

Reports on Australia's Cultural and Creative Sector

Summary by TNA

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This summary synthesises findings from two reports: [Analysis of the Cultural and Creative Sector—Revive: Sectoral Analysis \(December 2024\)](#) and [Cultural and Creative Activity in Australia, 2008–09 to 2022–23: Methodology Refresh \(December 2024\)](#). These reports, developed by the Bureau of Communications, Arts and Regional Research (BCARR), provide data-driven insights into the cultural and creative sectors' contributions to Australia's economy and society, focusing on trends in business activity, employment, participation, and sectoral recovery from the COVID-19 pandemic.

Context and Purpose of the Reports

Revive: Sectoral Analysis (2024)

- Developed as part of the *Revive* policy, this report provides a comprehensive overview of Australia's cultural and creative sectors following the COVID-19 pandemic.
- It examines trends in employment, business activity, economic contribution, and participation, with a particular focus on the period between 2021 and 2023.
- The analysis was created to guide future policy decisions by highlighting economic, social, and cultural metrics.

Methodology Refresh (2024)

- This report updates the methodology for measuring cultural and creative activity, ensuring it reflects current economic conditions and aligns with best practices in economic measurement.
- It revises the scope of activities included in the sector to better represent its composition and to avoid double-counting, providing consistent, production-focused estimates of GDP and Gross Value Added (GVA) for the sector.

Capturing the Performing Arts

The sector is divided into 15 domains, including literature, creative and performing arts; visual arts and crafts; architecture services; and advertising and promotion. These domains reflect the breadth of cultural and creative activity and highlight areas of growth and decline over time.

The performing arts are encompassed within the **Literature, Creative, and Performing Arts** domain, which includes:

- **Performing Arts Operations:** Organisations producing live theatrical or musical performances.
- **Creative Artists, Musicians, and Performers:** Individuals or groups engaged in creating original works, whether or not they perform them.
- **Performing Arts Venue Operations:** Facilities used for rehearsals and performances.

Figures specifically related to the performing arts include:

- **Economic Contribution:** The GDP contribution from the performing arts domain increased from \$1.5 billion in 2008–09 to \$2.4 billion in 2022–23, representing a growth of 57.2%.
- **Employment:** In 2021, literature, creative, and performing arts accounted for 17.1% of employment in cultural and creative industries.

Key Findings

Economic Contribution

- The broader cultural and creative sector contributed **\$63.7 billion to GDP** in 2022–23, representing **2.5% of the economy** and comparable to industries like Agriculture and Forestry.
- Over the period from 2008–09 to 2022–23, the sector **grew by 61.9%** in nominal terms, though its share of the total economy **declined from 3.1% to 2.5%**.
- Performing arts accounted for a significant share of activity within the **Literature, Creative, and Performing Arts** domain.

Employment Trends

- The sector **employed approximately 282,000** people in 2021, **2.4% of the total Australian workforce**.
- Employment in cultural and creative industries **grew by 10.7%** between 2016 and 2021, slower than the national employment growth of 12.7%.
- Domains like literature, creative and performing arts, and visual arts and crafts accounted for **17.1% of total employment** in the sector.
- Many workers in the sector hold multiple jobs to sustain their income, with 8% of workers in arts and recreation services identified as multiple job holders in 2024. However, this rate has been declining due to post-pandemic shifts.

Attendance and Participation

- Attendance at cultural venues and events, particularly performing arts, **declined markedly** during the pandemic.
- Between 2017–18 and 2021–22 attendance at performing arts events by children **dropped from 40% to 31%**, and adult attendance at cultural venues **fell from 86% to 69%**.
- A 2023 survey found that cost and location are the two primary barriers preventing Australians from participating in cultural activities.

Recovery Trends

- Despite COVID-19 disruptions, the performing arts domain rebounded between 2021–22 and 2022–23. This recovery was partly driven by increased demand for international artists in contemporary music and improved ticket sales.
- Despite challenges, the number of businesses in the cultural and creative industries **grew by 8.9%** between 2021 and 2023, reaching approximately **95,700 businesses**.

Barriers to Recovery

- Performing arts are among the most affected by cost-of-living pressures, as household spending on cultural activities is discretionary and vulnerable during economic downturns.
- Surveys show strong public interest in attending performing arts events, with **76% of Australians indicating they would like to attend more events if barriers such as cost and accessibility were addressed**. This latent demand suggests that targeted initiatives, such as discounted ticketing programs, could significantly boost participation.

Diversity and Inclusion

- In 2022, **13.4% of workers** in the arts and recreation services industry reported having a **disability**, compared to 11.6% in the overall Australian workforce.

First Nations Businesses

- Approximately **20% of all First Nations businesses** operate in the arts and heritage industries, with a significant share identified as medium or large-sized businesses.

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