Creative Economy Report Card 2011 (p 1 of 2)

Snapshot of Australian creative economy indicators, March 2011

Creative industries are advertising and marketing; architecture and design; visual arts; film, TV and radio; music and performing arts; publishing; software and digital content[i]

ARC CENTRE OF EXCELLENCE FOR CREATIVE INDUSTRIES AND INNOVATION

CREATIVE INDUSTRIES

Contribution to GDP [ii]	
A$31.1 billion towards GDP (For 2007-08)	• *Exceeds the industries of agriculture, forestry & fishing; administrative & support services; and supply of electricity-water-gas-waste services* [+]
Growth (relative to GDP) [ii]	
3 years growth = 3.4% pa (Up to 2007-08)	• *On par with the broader economy; a sign of a maturing sector*
Long-term growth = 5.8% pa (11 years up to 2007-08)	• *significantly higher growth rate than overall economy (average was 3.4% pa); a sign of rapid acceleration since the mid 1990s*
Trade [iii]	
Creative industries are a **net importer** Ratio of imports to exports of **over 2–to–1** (twice the imports as exports)	• *For 2007-2008, exports were $1.73 billion with imports over $3.8 billion* • *Television royalties accounted for over half of Australia's $163 million in cultural services royalties earned in 2008/2009* • *Architectural services are a* ***net exporter*** *(2009 saw $112 million in exports and $63million in imports)**

CREATIVE EMPLOYMENT [iv]

Employment in the creative industries (creative and support occupations within the creative industries)	
315,200 in employment across the creative industries (2006 Census data) **3.5% share** of Australian workforce (2006 Census data)	• *5-year employment growth for advertising & marketing (3.5% pa), and architecture, design & visual arts (2.8% pa) above overall growth for the creative industries (1.7%)* (2001 & 2006 Census) • *5-year shrinkage for music & performing arts (-1% pa)* (2001 & 2006 Census) • *Occupations with the highest number of jobs: graphic designer, software designer and programmer , marketing specialist, architect, journalist, media producer, photographer, librarian, and musician* (2001 & 2006 Census)
84% to 89% of creative industries workers employed within capital cities^ (2006 Census data)	• *In Queensland, high concentration of employment found across South East Qld (Brisbane employs 62% of the state's creative industries workers)*
Creative occupations across the economy	
141,800 'specialist' occupations (creative occupations in the creative industries) (2006 Census data)	• *The software development and interactive content segment employs almost 40% of 'specialist' creatives*
171,500 'embedded' occupations (creative occupations in other industries) (2006 Census data)	• *Finance, government, education and manufacturing industries predominantly employ 'embedded' creatives*
Support occupations (in the creative industries)	
173,400 'support' occupations (technical and administrative occupations in the creative industries) (2006 Census data)	• *For every creative there is more than one support worker*
Total creative workforce (total creative industries plus creatives working in other industries)	
486,700 people in total (2006 Census data) **5.3% share** of Australian workforce (2006 Census data) **5-year growth = 10% (2% pa)** (2001 & 2006 Census data)	• *Between 2001 and 2006, employment rose by almost 40,000 jobs* • *Employment growth due almost exclusively to 'embedded' creatives rather than 'specialist' creatives*
Earnings = A$27.8 billion pa (2006 Census) **7% share** of all Australian earnings (2006 Census)	• *For workers employed within the creative workforce, average income is 30% higher than the national average of A$43,540, as of 2006 Census*

CREATIVE BUSINESSES [v]

Number of creative businesses	
155,000 registered creative businesses (2006 Aust. Business Register)	• *High proportion of sole traders within some creative industries sectors: arts, music and performance (60% sole traders), photography (37%), jewellery design (26%), and specialist design (25%)*
6.6% of all GST-registered businesses **10.8%** of all non-GST-registered businesses (2006 Aust. Business Register)	• *Creative industries businesses are predominantly micro and small enterprises*

Sources

[i] Creative industries segments as defined by ARC Centre of Excellence for Creative Industries and Innovation (CCI).
[ii] The Centre for International Economics (CIE). *Creative Industries Economic Analysis: final report* (2009). Produced for the Creative Industries Innovation Centre (CIIC).
[iii] Australian Bureau of Statistics. *Arts and Culture in Australia: A Statistical Overview* (2010). Catalogue No. 4172.
[iv] CCI. *Australia's Creative Economy Information Sheets* (2008) including *Overview of Employment in the Creative Segments in 2006* and *The Creative Workforce Grows to 486,715 in 2006.*
[v] CCI. *Australia's Creative Economy: basic evidence on size, growth, income and employment* (2007).
^ Internal CCI statistical report
+ Australian Bureau of Statistics. *Australian System of National Accounts 2009-10* (2010). Catalogue no. 5204.0.
* Dept of Foreign Affairs and Trade. *Trade in Services, Australia, 2009* (2010).

Notes: Employment figures rounded to nearest hundreds.
Further Info: http://www.cci.edu.au/

Creative Economy Report Card 2011 (p 2 of 2)

Snapshot of national statistics related to creative industries, presented March 2011

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CREATIVE PARTICIPATION

Arts involvement [vi]	
277,600 people involved in both paid & unpaid performing arts roles (For 2007)	• *These are predominantly second job and volunteer activities (the 2006 Census counted 38,800 people holding their main job in music and performing arts related occupations)*
15.2 million attendances per year at performing arts venues and events (2005/2006 period)	• *One quarter of Australians (15 years +) attended a popular music performance in 2005/2006*
Study [vii]	
81,279 students in creative arts disciplines in higher education (For 2007)	• *Exceeds the number of students enrolled in natural & physical sciences, engineering, and information technology*
Media Participation	
2 hrs 20mins per person per day (15 years +) viewing television and other audio/visual media[viii] (2006 data)	• *An increase of 10 minutes per day compared to 1997 data* • *Australians (15yrs +) spent slightly more time each day viewing television and other audio/visual media than they did on domestic household duties*
91.1% of Australians per week (15 years +) listen to the radio[ix] (2009)	• *Younger listeners (15-24yrs) prefer music content whilst older listeners prefer news, information content and talkback radio*
4.4 million people per week listen to community radio[x] (2010)	• *640,000 of these Australians (15yrs+) listen exclusively to community radio in an average week*
57 hours spent online at home per person in June quarter 2009[ix]	• *Compared to 47 hours in the June quarter 2008*
Annual Entertainment and Cultural Spending	
$756 per capita and $17 billion overall spent on entertainment and media (For 2009, from PricewaterhouseCoopers 2010)	• *Australia has the fifth highest E&M spending per capita ($756) after the USA ($1,076), Japan ($1,006), UK ($921), and Germany ($844)*
$1.88 billion total revenue on live entertainment (For 2008, from Live Performance Australia 2010)	• *Generated by box office income (56.2% of total revenue), Government funding (11.2%), and other income from orchestra hires, royalty receipts and merchandising, and catering (32.6%)*
$36.40 per week average household spending on culture (For 2003/2004, from ABS 2010b)	• *Compared to $26.74 per week five years earlier*

EMERGING CREATIVE MARKETS [xi]

Digital recorded music: $64.7 million (For 2009)	• *Increased by over 8 fold, over 4 yrs (2005 figure = $7.8 million)*
Mobile Internet: Number of subscribers: **380,000** Access spending: **$48.4 million** (For 2009)	• *Subscribers and access spending more than doubled in 4 yrs (2005 figures = 150,000 subscribers + $21 million access spending)*
Internet advertising market: $1.1 billion (For 2009)	• *Tripled over 4 yrs (2005 figures = $378.3 million)*
Satellite TV penetration: 20.5% of households (For 2009)	• *Almost doubled over 4 yrs (2005 figures = 12.5%)*
Online distribution of filmed entertainment: Online subscription rental market: **$53.8 million** Digital download market: **$4.7 million** (For 2009)	• *Online subscriptions increased by 11 fold over 4 yrs (2005 figure = $4.7 million)* • *Digital downloads increased by 6 fold over just 2 yrs (2007 figure = $780,000)*
Online and mobile game market: Online game market: **$128.7 million** Wireless game market: **$145 million** (For 2009)	• *Online game market doubled over 4 yrs (2005 figure = $62.4 million)* • *Wireless game market tripled in just 2 yrs (2007 figure = $51.5 million)*

Sources

[vi] Australian Bureau of Statistics. *Arts and Culture in Australia: A Statistical Overview* (2010). Catalogue no. 4172.
[vii] Australian Major Performing Arts Group (AMPAG). *The Arts: The Big Picture* (2010).
[viii] Australian Bureau of Statistics. *How Australians Use Their Time, 2006* (2008). Catalogue no. 4153.
[ix] Australian Communications and Media Authority (ACMA). *Communications Report, 2008-2009* (2009).
[x] McNair Ingenuity Research. *Community Radio National Listener Survey* (2010).
[xi] PricewaterhouseCoopers. *Global entertainment and media outlook 2010-2014* (2010). NB: this report uses US$; we has converted to AU$, using the report's 1.2812 conversion rate (for 2008).
[xii] Live Performance Australia. *Size & scope of the live entertainment industry* (2010).

Notes: Employment figures rounded to nearest hundreds.
Further Info: http://www.cci.edu.au/