

# THE CREATIVE ECONOMY IN AUSTRALIA

## WHAT CENSUS 2021 TELLS US

Briefing paper 1



**NEWS & MEDIA  
RESEARCH CENTRE**



**CITY OF SYDNEY**



**Government of South Australia**  
Department for Industry,  
Innovation and Science



Department of  
**Local Government, Sport  
and Cultural Industries**

This Briefing Paper is an output of a collaboration led by the University of Canberra in partnership with the Australia Council, the City of Sydney, the South Australian Government's Department for Industry, Innovation and Science and the Western Australian Department of Local Government, Sport and Cultural Industries.

It presents an overview of cultural and creative activity in Australia, drawing on custom tables of employment data from the Australian Bureau of Statistics' five-yearly Census of Australian Population and Housing.

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## HIGHLIGHTS

- In 2021, the creative economy provided employment to 714,632 people in Australia.
- The creative economy's share of total employment continues to increase, growing from 5.9 per cent of the total workforce in 2021 from 5.5 per cent in 2016.
- Creative employment is growing at a rate more than 50 per cent higher than the rest of the workforce, despite some sectors being hit very hard by COVID.
- Creative incomes are on average higher than those in the rest of the workforce, although it should be noted that cultural production workers, particularly in music and performing arts, have lower incomes and work fewer hours than other creatives.
- On average, the creative industries employ 1.5 times as many people in support roles as in core creative roles. There are more people in creative roles working in industries other than the creative industries than within them.
- The sectors affected most adversely by the COVID pandemic were the performing arts, newspaper and periodical publishing and radio, with all sectors experiencing significant job losses.

## DEFINITIONS AND BACKGROUND

This factsheet presents employment data from the Australian Censuses 2021 and 2016 (ABS, 2018, 2022). The data is aggregated according to the dynamic model of the cultural and creative industries (CCIs) (Bakhshi et al., 2013; Higgs & Lennon, 2014) and the creative trident (Bakhshi et al., 2013; Higgs & Lennon, 2014).

Following the dynamic model approach, the CCIs can be grouped into seven sectors:

- the mostly business-to-business creative services sectors (1) *advertising and marketing*, (2) *architecture and design*, (3) *software and digital content*, and
- the mostly business-to-consumer cultural production sectors (4) *film, TV and radio*, (5) *music and performing arts*, (6) *publishing* and (7) *visual arts*

The creative trident is a useful way of presenting creative industry and creative occupation data that highlights different categories of creative workers:

- *Specialist* creatives work in creative occupations within the creative industries (orange in the table below)
- *Support* professionals work in support roles (not defined as creative occupations) within the creative industries (blue)
- *Embedded* creatives work in creative occupations in industries other than creative industries (green)

The creative trident

	Creative industries	Other industries
Creative occupations	Specialist creatives	Embedded creatives
Other occupations	Support workers	

The term *Creative Economy* used here refers to the combination of Specialist, Support and Embedded workers.

Note that the Australian Census records only the occupation and industry of employment of respondent's main source of income. Much creative employment is not a practitioner's main income source and, although it may be the main focus of the practitioner, may only provide a supplementary income and is thus not captured in the Census. For example, the 2017-18 Cultural Participation Survey indicates that the number of musicians who receive income from singing or playing is 11 times the number reported in the 2016 Census. For visual artists, it is nine times as many and it is four times for actors and dancers (Cunningham & McCutcheon, 2020).

## LOOKING AT AUSTRALIA AS A WHOLE

**The Australian Census 2021 reveals that the creative economy provides employment to 714,632 people, or 5.9 per cent of Australia's workforce**

The creative industries employed nearly 500,000 people, with more than 190,000 people in specialist creative occupations, and 305,000 in support roles (Table 1). Nearly 220,000 people are employed in creative roles embedded in other industries, including public administration, finance and insurance services, education and training, retail and manufacturing.

**The creative economy continues to be a growing segment of the workforce**

Australia's creative economy demonstrated its resilience through the 2020 and 2021 COVID pandemic, despite some sectors being hit hard (discussed in the following sections). Between the Census years of 2016 and 2021, total creative employment grew by an annual average rate of 3.8 per cent, well above the 2.4 per cent for the rest of the workforce (Table 2).

**Creative employment's share of the workforce also continues to increase**

Creative employment as a share of the total workforce grew from 5.5 per cent to 5.9 per cent, a continuation of the growth of its footprint in the Australia economy since the 1980s (Table 3).

**Creative incomes are higher and growing faster than those in the rest of the workforce**

In 2021, the median income for a creative worker was \$85,600, more than 30 per cent higher than the median for the rest of the workforce (Table 4). Median incomes in the creative industries were growing at an average rate of 2.4 per cent per annum, more than 40 per faster than in other industries (1.7 per cent). Incomes vary across creative sector occupations. Specialist creatives in the creative industries earned a median income of \$76,300, while creatives embedded in other industries earned \$87,500. Support workers in other occupations in the creative industries earned the highest incomes of all, at \$90,500.

Table 1 Trident I—creative employment by creative industry and creative occupation, 2021

<b>714,632</b> Total creatives	Creative industries	Other industries	Total
Creative occupations	<b>190,896</b>	<b>218,297</b>	409,195
	Specialist	Embedded	
Other occupations	<b>305,439</b>	11,334,778	11,640,217
	Support		
Total	496,334	11,553,076	12,049,410
			Workforce

Table 2 Trident I—compound average annual growth in employment 2016-2021 (per cent)

<b>3.8</b> Total creatives	Creative industries	Other industries	Total
Creative occupations	3.3	3.4	3.3
	Specialist	Embedded	
Other occupations	4.4	2.4	2.4
	Support		
Total	4.0	2.4	2.4
			Workforce

Table 3 Creative employment as a share of the Australian workforce, 1985 to 2021 (per cent)

Year	Creative industries	Embedded in other industries	Creative employment
1986	2.5	1.2	3.7
1991	2.6	1.4	4.0
1996*	3.3	1.3	4.7
2001	3.9	1.6	5.4
2006	3.5	1.7	5.2
2006*	3.5	1.6	5.1
2011	3.7	1.6	5.3
2016	3.8	1.7	5.5
2021	4.1	1.8	5.9

Note \* Industry classification systems changed in 1996 and 2006. 2006 results are presented using the previous and current classification systems to aid comparability over time.

Table 4 Trident I—median annual incomes and compound average annual growth (adjusted for inflation), 2021

Total creatives <b>\$85,600</b>	Creative industries	Other industries	Total
Creative occupations	<b>\$76,300</b>	<b>\$87,500</b>	\$82,400
	Specialist	Embedded	
Other occupations	<b>\$90,500</b>	\$61,500	\$62,100
	Support		
Total	\$84,600	\$61,900	\$62,700
	CAGR: 2.4%	CAGR: 1.7%	CAGR: 1.8%

Note: Compound average annual growth (CAGR) is adjusted for inflation using the CPI.

## CREATIVE INDUSTRIES

People in employment in creative industries include specialist creatives and people employed in support roles. Employment trends in the creative services and cultural production industries are highly polarised, with more jobs, higher growth and higher incomes to be found in the more commercially-oriented creative services industries than in cultural production.

### CREATIVE SERVICES INDUSTRIES

As a whole, change in employment counts by industry show that the commercially-driven creative services sector withstood COVID well, with most industry sectors continuing to attract new workers at rates well above the 2.4 per cent average growth rate of the total workforce (Figure 1). The industry experiencing the strongest growth between the Census years of 2016 and 2021 was software publishing (49.6 per cent per annum), a more-than-seven-fold increase in employment to 5,119 people. The industry with the greatest number of workers, software development (which employed more than 220,000) also had above average growth (6.4 per cent). Other creative services industries with strong growth included advertising services (4.7 per cent), reflecting the emergence of digital marketing services, and architecture (3.7 per cent), which benefitted from Australia's love affair with housing and urban design. Photography (1.8 per cent) and specialised design (1.4 per cent) were the only creative services industries to grow at rates below the average of the total workforce, with COVID impacting on demand for the services of professional photographers and on the fashion industry.

The range of incomes in the creative services industries is very broad. The highest median incomes in the creative services industries are to be found in the software and digital content sector (Figure 2). The fastest-growing software publishing industry has both the highest median income (\$143,500) and highest growth in median income (11.0 per cent). Unlike other creative services industries, the architecture and design sector includes industries with median incomes below the national average of \$62,700. People working in the specialised design industry earned a median income of \$58,600, while those in photography earned a median income of \$46,000, not dissimilar to the averages for those in visual arts. Architecture is the only creative services sector with income growth below the national average.

### CULTURAL PRODUCTION INDUSTRIES

With the exception of film production and post-production, between 2016 and 2021 employment in cultural production industries either tended to track growth similar to that of the rest of the workforce, or it declined. The film production and post-production industries experienced strong growth (6.5 per cent and 16.4 per cent respectively), as a result of the foreign productions that located and did post-production in Australia in order to benefit from the expansion of taxation offsets and Australia's relatively COVID safe conditions.

Declines in employment in cultural production industries were not only due to the COVID pandemic, but also were an outcome of technological change as digitisation profoundly affected the operation of traditional information-based industries and demand for their products. The most significant proportional declines were in periodicals publishing (10.0 per cent), newspaper publishing (8.7 per cent) and other publishing (3.0 per cent), as magazine and newspaper titles changed hands or were closed outright as anticipated revenue losses during the COVID pandemic accelerated structural changes in the publishing industry.

In the visual and performing arts, the relatively small decline in employment in the music industry (2.0 per cent) understates the impact of COVID on the ecosystem that supports live music, which

Figure 1 Employment in creative industries

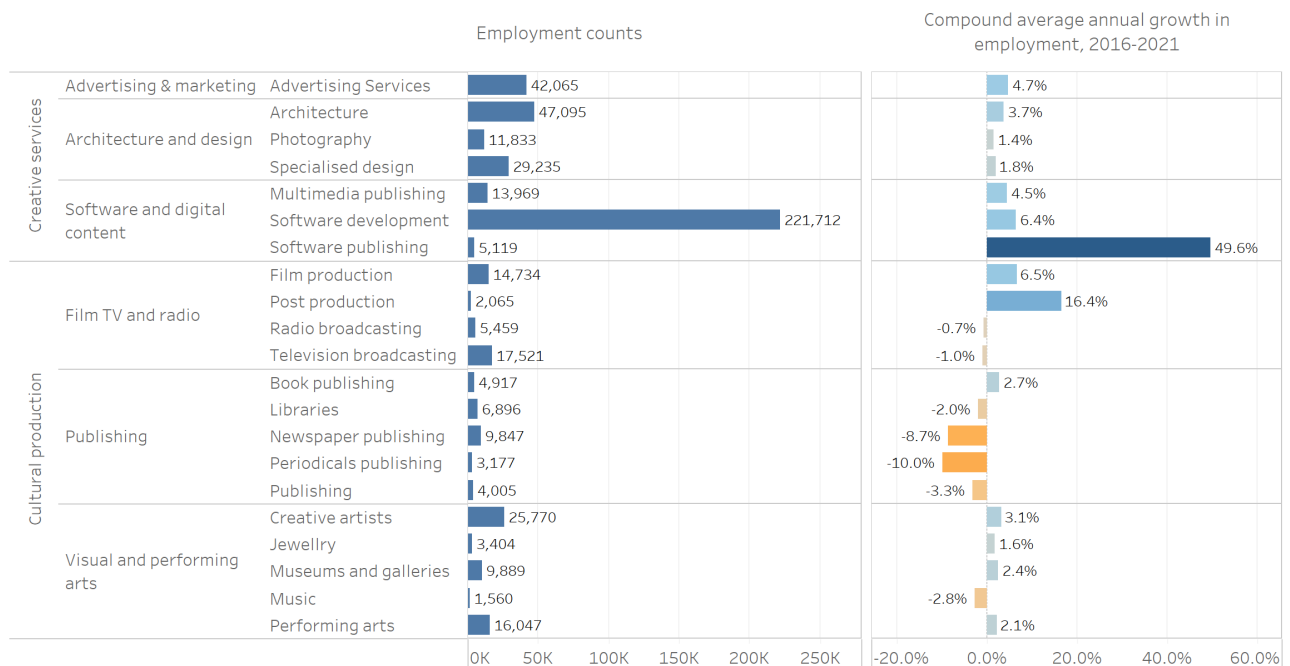
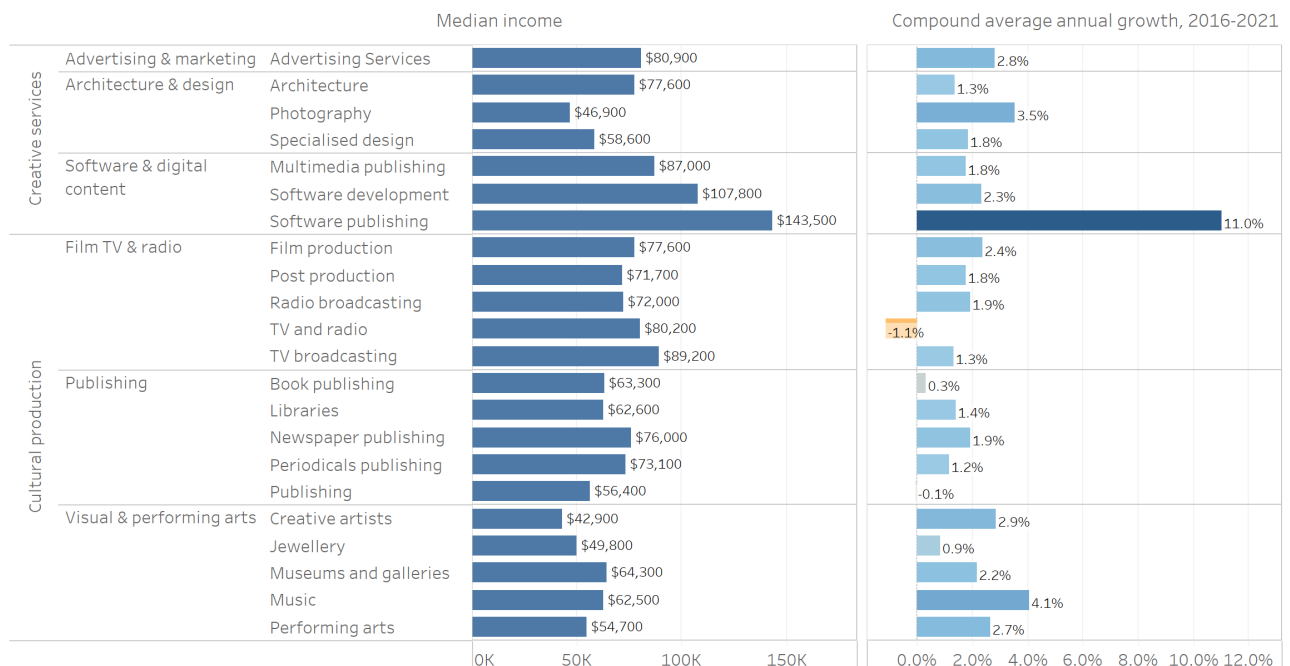


Figure 2 Median incomes in creative industries and average growth (adjusted for inflation)



also encompasses festivals and the hospitality sector. Counter to this trend was an increase in the number of people working as creative artists (3.1 per cent), as platforms such as Etsy and Instagram plus the shift to home-based work made earning an income through art a more feasible prospect for many practitioners.

Incomes in the cultural production industries also cover a wide range. The lowest incomes are to be found in visual and performing arts, with the median income for people earning their main income in creative arts at \$42,900 and in performing arts at \$54,700. The highest incomes are in television and film production, including \$89,200 in television broadcasting and \$77,600 film production. Unlike the creative services sectors, here the industries with the lowest median incomes are those with the highest growth. Income growth in the creative arts and performing arts was 2.9 per cent and 2.7 per cent respectively, compared with 2.4 per cent and 1.3 per cent for film production and television broadcasting. Median income in the music industry grew by 4.1 per cent. It is unlikely that these higher-than-average growth rates represent real gains in incomes for artists. Rather, they are likely the result of people in low-earning and precarious employment seeking an income elsewhere during COVID.

## CREATIVE OCCUPATIONS

Turning to creative occupations, the devastation wreaked by the COVID pandemic on the cultural production sector is very evident in the fall in employed musicians and particularly in the large increases in the proportions of employed performers working zero hours in the week prior to the Census.

### CREATIVE SERVICES OCCUPATIONS

As with creative industries, employment by creative occupation demonstrates that most workers within the commercially-driven creative services sector were not forced to move to alternative employment during the COVID pandemic (Figure 3). Rather, for most creative services occupations, between 2016 and 2021 employment grew at rates above the average the total Australian workforce. The creative occupations with the largest numbers of workers were amongst the fastest growing: between 2016 and 2021, software development grew by a compound annual average rate of 5.9 per cent to nearly 87,500 workers and marketing services by 6.9 per cent to 71,700. Comparing the total number of people employed in the software development occupations (which includes specialist and embedded workers) with the 221,000 people employed in the software development industry (specialist and embedded workers) reveals that the industry is a very significant employer of people in non-specialist support positions.

The fastest growing creative services occupations are those that are benefitting from digital disruption, not only due to the increasing sophistication and availability of computer-based design tools and broadband communications technologies, but also thanks to the emergence of social media platforms and the platformisation of traditional media services. The impact of digital marketing and social media can be seen in the rapid growth of marketing services (6.9 per cent) and public relations (7.0 per cent). Increasing demand for integrated design solutions is reflected in the growth in industrial design professionals (8.3 per cent), interior design (5.7 per cent), landscape design (4.5 per cent) and marine architecture (4.8 per cent).

### CULTURAL PRODUCTION OCCUPATIONS

The cultural production occupation data illustrates both gains and losses to the creative economy since the 2016 Census due to digital disruption and the impacts of the COVID. Within the film, TV and radio sector, for example, the number of people working as film and television directors, producers and editors increased at twice the rate of the total workforce, 4.8 per cent per annum, as the sector benefited from boosted production activity. On the other hand, both radio and TV

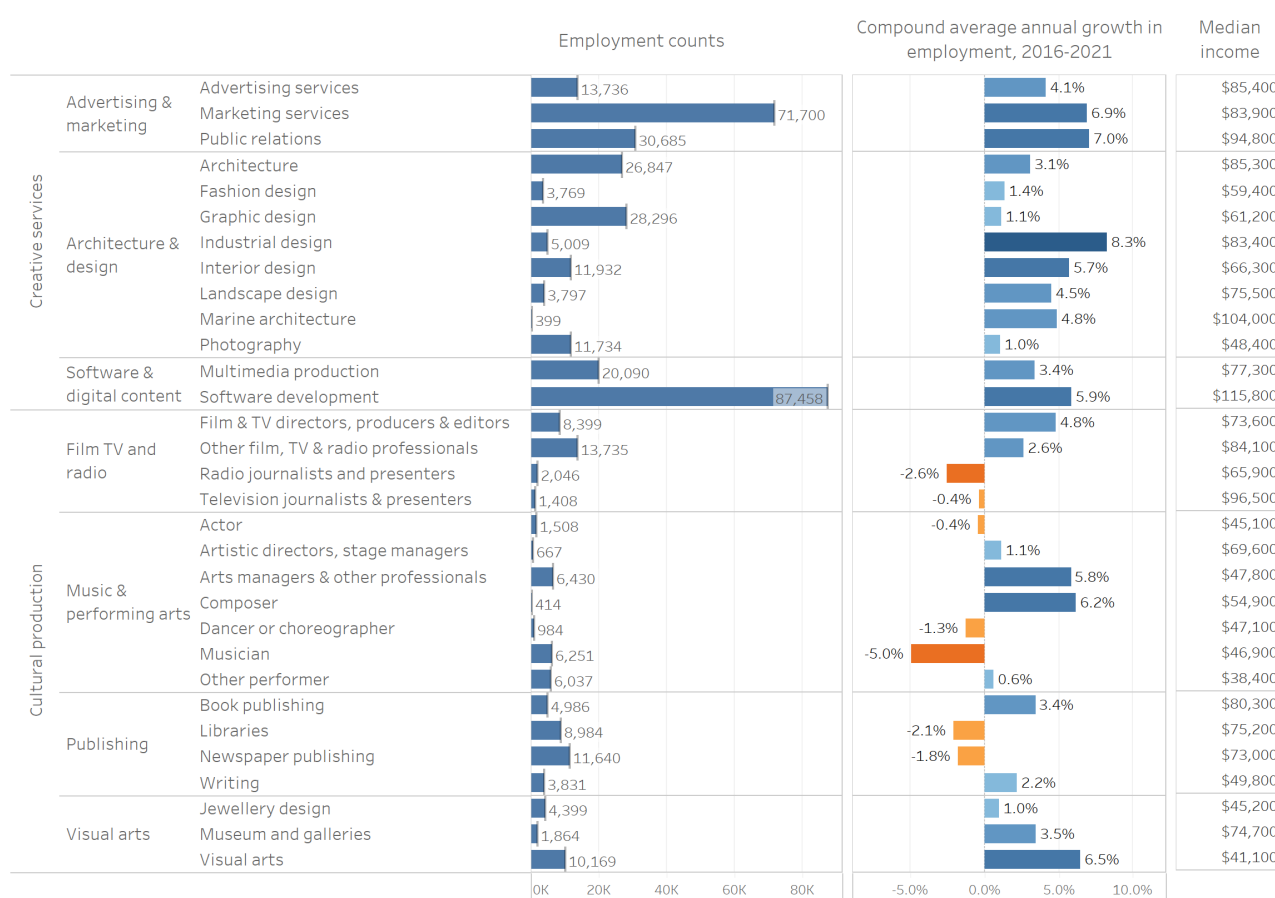
journalists and presenters fell (by 2.6 per cent and 0.4 per cent respectively) as media networks continued to concentrate operations into specialist hubs.

The music and performing arts professions were amongst those hardest hit by COVID, as the entire live entertainment and performing arts industry was shut down and federal government support programs excluded people in casual and short-term contract employment. The Census data also shows that people still working as performing artists in 2021 were more likely to have not worked in the previous week. For example, between the 2016 and 2021 Censuses, while the number of people working as musicians as their main source of income fell by nearly 2,000, an average of 5.3 per cent per annum, the proportion of musicians who reported working zero hours in the week of the Census increased from 2.7 per cent to 14.8 per cent, and those reporting being away from work increased from 4.5 per cent to 16.0 per cent (Figure 4).

In publishing, the overall fall in employment is due to falls in the numbers of people employed as librarians and archivists (2.1 per cent) and newspaper journalists (1.8 per cent), as digital disruption continued to impact on each sector. Mitigating these losses partially were increases in the numbers of people working as technical writers within book publishing (5.7 per cent).

There was surprising growth in employment in visual arts occupations between 2016 and 2021, perhaps evidence of people switching to focus on their [home-based] passions to generate the main illustrators, painters, potters and sculptors grew substantially, by more than 2,700 people, an

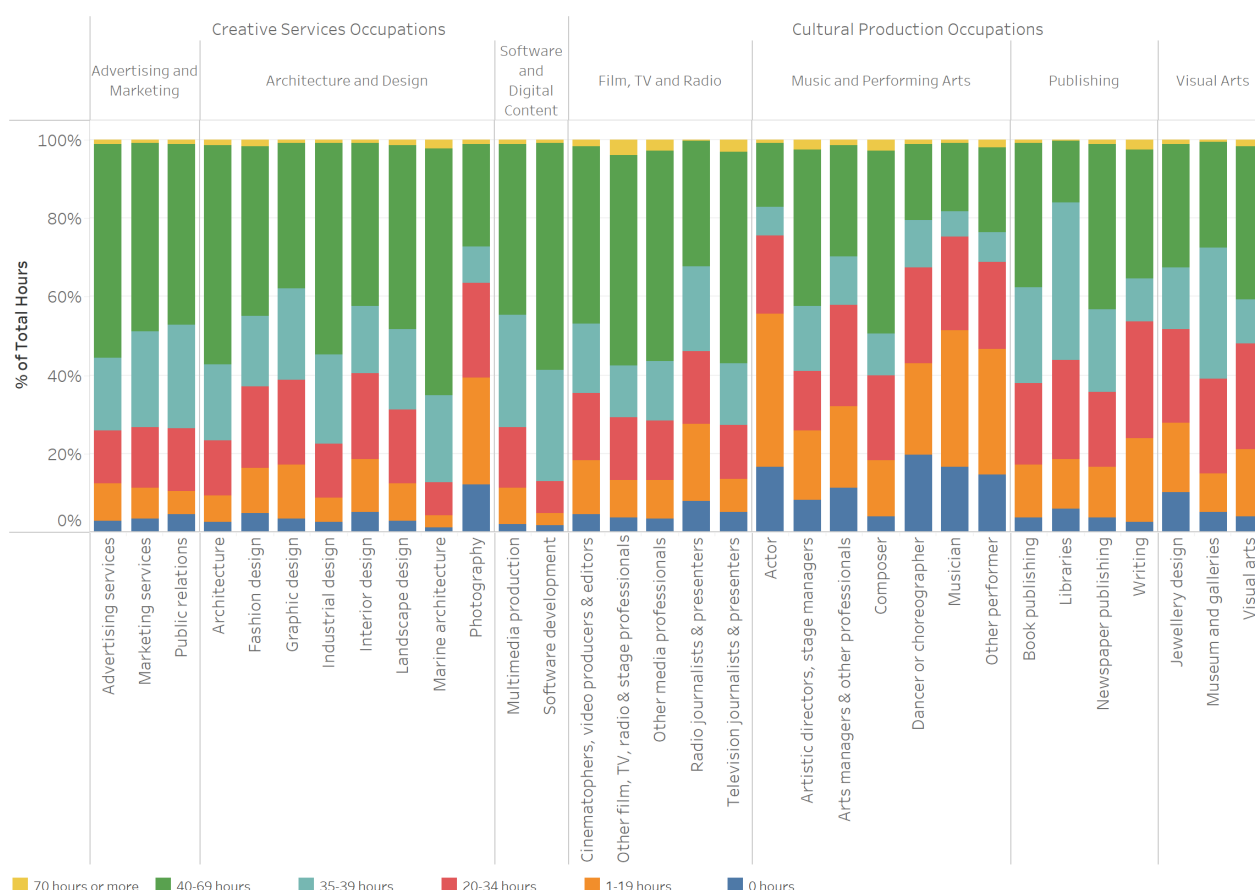
Figure 3 Employment in creative occupations and mean incomes, 2021





average of 6.5 per cent per annum. The proportion of visual arts workers reporting working zero hours was well below the levels reported by performing artists, and was similar to the level reported in 2016. Some musicians also appear to have turned to home-based work, with the number of musicians earning the main income as composers also increasing (6.2 per cent), counter to the fall in the number of working performers.

Figure 4 Hours worked by creative occupation, 2021



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