribution and exhibition, arts education, advertising, design, photography, and religious and funeral services.[8]

The definition does not include the majority of sports or gambling activities, amusement arcades, some cultural retail (such as toy and game retail), or software. Personal services such as hairdressing, tattoo art, beauty services and massage are also excluded.

As with any definitions, arguments can be made at the boundaries. But the question of definition is more than a nerdy dispute as to where to draw a line. Culture is a very broad term. In one famous definition, "culture is everything that is not nature".[9] Clearly such an anthropological definition would be near meaningless: everything and nothing. The narrower definition we use here when we talk about culture as an object of public policy (for which statistics are required) is not arbitrary, but it requires some discussion.

1b. Why Defining Culture is so Hard.

The ABS statistics do not measure culture in the wider anthropological sense of the word. In particular, the exclusion of activity associated with prominent sporting codes such as football, cricket, horse racing and the Olympics from these definitions of ostensibly 'cultural' activity is one which might surprise many sports-mad Australians. The same could be said for gaming and gambling, whatever one might think of their social impact. Similarly, hairdressing, tattoos and other personal services are part of 'culture' in this sense, but they are not included. On the other hand, some might find it odd that religious services and funerals are included.

The Culture being measured in the ABS statistics is narrower than the fundamental social or ontological category of 'culture'. The same is true of employment measures of, say, health or education. There are many things we deem as 'healthy' or 'educational'. Our lives from birth involve learning and seeking to enhance health, just as our lives involve meaning making through various symbolic practices and artefacts. When we measure specific metrics in statistical categories such as Health or Education, we are concerned with a relatively narrower field of public policy (which might involve public, private and not-for-profit entities). There are things associated with both education and health that may fall outside these statistical areas. Think of personal trainers, 'fitbit' manufacturing, crystal healing, aromatherapy or meditation classes. Or various self-help groups, cultural tourism (after all "travel broadens the mind"), personal development gurus and so on. The line may change overtime. In part driven by better measurements of health at the level of populations, public health policy has moved from concerns with hospitals and doctors to questions of diet, exercise and living conditions.[10] Would we want to include sanitation, housing, food supply and so on in the statistical category of health employment? Or the provision of school meals, the production of electronic calculators and iPads, public transport and so on in the education statistics?

Culture, too, is caught between an identifiable field of public policy, and the all-pervasiveness of that myriad of activities and objects we might call 'cultural'. However, it is clear that the gap between formally defined culture and the wider, more diffuse 'culture' is wider than in education and health. This is less to do with the nature of culture, and more to do with its weakness as a public policy area.

Though it emerged at the same time as health, education and what came to be known as social services, 'culture' was always smaller and less important. In part this was because there were many other social institutions which provided cultural services – the church, the family, traditional institutions, trades unions, and a range of civil society associations with long historical roots. Whilst some states tended towards a near monopoly in the provision of education, health and social services, especially in richer nations after the Second World War, they never attempted this in culture. The state's intervention tended to be limited to 'arts and heritage', however widely or narrowly defined.

The problem was also that what was included in 'culture' was increasingly contested. With the expansion of education, leisure time and disposal income, came the rise in the commercial cultural sector (including the 'cultural industries' of music, film, publishing, broadcasting and so on), especially in the late 1950s and early 1960s. The expansion of the welfare state brought within it planning for leisure, enjoyment and education that inevitably involved some kind of arts and cultural provision. Cultural policy, then often simply called 'arts policy', was faced with an expanded field, as well as some real dilemmas. What role does state cultural policy play in a modern (social) democracy? Should it be competing with, collaborating with, or simply regulating commercial culture? Should the state distribute established forms of traditional culture, or embrace the actually existing democracy of 'popular' cultures? Or somehow both?

These debates emerged most sharply in the 1970s.[11] They leave their traces on the statistical debate, mostly by favouring the inclusion of more traditional cultural activities and occupations over those associated with "recreation" and "amusement". This relates to the historical framing of cultural policy, as it emerged alongside other those public policy areas – health, education, social reform – aimed at improving the basic quality of life of the population as well as social cohesion and productive capacity. It was a particular kind of educational project intended to 'improve' individuals and the social world in which they lived and worked. In its liberal and social democratic versions after 1945, art and culture were part of the creation of democratic citizenship.[12]

All of this has complex class, gender and ethnic assumptions and hierarchies which have been contested ever since. Nonetheless, public policy for culture is grounded on what is 'good' for the population. The precise nature of this 'good', the 'value' of culture, has been a site of fierce dispute. For many 'economic rationalists', it was a sub-set of the consumer economy with some employment effects. For other economists, art and "creative industries" were a part of the innovation system. Others looked to small-scale commercial popular culture as authentically democratic, 'art' being merely the culture of the middle classes. Others still rejected the normative idea of 'the good', seeing in it merely the latest iteration of state power over individuals and groups. Much more so than health and education (though these were also subjected to similar critiques), the 'good' in public cultural policy was – is – a matter of political contention.

Defining culture (in this context) is not about anthropological disputes over what is culture, but a dispute as to what constitutes the proper field of application of public cultural policy and, therefore, what 'public good' is to be sought through this policy. This relates directly to definitional boundaries. For example, the ABS includes heritage activities such as parks and zoos in its definition of cultural industries and occupations. This can be justified as a mark of their historic cultural-educative mission. Promoting knowledge of a common past, exposure to 'nature', a 'live' introduction to natural history: these were seen as essential parts of modern cities and nations. On the contrary, amusement parks, gambling and some other 'distractions' usually provided on a commercial basis are left out. Historically, many styles of popular music and entertainment, such as Victorian music halls or underground techno clubs, have also excluded from policy definitions of 'the arts'. Nowadays, we'd associate zoos with these latter amusements perhaps, but public parks and heritage are still central to the field of public policy for culture. So too, popular music (danceable or otherwise) is now included within cultural policy. In terms of public policy, various reports that use different definitions of cultural employment are not easily comparable or commensurable, which makes it all the more important to carefully delineate the definition used.

1 **The data is publicly available and open. It is published via the ABS website and the Bureau's 'TableBuilder' web interface, that permits citizens and researchers to explore and download official ABS data across a large number of official datasets.**

2 **For the Census, microdata was obtained from the "industry of employment" and "occupation of employment" sections of the Census results, enabling cross-matching for age, sex, income, place of work, educational qualifications and a subset of employment-related characteristics. For the Labour Force Survey, data was obtained from the "Characteristics of Employment" sub-survey, that questions labour force participants about industry, occupation, mode of employment, freelance status, status in the labour force, and union membership.**

3 **Australian Bureau of Statistics (2024). 'TableBuilder'. Australian Bureau of Statistics. https://www.abs.gov.au/statistics/microdata-tablebuilder/tablebuilder**

4 **For a definition see: Marion McCutcheon and Stuart Cunningham (2024) The Creative Economy in Australia. What the 2024 Census Tells Us. Briefing Paper 2.**

5 **This model goes back to statistical work conducted for the Arts Council of England in the mid-1990s. It was re-introduced as a novel methodology in relation to the "creative industries" in the late 2000s, mainly because it added "creative" occupations in non-creative industries, which were not previously picked up by "cultural" occupations. This mainly involved software workers, but also others that were deemed "creative" (see Hasan Bakhshi, Alan Freeman and Peter Higgs (2013). A dynamic mapping of the UK's creative industries, NESTA. https://www.nesta.org.uk/report/a-dynamic-mapping-of-the-uks-creative-industries/). More on this below.**

6 **Australian Bureau of Statistics (2012). Employment in Culture, 2011. Cat. No. 6273.0. Australian Bureau of Statistics. https://www.abs.gov.au/AUSSTATS/abs@.nsf/Lookup/6273.0Main+Features12011?OpenDocument**

7 **Australian Bureau of Statistics (2014). Australian Cultural and Leisure Classifications (3rd edition). Cat. no. 4902.0. Australian Bureau of Statistics. https://www.abs.gov.au/ausstats/abs@.nsf/mf/4902.0**

8 **These categories are currently being reviewed in a "Cultural and Creative Activity Satellite Accounts Methodology Refresh" consultation currently underway. https://www.infrastructure.gov.au/sites/default/files/documents/cultural-and-creative-activity-satellite-accounts-methodology-refresh-consultation-paper-february2023_0.pdf**

9 **See: Philippe Descola (2014). Beyond nature and culture. In *The handbook of contemporary animism* (pp. 77-91). Routledge.**

10 **The research literature on the "*social determinants of health*" is vast. See: Michael Marmot and Richard Wilkinson (Eds.). (2005). Social determinants of health. OUP Oxford.**

11 **See: Nicholas Garnham (1987) Concepts of culture: public policy and the cultural industries. *Cultural studies*, 1(1), 23-37.**

12 **Jim McGuigan (2001). Three discourses of cultural policy, in Nick Stevenson (ed.), *Culture and citizenship*, SAGE, pp. 124-137.**

Why Culture (or Health or Education) is not really an industry

2a. Industries, Services, Public Goods

Alongside definitions, there's the problem with the term "industry" itself. The ABS occupational and industry statistics are organised, as in other countries such as European Union members and the UK, in a cascade of economic activity beginning with primary agriculture, through processing and manufacture, ending with business and personal services (see Appendix 1). The general schema of agriculture, manufacturing and services follows the original ideas underpinning the creation of "systems of national accounts", laid down by Simon Kuznets, Colin Clark and Richard Stone in the 1930s and 1940s.[1] In this heuristic, 'industry' is primarily concerned with the nature of the production, or the type of good or service produced: a more-or-less coherent group of activities producing a more-or-less coherent set of products. This works well for sectors such as wine production or car manufacturing, but less well for those broad areas of public policy such as health, education or social services.

By the middle of the 20th century, these sectors had expanded enormously and involved large-scale public funding. They could be classed as 'industries' only in a very general sense. They were non-market services, in many ways like essential infrastructure, the government provision of 'public goods' which contributed to the wider economy and society. Beyond a basic counting exercise, it made little sense to see them as industries concerned with the profitable production of goods and services. Profit was not necessarily the main aim, nor were many of their operations 'commercial' in the accepted sense of that term.

This is indicated by the fact that GDP figures notoriously do not count all the production in the economy, ignoring many types of "non-market output" such as government-provided health, social or educational services, not to mention voluntary services in the home.[2] The statistical problem is that prices are partial or absent in important human activities, including health, education, personal care, and culture. As a result, these endeavours may not, for GDP value chain purposes, count as value-creating economic activity.[3] But these activities combined can often represent a large proportion of local work – even the biggest single employment sector in a local area.

This has been a major point of contestation over the last forty years. To what extent should these sectors be made more commercial, or be tested against commercial criteria – or, if necessary, made to operate in quasi-commercial ways? This contestation of a publicly funded welfare state has been the key battleground between social democracy and neoliberalism over the past four decades. It is not a simple, zero-sum conflict between a state/market binary. Public expenditure is higher than it was in the 1980s; nor has the state somehow disappeared as the private sector took over. What was involved was a reconfiguration of the relationship between state and market.[4] In the 21st century, the state still finances public services, but increasingly it does not directly control them. The private sector is dependent on a range of public contracts to deliver public goods, but now on a commercially efficient manner. That is, they are meant to be profitable.

2b. What is the Value of Culture?

The cultural sector has been caught up in this reconfiguration of state and market in a way that has been quite damaging. It is not just a question of how far public goods should be delivered through private sector actors working to market discipline under broad state regulation (such as in aged care, or a myriad of privatised agencies working to government contract), but whether culture was a public good at all.

In 1976, the Industry Assistance Committee (the forerunner of today's Productivity Commission) argued to Australia's prime minister Malcolm Fraser that culture was an individual consumption economy, just like any other leisure-related sector. Therefore, there was no justification for public subsidy.[5] Cultural consumption has certainly taken off since the 1970s, with increased leisure, education and disposable income. A lot of this has been driven by commercial culture but, despite the IAC pronouncement, some kind of requirement for public funding has consistently remained in play. It was not politically possible to countenance the complete loss of the publicly funded arts sector, the ABC, or a slew of community cultural institutions, such as libraries. So some kind of "market failure" arguments had to be used, even though many economists doubted that such market failure was such a bad thing – after all, if these institutions were not profitable, then perhaps they should be left to fail. It was this public policy vessel, holed below the waterline and demanding constant bailing by cultural advocates inside and outside government, that had to navigate a new era in which pro-market philosophies ran rampant.

Such reasoning, which by the early 1990s had come to be called "economic rationalism", quickly pervaded most aspects of public policy, as they came to be measured both by economic impact and cost-benefit analyses.[6] This prevailing atmosphere of "new public management"[7] eventually extended even to the core functions of public administration itself – which began to be outsourced to commercial consultancies, who began to do the work of policy development and assessment once undertaken by public servants.

Economic impact assessments, for example, typically used techniques drawn from econometrics to measure the "value added" by certain activities.[8] Applied to education policy, this might involve estimations of how education might improve innovation and productivity. Similarly, better population health might reduce working days lost to illness across the labour force. Such assessments also might include educational exports (such as overseas students paying university fees) or expanding health-related industries, such as medical manufacturing. These kind of economic justifications for the various public services became common place, and led to many in culture to embrace these as the only possible way continued funding might be secured.

Cost-benefit analysis, which did more damage, is a form of accounting which imposes neoclassical economic metrics, often in a very narrow frame, on any government policy.[9] Leaving aside technical questions about phenomena such as consumer surpluses and shadow prices, legitimate questions emerge. Is this the most efficient process, that is, does it do the most with the least? The failure of this method to take into account aspects of "efficiency" that are not immediate or easily measurable led, for example, to well-publicised policy failures in Australian aged care, and a range of other public health systems in the pandemic. It is part of a wider "hollowing out" of the state and public policy capacity that has been noted frequently in the political and public policy literature. Many of the things people had taken for granted, or assumed as part of their citizenship, were deemed to be costs whose benefits were found wanting.[10] Scandals like Robodebt are simply the most egregious manifestations of this tendency.[11]

2c. Advocating Culture: Caught in a Bind?

Cost-benefit regimes, in the form of "rationalisation" or "efficiency dividends", have strongly impacted the public culture sector, as they have health, education and social services. But it has been more damaging in culture. The economic impact benefits of health and education do get used as part of the public good arguments, as employment in health and education is a major part of state and territory government employment. However, they are mainly viewed as delivering public goods – in partnership with the private and philanthropic sector – and the 'public good', rather than being simply industries like any other.

This is not so with culture, where its public good value is often doubted by government and public administrators alike. Consequently, it has been required to perform often quite onerous cost-benefit reporting tasks for its meagre public subsidies. The contrast between the intense scrutiny of Centrelink payments in the Robodebt scandal, and the huge amounts of money given with no obligations to businesses in the pandemic-period JobKeeper program could be applied, writ large, to culture. Think of the billions that the Commonwealth foregoes on negative gearing, or the capital gains tax discount for investment properties, compared to the detailed scrutiny of the minute sums given (individually and collectively) to artists and small cultural organisations.[12]

However, what makes this more complicated is that, in the 1990s, the cultural sector and many in public policy, strongly asserted that culture was an industry, and a growing one at that. This formed part of a general argument around the 'post-industrial' economy made by Australian Labor Party, and New Labour in the UK. They suggested the need for public funding not so much because of market failure (the public stepped in where the market failed, e.g. symphony orchestras), but because this was a thriving industrial sector that deserved government investment. It seemed a perfect solution to the judgement of the IAC: culture could now be seen as a public good, as it provided the basic investment in a growing industrial sector.

The problem was two-fold. First, as we suggested above, culture was always more a complex public, private and civil society ecosystem than a coherent industry. As such, "investment" was hard to distinguish from the existing public "subsidy" that supported arts education, cultural infrastructure, community facilities, grants to artists, and so on. Many publicly funded arts and cultural activities were now justified in a different economic language, but the financial mechanism remained basically the same. The reporting requirements, however, were increasingly based on cost-benefit, which demanded more and more econometric data.

Second, the cultural sector presented themselves as an industry at the very moment, in the 1980s and 1990s, when governments were stepping back from direct industrial subsidy (ostensibly, at least). Cultural advocates expected the care and resources once lavished on local manufacturing to be targeted at the "cultural industries", even at a time when other local industries were being cast adrift and left to their own devices. Such optimism ran headlong into the received wisdom that assailed all industry policy as disguised rent-seeking: if the cultural industries were the industry of the future, then they needed to stand on their own two feet, and not expect government protection and handouts. Australian manufacturing was decimated, as we found in the pandemic where basic medical equipment and serums had to be imported. What chance culture?

Third, Australia's post-industrial future was to be based, like Brazil, on finance, real estate, agriculture and primary resources, not advanced manufacturing, 'hi-tech', or digital innovation. Whilst the UK and many other countries embraced some notion of "creative industries" – for good or ill – Australia basically ignored them. Where large scale commercial cultural industries were addressed – TV and radio broadcasting, newspaper publishing, music recording and festivals, film production, games, streaming services – they were mostly subjected to the same "market discipline" as other sectors. In practice, this meant they were subject to that combination of intense lobbying, grooming of political connections and donations that Dylan Ryley has called "political capitalism".[13] (When this becomes all pervasive, we might call it 'state capture'.) This worked fine for Hollywood studios, who were able to negotiate lucrative production subsidies for shooting movies at Australian locations. But outside of a few politically influential industries such as free-to-air television, talk radio, big music festivals[14], streaming platforms and the big newspaper chains, culture's influence on the high grounds of public policy is very weak.

Culture remains caught between two languages: of a 'public' and 'good' sector requiring and deserving subsidy, and a thrusting post-industrial sector seeking investment with the promise of future growth. This Janus-faced approach results in a continual flip-flop between a community good and a global export industry, a force for social cohesion and a highly competitive entrepreneurial sector, telling Australian stories and pushing back the frontiers of technology. Health, education and social services also have some highly commercial entities operating under a public policy umbrella. Yet, ultimately, these are meant to be judged on their efficiency in delivering their respective public goods. The culture sector remains conflicted as to whether it is a public good delivering for the public, or a private good, rich in employment, consumption and export earnings.

This is why these statistical exercises have become very important. All public policy requires basic statistical knowledge – though of course the limits of such methods and the need for other kinds of knowledge is clear.[15] However, in the last two decades statistics have become part of the advocacy tool of the cultural sector. As the value of its public goods was questioned, and cost-benefits imposed on it, the cultural sector was keen to show its economic weight. Sometimes, this was its impact on local economies through direct and secondary spending (tourism and visitors especially). Jobs in culture were advanced as the aim of cultural policy: in the words of Queensland's 2004 creative industries strategy, "creativity is big business". Counting and publicising significant levels of cultural sector employment was important not just to understand the sector, but to show how it was growing, and how fast, and how much it represented as a contribution to total employment. But, as our figures show, this was a very risky strategy. If the hard figures did not bear this out, then, well ... live by statistics, die by statistics.

1 Rosemary D. Marcuss & Richard E. Kane (2007). US national income and product statistics: Born of the Great Depression and World War II. *Survey of Current Business*, 87(2), 32-46.

2 See: Angus Deaton and Paul Schreyer (2022). GDP, wellbeing, and health: thoughts on the 2017 round of the International Comparison Program. *The Review of Income and Wealth*, 68(1), 1–15. https://doi.org/10.1111/roiw.12520 See also: Joseph E. Stiglitz, Amartya Sen and Jean-Paul Fitoussi (2009). Report by the Commission on the Measurement of Economic Performance and Social Progress. https://www.economie.gouv.fr/files/finances/presse/dossiers_de_presse/090914mesure_perf_eco_progres_social/synthese_ang.pdf

3 The ABS methodology guide to the System of National Accounts states that "the non-market output of general government units and non-profit institutions serving households is valued at the costs of producing the outputs, comprising compensation of employees, the cost of purchased goods and services used in production (intermediate consumption), other taxes (less subsidies) on production and consumption of fixed capital. These units therefore do not generate a net operating surplus from their non-market production." Conversely, when public sector agencies or assets are privatised – health, or pensions, or aged care – they immediately become included in GDP. See: Australian Bureau of Statistics. (2021). Australian System of National Accounts: Concepts, Sources and Methods. ABS. https://www.abs.gov.au/statistics/detailed-methodology-information/concepts-sources-methods/australian-system-national-accounts-concepts-sources-and-methods/2020-21

4 Quinn Slobodian (2018). *Globalists: The end of empire and the birth of neoliberalism*. Harvard University Press.

5 The Commission was tasked with examining funding for the performing arts, but by implication the argument extended to publicly funded culture across the board. See Julian Meyrick (2023) "The Undoing of Australian Cultural Policy: the 1976 IAC Inquiry Assistance to the Performing Arts", *Performance Paradigm*, 18: 8-40. https://www.performanceparadigm.net/index.php/journal/article/view/277/303

6 Michael Pusey. (1991). *Economic rationalism in Canberra: A nation-building state changes its mind*. Cambridge University Press.

7 Christopher Hood (1991). A public management for all seasons?. *Public administration*, 69(1), 3-19.

8 Saul Pleeter (Ed.). (2012). *Economic Impact Analysis: Methodology and Applications: Methodology and Applications* (Vol. 19). Springer Science & Business Media.

9 See for instance a frequently assigned textbook on cost-benefit analysis: Euston Quah & E.J. Mishan (2007). *Cost-benefit analysis (5th ed)*. Taylor & Francis Group.

10 See Tom Chodor and Shahar Hameiri (2024) *The Locked-Up Country. Learning the Lessons of Australia's Covid-19 Response.* University of Queensland Press.

11 See Rick Morton's forthcoming book on Robodebt, Fourth Estate.

12 https://www.afr.com/politics/federal/no-strings-attached-for-nearly-1b-in-federal-grants-20240210-p5f3xk

13 Dylan Riley (2020) 'Faultlines', *New Left Review* 126: 35-52

14 Kelly Burke (2024). The Australian company behind Splendour has a rich parent – so why does it need millions in public money?, *The Guardian*, 14 April 2024, https://www.theguardian.com/culture/2024/apr/14/the-australian-company-behind-splendour-has-a-rich-parent-so-why-does-it-need-millions-in-public-money

15 James C. Scott (1998). Seeing like a state: How certain schemes to improve the human conditions have failed. Yale University Press.

Other Industrial Categories

As part of the growing advocacy for culture as a sector with economic weight, and even as a "growth industry" in the 1990s, many arts and cultural agencies began to collect statistics on culture. This was not easy for, as we know, culture is hard to define. There was a significant gap between official arts and culture, and wider understandings of culture previously ignored as popular, commercial or amateur/local. Nor did culture obviously appear in the statistics. Rather, it was scattered around in many different locations. Since that time much work has been done to identify the different elements of culture distributed across the full range of industries and occupations. The most comprehensive survey was conducted by UNESCO in 2009, seeking to standardise the statistics for the cultural sector, though this is itself currently under review. As we noted above, the ABS has set itself the task of identifying the cultural sector statistically, and, post *Revive*, is currently consulting on an update.

A consensus has been more or less achieved, though of course border disputes abound as cultural and technological changes impact. The exception has been those sectors added under the rubric of "creative industries", and it is to a discussion of these that we now turn.

3a. Software, Creative Industries and Creative Economy.

The ABS does not include most types of software development in its definition of cultural employment, a judgement with which the present authors and UNESCO concur. The exclusion of software is a primary distinction between "cultural" and "creative" industries. Though this distinction is far more complex than simply adding an extra 3- or 4- digit industry to a culture list, it should be noted that in most statistical surveys, here and overseas, the inclusion of software/computing adds around 45% to the overall employment and GVA totals.[1] Further, adding other sectors such as engineering design, fashion retail, and tourism under the rubric of creative industries can, taken together, routinely double the creative workforce statistics.

In 2018, a federal government report used an expanded definition of "cultural and creative industries" that suggested the Gross Value Added (GVA) of "cultural and creative activity" in Australia was $111.7 billion in 2017 dollars.[2] The figure was used widely by media and politicians during the pandemic to bemoan the Morrison government's failure to support art and culture.
The report's methodology built on satellite accounts constructed

from the System of National Accounts to create input-output tables and value chains for cultural and creative goods and services through the economy. But the figure included some very generous definitions of the creative industries, such as textiles and clothing manufacturing, fashion retail and computer system design. In fact, stripping out software and retail and engineering and so on meant the actual GVA figure for arts, culture and media (TV and radio, games, music, film, performing arts, museums and galleries - in other words, most of what is covered in our definition) was a rather more modest $14 billion.[3]

Given the rise and rise of software in all aspects of our lives, its inclusion can lead to the impression of a rapid and significant rise in creative employment. This has underpinned repeated claims that the creative industries are one of the fastest growing employment sectors. However, the reality is somewhat different, as we shall see. But why not include software, as it is surely just a newer, more technological form of symbolic manipulation? The problem is that software products apply to all areas of our lives – financial services, renting a holiday apartment, diagnosing brain cancer, buying takeaway food. They certainly have transformed cultural production and consumption, in profound ways we do not need to spell out. But then they have also transformed so much else in our lives. Nor is software the whole story. Applications run on hardware, and our phones and laptops require computer chips and server farms, 5G transmitters and fiber-optic cables. Are these hardware industries to be included in the creative industries sector too?

Two recent Briefing Papers by Marion McCutcheon and Stuart Cunningham have used this expanded definition to make claims for a "creative economy" in Australia.[4] The headlines look very different to ours. Employment (714,632) is twice that which we report here (347,007) using the ABS definition of cultural occupations. They find cultural employment is growing faster than the rest of the economy, with higher-than-average wages, whereas we found the opposite. These kinds of figures are used by many arts and cultural agencies as advocacy tools, but a cursory glance behind the headlines show that the "creative economy" is primarily driven by software development, advertising and marketing, and architecture and design. Strip these out, and we have a very different picture of a cultural sector.

Much is made of "embedded creatives" which, according to these briefing papers show that "there are more people in creative roles working in industries other than the creative industries than within them". In fact, the category of "cultural occupations" picks up these activities and counts them, excluding software. And as their figures show, the vast majority of these embedded jobs are working in software, advertising, marketing, architecture and design. The number of other cultural occupations working in these "non-cultural" industries is minuscule. Again, these figures include software, using a definition of "creativity" which has less to do with culture than it does with innovation. A good example of how far the definition stretches is their decision to include the FinTech sector in their categorisation of "embedded creative" employment.[5] In this conceptualisation, software developers working in banks and insurance companies are part of the "creative economy".

The reason software was initially counted was purely tactical – the inflation of the employment and GVA figures as a form of advocacy. But it also relates to a different policy focus. The creative industries were part of a larger creative economy, which covered all those activities that made money out of some form of intellectual property. In this conception, a creative occupation was any such which added new value through the application of creativity – a capacious net, which takes us far beyond the cultural sector as outlined here.[6] If the interest was innovation economies and the high value-add that came with cutting edge creative services, then the creative economy was for you. If the concern was with cultural public good outcomes or understanding the dynamics and constraints of existing cultural industries and occupations, then this far-reaching extension was less useful — unless you wanted to tie culture's public policy justification to creative innovation, or to the simple growth of the creative economy. The "creative" bit of the "cultural and creative" dyad thus traded what was thought to be policy influence for a dissolution of culture's identity into a wider creative economy, the boundaries of which are, by necessity, never fixed and always evolving.

The problem was that, whilst culture's input into creative innovation sounded good rhetorically, the actual policies to promote new digital industries, or to use digital innovation to secure advantageous positions in global production networks, barely considered art and culture. The software sector in Australia is certainly underdeveloped, but what success there had been owes little to any "culture and creativity" policy. When culture is considered, it was through a focus on particular industries with high political salience, such as location incentives for Hollywood movies or funding for large-scale festivals and sporting events. These required somewhat more traditional and pragmatic industrial strategies which barely referenced cultural objectives. Finance, tech and legal services were in the driving seat, not the creatives.

We have therefore kept software out of our definition of cultural occupations. The ABS counts all those working in cultural industries – if you are a software designer in a games firm, you are counted. If you are a software designer working for a bank, you are not counted. If you are a software designer by occupation – you are not counted in cultural occupations, though cultural industries may be your client from time to time.

A telling parallel here might be hospitality. There are multiple ways in which restaurants, bars, cafes and hotels intersect with culture. Food is of course anthropological culture, as any multicultural festival illustrates. Hospitality thrives on cultural events, and many in the cultural sector work in hospitality as their key source of income. Bars host gigs, and wineries host festivals. What theatre or cinema or festival would go ahead without hospitality? But few suggest that we should somehow call hospitality part of the cultural sector. It would muddy the waters in ways that would not be useful to anyone. We might say the same about adding software to the cultural sector.

3b. Culture and Manufacturing.

A more difficult area are those cultural sectors which do (or did) have a high degree of manufacturing and/ or retail employment.

As cultural production has become more digital in nature, the physical reproduction, distribution, wholesaling and retailing of such products has declined. This has had great impact on the printing industry, especially newspapers and magazines. The figures below bear this out.[7] This is not to say physical products or “live” performance have disappeared. And of course, both computer and communications hardware and software products, and the services which go with them, have expanded enormously. But these latter are not normally counted as cultural industries, and ICT workers such as phone technicians are not counted as cultural occupations. In Australia the lack of mass manufacturing makes much of this debate – which would be very live in China – moot.

A whole range of “creative” and “non-creative” technical jobs are included in the statistics. Again, if you have a job that is deemed part of culture – film editor or sound engineer – you are included under a cultural occupation, and counted as being part of a cultural industry. If you have a more generic skill – project manager or carpenter, for example – you are counted as employed in a cultural industry (if that is the case), but not as having a cultural occupation.

When a creative input is linked to a large-scale manufacturing industry, such as ceramics or carpets or furniture, then the debate was always whether to include designers (product, graphic, textile, etc.) and the chain of manufacture. Again, Australia’s de-industrialisation makes much of this conversation mostly irrelevant. There is a certain amount of skilled making involved in the cultural sector – set design, staging production, bump in/bump out, costume making, bespoke furniture, or a range of build and design services – which sometimes is and sometimes is not picked up. But the largest cultural manufacturing sector is textiles, clothing and footwear, the so-called “TCF” sector, which has retained a mass manufacturing presence (at least in Asia).

In the past, clothing manufacture and retail has been included in some definitions of cultural employment, but, following the ABS, we have elected to exclude the retail and manufacture element, keeping only the design element. The federal government's recent review by the Bureau of Communications and Arts Research appears to agree.[8]

We should emphasise that this is not a value judgement around what is and what is not "creative", as if the artist-designer was a creative intellectual and the skilled worker a non-intellectual reproductive labourer. The hand knows things the head can never grasp. It is more that fashion (as well as interior and graphic) designers share an infrastructure and 'agora' of ideas exchange associated with the cultural sector (with their products an important contribution to that conversation). In contrast, the manufacturing sector to which these ideas are applied is a large-scale industry whose regulation or direction does not come under the rubric of 'public good' or at least, not the same public good as that of culture.

In any event, the kind of policy required to support this more-or-less coherent industry would demand some very specific instruments not best served by it being wrapped up into culture as a whole. Indeed, the dominant policy in Australian manufacturing in recent decades has been to unilaterally remove manufacturing tariff barriers, at the cost of widespread employment contraction in the textiles, clothing and footwear sector.[9] The decline of TCF manufacturing in Australia is one of the biggest stories of the liberalisation of Australia's economy in the 1980s and 1990s: huge numbers of jobs were shed, as tariffs were lowered and production moved overseas.

Designers and design companies are included in the occupational and industrial figures. However, we exclude engineering, in which the symbolic or aesthetic element is barely present. This is a fuzzy area. Designing an air-cooling system is one thing, designing the sleek lines of a car or vacuum cleaner another. It is sometimes hard to make a clear demarcation. But graphic, interior and fashion designers are all counted as cultural occupations, as are industrial designers.

3c. Architecture

Architecture is always an anomaly. It has been an art form since classical times. Architecture frequently gets to provide the iconic building, with a lucky few "starchitechs" commanding the sort of visibility and incomes of pop stars or famous visual artists. On the other hand, architects and architectural services cover a vast range of services, from designing a major highway intersection, to a granny flat in the back garden. Any understanding of the cultural public good must include some quality of the public realm in which that public live and work. Architects provide much of this quality (or not), as do urban planners, who are also included. Architecture and urban planning fall to some degree under the public good rubric of cultural policy. But their more functional aspects – Vitruvius famously argued for firmitas and utilitas, as well as venustas – apply to a wider range of social and cultural (in the anthropological sense) benefits. Nonetheless, we have again followed the ABS and elected to keep them in. They represent one of the largest groups of occupations and industries.

1 Cf. DCMS Economic Estimates. "'ICT, software and computer services' is the largest subsector component of the Creative Industries by GVA (£53.4bn in 2022). It is more than twice the size of the next largest subsector 'Film, TV, video, radio and photography' at £20.8bn in 2022". See: Department of Culture, Media and Sport (2024). DCMS and digital sector GVA 2022 (provisional), Department of Culture, Media and Sport. https://www.gov.uk/government/statistics/dcms-and-digital-sector-gva-2022-provisional

2 Bureau of Communications and Arts Research (2018). Cultural and creative activity in Australia 2007-08 to 2016-17, October 2018 working paper, Department of Communications and the Arts.

3 Justin O'Connor (2021) 'Art as Industry' https://justin-oconnor.com/2020/06/20/art-as-industry/

4 Marion McCutcheon and Stuart Cunningham (2022) The Creative Economy in Australia. What the 2024 Census Tells Us. Briefing Papers 1& 2: https://www.canberra.edu.au/research/faculty-research-centres/nmrc/major-projects/tabs/current-funded-projects/Briefing-paper-1-20221122.pdf https://www.canberra.edu.au/research/faculty-research-centres/nmrc/major-projects/tabs/current-funded-projects/Briefing-paper-1-20221122.pdf

5 See Figure 6 of Stuart Cunningham and Marion McCutcheon (2022) The Creative Economy in Australia: What Census 2021 Tells Us, Briefing paper 2: Embedded creative employment and creative incomes. https://apo.org.au/sites/default/files/resource-files/2023-03/apo-nid322266.pdf

6 NESTA defined a creative worker as those performing "a role within the creative process that brings cognitive skills to bear about differentiation to yield either novel or significantly enhanced products whose final form is not fully specified in advance". This might describe the artist, but also the financial whizz-kid, scientific researcher or database developer. See: Hasan Bakhshi and co-authors, cited aboce.

7 The shift to digital also affects cultural industries "business models". Finding ways to make cultural goods "excludable" and thus chargeable has been a key concern. So techniques such as "turnstile" entry to cinemas and theatres, purchase of physical product like a record, require new technologies of exclusion (watermarks, geolocking, subscription). The near free distribution of newspapers or television funded by advertising was undermined by the platforms taking the advertising whilst extracting user and provider data to establish themselves as "middlemen".

8 Bureau of Communications and Arts Research (2023). Cultural and Creative Activity Satellite Accounts Methodology Refresh: Consultation paper. Department of Infrastructure, Transport, Regional Development and Communications. https://www.infrastructure.gov.au/sites/default/files/documents/cultural-and-creative-activity-satellite-accounts-methodology-refresh-consultation-paper-february2023_0.pdf

9 Buxey, G. (2005). Globalisation and manufacturing strategy in the TCF industry. *International Journal of Operations & Production Management*, 25(2), 100-113.

Counting Culture

The data we use is mostly drawn from the responses of millions of Australians who fill out their Census questionnaires every five years, particularly the questions about their employment. The Census is the most authoritative instrument available for measuring demography in Australia. Having said that, there are still some problems posed when it comes to culture and the arts. The Census survey design does not always do a good job of capturing the precarious and fractured nature of cultural employment.

For instance, the Census questionnaire asks respondents what their "main job" was in the last week before the Census.[1] By its framing, this question is likely to miss a considerable amount of cultural work of a part-time or periodic nature. Artists, who often work "day jobs" in other sectors like hospitality or education, are likely to be under-counted. Similarly, many artists work in "portfolio careers", where they may intersperse periods of artistic work with periods of employment in other sectors. This issue is well known and has been commented on by a number of experienced observers, such as David Throsby.[2]

Unfortunately, there isn't a lot that individual researchers can do about these survey design problems. There has been growth (although not high growth) in the number of respondents putting down artistic occupations since 2006; whether this means that the undercounting problem has decreased is unknown. While the "main job" methodology is problematic, it is at least consistent: the same words in the questionnaire have been used by the ABS for the past four censuses.

4a. Counting Cultural Industries

The ABS has a tiered and nested classification of industries.[3] At the lowest level are the so-called "4-digit" industries, which are the smallest units of industry that the ABS counts. 4-digit industries are then collated into progressively larger categories at 3- and 2-digit level; at the top level, the ABS tracks large, 1-digit "divisions' that correspond to big sectors of the economy, such as Agriculture, Construction, Education, Healthcare and Social Assistance, and so on.

When it defined its list of cultural employment in 2011, the ABS built it up from a series of lowest-level, 4-digit industries. We have followed that list. For the purposes of this study, the 4-digit industries defined as Australia's "cultural industries" are listed here:

The ABS 4-digit "cultural industries"

Heritage industries
Libraries and Archives
Museum Operation
Zoological and Botanical Garden Operation
Nature Reserves and Conservation Parks Operation

Arts industries
Printing
Newspaper Publishing
Magazine and Other Periodical Publishing
Internet Publishing and Broadcasting
Other Publishing (except Software, Music and Internet)
Book and Magazine Wholesaling
Entertainment Media Retailing
Newspaper and Book Retailing
Architectural Services
Advertising Services
Other Specialised Design Services
Motion Picture and Video Distribution
Motion Picture and Video Production
Motion Picture Exhibition
Post-Production Services and Other Motion Picture and Video Activities
Music Publishing
Music and Other Sound Recording Activities
Reproduction of Record Media
Radio Broadcasting
Free-to-Air Television Broadcasting
Cable and Other Subscription Broadcasting
Performing Arts Operation
Creative Artists, Musicians, Writers and Performers
Performing Arts Venue Operation
Video and Other Electronic Media Rental and Hiring
Professional Photographic Services
Arts Education

Other Cultural Industries
Religious Services
Funeral, Crematorium and Cemetery Services

ABS data for the 4-digit industries is not always available for every type of data. At times, we have sought to apply a 3-digit classification for cultural employment, for instance in order to define a cultural schema when using the ABS labour force statistics, which do not ramify down to 4-digit level.

No comparable 3-digit classification is provided by the ABS, so to construct one, we have taken the parent groups of the various 4-digit industries listed by the ABS in its cultural definition, and included them where the majority of the activity in these 3-digit groups is cultural. The resulting definition is not perfectly aligned, because some cultural industries (for instance arts education or architecture) are only minority activities within larger groups (professional education and professional services, respectively).

Selected 3-digit cultural industry groups

Recreational Goods retailing
Publishing (except Internet and Music Publishing), not further defined
Newspaper, Periodical, Book and Directory Publishing
Motion Picture and Sound Recording Activities, not further defined
Motion Picture and Video Activities
Sound Recording and Music Publishing
Broadcasting (except Internet), not further defined
Radio Broadcasting
Television Broadcasting
Internet Publishing and Broadcasting
Advertising Services
Arts and Recreation Services, not further defined
Museum Operation
Heritage Activities, not further defined
Parks and Gardens Operations
Creative and Performing Arts Activities
Reproduction of Recorded Media
Printing (including the Reproduction of Recorded Media), not further defined
Printing and Printing Support Services
Religious Services
Funeral, Crematorium and Cemetery Services

4b. Counting Cultural Occupations

As discussed above, the ABS has devised a classification for cultural occupations, based on a long-term project with occupation definitions in place since 2011.

As with industries, the ABS has a tiered and nested classification of occupations, entitled the Australian and New Zealand Standard Classification of Occupations.[4] The occupations schema begins at the broadest and most general typology of occupations, known as "Groups", such as managers, professionals, technicians, personal service workers, and labourers. The ANZSCO then progresses down to the most granular occupation descriptions. Below the top level of Groups, there are four levels of progressively finer-grained occupational distinction. At the bottom are the so-called "6-digit occupations" categorising individual occupations, such as "chief executive officer", "architect", "web administrator", "beauty therapist" and "fruit picker". There are 1,076 individual occupations in the classification.

The ABS list of what it defines as "cultural" occupations is built up from the lowest level by selecting a bespoke set of occupations from the 1,076 6-digit occupations. The list is not arbitrary, in that the cultural definitions are built up from the Australian Culture and Leisure Classifications exercise published in 2008. However, as with industry classifications, this does not mean that the definitions are unchallengeable. As we saw, the ABS definition is skewed towards a certain view of "arts and culture" which elides or ignores some of the more demotic and street-level dimensions of cultural work. Arts and culture occupations such as "author", "composer", "dancer or choreographer" and "painter" are part of the ABS definition, as are cultural production roles such as printers, film and television crews, stagehands, and broadcasting technicians. Ministers and religion and civil celebrants are also included.

Those with a broad anthropological definition of culture might baulk at tourism workers being excluded, even though clearly many tour guides would be taking part in cultural tourism. Personal services workers such as sports workers, fitness instructors, adventure guides, beauty therapists, body artists and sex workers are also excluded. This relates to the historic educational improving approach to art and culture, which some dispute. But apart from anything else, as with software or hospitality, to admit such a range of personal services workers into culture could render the category almost inoperable from a public policy point of view.

For all the specificity of many role descriptions, some types of cultural work are not well distinguished in certain parts of the broader classification. For instance, cultural retail jobs like book store assistants and record store clerks do not receive a specified

6-digit occupation. These workers have been submerged into a very broad cross-industry conceptualisation of "sales assistants".

Notwithstanding this, the definition of cultural occupations adopted here will follow the ABS schema presented in the Employment in Culture report of 2011 (ABS, 2012).

The ABS 6-digit cultural occupations

Heritage occupations

Built, Collectable and Environmental Heritage Workers

Antique Dealer
Arts Administrator or Manager
Conservator
Environmental Manager
Gallery or Museum Curator
Gallery or Museum Guide
Gallery or Museum Technician
Park Ranger
Zookeeper
Library and Archive Workers
Archivist
Librarian
Library Technician
Library Assistant
Other Heritage Workers
Gallery, Library and Museum Technicians, nfd
Archivists, Curators and Records Managers, nfd
Gallery, Museum and Tour Guides, nfd

Arts occupations

Writers and Print Media Workers

Author
Book or Script Editor
Authors, and Book and Script Editors, nfd
Classified Advertising Clerk
Copywriter
Newspaper or Periodical Editor
Print Journalist
Radio Journalist
Technical Writer
Television Journalist
Journalists and Other Writers, nec
Journalists and Other Writers, nfd
Proof Reader

Performing Artists and Music Composers

Actor
Dancer or Choreographer
Entertainer or Variety Artist
Actors, Dancers and Other Entertainers, nec
Actors, Dancers and Other Entertainers, nfd
Composer
Music Director
Musician (Instrumental)
Singer
Music Professionals, nec
Music Professionals, nfd
Radio Presenter
Television Presenter

Performing Arts Support Workers

Art Director (Film, Television or Stage)
Director (Film, Television, Radio or Stage)
Director of Photography
Film and Video Editor
Program Director (Television or Radio)
Stage Manager
Technical Director
Video Producer
Film, Television, Radio and Stage Directors, nec
Film, Television, Radio and Stage Directors, nfd
Artistic Director
Media Producer (excluding Video)
Make Up Artist
Production Assistant (Film, Television, Radio or Stage)

Visual Arts and Crafts Professionals

Painter (Visual Arts)
Potter or Ceramic Artist
Sculptor
Visual Arts and Crafts Professionals, nec
Visual Arts and Crafts Professionals, nfd
Photographer
Architects and Urban Planners
Architect
Landscape Architect
Architects and Landscape Architects, nfd
Urban and Regional Planner
Architectural Draftsperson

Design Workers

Advertising Specialist
Fashion Designer
Industrial Designer
Jewellery Designer
Fashion, Industrial and Jewellery Designers, nfd
Graphic Designer
Illustrator
Multimedia Designer
Web Designer
Graphic and Web Designers, and Illustrators, nfd
Interior Designer
Multimedia Specialist
Web Developer
Multimedia Specialists and Web Developers, nfd
Signwriter
Visual Merchandiser

Broadcasting, Film and Recorded Media Equipment Operators

Broadcast Transmitter Operator
Camera Operator (Film, Television or Video)
Light Technician
Sound Technician
Television Equipment Operator
Performing Arts Technicians, nec
Motion Picture Projectionist
Printing Workers
Printing Trades Workers, nfd
Print Finishers and Screen Printers, nfd
Print Finisher
Screen Printer
Graphic Pre-press Trades Worker
Printers, nfd
Printing Machinist
Small Offset Printer
Printing Assistants and Table Workers, nfd
Printer's Assistant
Printing Table Worker

Other Arts Support Workers

Art Teacher (Private Tuition)
Dance Teacher (Private Tuition)
Drama Teacher (Private Tuition)
Music Teacher (Private Tuition)
Cinema or Theatre Manager
Community Arts Worker
Musical Instrument Maker or Repairer
Photographer's Assistant
Picture Framer

Other Arts Workers

Arts and Media Professionals, nfd
Arts Professionals, nfd
Media Professionals, nfd
Artistic Directors, and Media Producers and Presenters, nfd
Performing Arts Technicians, nfd

Other Cultural Occupations

Social Professionals, nfd
Historian
Interpreter
Translator
Social Professionals, nec
Minister of Religion
Funeral Workers, nfd
Funeral Director
Funeral Workers, nec
Civil Celebrant

1 Question 43 of the 2021 Census questionnaire reads, in full:
- "In the main job held last week, what was the person's occupation?
- Give full title.
- For example: REGISTERED AGED CARE NURSE, HOUSE CLEANER, RETAIL SALES ASSISTANT, ORE CRUSHING MACHINE OPERATOR.
- For public servants, write occupation title and level. For example: CUSTOMER SERVICE OFFICER APS5.
- For armed services personnel, write rank and occupation."

2 Throsby and his collaborators like Katya Petetskaya have sought to get around this problem by directly surveying populations of professional artists. But they do not survey cultural workers who are not "professional" artists, such as performing arts crew, cultural manufacturing or cultural retail workers. See David Throsby and Katya Petetskaya (2024). Artists as workers: an economic study of professional artists in Australia. Pyrmont: Creative Australia.

3 Australian Bureau of Statistics (2013). Australian and New Zealand Standard Industrial Classification (ANZSIC) (revision 2.0). Australian Bureau of Statistics. https://www.abs.gov.au/statistics/classifications/australian-and-new-zealand-standard-industrial-classification-anzsic/latest-release

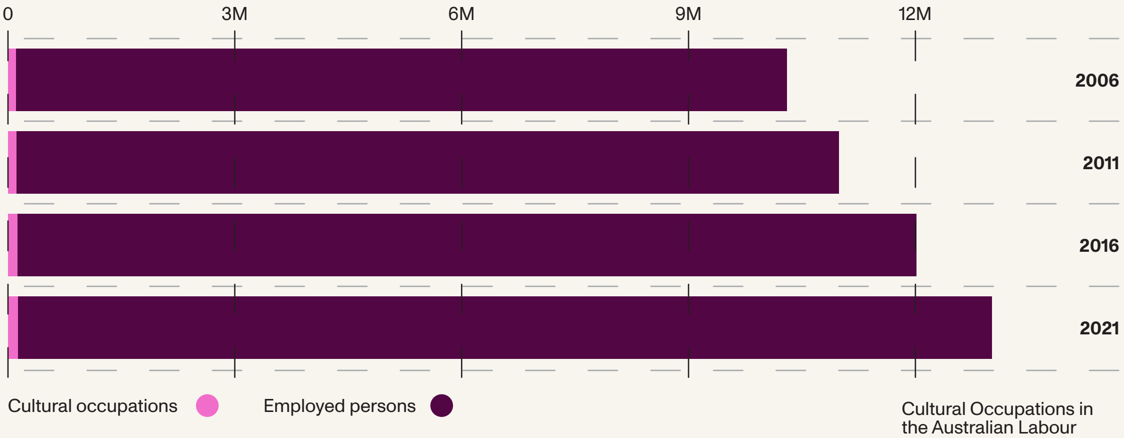
4 Australian Bureau of Statistics (2022). ANZSCO - Australian and New Zealand Standard Classification of Occupations. https://www.abs.gov.au/statistics/classifications/anzsco-australian-and-new-zealand-standard-classification-occupations/latest-release

Employment in Australian Cultural Industries and Occupations

5a. Cultural Employment in Comparison with the Total Labour Force.

As we have discussed, the ABS allows us to identify two sets of cultural workers: workers in cultural occupations, and workers in cultural industries. Both sets of workers are relatively small in comparison with the total Australian workforce.

In August 2021, the total Australian labour force was 13.759 million (including those looking for work) and there were 13.004 million employed persons, according to ABS Labour Force data collected on a rotating panel basis.[1] Total cultural employment for the ABS definition of cultural occupations on Census night in 2021 was 347,007 persons. This figure makes up 2.7% of the total of 12.9 million workers to which at least some kind of occupation was assigned in the 2021 Census data. Total cultural employment for the ABS definition of cultural industries at the same Census was 367,335. This figure makes up 2.8 percent of the total employed persons of 13.004 million.

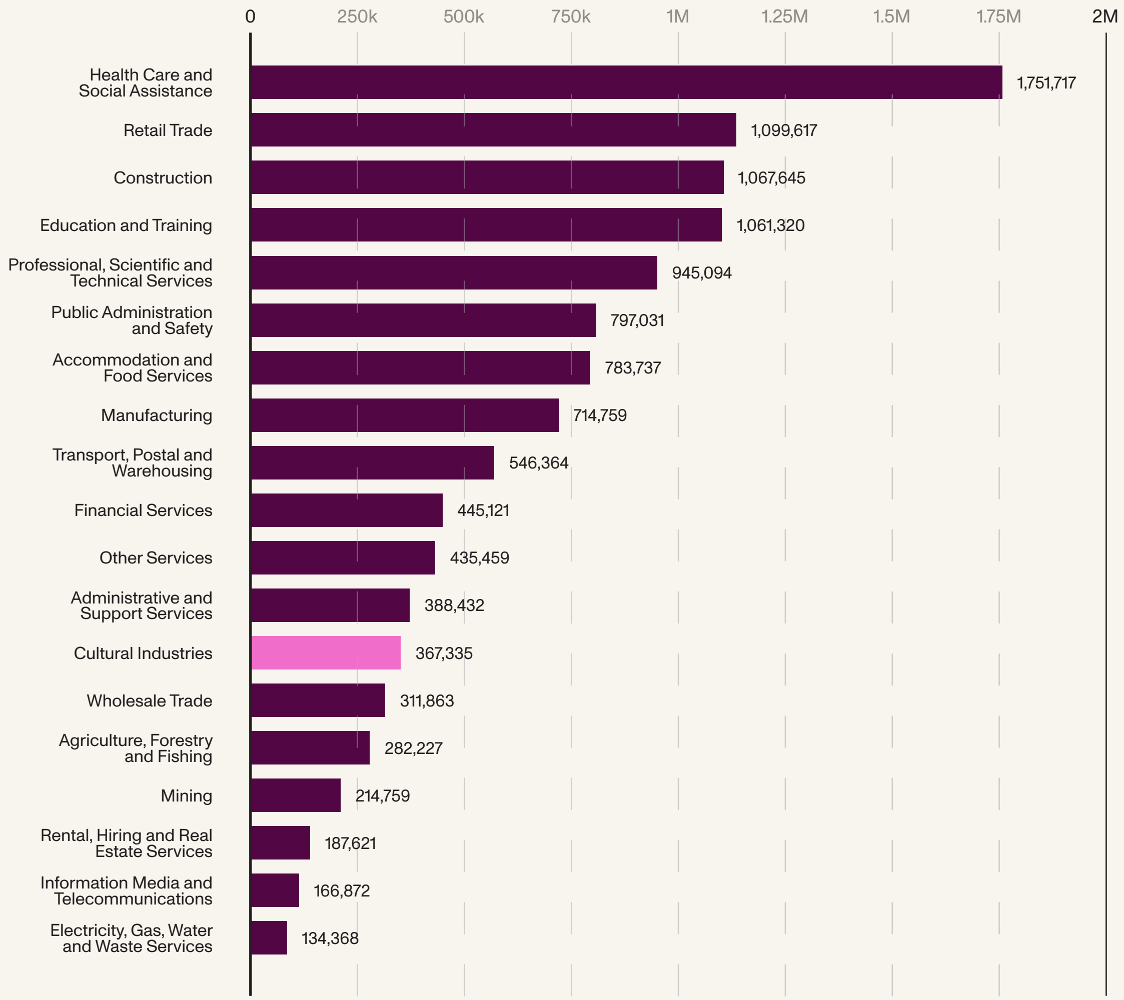


Cultural Occupations in the Australian Labour Force, 2006-2021. Source: ABS Labour Force, ABS Census Microdata

In summary, culture is a relatively small part of the Australian workforce. As we shall explore below, cultural employment has also grown more slowly than both overall employment and the total labour force in recent years.

Culture is a middling-to-small aggregation when compared to other large categories of workers. In terms of cultural industries, if we are to compare cultural work to some of the broadest, "1-digit" industry divisions of the labour force, such as health care and social assistance, education or construction, culture is not a particularly large sector. Arts advocates sometimes make the point that cultural industry employment is larger than mining, but this is not particularly strong claim: like culture, mining employment is one of the smaller sectors of employment in the Australian workforce.

Employment by Sector 2021



Employment in 1-digit ANZSIC divisions, and cultural industries, 2021. Source: ABS Census microdata.

5b. Employment in cultural industries

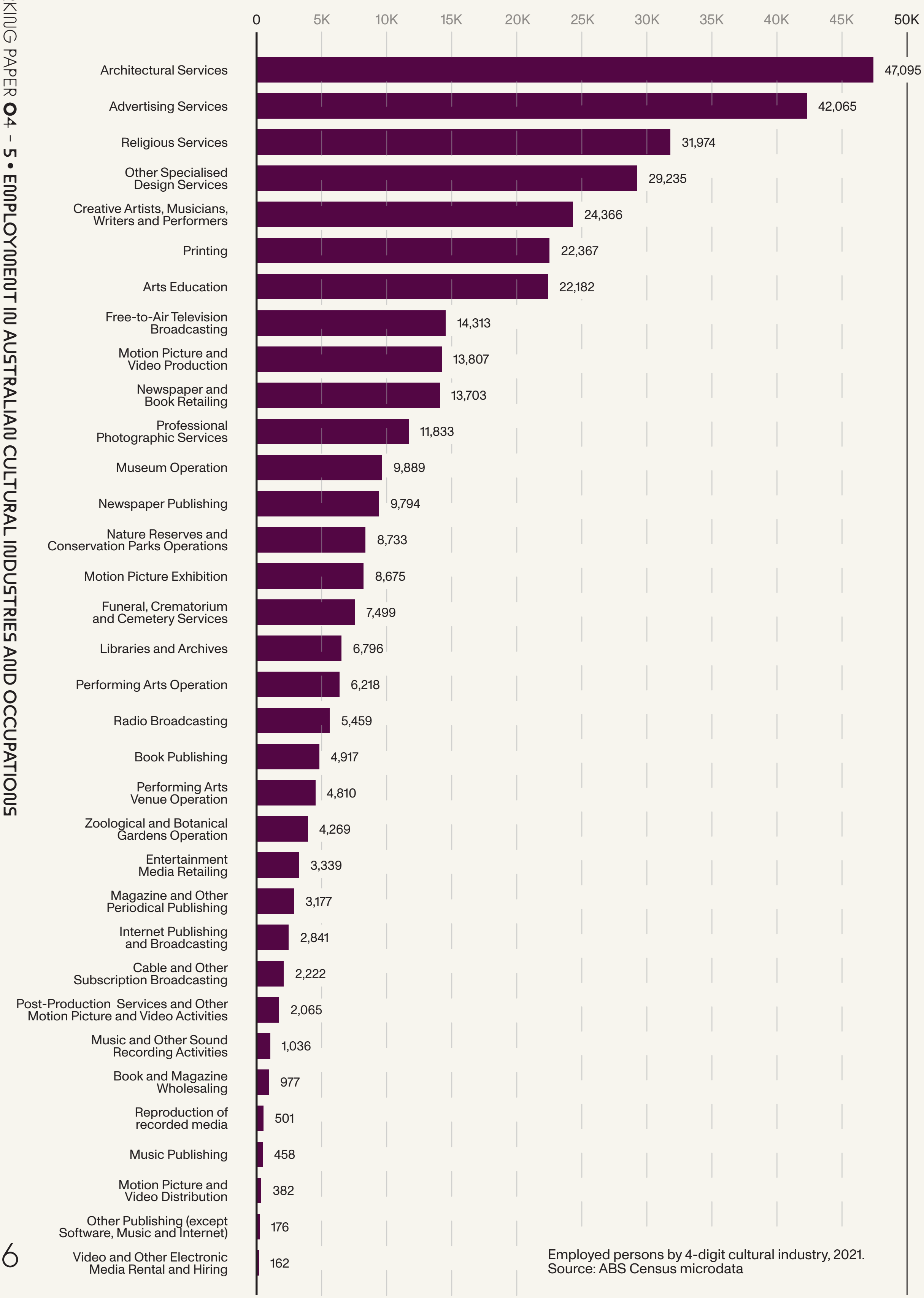
As discussed above, the ABS categorises data on “industry of employment” down to exclusive sets of industries at its lowest level of description, the list of which is given above. Cultural employment by 4-digit industry is presented in the following table.

There were 367,335 Australian working in one of the 4-digit cultural industries in August 2021, or 2.82% of the 13.004 million Australians employed in that month.

ABS 4-digit Industry 2021	Male	Female	Persons
Heritage industries			
Libraries and Archives	1,855	4,945	6,796
Museum Operation	3,641	6,252	9,889
Zoological and Botanical Gardens Operation	1,619	2,652	4,269
Nature Reserves and Conservation Parks Operation	5,485	3,252	8,733
Total Heritage industries	12,600	17,101	29,687
Arts industries			
Printing	14,703	7,665	22,367
Newspaper Publishing	4,812	4,984	9,794
Magazine and Other Periodical Publishing	1,243	1,939	3,177
Internet Publishing and Broadcasting	1,416	1,429	2,841
Book Publishing	1,649	3,268	4,917
Other Publishing (except Software, Music and Internet)	58	113	176
Book and Magazine Wholesaling	427	547	977
Entertainment Media Retailing	1,893	1,445	3,339
Newspaper and Book Retailing	4,683	9,022	13,703
Architectural Services	28,247	18,851	47,095
Advertising Services	19,517	22,542	42,065
Other Specialised Design Services	12,646	16,591	29,235
Motion Picture and Video Distribution	175	210	382
Motion Picture and Video Production	8,567	5,240	13,807
Motion Picture Exhibition	4,124	4,549	8,675
Post-Production Services and Other Motion Picture and Video Activities	1,403	657	2,065
Music Publishing	230	229	458
Music and Other Sound Recording Activities	824	213	1,036
Reproduction of Recorded Media	285	214	501
Radio Broadcasting	2,850	2,610	5,459
Free-to-Air Television Broadcasting	7,447	6,864	14,313
Cable and Other Subscription Broadcasting	1,380	845	2,222
Performing Arts Operation	2,961	3,257	6,218
Creative Artists, Musicians, Writers and Performers	11,033	13,330	24,366
Performing Arts Venue Operation	2,147	2,662	4,810
Video and Other Electronic Media Rental and Hiring	86	77	162
Professional Photographic Services	5,217	6,619	11,833
Arts Education	5,766	16,412	22,182
Total Arts industries	145,789	152,384	298,175
Other culture industries			
Religious Services	15,819	16,157	31,974
Funeral, Crematorium and Cemetery Services	3,658	3,840	7,499
Total Other culture industries	19,477	19,997	39,473
Total cultural industries	**177,866**	**189,482**	**367,335**

As can be seen, the single largest 4-digit cultural industry is architectural services, followed by advertising, religious services and other specialised design services. What has been termed by David Throsby as the "core" of the cultural labour force, corresponding to an ABS definition entitled "creative artists, musicians, writers and performers", is a relatively confined aggregation of workers, with a total of 24,366 employed persons.

Cultural industries, employed persons, 2021



Employed persons by 4-digit cultural industry, 2021.
Source: ABS Census microdata

5c. Cultural Occupations in Detail

ABS Census microdata allows cultural employment to be analysed at the lowest level of occupation, by building a list of 6-digit occupations listed by respondents in the Census. There were just over 347,000 workers employed in 127 6-digit cultural occupations in August 2021.

The following table presents occupation data grouped into larger sets, which aggregate the finer-grained 6-digit cultural occupations in mid-level classifications. By far the largest category of cultural workers is in the design sector, with more than 90,000 jobs in 2021. The second largest category is built environment workers such as architects and urban planners. More traditional cultural sub-sectors such as libraries, visual arts and the performing arts are smaller in comparison. In terms of primary creators such as artists, the largest category was writers and print media workers, with 25,296 people reporting a writing or print job on Census night, followed by visual arts and crafts professionals (18,527).

Cultural Occupations, by category	**2021**
Design Workers	90,069
Architects and Urban Planners	50,853
Other Cultural Occupations	31,838
Other Arts Support Workers	26,529
Writers and Print Media Workers	25,296
Performing Arts Support Workers	23,183
Library and Archive Workers	20,841
Visual Arts and Crafts Professionals	18,527
Performing Artists and Music Composers	15,155
Printing Workers	13,973
Built, Collectable and Environmental Heritage Workers	13,808
Broadcasting, Film and Recorded Media Equipment Operators	9,190
Other Arts Workers	7,612
Other Heritage Workers	133
Total	**347,007**

As noted, the figures above were catch-all categories comprised a sets of individual occupations. When we break the data out to look at these individual occupation roles, we can see that the single largest occupation is graphic design. There were more than 27,500 graphic designers on Census night in 2021, of which more than 16,200 were women. The next largest occupations were architects (19,337), ministers of religion (17,532), architectural draftspersons (13,963) and urban and regional planes (13,691).

The tenth largest occupation was librarians (7,904), however the figure for librarians should also be seen in the context of large numbers of library assistants (5,688) and library technicians (6,247); in total, there were 20,841 library and archive workers in 2021, making them a significant subset of cultural workers.

Top 20 6-digit cultural occupations	Employed persons, Aug 2021
Graphic Designer	27,528
Architect	19,337
Minister of Religion	17,532
Architectural Draftsperson	13,963
Urban and Regional Planner	13,691
Interior Designer	11,932
Music Teacher (Private Tuition)	11,801
Photographer	11,734
Web Developer	8,991
Librarian	7,904
Media Producer (excluding Video)	7,801
Dance Teacher (Private Tuition)	7,195
Advertising Specialist	6,853
Library Technician	6,247
Library Assistant	5,688
Signwriter	5,383
Web Designer	5,331
Industrial Designer	5,009
Musician (Instrumental)	4,882
Visual Merchandiser	4,669

1 It should be noted that the 2021 Census gives a slightly lower figure of 12.696 million people in what the ABS Census descriptors call "labour force status", excluding respondents not in the labour force, and collection artefacts ("not stated" and "not applicable"). For the purposes of understanding cultural employment in terms of its proportion of the broader labour force, it seems methodologically safer to use the Labour Force rather than Census data, while noting that the figures do not agree.

Longitudinal Trends in Cultural Employment

Cultural employment has grown more slowly than overall employment. We have data back to the 2006 Census, enabling trends to be examined over a 15-year time period. If we compare the growth in cultural workers to the broader labour force over the past four censuses, it is clear that cultural employment has lagged broader employment growth quite significantly.

Year	2006	2011	2016	2021
Employed persons in cultural industries	346,200	358,200	354,700	367,300
Employed persons in cultural occupations	284,800	310,700	323,300	347,000
Employed persons in the total labour force	**10,105,800**	**11,127,200**	**11,894,200**	**12,895,200**

In 2006, there were 346,200 workers employed in the cultural industries, compared with 10.1 million employed persons in total. By 2021, there were 367,300 workers in the cultural industries – just 21,100 more workers across fifteen years – while total employment had grown by nearly three million. As a result, the share of cultural industries workers in the broader labour force has fallen, from 3.4% in 2006 to 2.7% in 2021. Growth in cultural occupations has been stronger. In 2006, there were 284,800 employed persons in cultural occupations, which grew to 347,000 at the 2021 Census 2021.

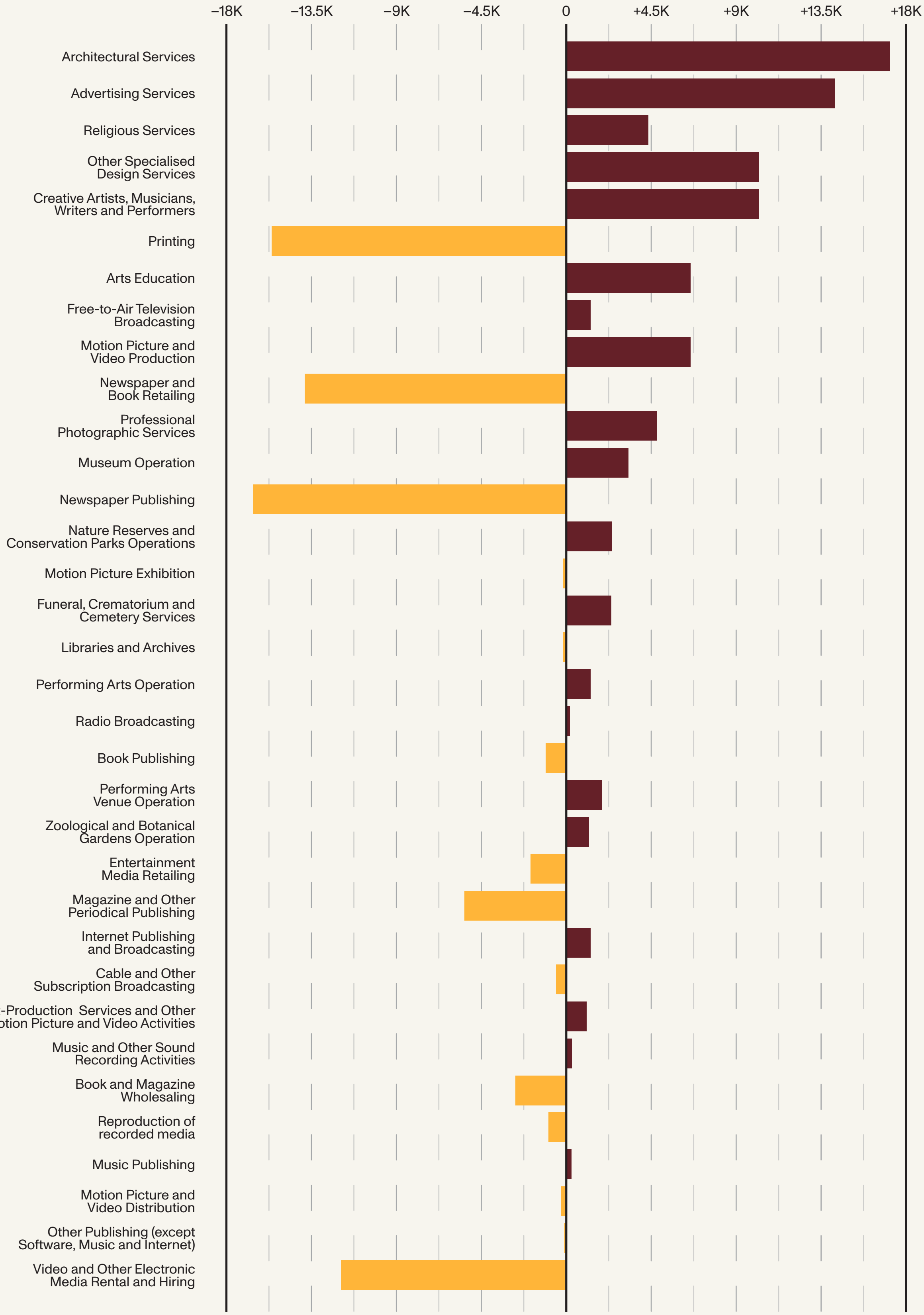
Employment growth across the total labour force was 27.6% over the fifteen years 2006-2021. For cultural occupations, it was 21.8% over this period. For cultural industries, it was just 6.1%.

As we might expect, there were quite distinct differences in the way that certain subsets of the cultural workforce grew or contracted. Employment growth was highly variable, with some industries and occupations growing strongly, while others suffering considerable job losses.

A number of trends emerge. The first is the healthy growth of the architecture, advertising and design industries, with advertising services and other specialised design services both adding more than 10,000 jobs between 2006-2021. Architectural services also grew, reflecting the exposure of this sector to Australia's construction sector. There was a distinct and very clear signal in the sectoral employment data related to digitalisation, with industries affected by digital technologies in both positive and negative directions. This was most obvious in print, with the printing and newspaper publishing industries both losing more than 15,000 jobs in the period 2006-2021. Cultural retail also suffered, with very sharp declines in employment in newspaper and book retailing,

Employment growth in Australian cultural industries 2006-2021

Employed persons by 4-digit cultural industry, 2021. Source: ABS Census microdata



entertainment media retailing, and video and other electronic media rental hiring. This last category was almost completely destroyed in fifteen years to 2021, representing the displacement of the once vibrant Australian video hire sector by online streaming services.

In summary, growth in cultural employment has been anaemic compared the broader job market. Australia has added millions of jobs in recent years, but the majority of these have been created outside cultural industries and occupations.

Mapping cultural employment across Australia

7a. Cultural employment across capital cities and regional Australia

The excellent geospatial data collected by the ABS makes it possible to map cultural employment by location in fine detail. The following analysis looks at some of the key characteristics of the geographical distribution of cultural employment.

Cultural employment is highly localised to the capital cities of Australia. The big cities, especially Sydney, Melbourne and Brisbane, house the majority of cultural employment. The greater capital city areas of Sydney, Melbourne and Brisbane had 204,967 jobs in the cultural industries in 2021, representing 55.8% of total cultural industries employment. In contrast, cultural employment in regional Australia is small and sparse. There were 88,914 jobs in the cultural industries outside the capital cities at the 2021 Census, making up less than a quarter of total employment (24.2%). Only Queensland, with its large population centres outside Brisbane, reported more cultural industries employment outside its capital city.

However, cultural industries employment has been growing strongly in the regions over the past 15 years, albeit off a low base. When comparing jobs growth for the capital cities with their regions since 2006, the highest growth in jobs in the cultural industries was in regional Queensland, with the Sunshine Coast and Gold Coast both showing strong increases. Regional New South Wales, the regional Northern Territory, and regional Victoria also grew by more than 10% across the 2006-21 period. Greater Melbourne, greater Hobart and greater Perth also showed jobs growth in this timeframe, while Canberra and greater Sydney flatlined. In contrast, Adelaide, Brisbane and Darwin reported cultural employment contraction, with regional South Australia the worst performer.

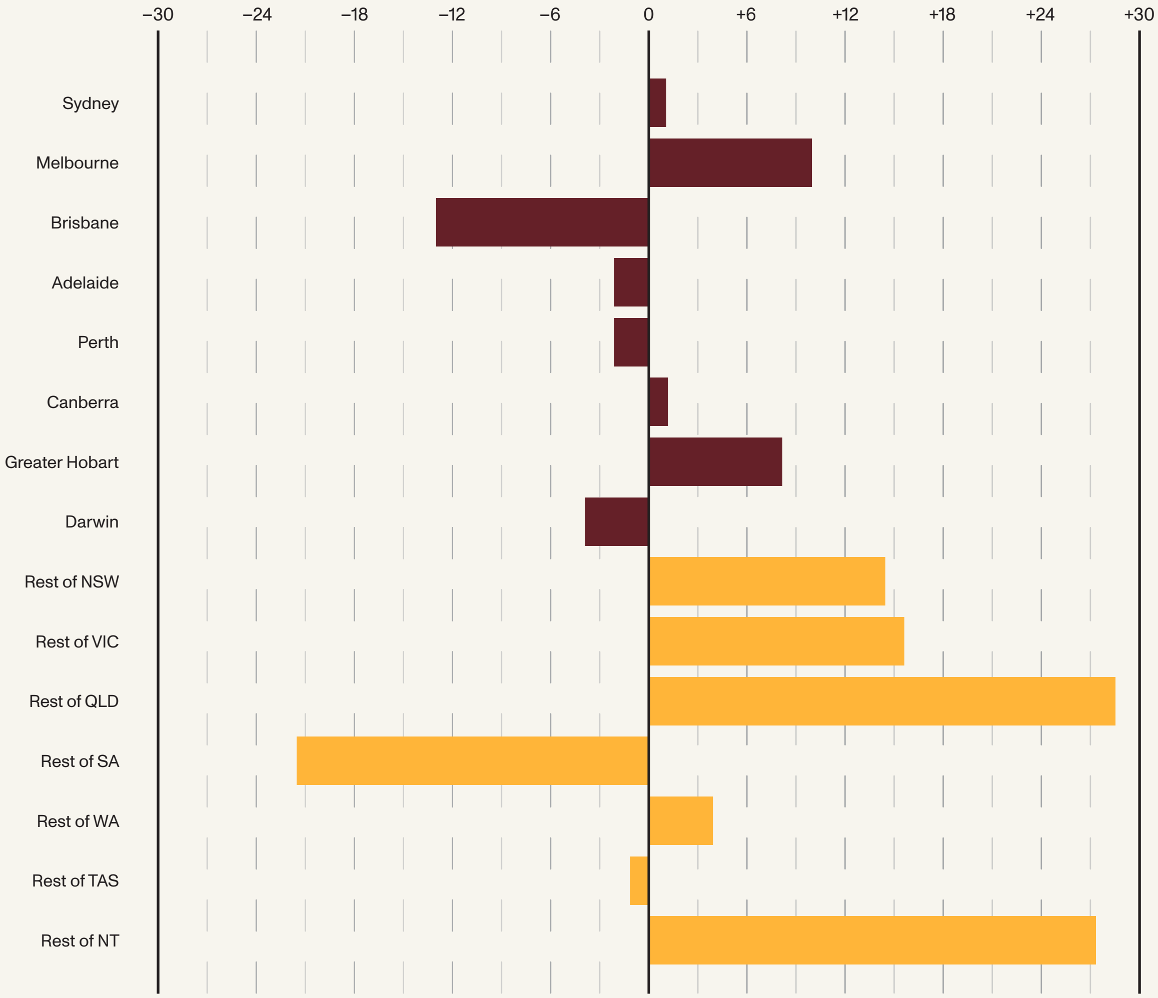
Cultural industries employment, by capital city and region	2006	2021
Sydney	96,633	97,444
Melbourne	73,796	81,650
Brisbane	29,872	25,873
Adelaide	17,534	17,130
Perth	22,295	23,700
Canberra	7,494	7,614
Greater Hobart	3,585	3,887
Darwin	1,547	1,479
Rest of NSW	24,935	28,556
Rest of VIC	14,784	17,036
Rest of QLD	25,135	32,332
Rest of SA	3,156	2,490
Rest of WA	4,310	4,485
Rest of TAS	3,009	2,951
Rest of NT	836	1,064

Employment in 4-digit cultural industries, by capital city and region 2021.

Source: ABS Census microdata

Capital cities are the total of all capital cities SA4 statistical regions. 'Rest of' totals are the balance for each state and territory. 'No fixed address' responses excluded.

Cultural industries employment, capital cities vs regions, 2006-2021



Percentage of employment growth, 4 digit cultural industries employment, greater capital city regions vs regions, 2006-2021. Source: ABS Census microdata

Greater capital city regions defined by ABS SA4 greater capital city statistical areas.

7b. Cultural industries employment by population region

If we drill down to smaller geographies, finer-grained employment trends become visible. For instance, using the so-called "Statistical Area 4" classification of larger population centres, we can see how cultural employment is distributed across key Australian regional labour markets.[1]

As might be expected in a highly urbanised economy, the largest labour markets when measured by total employment are the inner cities of Melbourne, Sydney and Brisbane, followed by Melbourne's south-east, the Gold Coast, Melbourne's west, and the Australian Capital Territory.

The largest SA4 regions for cultural employment roughly follow these urbanised employment clusters. Inner Melbourne is the largest region in Australia for cultural employment, followed by Sydney – City and Inner South, Sydney - North Sydney and Hornsby, Brisbane Inner City, Adelaide -- Central and Hills, the Gold Coast, and Perth – Inner. In contrast, the lowest levels of cultural employment are in regional and remote labour markets such as Outback Queensland, Outback South Australia, Mandurah in Western Australia, and regional south-east Tasmania.

Cultural employment at SA4 level is highly concentrated. Of 89 SA4 regions in mainland Australia, the top nine (or top 10% of SA4 regions) contain 44.9% of all cultural employment, while just five regions in inner Sydney, inner Melbourne, inner Brisbane and central Adelaide contain more than one-third of cultural jobs (35.5%). When cultural employment is expressed as a percentage of the labour force, clear regional patterns emerge. While cultural employment patterns remain highly concentrated and urbanised, central Sydney and Melbourne emerge with the highest percentages of cultural jobs. The top five regions by proportion of cultural industries employment are North Sydney and Hornsby (7.2%), Sydney – City and Inner South (6.7%), Sydney Eastern Suburbs (6.4%), Sydney – Northern Beaches (5.5%), and Melbourne – Inner (5.5%). Inner Brisbane, central Adelaide, Inner Perth, Hobart, the Gold Coast and Sunshine Coast are all between 4% and 3%. The ACT is 2.9%, Darwin is 2%, with most SA4 regions encompassing regional cities below 2.5%. At the bottom of the table, regional Queensland cities have some of the lowest levels of cultural industries employment, such as Townsville (1.7%), Ipswich (1.5%), Wide Bay (1.6%), Darling Downs (1.1%) and Mackay (1.1%).

7c. Cultural industries employment at the suburban level

At the so-called "Statistic Area 2" level, a much smaller population size, we can see very particular concentrations of cultural employment within and inside the capital cities, especially in the central districts of Australia's capital cities. Not only are most of the jobs in capital cities, they are in the inner core of these capitals.

Large and job-rich statistical areas such as the inner cities of Brisbane, Sydney and Melbourne are marked by quite significant levels of cultural employment. For instance, cultural industries employment reaches 26% of all employment in the SA2 region of Pyrmont in inner Sydney, 25% in Surry Hills, 23% in Paddington, 22% in Ultimo and 9% in North Sydney. Densities are lower in Melbourne, but still noteworthy, reaching 22% in Southbank, 15% in South Yarra, 14% in Richmond, and 13% in Collingwood and Brunswick East. In Brisbane, the highest densities of cultural industries jobs are West End at 10%, New Farm, Bardon, Grange and Red Hill, all at 8%, and Fortitude Valley and South Brisbane at 7%.

There are some very significant small clusters in Canberra, including a hot spot for the SA2 area encompassing the National Arboretum (48%), Tuggeranong at 27% and Campbell at 26%, and overall densities are high in key job-rich SA2s such as Watson (16%) and Parkes -- ACT (17%), reflecting the location of key national institutions such as the National Library of Australia and National Gallery of Australia.

Tasmania shows interesting regional patterns of cultural employment. There are measurable cultural hotspots in Hobart associated with the MONA gallery (Berriedale – Chigwell, 27%) and the cultural tourism of Tasman peninsula (Forestier – Tasman, 15%). Noteworthy cultural employment percentages can be found in "lifestyle" areas of Hobart and its surrounds such as West Hobart (9%), South Arm, (7%), Taroona – Bonnet Hill (6%) and Cygnet (5%). Cultural employment densities are much lower in Adelaide and Perth, reflecting both the relatively smaller number of cultural jobs in these capitals, and also the comparatively lower levels of concentration in those metropolitan areas.

Looking nationally at cultural employment at SA2 level, some outliers are also of interest, such as the dense cultural workforce working in the funeral industry in the area of Rokewood Cemetery in Sydney, the large proprtion of park rangers in SA2 areas covering certain national parks (Royal National Park, Wilsons Promontory) and the roughly three-quarters of the relatively small labour force that works in the broadcasting industry in the SA2 area of Mount Coo-tha (72%), where Brisbane's major television studios are located. Cultural employment is also of clear significance in important First Nations regions of remote Australia, such as APY Lands (12%), Yuendumu – Anmatjere (8%), and West Arnhem (7%).

Zooming up, mapping cultural employment at the SA2 statistical areas again shows the concentration of jobs in relatively few locations. For instance, the OECD uses a measure of "geographic concentration" of population, in which concentration is expressed as a measure of the percentage of a given population that lives in the top tenth or 10% of regions with the highest populations. On this measure, cultural industries employment is highly concentrated, with the top 10% of SA2 areas containing a majority (56.0%) of cultural employment. The top 25 SA2 areas – the top 1% of these areas -- contain nearly a quarter (24.5%) of total cultural employment (24.5%). The top 20% of SA2 areas contains more than three-quarters (77.7%) of cultural employment.

1 The ABS uses a statistical measure called the Main Statistical Areas as a standardised geographical map for statistically comparable geographies at a range of progressively smaller areas in Australia. The largest categories are the nation of Australia, and the eight states and territories. Below the state and territories is the so-called "Statistical Area 4" level, which is a list of roughly 100 large statistical areas of regional significance, with populations ranging from around 100,000 to around 500,000 for parts of larger capital cities. The SA4 level has been specifically designed by the ABS to compare labour markets. The Statistical Area 2 level is described by the ABS as "medium-sized general purpose areas", with populations of between 3,000 and 25,000. There are 2,437 SA2 areas in the level 2 classification.

Characteristics of Cultural Industries Employment

8a. Gender composition

In 2021, the cultural labour force was majority female, for the first time in available Census data.[1] Cultural jobs have been feminising in recent Census periods. In 2006, there were 155,785 men working in cultural occupations compared to 129,008 women. By 2021, the gender disparity had flipped, with 170,385 men and 176,656 women.

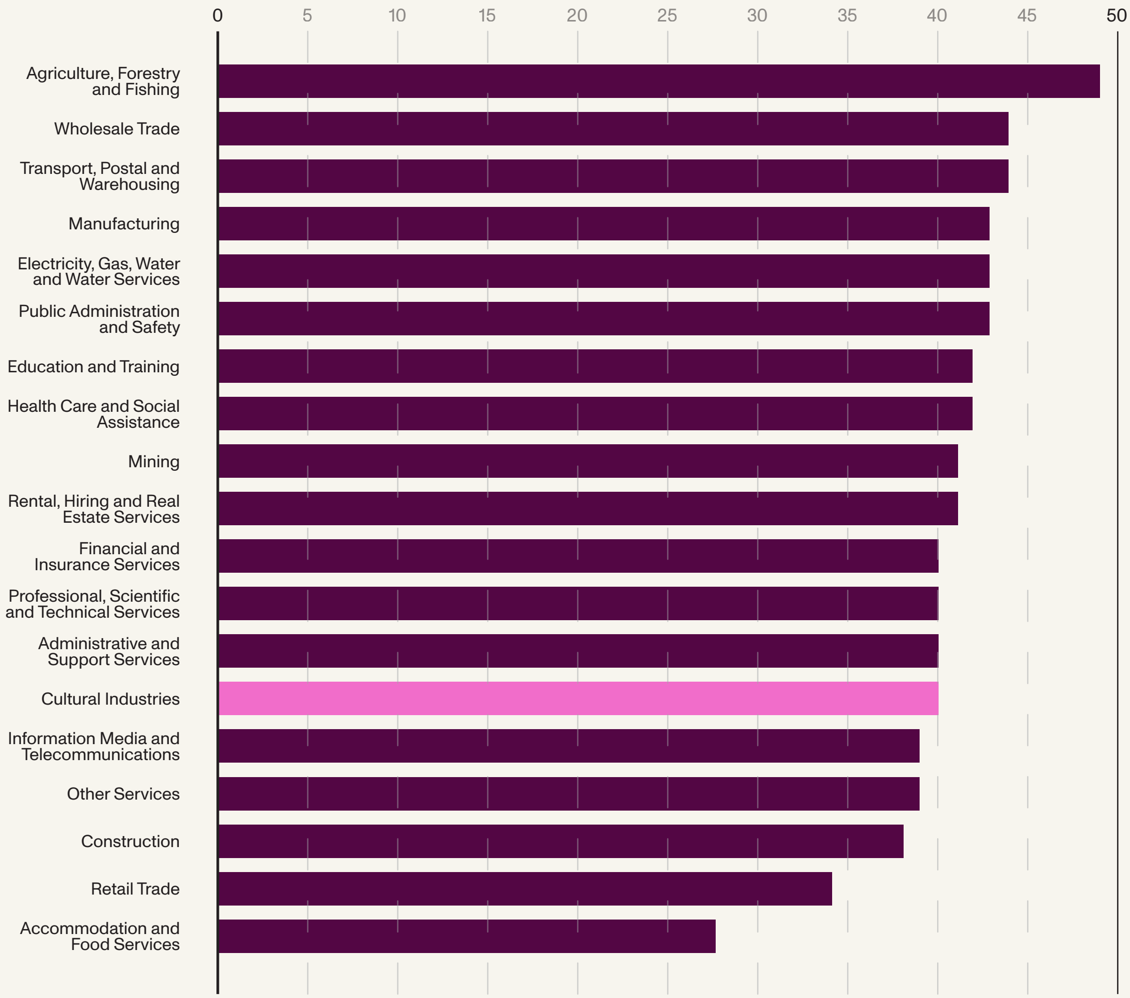
In the 2016-2021 Census period, growth in female cultural employment has added 16,981 jobs for women at a rate of 2.13% per annum. In terms of occupations, female employment growth has been strongest in numerical terms in occupations such as architecture (1,295 jobs added), graphic design (1,786 jobs) and interior design (2,691 jobs), while in percentage terms the most striking increases in female cultural employment have been amongst make up artists (160%), composers (130.4% growth), potters and ceramicists (92.3% growth), and technicians and crew members, such as camera operators (106.4%).

Of particular note is the gradual feminisation of occupations that had previously been very strongly male, such as camera operators, architects and ministers of religion. While these occupations have not reached parity, there are far more women working in them than in 2006.

8b. Age of Cultural Workers

Cultural industries workers are slightly younger than of median age, with a similar median as the broader the Australian labour force, which had a median age of 41 in 2021. Cultural industries workers had a median age of 40 in 2021, younger than the overall labour force and also younger than the median ages of the majority of the 1-digit industry division codes in the Census year. None-the-less, culture was not an outlier, with agriculture by far the sector with the oldest median age of workers, at 49, compared with accommodation and food services, which had a median age of 27.

Median age of employed workers, by sector, 2021



Median age of employed workers, by 1-digit industry division, 2021. Source: ABS microdata.

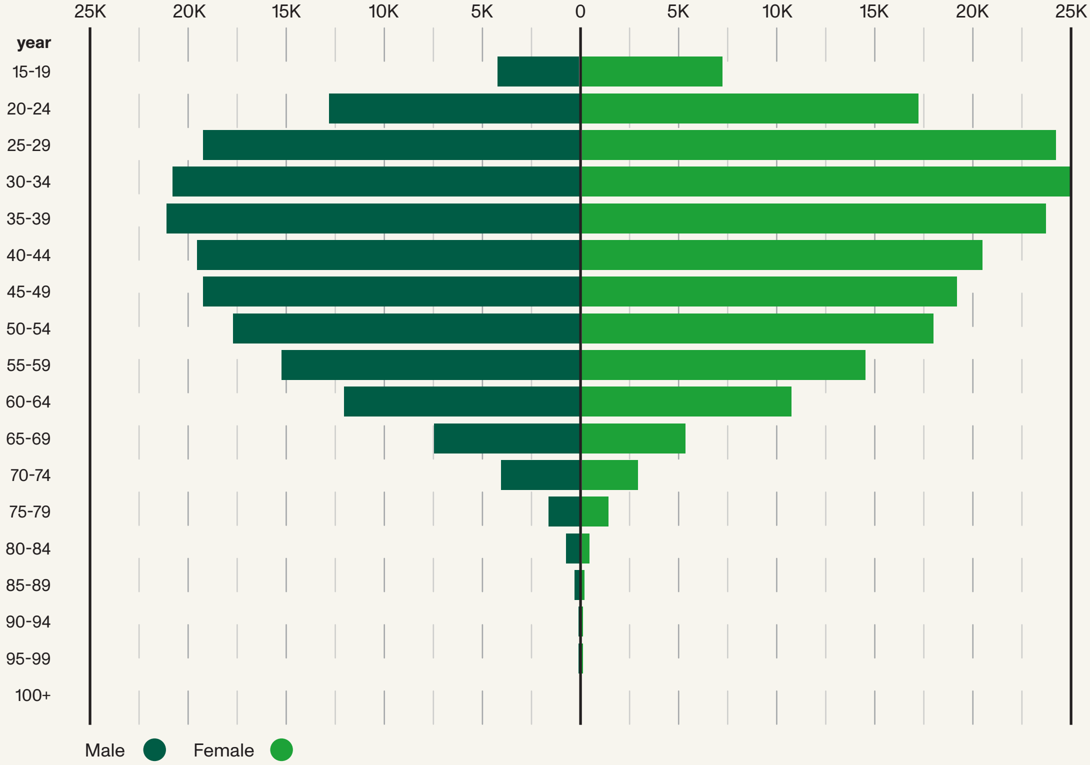
8c. Age and Sex Pyramids

Age-sex comparisons show that the cultural industries and occupations are both significantly more female than the broader labour force. These distributions are commonly visualised with the aid of the famous age-sex pyramid, well known in demographic studies. A number of such pyramids are presented below. Breaking down the cultural industries workforce by 5-year age and sex intervals, the median worker is a female 30-34 year old. The age and sex distribution of the broader labour force skews older and more male than this.

Another way to visualise the cultural workforce is to compare its age-sex pyramid to other industries. The construction sector, for instance, is heavily masculine and also has a relatively young working cohort compared to the general labour force. In contrast,

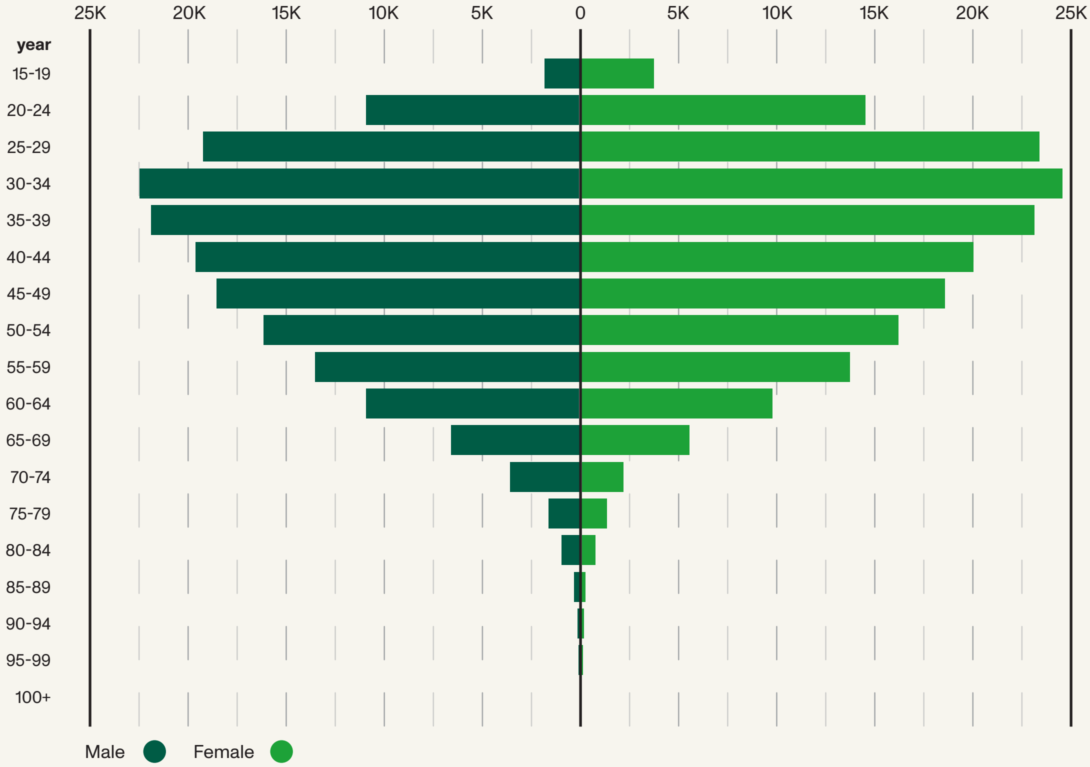
Cultural industries, age-sex, 2021

Employment in cultural industries, 5 year age bands by sex, 2021. Source: ABS microdata.



Cultural occupations, age-sex, 2021

Australians employed in cultural occupations, 5 year age bands by sex, 2021. Source: ABS microdata.



health care and social assistance is a highly feminine sector, with a relatively greater proportion of workers in older age groups. Sitting between these two case studies, culture is younger than both construction and health care, and majority female (though not as feminised as health care).

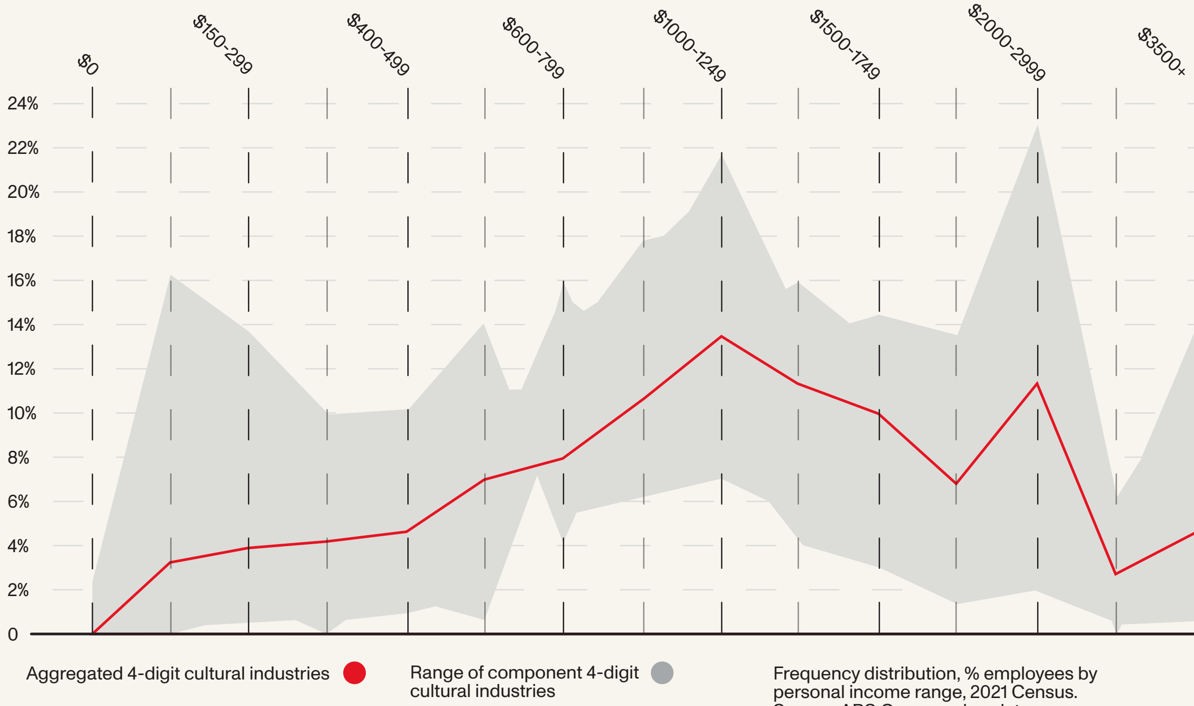
8d. Income

According to the ABS, the median income for the entire working-age Census population (including retirees) was $805 in 2021.[2] A more useful median income comparator would exclude retirees and those not in the workforce, to measure incomes for the participating labour force. To do this, we have built a measure of workers in all top-level (1-digit) industry classifications, excluding the “not applicable” data the ABS has reported for these respondents, for a total labour force by this measure of 11.8 million.

However, ABS Census data is unfortunately aggregated into fairly wide income bands, such that middle incomes are relatively vaguely described – there is a relatively large band in the range $2,000-2,999 a week, which covers a large number of upper-middle income earners.

Taking this measure, the median income band of workers in all industries is the range $1,250-$1,499 a week, or $65,000-$77,999 a year. The income distribution for cultural industries generally tracks that of the workforce at large. For cultural industries, the

Cultural industries % of jobs by income range, 2021

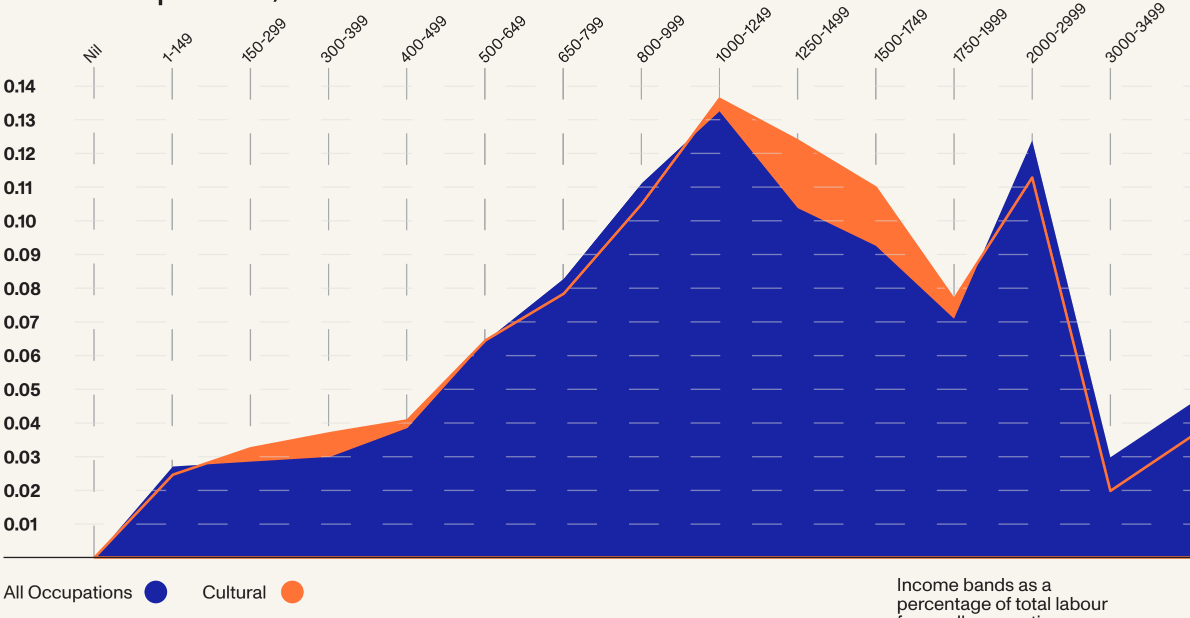


Frequency distribution, % employees by personal income range, 2021 Census. Source: ABS Census microdata median income band is also within the range $1,250-$1,499 a week ($65,000-$77,999 a year). Looking within the cultural industries, there is quite substantial variation in the earnings profiles of the different cultural industries. The highest income profile for workers across earnings bands in the cultural industries is cable and subscription broadcasting, while the lowest income profile is cinema exhibition.

The chart on page 53 shows a histogram for the 4-digit cultural industries expressed as percentages of the total labour force for each industry. The red line represents the aggregate figure, that is the frequency distribution by income range for all cultural industries. ABS data does not allow a true histogram to be constructed, as income ranges are idiosyncratic: as mentioned, there is a large income band at $2000-2999 a week, for instance, that distorts the upper middle of the frequency curve.

Decomposing the income data across the various individual industries shows a large heterogeneity between income distributions amongst the cultural industries. At the bottom of the income rankings, many employees in cinema exhibition had very low weekly earnings, with one-sixth (16.3%) of employees in cinema exhibition earning less than $149 in the week of the 2021 Census (almost certainly pandemic related). At the top end of the scale, 13.2% of cable and subscription broadcasting employees earned more than $3,500 in the 2021 Census week. This demonstrates the considerable inequality range between different types of jobs in the cultural sector.

Income distribution, cultural occupations vs all occupations, 2021

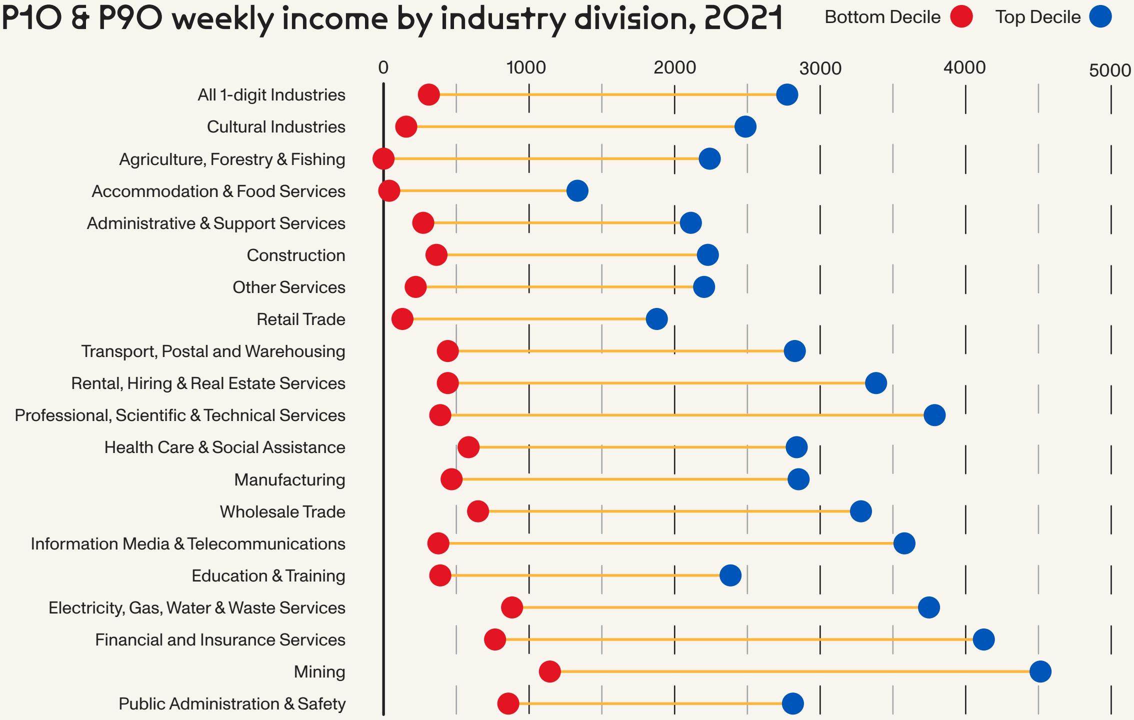


Income bands as a percentage of total labour force, all occupations vs cultural occupations, 2021, Australia. Source: ABS Census microdata

There are also significant divergences in median incomes when we differentiate cultural industries by employment size. Comparing 4-digit cultural industries by median income band and their employment size shows a number of distinct industry groupings. The job-rich industries of advertising and architecture both have above-median incomes. The free-to-air and cable television industries also have above-median incomes. A swathe of important cultural industries lie in the middling $1000-1249 a week income band, which roughly equates to median incomes in Australian industries overall. These include performing arts and museum operations, libraries and archives, printing, and other specialised design services. At the bottom of the income scale are a number of low-income industries in cultural retail, such as cinema exhibition and book and electronic media retailing. Creative artists, writers, musicians and performers also have below-median incomes, as do arts educators.

The chart above compares income distributions for cultural occupations, with income distributions across all occupations in the Australian labour force in 2021. The vertical axis measures the proportion of the labour force in each income band, while the horizontal access traverses ascending incomes. The peak of both curves occurs in the $1000-1249 income bands. As can be seen, cultural occupations map relatively closely to the distribution for the entire labour force, with three notable divergences. There is a higher proportion of cultural workers in low-income bands than in the broader labour force. There is also a higher proportion of cultural workers in middle-to-upper-middle income bands compared to the overall labour force, between $1,000 and $1,999 a week. Finally, there are fewer cultural workers in high income bands, above $2,000 a week.

P10 & P90 weekly income by industry division, 2021



Total personal weekly income of employees (ABS INCAP administrative income series), bottom and top deciles, by 1-digit industry division, 2021. Source: ABS Census microdata

8e. Income inequality

ABS income data allows us to build some measures of income inequality. Using the available data, we have constructed a comparison of income across deciles for cultural industries workers compared to other Australian employment sectors. Culture is one of the more unequal industries when measured by comparing top and bottom income deciles (a so-called P90 and P10 inter-decile analysis).[3] The range chart above compares the income distributions of workers in cultural industries to workers in other 1-digit industry divisions on Census night in 2021, by comparing the weekly incomes of workers in the top decile versus the bottom decile in these industry categories. Cultural industries have a ratio of top to bottom deciles of around 11, making them highly unequal. Only agriculture, accommodation and food services, and retail trade, are more unequal (and agriculture figures are likely distorted by the high proportion of farmers with zero income).

8f. Precarious employment in the cultural industries

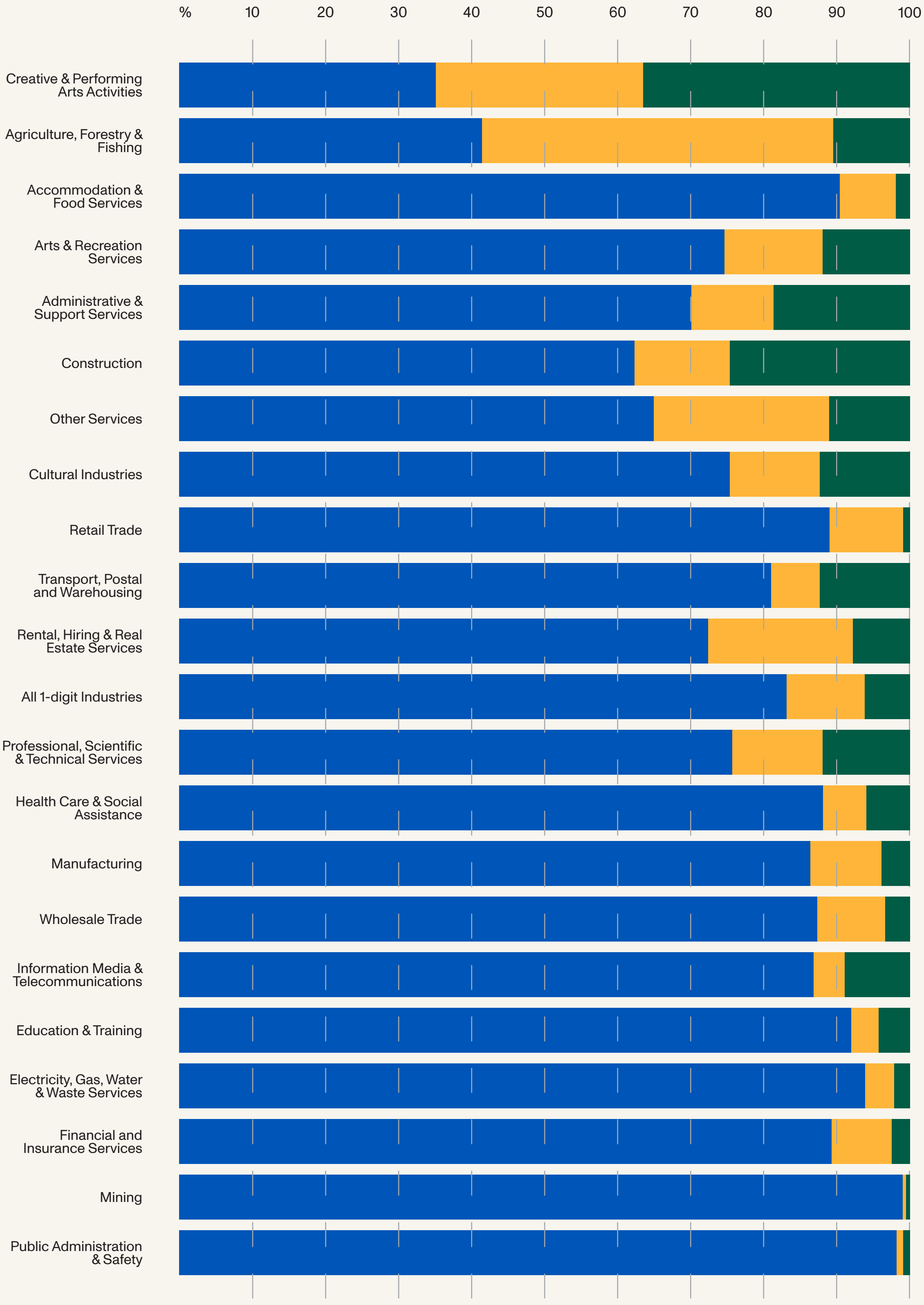
Using the ABS Characteristics of Employment microdata, it is possible to explore some proxies for what has been termed "precarious employment" in the scholarly literature.[4] Since first being popularised by Guy Standing, the definition of precarity in employment has coalesced into a threefold understanding related to a combination of employment insecurity, income inadequacy, and a lack of social rights and protections. Accepting that precarity is first-and-foremost a qualitative phenomenon, there are none-the-less quantitative proxies that might be probed to build a snapshot of precarious labour conditions across industries. The following analysis presents some metrics.

The following analysis examines employment across a number of dimensions, while not pretending to construct a multi-dimensional quantitative model of precarious employment.

For employment insecurity, contractual relation insecurity is measured using the ABS definition of access to paid leave, which the ABS uses to define as the boundary between formal and secure work, and casual and informal work.[5] Another salient measure is that of mode of employment. The ABS Labor Force data tracks workers who identify as "independent contractors", which in the Australian context represents workers who are not legally employees, but who instead engage in self-employed work by contracting to customers for the delivery of services.[6] In Australia this category encompasses contractors such as professional services consultants, many types of tradespeople such as plumbers or electricians, and platform workers such as Uber drivers. Many workers in the cultural and creative industries are also independent contractors, such as jobbing musicians, freelance writers and graphic designers, and many types of visual artists. Independent contractors, by definition, lack nearly all the legal protections of employees under Australian workplace law; they are not entitled to a minimum wage, protection against unfair dismissal, the right to collectively bargain, or workers compensation insurance. Some do receive superannuation, however.

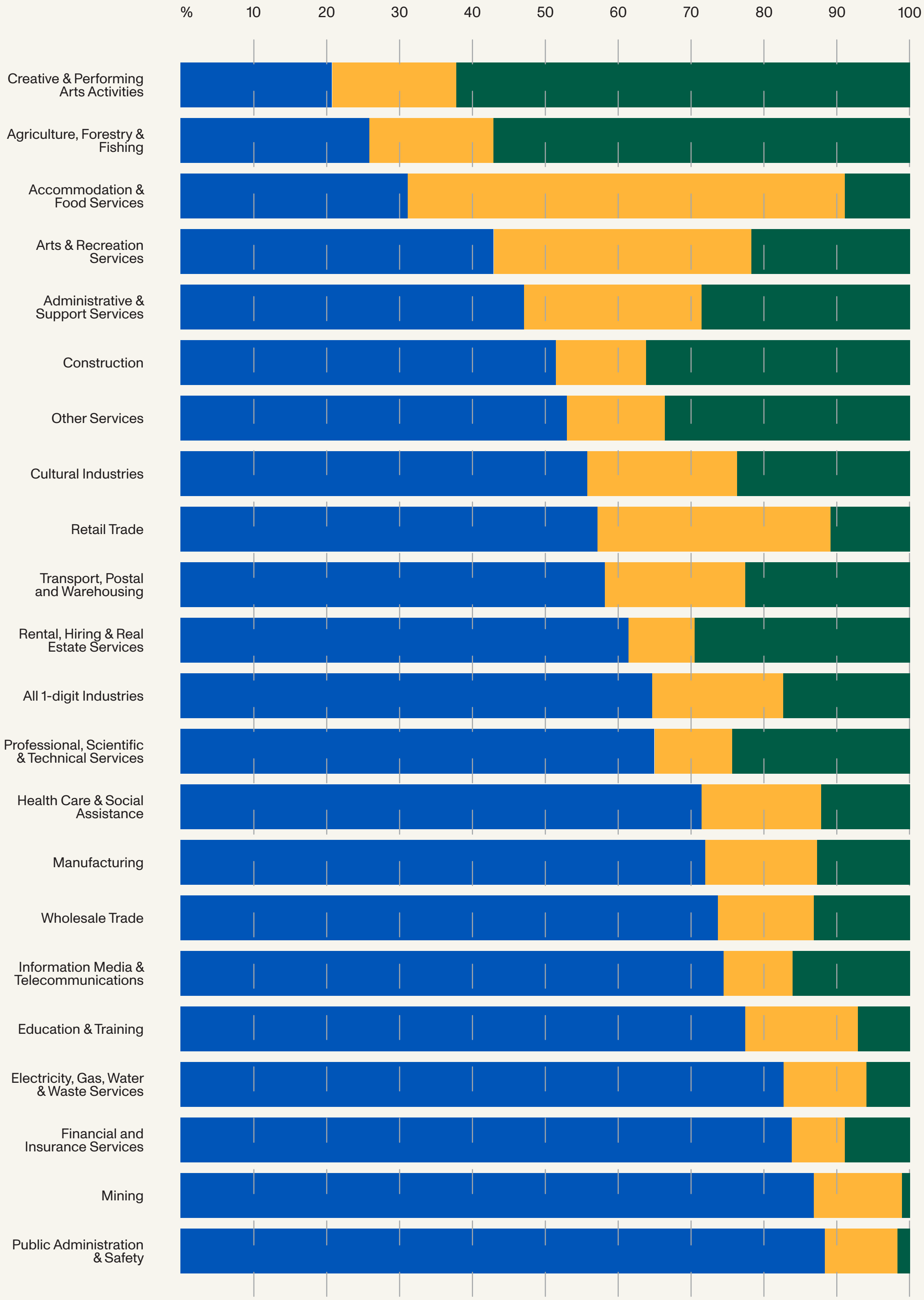
The figure below compares the percentage of independent contractors in a number of comparable industry categories. Cultural industries have a higher rate of independent contracting than the border labour force: 12.1% of workers are independent contractors, with 12.3% classed as "other business operators", compared with just 7.7% independent contractors for the labour force across all industries. In specific sub-categories of cultural work, this figure is very much higher. The creative and performing arts activities employment category has a plurality of workers who are independent contractors, at 37.1%, with another 27.1% classed as other business operators. This is higher than industry categories such as construction (with a high percentage of tradespeople operating as small businesses) and administrative and support services (with high number of consultants). This data shows the widespread prevalence of freelancing and "sole trading" as a mode of employment in cultural industries such as the performing and visual arts.

Independent contractors in the labour force, 2021



Mode of employment for selected 1- and 3-digit industry groups, August 2021. Source: ABS Census microdata

Workers with paid leave entitlements, 2021



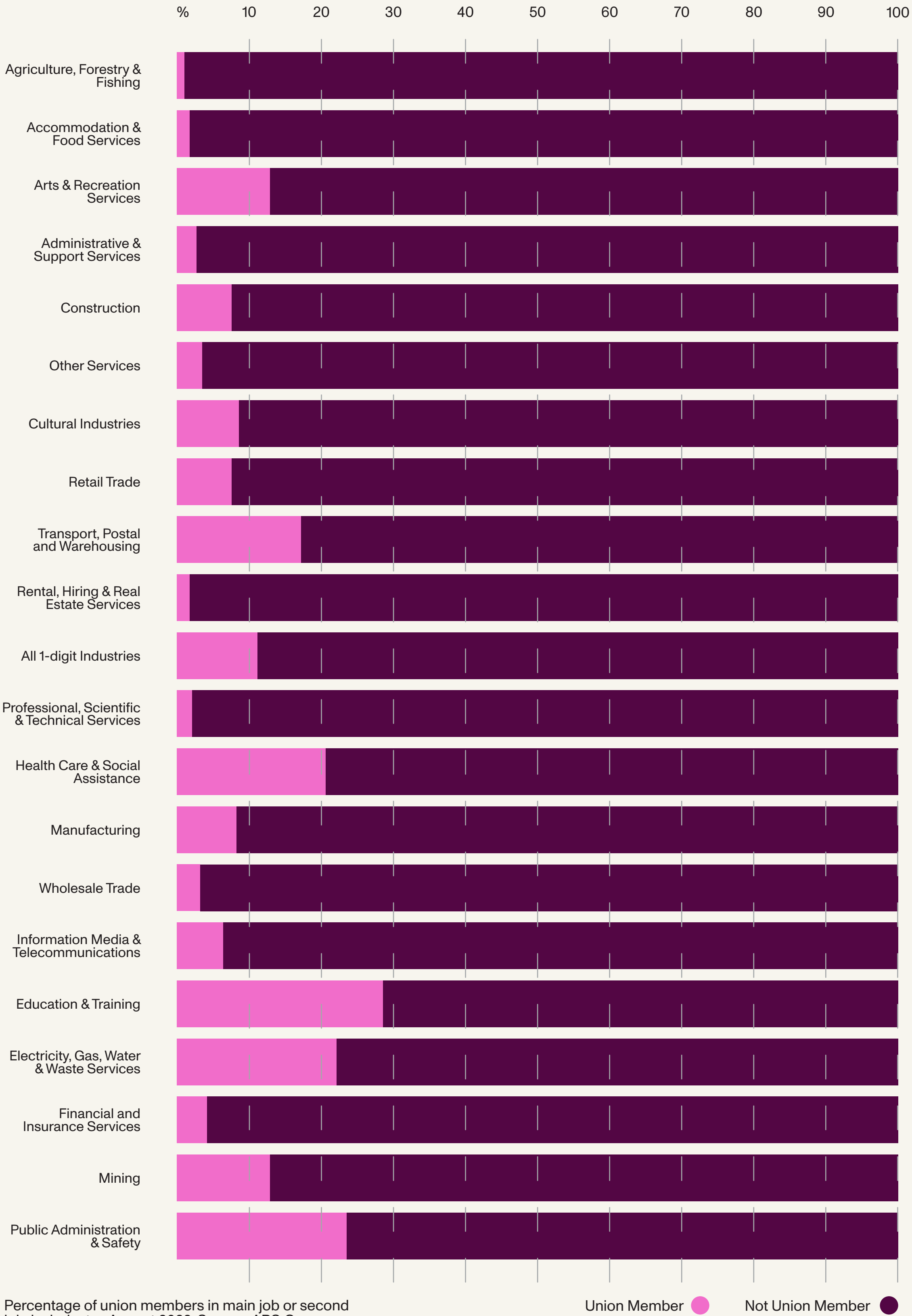
Percentage of workers with paid leave entitlements in main job (ABS definition of casual employment), by slected industry divisions and groups, August 2021. Source: ABS Census microdata

The chart on page 58 compares the percentage of workers receiving paid leave within a series of industry of employment categories. On average, fewer cultural workers receive paid leave than the average for the labour force as a whole. The average for workers across all Australian industries is 64.4% entitled to paid leave, with 18.7% not entitled to paid leave and 17.0% classed as "not employees" (in other words, contractors and gig workers). In contrast, entitlement levels for workers in cultural industries were lower, at 56.9% entitled to paid leave, with 19.3% not entitled to paid leave and 23.8% not employees. If we drill down to specific sub-sectors of the cultural industries, these figures skew more negative for paid leave entitlements. In the 1-digit arts and recreation services industry category, paid leave entitlements are in the minority at 45.2%, with 32.0% not entitled to paid leave and 22.7% not employees. In the narrower "Creative arts and performing arts activities" industry category, just 20.5% of workers are entitled to paid leave, with 16.9% not entitled, and 62.26% non-employees. In other words, the majority of workers in the creative and performing arts are likely freelancers or gig workers. Using this measure, cultural industries workers are more insecure than workers in most (but not all) Australian industries, and more insecure than the average across the labour force.

Union membership is relevant to job insecurity because it can be seen as a possible proxy for the labour power of workers. Of course, not all workers who are union members will enjoy collective bargaining rights (many freelance workers, for instance, are union members), but there is a substantial international scholarly literature that attests to the correlation between union density and labour power in a particular industrial labour force. Union membership has been declining steadily for a generation in Australia. According to top-level ABS measures, union density across the entire Australian labour force has declined to just 12.5% of employees in 2022, down from approximately 41% in 1992. The reasons for this decline are outside the scope of this paper,[7] but what is clear is that union membership is low and continuing to fall across many industries.

In the following data, we have calculated union membership slightly differently to the top-level ABS figures, by combining figures for union membership in both an employee's main job and second job, and expressing that as a percentage of the total survey response. On this measure, the cultural industries had a union density of 9.5% in 2022. Few would describe a union density below one in ten as likely to be able to exert significant power in collective organisation or bargaining negotiations.

Union Density, Australian Labour force, 2022



Percentage of union members in main job or second job, by industry, August 2022. Source: ABS Census microdata

1 ABS definitions do encompass non-binary and trans identities, however this data is quite limited in scope. The ABS microdata available for employment specifies only "male" and "female" categories, and do not allow respondents to respond with transgender or non-binary identifications

2 ABS (2022). Income and work: Census. Australian Bureau of Statistics. https://www.abs.gov.au/statistics/labour/earnings-and-working-conditions/income-and-work-census/latest-release Given it does include retirees, this figure obviously therefore includes a significant number of people who are no longer actively in the labour force, and media incomes for workers are correspondingly higher.

3 The OECD provides a useful guide to income inequality methodologies, including P90/P10 inter-decile analysis, at the OECD Income (IDD) and Wealth (WDD) Distribution Database site, https://www.oecd.org/social/income-distribution-database.html

4 Guy Standing (2011). *The precariat: The new dangerous class.* Bloomsbury Academic.

5 Australian Council of Trade Unions (2021). Insecure work in Australia: ACTU submission to the Senate Select Committee on Job Security: Inquiry into the impact of insecure or precarious employment, 30 April 2021.

6 Tui McKeown (2016). A consilience framework: Revealing hidden features of the independent contractor. *Journal of Management & Organization*, 22(6), 779-796.

7 For an overview of a global trend, see: Alex Bryson, Bernhard Ebbinghaus and Jelle Visser (2011) 'Introduction: Causes, consequences and cures of union decline', *European Journal of Industrial Relations*, 17 (2): 97–105. For an Australian analysis, see: David Peetz, Robin Price and Janis Bailey (2015). Ageing Australian unions and the 'youth problem'. In: *Young workers and trade unions: A global view* (pp. 54-70). London: Palgrave Macmillan UK.

Conclusion

Characteristics and Geography

The data we have presented suggest that workers in Australian culture show quite distinct socio-economic characteristics. Cultural work in Australia is insecure, fragmented and poor. Cultural workers in Australia are on average younger, more female and more insecure than the broader Australian labour force. Their wages are lower, while their income inequality is higher. They have higher proportions of independent contractors and lower proportions of workers with employment entitlements, such as paid leave, than the labour force as a whole. They have low union density, which suggests they have little labour power (consistent with their lower-than-average wages). Employment growth for culture has been much slower than in the broader Australian labour force, across a span of fifteen years.

The cultural labour force is majority female, and feminising rapidly. This trend is not just evident when looking at majority-female occupations such as interior design, but also in the notable entry of women into previously masculine occupations such as “below the line” film crew and backstage performing arts crew. Given the continuing gender pay gaps observable across all Australian wages, including in culture, this feminising trend is not a good sign for the future of cultural workers’ incomes.

Cultural work is highly urbanised, even in Australia, one of the most urbanised nations in the world. Despite some growth in cultural employment in the regions in recent years, the vast majority of cultural jobs are still located within a few kilometres of one another in the inner urban cores of Sydney, Melbourne and Brisbane. While more cultural work is being done outside the inner cities, the densest concentration of cultural work is in a small number of suburbs like Sydney’s Pyrmont and Melbourne’s Southbank. Given the very difficult housing conditions of Australian inner cities, it is therefore likely that many cultural workers suffer considerable housing stress, either paying high rents and mortgages close to their jobs, or commuting long distances from cheaper housing located further away from the inner cities. Such stresses can only add to the insecurity faced by cultural workers we were able to measure in terms of their employment conditions.

Differences within the cultural workforce are perhaps more important than comparing cultural workers to the broader labour force. Cultural work is highly heterogenous, and there are very marked divergences between particular industries and occupations. Cultural industries that are well-placed to sell their wares in the digital economy or that provide services to high-demand sectors of the economy such as housing and construction, are doing better than the so-called "core" cultural industries like the performing arts, publishing or music, much of which suffered very significant damage in the COVID years, and have not fully recovered from the disruptions of the pandemic. While architecture, advertising and design are adding jobs and report above-median incomes, much of the cultural workforce earns below-median incomes and is growing slowly or even shedding jobs.

The healthy growth of advertising, architecture and design therefore conceals a much bleaker picture for much of the rest of the cultural workforce. The job destruction in cultural retail since 2006 is very significant – an entire industry, video hire, has almost completely vanished, while conditions for booksellers and music retailers are deteriorating rapidly. This job destruction is not just a matter of changing patterns of employment: it has cultural significance as well. Record stores and bookshops have long been an important site of street-level culture, as paces of cultural discovery and exchange. Bookshops often host book launches and events for writers; the loss of a bookshop from a particular neighbourhood or town has ripple effects for the literary culture of that place. There are other parts of the cultural workforce doing it tough. If we examine the income and conditions of artists and performers, for instance, we see below-median incomes, high inequality and extremely high employment insecurity. These are not the sorts of metrics that are likely to deliver a dignified or secure creative life.

Policy

The arts and cultural sector is at something of a crossroads. Advocacy around employment figures and economic impact has been "hoist on its own petard". The economic impact of the cultural sector, at least when measured in terms of jobs, is limited and patchy, as this report has outlined. Some sectors have grown; many have shrunk. Some occupations command high wages, others almost subsistence level. Cultural work is concentrated in some areas of the big cities, especially inner Melbourne and Sydney. The most successful sectors are those at the conceptual edge of culture – advertising and marketing, architectural and design services.

The expanded "creative economy" definition includes software and many marketing professions in the non-cultural sectors. If the industrial economic logic is followed, then most arts and cultural funding should be stopped and investment directed to these commercial sectors. Choosing this as a priority would entail the development and implementation of an industry policy dedicated to software, marketing and design, not a catch-all "creative industries" one, which is clearly carrying the weight of an underperforming arts and cultural sector.

In short, this presents a stark choice for cultural policy. Do we value art and culture as a public service – and this includes the commercial and independent sector – or as a growth industry? If we want the former, then there is a lot of thinking ahead, within new paradigms. If we want the latter, then, outside the inner-city cores of the big cities, we may as well call it a day.

Appendix I

The Australian Bureau of Statistics defines industries using the Australian and New Zealand Standard Industry Classification (ANZSIC). The schema is broadly based on international standards that classify industries in a cascade beginning with primary agriculture and ending with personal services. The Australian and New Zealand industry classifications are broadly homologous, though by no means identical, with the United Kingdom, Canadian and European industry classification schemas.

The ABS schema has four levels. The top level classification are known as "divisions", and deal with the broadest sectors of the economy such as agriculture, mining, manufacturing and retail trade. These divisions are given a single-letter character code by the ABS, such as "A" for Agriculture, Forestry and Fishing, or "J" for Information, Media and Telecommunications. Progressively finer distinctions are made at the three lower levels of classification: a two-digit number for what the ABS calls for "subdivisions" ("55" for Motion Picture and Sound Recording); a three-digit number for what the ABS calls "groups" ("552" for Sound Recording and Music Publishing); and finally a four-digit number for the lowest level classification, which the ABS calls a "class" but which could be considered to correspond to a single industry ("5521" for Music Publishing).

The ABS goes on to specifically define the Music Publishing industry in the following way:

5521 Music Publishing

This class consists of units mainly engaged in acquiring and registering copyrights for musical compositions and promoting and authorising the use of these compositions in recordings, radio, television, motion pictures, live performances, print, or other media. Units in this class represent the interest of the composing unit, or other owners of musical compositions, to produce revenues from the use of such works, usually through licensing agreements. These units may own the copyright or act as administrator of the music copyrights on behalf of copyright owners. Also included in this class are units publishing sheet music (including in bound book form).

Primary activities

- Authorising use of copyrighted musical composition
- Music book publishing
- Music book (bound sheet music) publishing
- Music copyright buying and selling
- Music publishing
- Sheet music publishing
- Song publishing

Exclusions/References

Units mainly engaged in

- composing music are included in Class 9002 Creative Artists, Musicians, Writers and Performers; and
- printing sheet music without publishing are included in Class 1611 Printing.

Above: ANZSIC definition of industry class 5521 Music Publishing, explaining what the class includes and excludes.

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