



Australian Government

Department of Infrastructure, Transport,
Regional Development, Communications and the Arts



Bureau of Communications,
Arts and Regional Research

FAQ: Cultural and Creative Activity in Australia 2010–11 to 2019–20

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Overview

What is the purpose of this publication?

This publication quantifies the economic contribution of cultural and creative activity in Australia from 2010–11 to 2019–20. Cultural and creative activity is recognised as an important component of economic growth. It has the potential to continue to increase as the economy transforms through the growing use of advanced technologies and the rise of automation.

This publication provides an update to the Bureau of Communications, Arts and Regional Research (BCARR) working paper [Cultural and creative activity in Australia, 2008–09 to 2016–17](#) released in October 2018 and the following visual summaries:

- › [Cultural and creative activity in Australia, 2008–09 to 2017–18](#) released in October 2020; and
- › [Cultural and creative activity in Australia, 2009–10 to 2018–19](#) released in September 2021.

This publication follows the same approach taken in the working paper. Each table and figure corresponds to those used in the original BCARR working paper.

Unless otherwise noted, the 10-year period refers to 2010–11 to 2019–20. Data is subject to revisions by the Australian Bureau of Statistics (ABS) national accounts and estimates in this release vary from those published previously.

What is cultural and creative activity?

Cultural and creative activity refers to activities that involve human creativity as a major input. While there is no universally accepted definition of cultural and creative activity, the terms 'cultural' and 'creative' are used to describe activities connected with the arts, media, heritage, design, fashion, and information technology. Cultural activity may also contain intellectual property to communicate symbolic meaning while creative activity requires human creativity as a significant and identifiable input.

The economic value of cultural and creative activity is determined by how it is defined and identified—as either creative, cultural or both. Some cultural and creative activity may not be captured fully in this approach, owing to methodological issues, unavailability of data, and how volunteering and non-market based production have been reflected in the measurements.

Our definition of cultural and creative activity is the same as the ABS 2014 publication [Cultural and Creative Activity Satellite Accounts, 2008–09](#).

The definition of cultural and creative activity was decided by the Statistics Working Group (SWG) of the Meeting of Cultural Ministers before the 2014 ABS release. For more information on the definitional decision of the SWG, see: [Measuring the economic value of cultural and creative industries](#).

How was cultural and creative activity measured?

The analysis uses the same approach taken by the ABS in its original report on cultural and creative activity [Cultural and Creative Activity Satellite Accounts, 2008–09](#).

BCARR's publication calculates a time series from the satellite accounts definition of cultural and creative activity. The figures presented, unless otherwise stated, are in current prices and on a national accounts basis. A satellite accounts basis refers to the activity included on a national accounts basis, plus volunteer services and non-market output of market producers in the cultural and creative industries.

The main components of cultural and creative activity include activity from cultural and creative industries as well as the wages and salaries, and employers' social contributions received from cultural and creative occupations that are performed outside of these cultural and creative industries.

The publication sources all of its data from ABS publications. This consists of the [Australian System of National Accounts, 2020–21](#), [Australian National Accounts: InputOutput Tables](#) and [Cultural and Creative Activity Satellite Accounts, 2008–09](#).

What is a 'satellite account'?

A satellite account is a term used to measure the size of economic sectors that are not defined as industries in national accounts. The ABS has developed satellite accounts such as tourism, non-profit institutions, and cultural and creative activity.

How was COVID-19 impact captured in this publication?

This release includes the early impact of COVID-19 on cultural and creative activity. COVID-19 led to social distancing measures and business restrictions announced from 18 March 2020.

A nationwide lockdown started on 23 March 2020 after National Cabinet implemented Stage 1 restrictions on social gatherings. Facilities such as pubs, clubs, restaurants and cafes were restricted from opening.¹ This lockdown was expected to be in place for at least 6 months. However, the incidence of new cases of COVID19 reduced dramatically between late April and early May 2020, down to fewer than 20 new cases per day.² Restriction began to ease during this period and some cultural and creative industries such as clothing and footwear retailing experienced a large rise in May and June 2020, with continued recovery from the trading restrictions during this period.^{3,4}

1 Department of Health and Aged Care (2020), [Australian Health Protection Principal Committee \(AHPPC\) coronavirus \(COVID-19\) statement on 22 March 2020](#), March 2020

2 Department of Health and Aged Care (2022), [Coronavirus disease 2019 \(COVID-19\) epidemiology reports, Australia, 2020–2022](#), Australia, September 2022

3 Australian Bureau of Statistics (2020), [Retail Trade, Australia](#), May 2020

4 Australian Bureau of Statistics (2020), [Retail Trade, Australia](#), June 2020

Industry / art form specific

Which area of cultural and creative activity experienced the largest increase?

Design experienced the largest growth in cultural and creative activity over the past decade. From 2010–11 to 2019–20, design's contribution to the national economy grew by \$17.8 billion (or 54 per cent), in line with growth of the overall economy. This growth was driven mainly by computer system design and related services as workplaces have been regularly upgraded and enhanced over the past decade.

Demand from computer system design services increased \$3.1 billion or 9.6 per cent in 2019–20. COVID-19 led more people to work from home from late 2019–20, leading to greater demand for cloud-based services across a range of client businesses and other organisations.⁵

Which area of cultural and creative activity experienced the largest decline?

Literature and print media declined significantly by \$3.9 billion (or 32 per cent) from 2010–11 to 2019–20. This decline was driven by falling demand for traditional print media as consumers shifted to digital content. Traditional print materials are also comparatively slower to produce and more costly to distribute.

How can I find out more about the activity captured in each domain?

More information on the size of cultural and creative activity in Australia by industry division and by each domain is provided in the original BCARR working paper [Cultural and creative activity in Australia, 2008–09 to 2016–17](#).

⁵ IBISWorld industry report (2022), M7000 Computer system design services in Australia, April 2022, p. 17.

Which domain captures economic activity from the production of Australian visual art?

Economic activity from the production of works of art, such as paintings and sculptures, is captured in more than one domain. For example:

- › **Design:** where it is captured as part of the Australian and New Zealand Standard Industrial Classification (ANZSIC) class name '**Other Specialised Design Services**' which includes commercial art services, alongside other activities that may be indirectly related to fine art (such as fashion and graphic design activities).
- › **Performing arts:** where it could otherwise be captured under the ANZSIC class name 'Creative Artists, Musicians, Writers and Performers' which includes the services of artists and sculpting, as well as services that may be indirectly related to fine art.

Which domain captures economic activity from interactive game development and distribution?

Economic activity from game development and distribution is captured in more than one domain. For example:

- › **Design:** includes information technology development such as writing, modifying, testing or supporting software to meet the needs of a particular consumer; or planning and designing computer systems that integrate computer hardware, software and communication technologies.
- › **Other culture goods manufacturing and sales:** includes computer game retailing.
- › **Broadcasting, electronic or digital media, and film:** includes software publishing and computer game rental.

Which domain captures economic activity from festivals?

Economic activity from festivals is captured across multiple domains because it depends on the type of festival. For example:

- › **Broadcasting, electronic or digital media, and film:** includes activity relating to screening motion pictures using a variety of visual media (such as screening productions at festivals and other similar events).
- › **Performing arts:** includes operations engaged in providing or producing live theatrical or musical presentations and performances.

Methodology questions

Are there any differences between the methodology used in this publication and the approach used by the ABS in 2008–09?

There are some minor methodological differences from the ABS report as some data was unavailable to BCARR. These differences are outlined in the appendix to the working paper.

How does Australia's cultural and creative activity compare to other nations, and across states and territories?

There is no universally agreed definition of cultural and creative activity. A number of government (domestic and international) and non-government organisations have reported on the economic impact of cultural and/or creative industries. However, a range of statistical definitions and approaches have been used. Due to the variety of definitions used to classify cultural and creative activity, international comparisons are difficult to make.

The ABS data used in the publication does not provide a breakdown of the results at the state and territory level.

Why do the estimates only go back to 2010–11?

BCARR has examined a 10-year period to track a consistent period of time. Looking at cultural and creative activity over the decade provides a historical view of the contribution of these sectors over time in Australia.

While this publication only includes estimates back to 2010–11, the previous release has the estimates for 2008–09 and 2009–10 which remain consistent with the estimates presented here and could be used to generate a time series with 12 years of cultural and creative activity estimates.

Why do the 2010–11 to 2018–19 cultural and creative estimates in this document vary from previous BCARR releases?

- › The estimates of cultural and creative activity from 2010–11 to 2019–20 are derived from the ABS National Accounts data: [Australian System of National Accounts, 2020–21](#) and [Australian National Accounts: Input-Output Tables, 2019–20](#). In 2021 the ABS revised a longer annual time series, referred to as a '[historical revision](#)'. The longer time series revisions focus on improving data quality, adopting new classifications, and improving international comparability.
- › As a result of these revisions, BCARR's updated estimates of cultural and creative activity vary from those presented in previous releases.
- › Cultural and creative activity estimates for 2018–19 have been revised to \$117.2 billion (up \$1.3 billion from last year's release). This revision has been mainly driven by the \$1.7 billion increase to cultural and creative activity in professional, scientific and technical services.
- › The revisions of cultural and creative activity estimates from 2010–11 to 2017–18 were also driven mainly by the revisions of cultural and creative activity in professional, scientific and technical services.

Table 1: Revisions of cultural and creative activity Gross Value Added (GVA), by industry division, 2010–11 to 2018–19

Division name	2010–11 (\$m)	2011–12 (\$m)	2012–13 (\$m)	2013–14 (\$m)	2014–15 (\$m)	2015–16 (\$m)	2016–17 (\$m)	2017–18 (\$m)	2018–19 (\$m)
Manufacturing	17	17	6	6	2	-3	-8	-14	-184
Wholesale Trade	18	13	4	7	-3	-8	-30	-61	-17
Retail Trade	40	31	8	16	3	21	-79	-118	0
Information Media and Telecommunications	61	55	31	37	10	8	-107	113	-469
Rental, Hiring and Real Estate Services	3	2	1	0	0	-1	-1	-1	2
Professional, Scientific and Technical Services	191	179	68	48	24	-9	-82	-156	1,790
Education and Training	1	2	2	2	2	2	2	4	15
Arts and Recreation Services	9	6	3	3	1	-1	-19	-21	132
Total	340	305	123	119	39	9	-324	-254	1,269

Source: ABS Australian System of National Accounts, ABS Australian National Accounts: Input-Output Tables; BCARR calculations