



Australian Government

Department of Communications and the Arts



Bureau of  
Communications  
and Arts Research

# Cultural and creative activity in Australia 2008-09 to 2016-17

October 2018

**Working paper**

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## Contents

<b>Cultural and creative activity in 2016-17 .....</b>	<b>7</b>
<b>Cultural and creative activity from 2008-09 to 2016-17 .....</b>	<b>9</b>
<b>Cultural activity 2008-09 to 2016-17 .....</b>	<b>15</b>
<b>Creative activity 2008-09 to 2016-17 .....</b>	<b>17</b>
<b>Cultural and creative activity by domain, 2008-09 to 2016-17 .....</b>	<b>19</b>
Museums .....	22
Environmental heritage .....	23
Libraries and archives .....	24
Literature and print media .....	25
Performing arts.....	27
Design .....	29
Broadcasting, electronic or digital media, and film .....	31
Music composition and publishing.....	33
Visual arts and crafts .....	35
Fashion.....	36
Other culture goods manufacturing and sales .....	37
Supporting activities .....	38
<b>Appendix A: Methodology .....</b>	<b>39</b>
<b>Appendix B: Data gaps.....</b>	<b>45</b>
<b>Appendix C: ANZSIC (2006) industry classes .....</b>	<b>46</b>
<b>Appendix D: Structure for cultural and creative activity of the domain tables.....</b>	<b>49</b>
<b>Appendix E: Glossary .....</b>	<b>50</b>
<b>List of tables .....</b>	<b>53</b>
<b>List of figures.....</b>	<b>54</b>

## Executive Summary

There is growing interest in quantifying the economic contribution of cultural and creative industries both in Australia and internationally. Measurement of this activity can inform policy makers about how such industries contribute to economic outcomes relative to other industries.

Cultural and creative activity is increasingly recognised as an important component of economic growth. Its contribution has the potential to grow as the economy transforms in parallel with the use of advanced technologies and the rise of automation. The economic response to a digital and technology-based transition is already evident in services such as internet publishing and computer system design which are also linked to creative activity.

The economic value of cultural and creative activity is determined by how it is defined and identified for each activity, or for both. In addition, some cultural and creative activity may not be captured fully, owing to how volunteering and non-market based production are reflected in the measurements.

While there is no universally accepted definition, the terms 'cultural' and 'creative' are often used to describe activities connected with the arts, media, heritage, design, fashion, and information technology.<sup>1</sup> As defined by the Australian Bureau of Statistics (ABS), human creativity is a vital input to cultural and creative activity. Cultural activity requires human creativity as an input and may contain intellectual property to communicate symbolic meaning.<sup>2</sup> Creative activity requires human creativity as a significant and identifiable input.<sup>2</sup>

This paper reports a times series on the economic contribution of cultural and creative activity in Australia from 2008-09 to 2016-17. The definition is based on the ABS's *Australian National Accounts: Cultural and Creative Activity Satellite Accounts* (Satellite Accounts).<sup>3</sup>

The Satellite Accounts estimated the economic contribution from cultural and creative activity to Gross Domestic Product (GDP) at \$86.0 billion in 2008-09. The main components of this 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.<sup>4</sup>

Between 2008-09 and 2016-17, cultural and creative activity in Australia grew to \$111.7 billion, an increase of \$25.8 billion or 30.0 per cent. While this activity is growing in absolute terms, the increase is slightly slower than the pace of the Australian economy overall. As a share of GDP, cultural and creative activity declined by 0.5 percentage points, from 6.9 per cent in 2008-09 to 6.4 per cent in 2016-17.

Over that period, the Australian economy has been supported by activities relating to the mining sector, which is almost entirely outside cultural and creative activity. At the same time, some cultural and creative industries have faced increased global competition and have needed to adjust to the transition towards digital content. This has led to a decline in areas such as onshore printing and clothing manufacturing.

While parts of cultural and creative activity are shrinking as a share of GDP, other activities are outpacing the overall economy. Cultural and creative activity within professional, scientific and technical services, and education and training has increased its share within the economy over the period. These activities utilise highly skilled labour which will be increasingly important to Australia's economic growth.

Examining the breakdown of cultural and creative activity, cultural activity grew from \$51.4 billion in 2008-09 to \$63.5 billion in 2016-17 while its share of GDP declined from 4.1 per cent to 3.6 per cent over this period. Creative activity increased from \$75.2 billion in 2008-09 to \$99.7 billion in 2016-17 while its share of GDP declined from 6.0 per cent to 5.7 per cent over this period (Table 1).

**Table 1.** Cultural and creative activity 2008-09 and 2016-17

Gross Domestic Product - National Accounts Basis (\$m) (a)	2008-09	2016-17
Cultural activity	51,395	63,476
As a proportion of GDP (%)	4.1	3.6
Creative activity	75,210	99,728
As a proportion of GDP (%)	6.0	5.7
Total for cultural and creative activity (b)	85,956	111,713
As a proportion of GDP (%)	6.9	6.4

(a) Activity considered both cultural *and* creative activity is counted only once in the total.  
Source: ABS cat. 5204, 5209; BCAR calculations

The majority of cultural and creative activity in 2016-17 came from cultural and creative industries, comprising 76.7 per cent or \$85.7 billion. The related industries (also known as 'domains') that contributed most to this activity were design at \$42.8 billion, fashion at \$14.2 billion, and broadcasting, electronic or digital media, and film at \$9.7 billion.

Cultural and creative activity in design experienced significant growth of \$16.2 billion or 60.7 per cent from 2008-09 to 2016-17. Design is the largest domain and has increased as a share of GDP by 0.3 percentage points. This growth is driven mainly by computer system design and related services. Workplaces have increased their use of information technology in their processes which have then required regular upgrades and enhancements over the past decade.<sup>5</sup>

Cultural and creative activity in fashion increased by \$2.4 billion or 20.3 per cent from 2008-09 to 2016-17. However, as a share of GDP, this domain fell by 0.1 percentage points over this period. Clothing and footwear wholesaling and retailing have driven the increase in absolute terms; but these industries have faced a challenging operating environment with greater competition and higher shopfront rental costs.<sup>6</sup>

Cultural and creative activity in broadcasting, electronic or digital media, and film increased by \$2.4 billion or 32.2 per cent from 2008-09 to 2016-17; although this domain remained relatively flat as a share of GDP over this period. Free-to-air television broadcasting, and cable and other subscription broadcasting were the two main contributors to this domain. While these components have grown over the period, future challenges may be on the horizon as Australians consume content on a wider variety of platforms.<sup>7</sup>

The figures presented in this report, unless otherwise stated, are in current prices and on a national accounts basis. This basis excludes volunteering and non-market based production due to its activity not being captured in the calculation of GDP. The figures are presented in a format that enable them to be updated each year.

Caution should be used when comparing the measurement of cultural and creative activity with activity that occurs in a particular industry of the Australian economy. The contribution of cultural and creative activity to the economy measures the contribution of that activity across multiple industry sectors as defined in the Australian and New Zealand Standard Industrial Classification 2006 (ANZSIC 06). This includes manufacturing, education, information media and telecommunications and arts and recreation services). The contribution of a particular industry (such as manufacturing) measures the contribution to the economy of activity from only that industry.

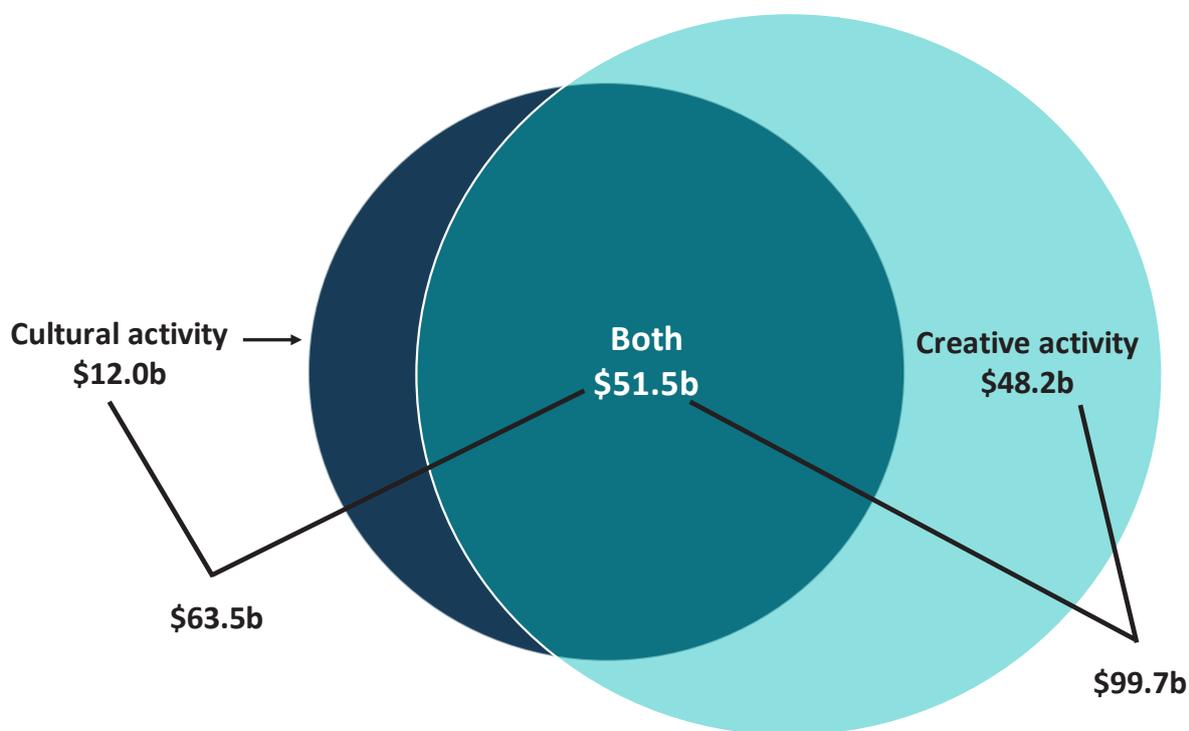
The remainder of this paper is structured as follows: the first section provides an overview of the size of cultural and creative activity in 2016-17 and its largest components; the second section shows how this activity has changed over time, and the main drivers of this change; the third and fourth sections report separately on cultural activity and creative activity, respectively; the final section details how each domain has contributed to cultural and creative activity; the methodology and supporting information including a glossary of terms used in the paper, can be found in the appendix.

## Cultural and creative activity in 2016-17

Cultural and creative activity contributed \$111.7 billion, or 6.4 per cent to GDP in 2016-17. Cultural and creative activity can be measured separately or as both cultural and creative activity.

Cultural activity contributed \$63.5 billion or 3.6 per cent to GDP in 2016-17, while creative activity contributed \$99.7 billion or 5.7 per cent to GDP in 2016-17. There is considerable overlap of industries and occupations common with these segments. Activity that has identified as both cultural and creative accounted for \$51.5 billion or 3.0 per cent to GDP. This common activity is counted only once in the total for cultural and creative activity, as shown in Figure 1.

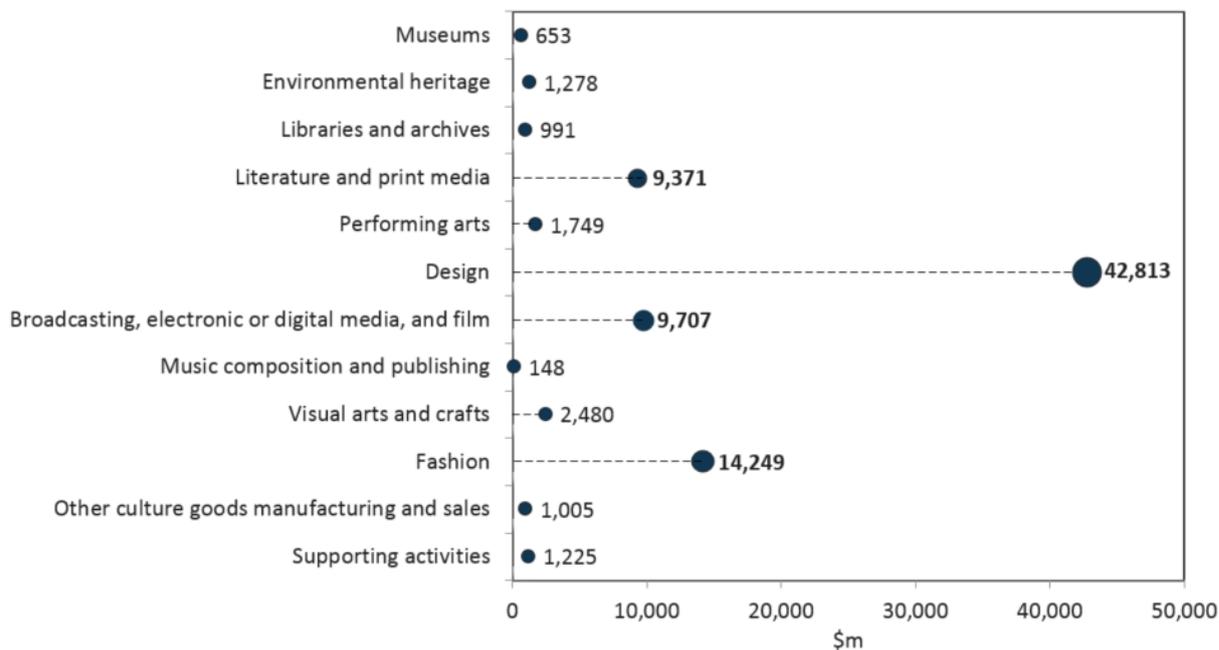
**Figure 1.** Cultural and creative activity, 2016-17



Source: ABS cat. 5204, 5209; BCAR calculations

The value of cultural and creative activity in industries considered to be cultural or creative was \$85.7 billion in 2016-17. The largest components were design at \$42.8 billion, fashion at \$14.2 billion, and broadcasting, electronic or digital media, and film at \$9.7 billion, as shown in Figure 2.

Figure 2. Cultural and creative industries, Gross Value Added (GVA) by domain 2016-17

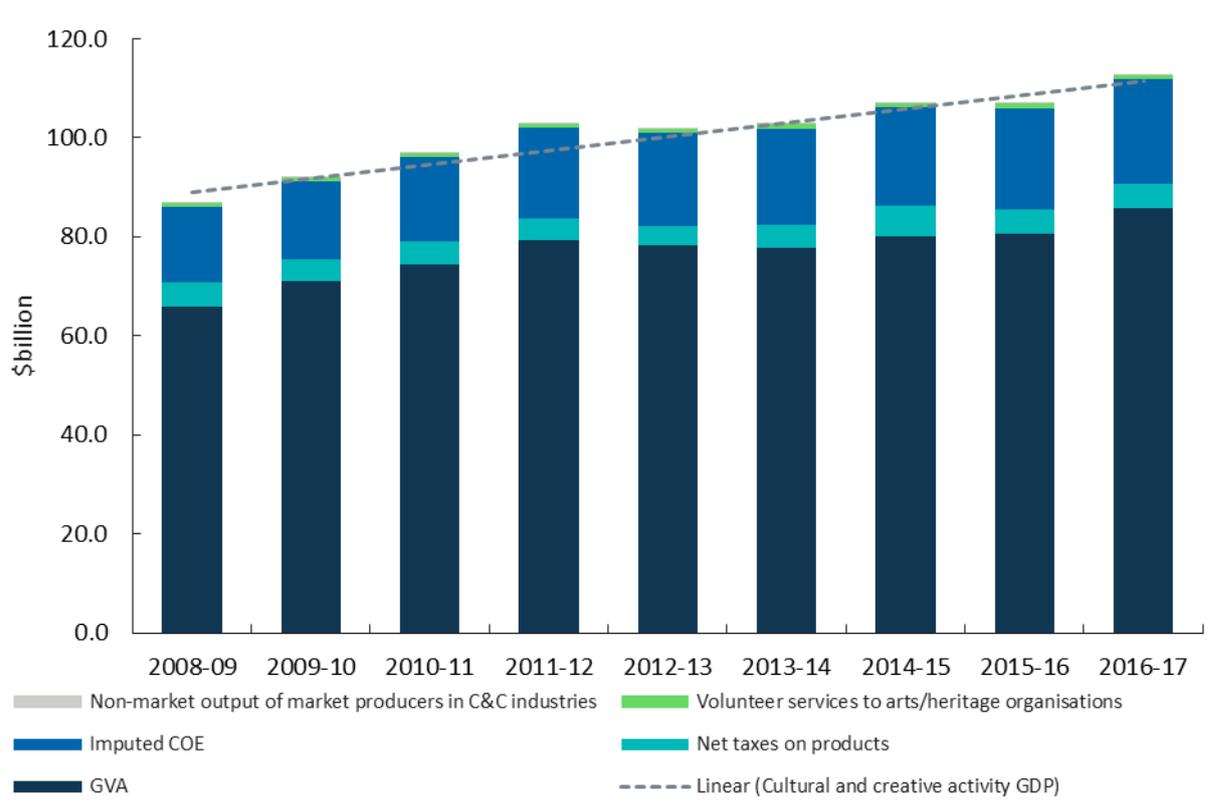


Source: ABS cat. 5204, 5209; BCAR calculations

## Cultural and creative activity from 2008-09 to 2016-17

Cultural and creative activity increased by \$25.8 billion or 30.0 per cent, from \$86.0 billion in 2008-09 to \$111.7 billion in 2016-17. This growth was driven mainly by an increase of \$19.9 billion in gross value added (GVA) from cultural and creative industries—primarily from professional, scientific and technical services with an increase of \$16.4 billion over the period, as shown in Figure 3.<sup>i</sup>

**Figure 3.** Cultural and creative activity, 2008-09 to 2016-17



Source: ABS cat. 5204, 5209; BCAR calculations

Cultural and creative activity, on a Satellite Accounts basis, consists of four components (see Appendix A: Methodology and Table 2):

- GVA from cultural and creative industries increased by \$19.9 billion or 30.3 per cent, from \$65.8 billion in 2008-09 to \$85.7 billion in 2016-17. Net taxes on products attributable to cultural and creative industries increased over the period by 0.6 per cent or \$32 million.
- Compensation of Employees (COE) received by individuals working in cultural and creative occupations that are outside industries identified as cultural and creative was \$21.0 billion in 2016-17. This grew by \$5.8 billion or 38.3 per cent over the period.
- The value of volunteer services to arts and heritage organisations was \$983 million in 2016-17, \$227 million more than in 2008-09.
- Non-market output of market producers in cultural and creative industries was \$88 million in 2016-17, an increase of \$20 million compared to 2008-09.

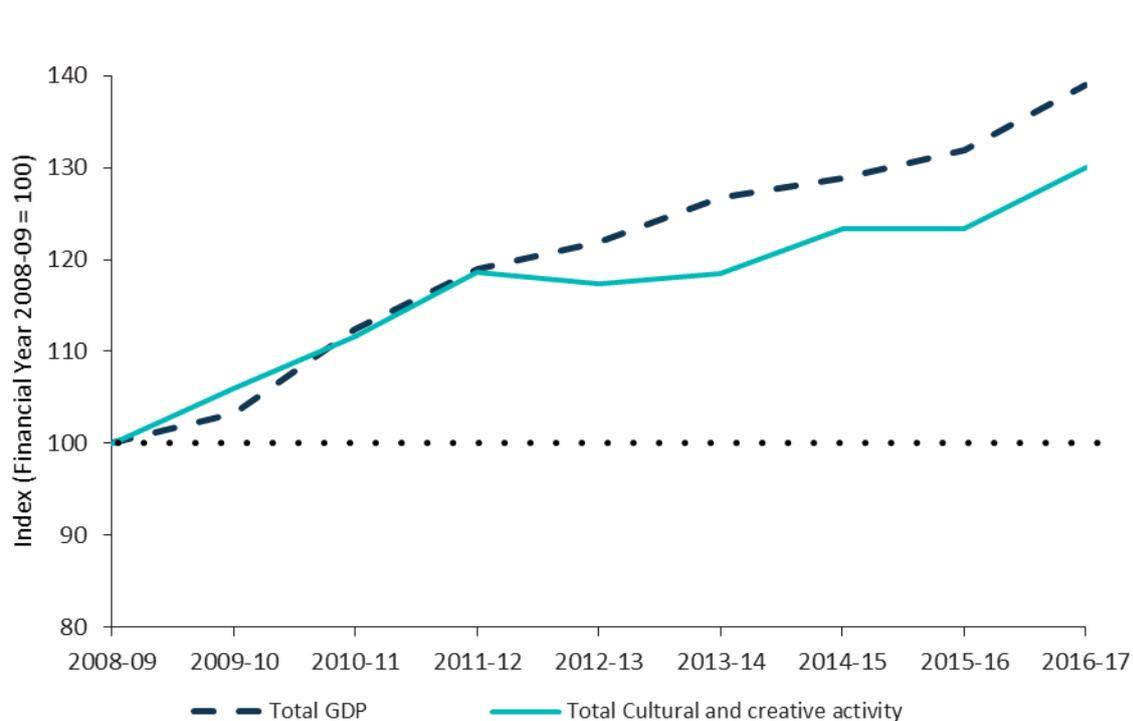
<sup>i</sup> The difference between GVA and GDP is explained in the glossary and can be found at Appendix E.

**Table 2.** Cultural and creative activity, share of GDP, 2008-09 to 2016-17

<b>Cultural and creative activity (C&amp;C) share of Gross Domestic Product</b>	<b>2008-09</b>	<b>2009-10</b>	<b>2010-11</b>	<b>2011-12</b>	<b>2012-13</b>	<b>2013-14</b>	<b>2014-15</b>	<b>2015-16</b>	<b>2016-17</b>
	<b>\$m</b>								
<b>C&amp;C activity GDP—national accounts basis</b>	<b>85,956</b>	<b>91,074</b>	<b>96,024</b>	<b>101,903</b>	<b>100,867</b>	<b>101,816</b>	<b>106,079</b>	<b>106,014</b>	<b>111,713</b>
Gross value added of C&C industries	65,772	70,998	74,500	79,286	78,273	77,638	80,074	80,554	85,670
Net taxes on products of C&C industries	4,967	4,408	4,496	4,486	3,925	4,889	6,194	4,888	4,999
COE for C&C occupations in other industries	15,217	15,668	17,028	18,132	18,668	19,289	19,811	20,572	21,044
<b>C&amp;C activity GDP—satellite account basis</b>	<b>86,780</b>	<b>91,948</b>	<b>96,945</b>	<b>102,880</b>	<b>101,834</b>	<b>102,792</b>	<b>107,096</b>	<b>107,030</b>	<b>112,784</b>
C&C activity GDP—national accounts basis	85,956	91,074	96,024	101,903	100,867	101,816	106,079	106,014	111,713
Volunteer services to arts/heritage organisations industries	756	801	845	896	887	895	933	932	983
Non-market output of market producers in C&C industries	68	72	76	81	80	81	84	84	88
<b>C&amp;C activity GDP national accounts basis share of GDP (%)</b>	<b>6.9</b>	<b>7.0</b>	<b>6.8</b>	<b>6.8</b>	<b>6.6</b>	<b>6.4</b>	<b>6.6</b>	<b>6.4</b>	<b>6.4</b>

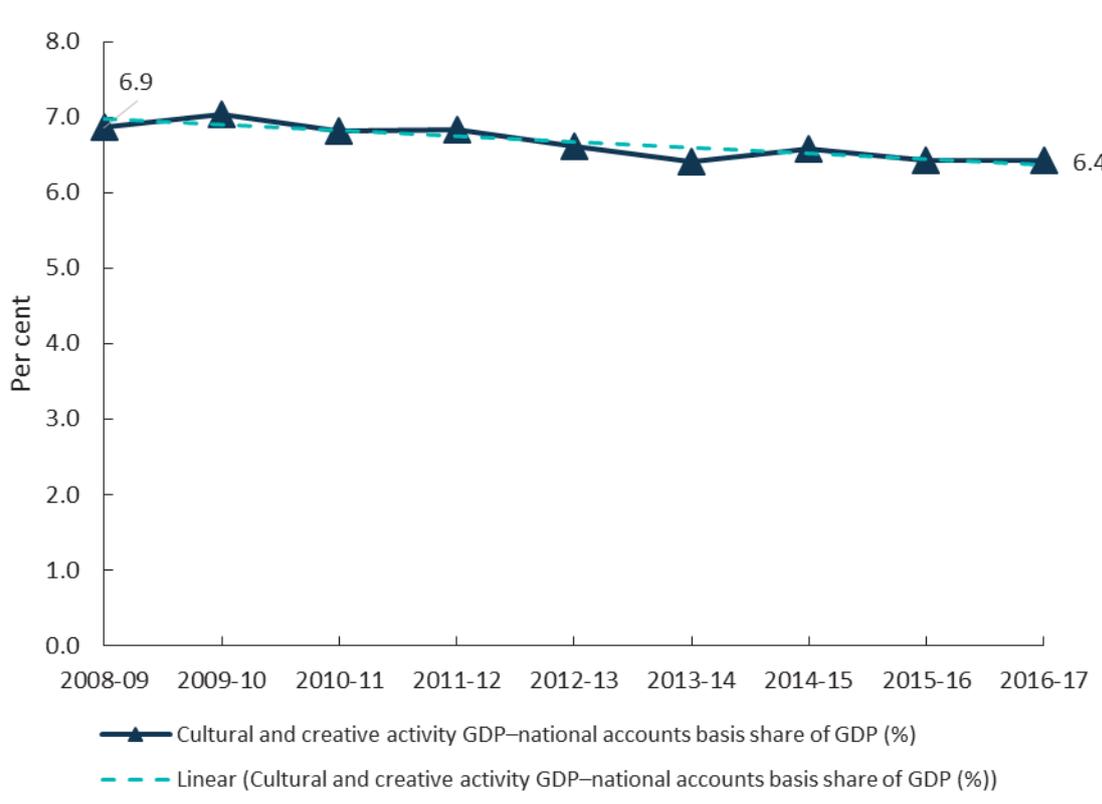
While cultural and creative activity is growing in absolute terms, the increase is slightly slower than the pace of the Australian economy overall (Figure 4). The Australian economy has been supported by activities that are almost entirely outside cultural and creative activity, such as mining related activity over the period.

In Figure 4, the dotted line at 100, represents the base year index of 2008-09. The area above the line represents growth whereas the area below the line represents a contraction since 2008-09. Similarly, the dash line represents GDP growth for the entire Australian economy relative to the base year. Cultural and creative activity grew faster than the overall economy in 2009-10 but then slowed after 2011-12. This slowdown reflects the contraction in manufacturing which is explored further in the industry division decomposition of the paper.

**Figure 4.** Cultural and creative activity relative to nominal GDP

Cultural and creative activity as a share of GDP declined slightly by 0.5 per cent over the period, from 6.9 per cent in 2008-09 to 6.4 per cent in 2016-17 (Figure 5).

**Figure 5.** Cultural and creative activity, share of GDP, 2008-09 to 2016-17



Source: ABS cat. 5204, 5209; BCAR calculations

The decline was driven by the reduction of cultural and creative activity in manufacturing, from \$6.2 billion in 2008-09 to \$3.9 billion in 2016-17. Cultural and creative activity within manufacturing was the only industry division to record an absolute decline, as shown in Table 3 and Figure 6. This decline in manufacturing accelerated in 2012-13. However, cultural and creative activity increased significantly in absolute terms within the industry division of professional, scientific and technical services with an increase of \$16.4 billion or 60.7 per cent over the period; followed by retail trade at \$3.3 billion or 33.9 per cent.

**Table 3.** Cultural and creative activity, GVA by industry division, 2008-09 to 2016-17

Division Name	2008-09	2009-10	2010-11	2011-12	2012-13	2013-14	2014-15	2015-16	2016-17
Manufacturing	6,246	5,854	5,864	5,936	4,607	4,208	4,273	3,932	3,937
Wholesale Trade	3,535	3,707	3,923	4,136	4,278	4,252	4,272	4,430	4,474
Retail Trade	9,701	10,069	10,719	11,533	11,793	11,832	12,056	12,600	12,988
Information Media and Telecommunications	15,507	16,234	16,210	16,449	15,739	15,209	15,490	15,820	15,742
Rental, Hiring and Real Estate Services	121	141	150	172	158	141	145	142	148
Professional, Scientific and Technical Services	27,051	30,989	33,432	36,606	36,996	37,081	38,724	38,758	43,476
Education and Training	779	853	933	984	1,032	1,082	1,126	1,176	1,225
Arts and Recreation Services	2,832	3,151	3,270	3,472	3,671	3,834	3,988	3,695	3,680
<b>Total</b>	<b>65,772</b>	<b>70,998</b>	<b>74,500</b>	<b>79,286</b>	<b>78,273</b>	<b>77,638</b>	<b>80,074</b>	<b>80,554</b>	<b>85,670</b>

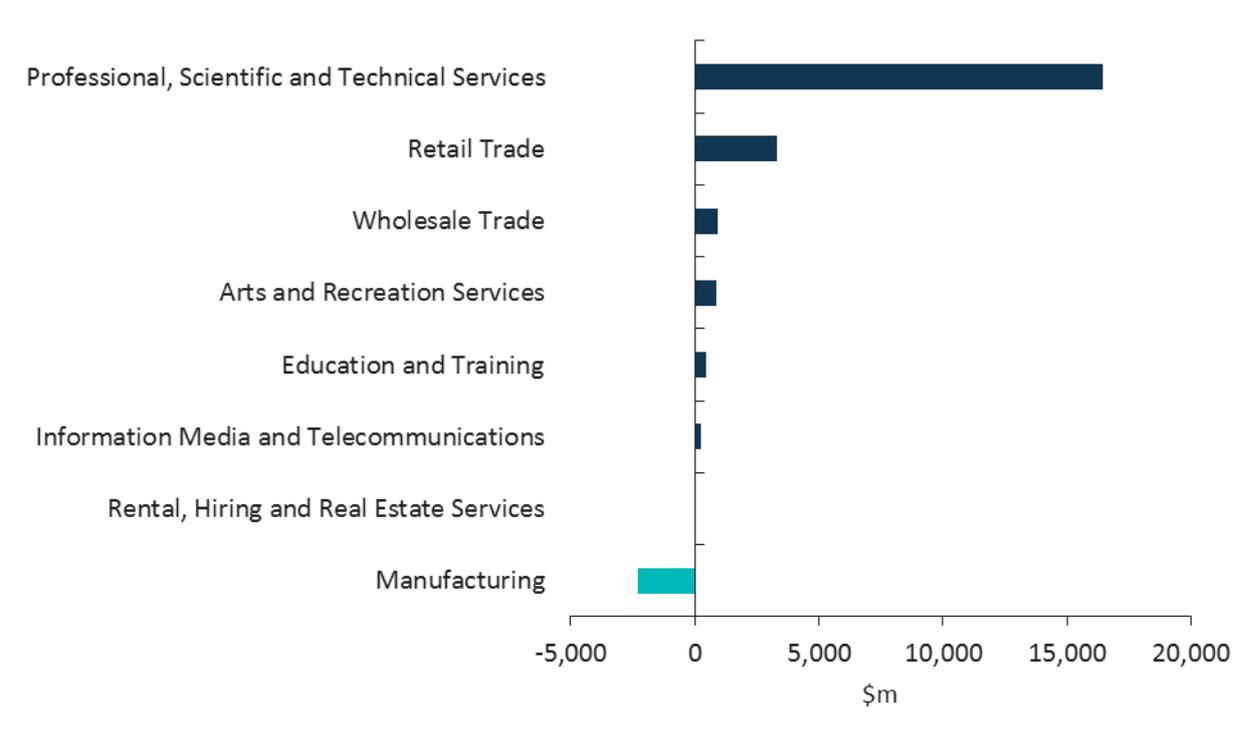
The industry divisions presented in this report are consistent with the ABS' Australian System of National Accounts, cat. 5204.

Professional, scientific and technical services was the largest contributor to cultural and creative activity by GVA over the period, increasing from 41.1 per cent in 2008-09 to 50.7 per cent in 2016-17. The increase in this industry division was driven primarily by computer system design services, up by

\$10.9 billion or 59.2 per cent over the period. The increase was due to the greater investment and adoption of information technology to create greater efficiency in business operations.

After computer system design services, architectural services was the second largest contributor to the increase in professional, scientific and technical services. GVA in architectural services rose by \$2.4 billion from 2008-09 to 2016-17. Additionally, advertising services increased by \$1.7 billion and other specialised design services grew by \$1.2 billion over the same period.

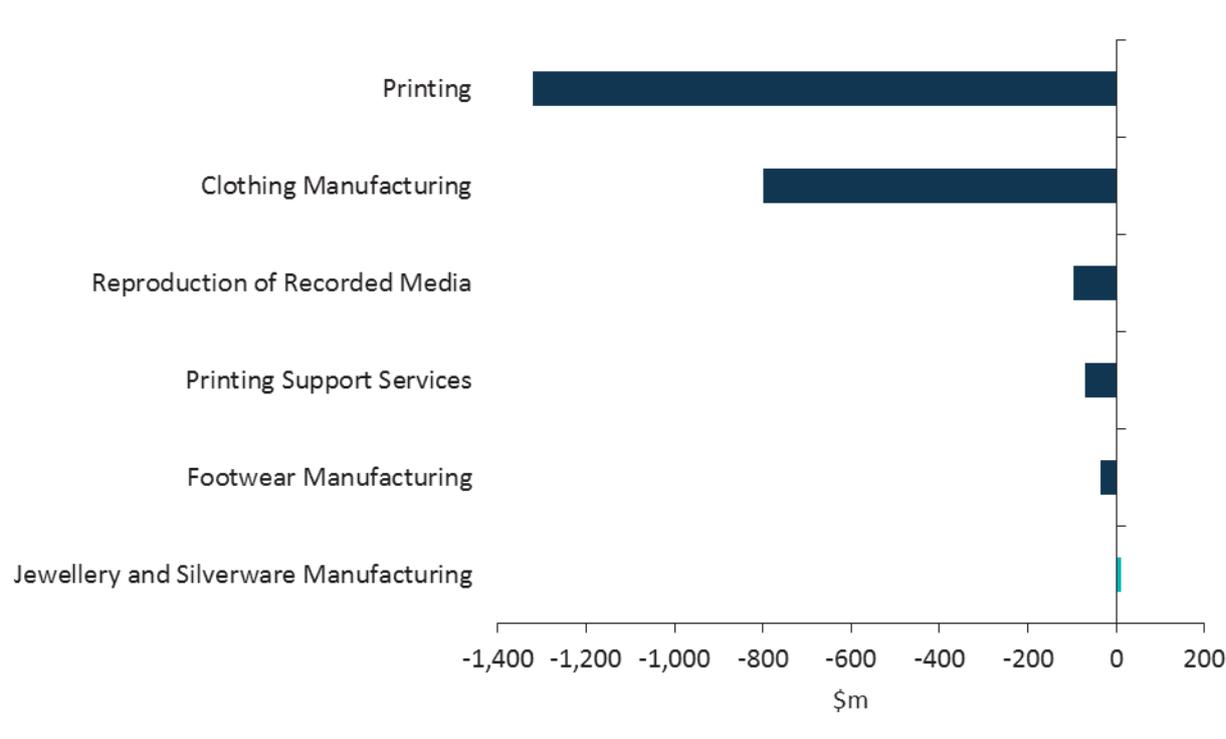
**Figure 6.** GVA change by division, cultural and creative industries, 2008-09 to 2016-17



Source: ABS cat. 5204, 5209; BCAR calculations

Five out of six cultural and creative industries within the manufacturing industry division experienced a decline from 2008-09 to 2016-17, as shown in Figure 7. Printing fell the most by \$1.3 billion or 34.2 per cent.

The printing industry in Australia has declined significantly over the past decade. Increased competition from overseas has created strong price pressures that have led to falling demand and excess capacity.<sup>8</sup> Another contributing factor has been consumers moving to online platforms. These online platforms provide information quicker to customers than traditional print materials and are more cost effective in distributing information.<sup>8</sup> As a result, online platforms are increasingly being used by businesses to interact and engage with their customers with traditional printing services being phased out.<sup>8</sup>

**Figure 7.** GVA change of cultural and creative industries in manufacturing, 2008-09 to 2016-17

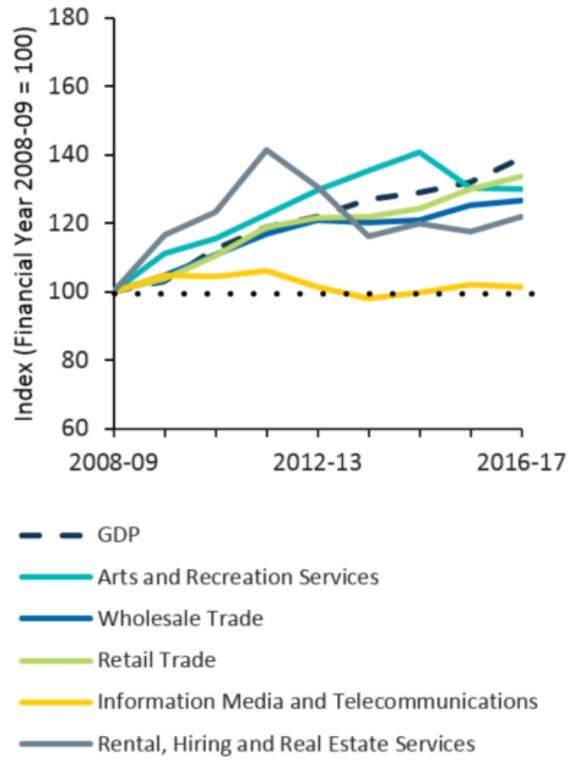
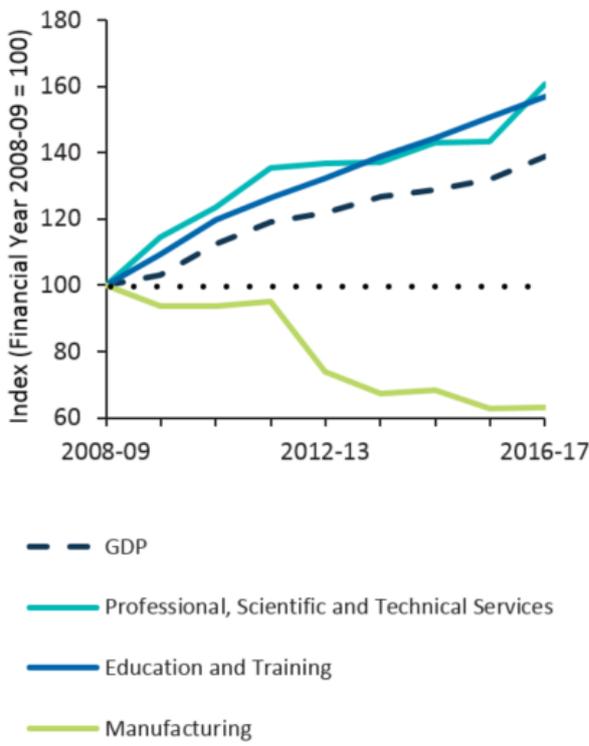
Source: ABS cat. 5204, 5209; BCAR calculations

After printing, clothing manufacturing, fell by \$799 million or 54.3 per cent over the period. This decline in clothing manufacturing in Australia is largely attributed to manufacturers facing increased competition from cheaper imports particularly from China.<sup>9</sup> Businesses have also continued to move their operations overseas to benefit from lower operating costs.<sup>9</sup>

In absolute terms, only cultural and creative activity in manufacturing declined. However, when each industry division's growth is compared with the pace of the economy as a whole, only two industry divisions outpaced the rest of the economy by the end of the period. Cultural and creative activity in professional, scientific and technical services outpaced the economy by 21.8 percentage points and cultural and creative activity in education and training outpaced the economy by 18.2 percentage points in 2016-17, as shown in Figure 8. These industry divisions tend to require more specialised skills than other industry divisions.

In Figure 8, the dotted line at 100, represents the base year index of 2008-09. As noted earlier, the area above the line represents growth whereas the area below the line represents a contraction since 2008-09. Also, if an industry division grew but did not outpace the economy as a whole, as did five out of the eight industry divisions (see Figure 8 – right hand panel), then their growth would be between the base year line and the dashed nominal GDP line.

**Figure 8.** Industry division's GVA relative to GDP



Source: ABS cat. 5204, 5209; BCAR calculations

## Cultural activity 2008-09 to 2016-17

Cultural activity requires human activity as an input and may contain intellectual property to communicate symbolic meaning, such as in beliefs, values, and traditions.<sup>10</sup>

Cultural activity increased by \$12.1 billion or 23.5 per cent from \$51.4 billion in 2008-09 to \$63.5 billion in 2016-17 as shown in Table 4.

GVA for cultural industries increased by \$6.6 billion or 18.8 per cent from \$35.2 billion in 2008-09 to \$41.9 billion in 2016-17.

Net taxes on products attributable to cultural industries increased by \$506 million or 11.2 per cent from 2008-09 to 2016-17.

COE received by individuals working in cultural occupations that are outside industries identified as cultural was \$16.6 billion in 2016-17. This has grown by \$4.9 billion over the period.<sup>ii</sup>

The value of volunteer services to arts and heritage organisations was \$983 million in 2016-17, \$227 million more than in 2008-09. This value is identical to the total cultural and creative value of volunteer services due to the cultural and creative overlap of arts and heritage organisations.

Non-market output of market producers in cultural industries was \$68 million in 2016-17, with an increase of \$13 million compared to 2008-09.

**Table 4.** Cultural activity, share of GDP, 2008-09 to 2016-17

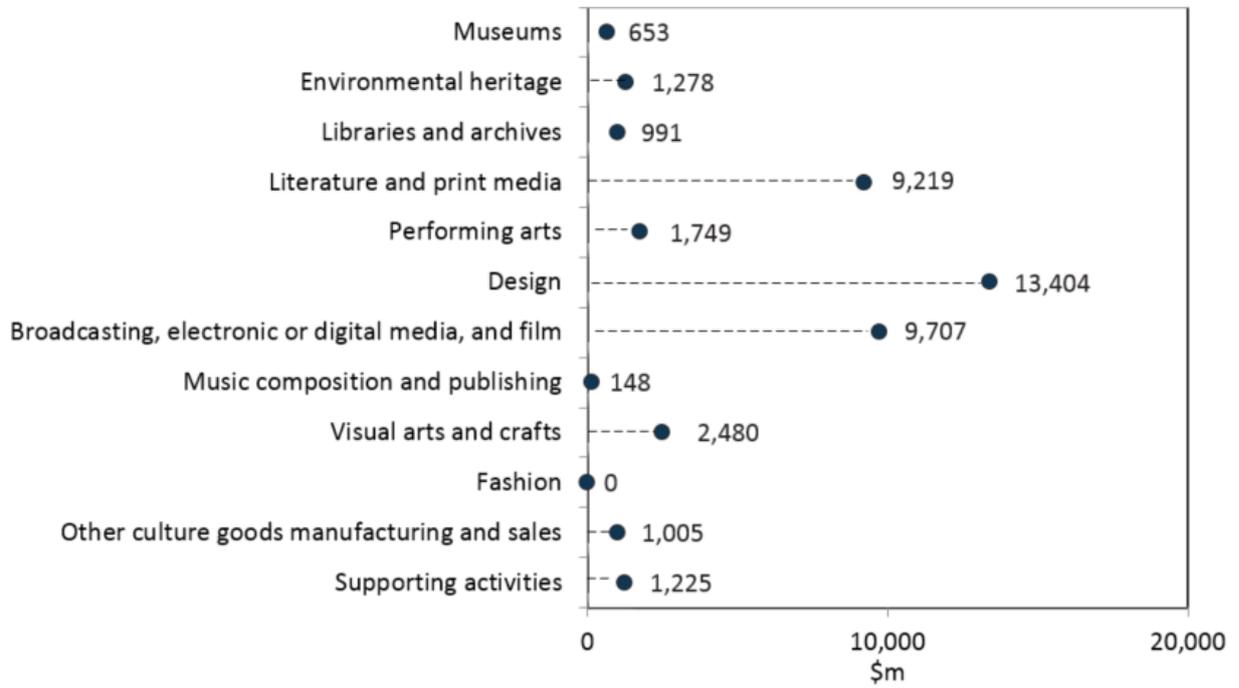
Cultural activity share of Gross Domestic Product	2008-09 \$m	2009-10 \$m	2010-11 \$m	2011-12 \$m	2012-13 \$m	2013-14 \$m	2014-15 \$m	2015-16 \$m	2016-17 \$m
<b>Cultural activity GDP—national accounts basis</b>	<b>51,395</b>	<b>53,793</b>	<b>56,090</b>	<b>58,718</b>	<b>58,869</b>	<b>59,692</b>	<b>61,376</b>	<b>61,402</b>	<b>63,476</b>
Gross value added of cultural industries	35,223	36,978	38,115	39,883	40,056	39,369	40,145	40,267	41,860
Net taxes on products of cultural industries	4,531	4,477	4,567	4,557	4,098	5,123	5,630	4,926	5,037
COE for cultural occupations in other industries	11,641	12,338	13,408	14,278	14,715	15,200	15,602	16,209	16,579
<b>Cultural activity GDP—satellite account basis</b>	<b>52,206</b>	<b>54,652</b>	<b>56,994</b>	<b>59,677</b>	<b>59,819</b>	<b>60,651</b>	<b>62,375</b>	<b>62,400</b>	<b>64,526</b>
Cultural activity GDP—national accounts basis	51,395	53,793	56,090	58,718	58,869	59,692	61,376	61,402	63,476
Volunteer services to arts/heritage organisations	756	801	845	896	887	895	933	932	983
Non-market output of market producers in cultural industries	55	58	60	63	63	64	66	66	68
<b>Cultural activity GDP national accounts basis share of GDP (%)</b>	<b>4.1</b>	<b>4.2</b>	<b>4.0</b>	<b>3.9</b>	<b>3.9</b>	<b>3.8</b>	<b>3.8</b>	<b>3.7</b>	<b>3.6</b>

The industry divisions presented in this report are consistent with the ABS's Australian System of National Accounts, cat. 5204.

Cultural activity represents a smaller share of total GVA compared to creative activity and primarily consists of design at \$13.4 billion, broadcasting, electronic or digital media, and film at \$9.7 billion, and literature and print media at \$9.2 billion in 2016-17 (Figure 9). Cultural activity in design includes architecture, advertising and other specialised design services; cultural activity in broadcasting, electronic, or digital media and film includes free-to-air television broadcasting, and cable and other subscription broadcasting; and cultural activity in literature and print media includes activities like newspaper publishing, printing, and newspaper and book retailing.

<sup>ii</sup> There are some departures from the Satellite Accounts in the calculations of cultural activity for net taxes on products and COE for occupations in other industries. Further explanation can be found in *Appendix A: Methodology*.

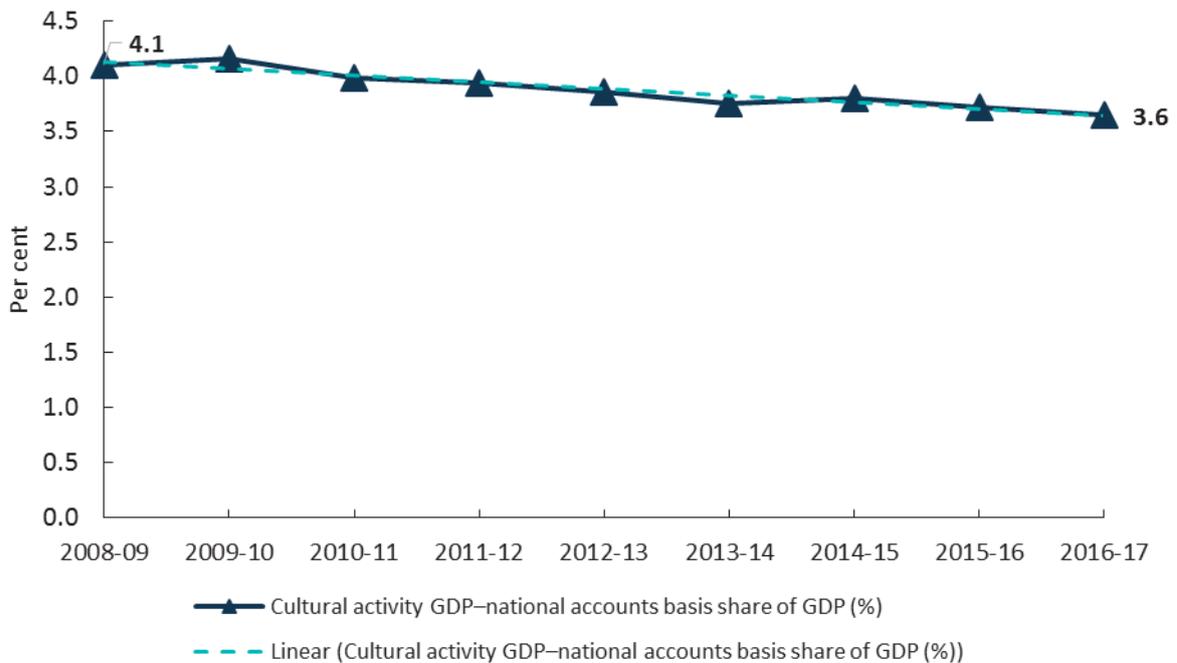
**Figure 9.** GVA by domain, cultural industries, 2016-17 (\$m)



Source: ABS cat. 5204, 5209; BCAR calculations

Cultural activity, as a per cent of GDP, declined slightly by 0.5 per cent, from 4.1 per cent in 2008-09 to 3.6 per cent in 2016-17 (Figure 10).

**Figure 10.** Cultural activity, share of GDP, 2008-09 to 2016-17



Source: ABS cat. 5204, 5209; BCAR calculations

## Creative activity 2008-09 to 2016-17

Creative activity requires human creativity as a significant and identifiable input.<sup>10</sup>

Creative activity increased by \$24.5 billion or 32.6 per cent from \$75.2 billion in 2008-09 to \$99.7 billion in 2016-17, as shown in Table 5.

GVA for creative industries increased by \$19.9 billion or 34.5 per cent from \$57.9 billion in 2008-09 to \$77.8 billion in 2016-17.

Net taxes on products attributable to creative industries decreased by \$40 million or 0.9 per cent from 2008-09 to 2016-17.

COE received by individuals working in creative occupations that are outside industries identified as creative was \$17.5 billion in 2016-17. This has grown by 35.9 per cent during the period.<sup>iii</sup>

The value of volunteer services to arts and heritage organisations was \$983 million in 2016-17, \$227 million more than \$756 million in 2008-09. This value is identical to the total cultural and creative value of volunteer services due to the cultural and creative overlap of arts and heritage organisations.

Non-market output of market producers in the creative industries was \$73 million in 2016-17, with an increase of \$18 million compared to 2008-09.

**Table 5.** Creative activity, share of GDP, 2008-09 to 2016-17

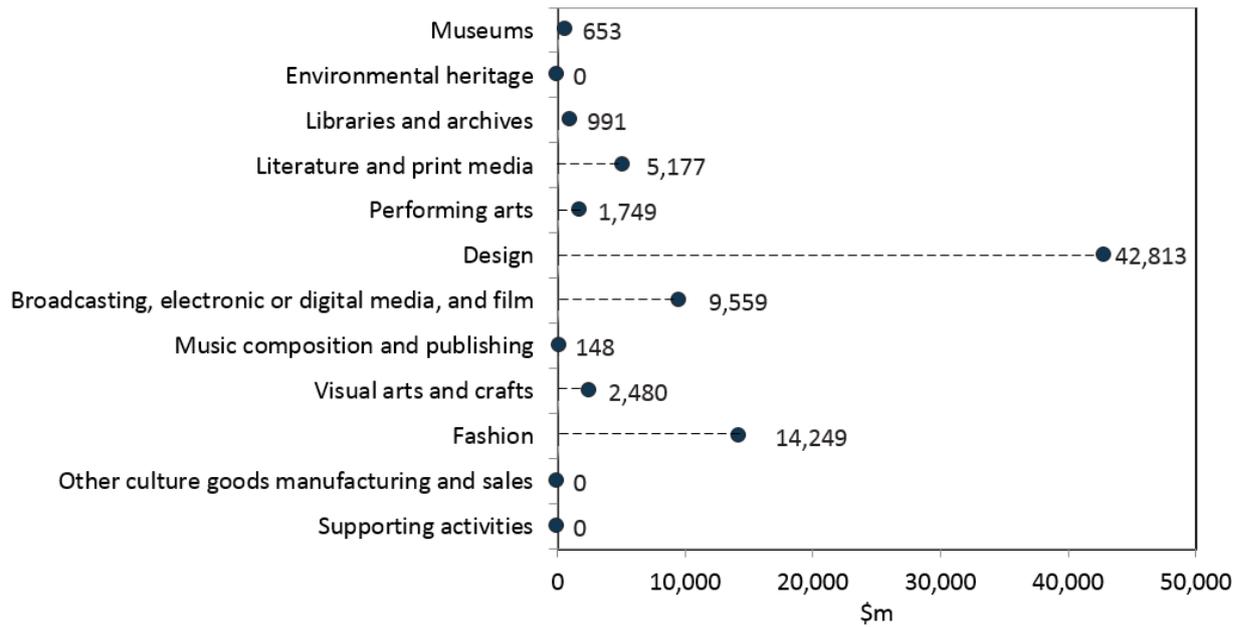
Creative activity	2008-09	2009-10	2010-11	2011-12	2012-13	2013-14	2014-15	2015-16	2016-17
share of Gross Domestic Product	\$m								
<b>Creative activity GDP—national accounts basis</b>	<b>75,210</b>	<b>80,274</b>	<b>84,722</b>	<b>90,080</b>	<b>89,170</b>	<b>90,048</b>	<b>94,152</b>	<b>94,242</b>	<b>99,728</b>
Gross value added of creative industries	57,871	63,166	66,410	70,861	70,105	69,643	71,926	72,818	77,820
Net taxes on products of creative industries	4,499	4,060	4,141	4,132	3,560	4,393	5,785	4,360	4,459
COE for creative occupations in other industries	12,840	13,048	14,171	15,088	15,505	16,012	16,441	17,064	17,449
<b>Creative activity GDP—satellite account basis</b>	<b>76,021</b>	<b>81,134</b>	<b>85,629</b>	<b>91,042</b>	<b>90,122</b>	<b>91,009</b>	<b>95,153</b>	<b>95,244</b>	<b>100,784</b>
Creative activity GDP—national accounts basis	75,210	80,274	84,722	90,080	89,170	90,048	94,152	94,242	99,728
Volunteer services to arts/heritage organisations	756	801	845	896	887	895	933	932	983
Non-market output of market producers in Creative industries	55	59	62	66	65	66	69	69	73
<b>Creative activity GDP national accounts basis share of GDP (%)</b>	<b>6.0</b>	<b>6.2</b>	<b>6.0</b>	<b>6.0</b>	<b>5.8</b>	<b>5.7</b>	<b>5.8</b>	<b>5.7</b>	<b>5.7</b>

The industry divisions presented in this report are consistent with the ABS's Australian System of National Accounts, cat. 5204.

Creative activity represents a larger share of total GVA compared to cultural activity and displays a very similar structure to the overall combination of creative and cultural activity, being dominated by design at \$42.8 billion, fashion at \$14.2 billion, and broadcasting, electronic or digital media, and film at \$9.6 billion in 2016-17 (Figure 11). Creative activity in design includes computer systems design and related services, architecture, advertising and other specialised design services; creative activity in fashion includes clothing retailing, and clothing and footwear wholesaling; creative activity in broadcasting, electronic, or digital media and film includes free-to-air television broadcasting, and cable and other subscription broadcasting.

<sup>iii</sup> There are some departures from the Satellite Accounts in the calculations of creative activity for net taxes on products and COE for occupations in other industries. Further explanation can be found in *Appendix A: Methodology*.

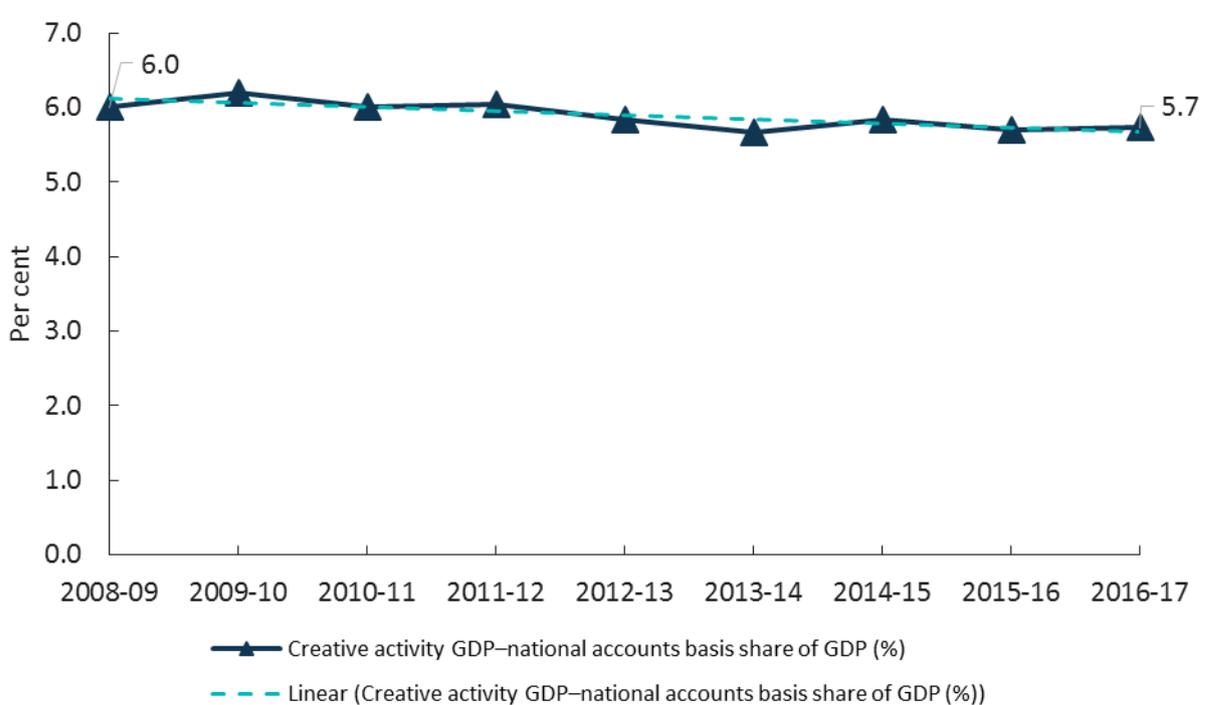
**Figure 11.** GVA by domain, creative industries, 2016-17 (\$m)



Source: ABS cat. 5204, 5209; BCAR calculations

Creative activity as a per cent of GDP declined slightly by 0.3 per cent, from 6.0 per cent in 2008-09 to 5.7 per cent in 2016-17 (Figure 12).

**Figure 12.** Creative activity, share of GDP, 2008-09 to 2016-17



Source: ABS cat. 5204, 5209; BCAR calculations

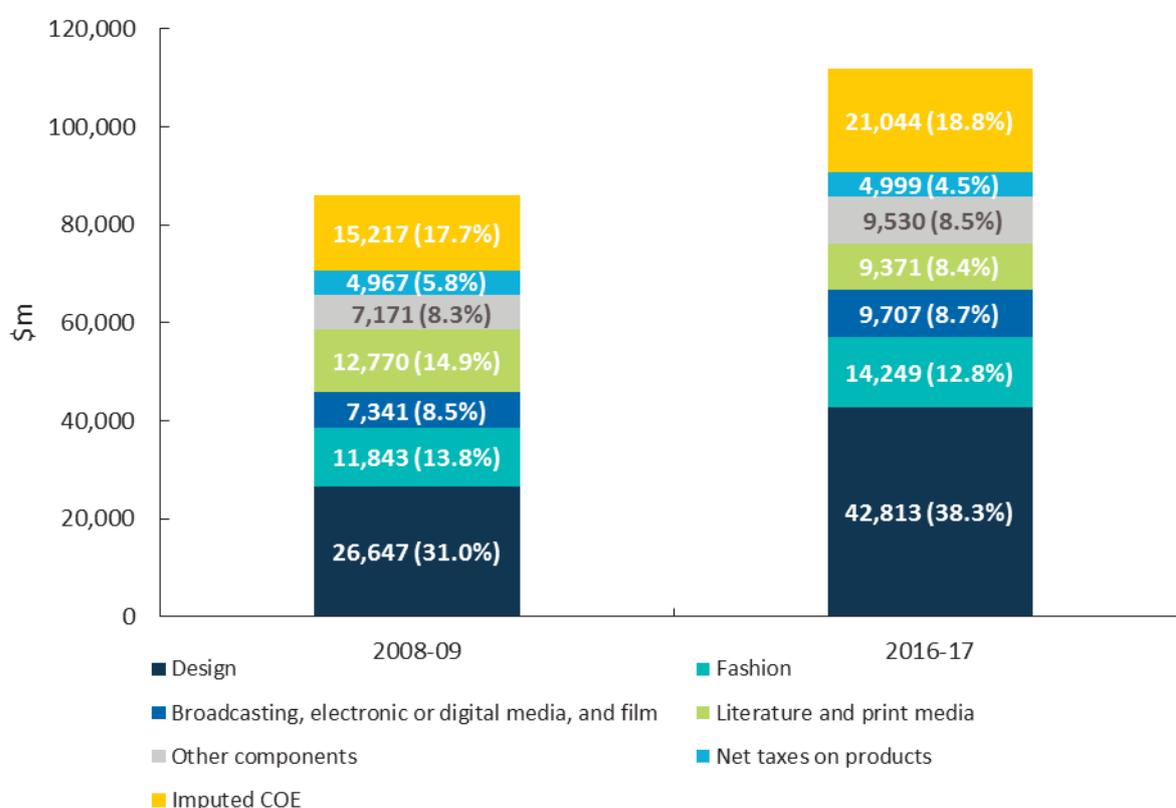
## Cultural and creative activity by domain, 2008-09 to 2016-17

Cultural and creative activity can be also analysed by domains which are grouped in terms of related industries. The Satellite Accounts listed twelve such domains which are museums; environmental heritage; libraries and print media; performing arts; design; broadcasting, electronic or digital media, and film; music composition and publishing; visual arts and crafts; fashion; other culture goods manufacturing and sales; and supporting activities and are shown in Figure 13 and Figure 14. The activity within the domains is grouped in terms of Australian and New Zealand Standard Industrial Classification 2006 (ANZSIC 06) class codes. The class codes by domain can be found at Appendix C.

The largest contribution to cultural and creative activity was design. This domain increased by 7.3 percentage points as a proportion of total activity, from 31.0 per cent in 2008-09 to 38.3 per cent in 2016-17. Fashion, the second largest domain as a proportion of cultural and creative activity declined by 1.0 percentage point, from 13.8 per cent in 2008-09 to 12.8 per cent in 2016-17. The proportion of broadcasting, electronic or digital media, and film has remained relatively flat, moving from 8.5 per cent in 2008-09 to 8.7 per cent in 2016-17. Literature and print media, the second largest domain in 2008-09 at 14.9 per cent dropped to 8.4 per cent and became the fourth largest domain of cultural and creative activity in 2016-17.

These four domains, in total, contributed 68.2 per cent of cultural and creative activity with all other domains having had a much smaller impact at 8.5 per cent in 2016-17. The remaining 23.3 per cent was made up of income received from creative and cultural workers in other industries (Imputed COE) and net taxes on products.

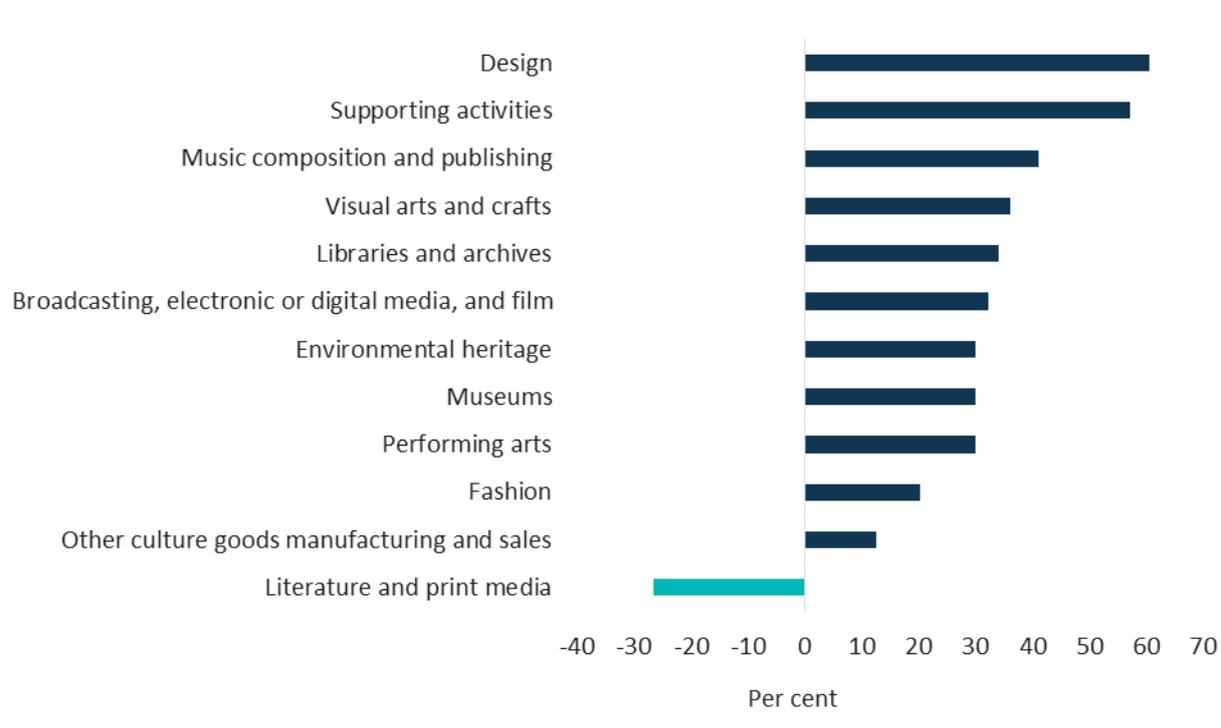
**Figure 13.** Contribution to cultural and creative activity, GVA (by domain), net taxes on products, and COE in other industries, 2008-09 and 2016-17



Source: ABS cat. 5204, 5209; BCAR calculations

Eleven of the twelve domains experienced growth from 2008-09 to 2016-17. Design had the strongest growth of 60.7 per cent or \$16.2 billion (Figure 14). The only domain to decline in absolute terms was literature and print media which decreased by 26.6 per cent or \$3.4 billion. This was driven by falling demand due to consumers moving towards online platforms.

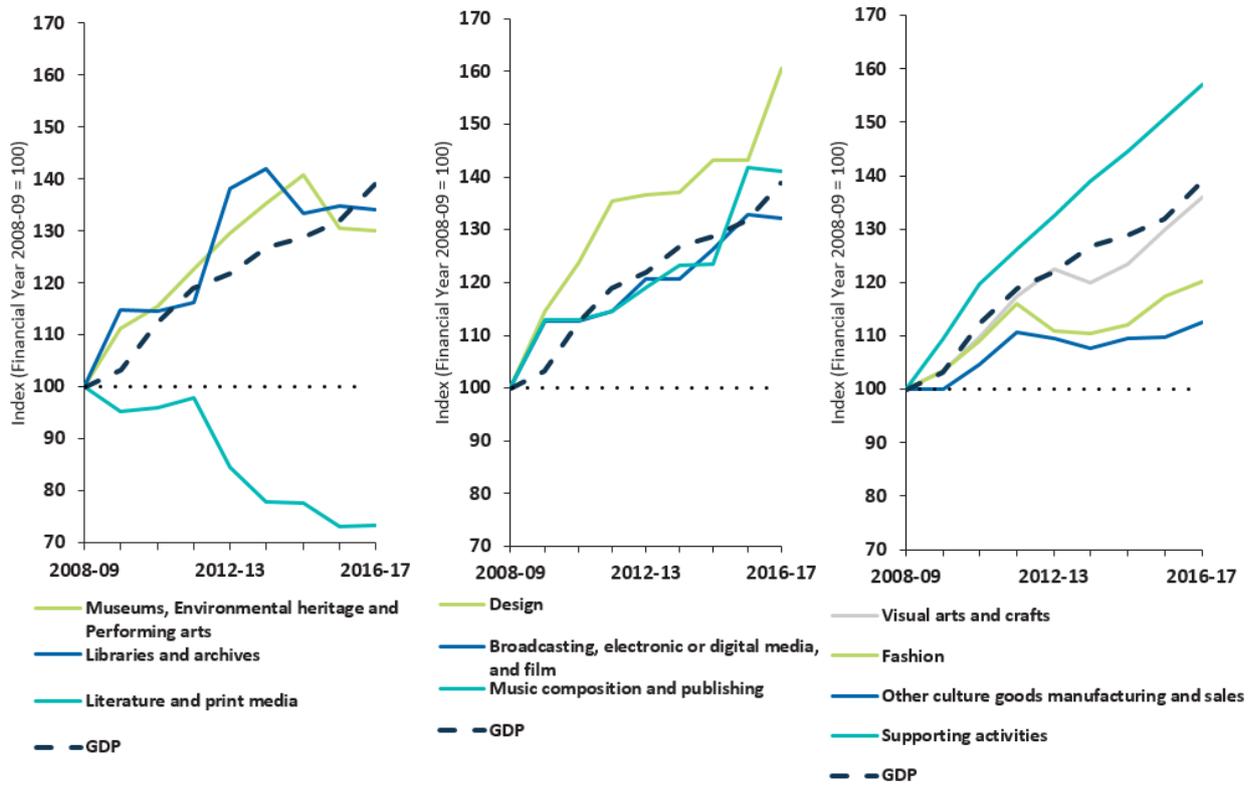
**Figure 14.** Nominal GVA growth by domain, cultural and creative industries, 2008-09 to 2016-17



Source: ABS cat. 5204, 5209; BCAR calculations

The information presented by domain is consistent with the information presented by industry division (as shown in Figure 8). Literature and print media contracted over the period; most cultural and creative domains grew, but did not keep pace with the economy as a whole; and design, which consists of services like architecture, computer system design and advertising services, as well as supporting activities, and music composition and publishing, outpaced the economy (Figure 15).

Figure 15. Domains' GVA relative to GDP



Source: ABS cat. 5204, 5209; BCAR calculations

## Museums

The museums domain includes museum operations such as the preservation and exhibition of heritage objects and artefacts as well as visual arts and crafts with aesthetic, historical, cultural, and educational value. This also includes activities related to entities operating in historical places, sites or houses.<sup>11</sup>

GVA of cultural and creative activity in museums achieved modest growth from 2008-09 to 2014-15, followed by a decline more recently (Table 6). Museums operate in a highly competitive environment. They contend with other leisure, sporting and entertainment organisations for a share of consumer expenditure and government funding. Museums are also providing some services to users free-of-charge but are diversifying income streams through increased earnings from cafes, gift shops and larger private donations.<sup>12</sup>

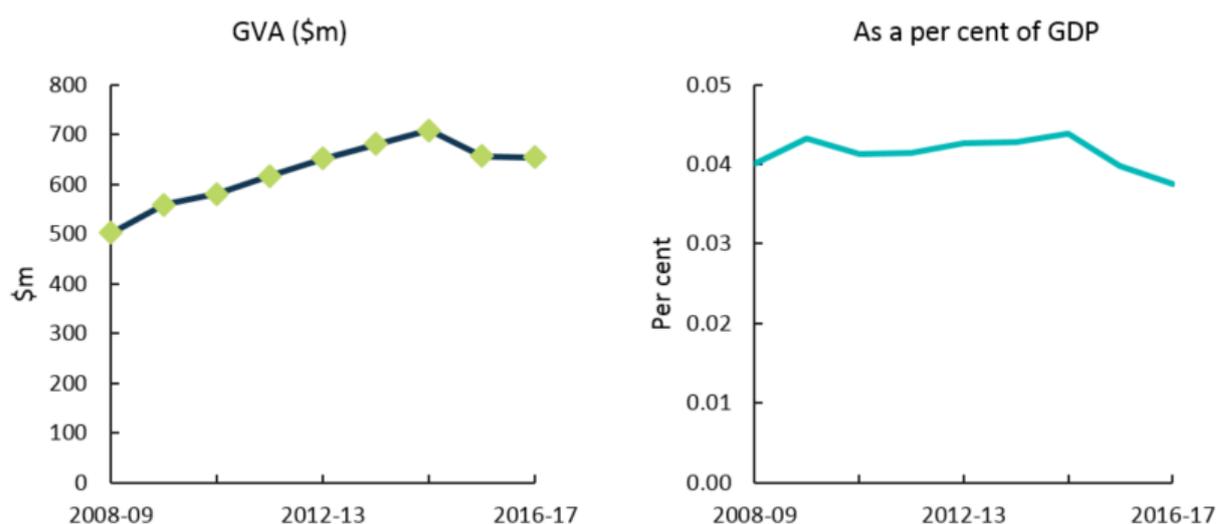
GVA of cultural and creative activity in museums increased by \$151 million or 30.0 per cent from 2008-09 to 2016-17. However, as a per cent of GDP, it has remained relatively flat over the period (Table 6 and Figure 16).

**Table 6.** Cultural and creative activity in museums, 2008-09 to 2016-17<sup>iv</sup>

Museums	2008-09	2009-10	2010-11	2011-12	2012-13	2013-14	2014-15	2015-16	2016-17
Output (\$m)	1,145	1,317	1,434	1,517	1,271	1,340	1,354	1,412	1,488
COE (\$m)	337	362	395	422	347	355	341	360	368
GOS and GMI (\$m)	188	219	209	219	340	364	396	337	329
Taxes less subsidies on production (\$m)	-23	-21	-23	-25	-36	-38	-29	-42	-44
<b>GVA (\$m)</b>	<b>503</b>	<b>559</b>	<b>580</b>	<b>616</b>	<b>652</b>	<b>681</b>	<b>708</b>	<b>656</b>	<b>653</b>
<b>As a per cent of GDP</b>	<b>0.04</b>								

Components of GDP are presented nominally. Further detail is provided at *Appendix D: Structure for cultural and creative activity of the domain tables*.

**Figure 16.** GVA, Cultural and creative activity in museums, 2008-09 to 2016-17



Source: ABS cat. 5204, 5209; BCAR calculations

<sup>iv</sup> The table of cultural activity in the domain of *museums*, and the table of creative activity in this domain are identical with Table 6 over the same period since all activity in this domain is both cultural and creative.

## Environmental heritage

Environmental heritage consists of:

- Zoological and botanical gardens operation which includes the active management, breeding, preservation, and study and exhibition of live plants and animals in a controlled environment such as zoological or botanical gardens;<sup>13</sup> and
- Nature reserves and conservation parks operation which is the preservation of flora and fauna in their natural environment such as in nature reserves and conservation parks.<sup>13</sup>

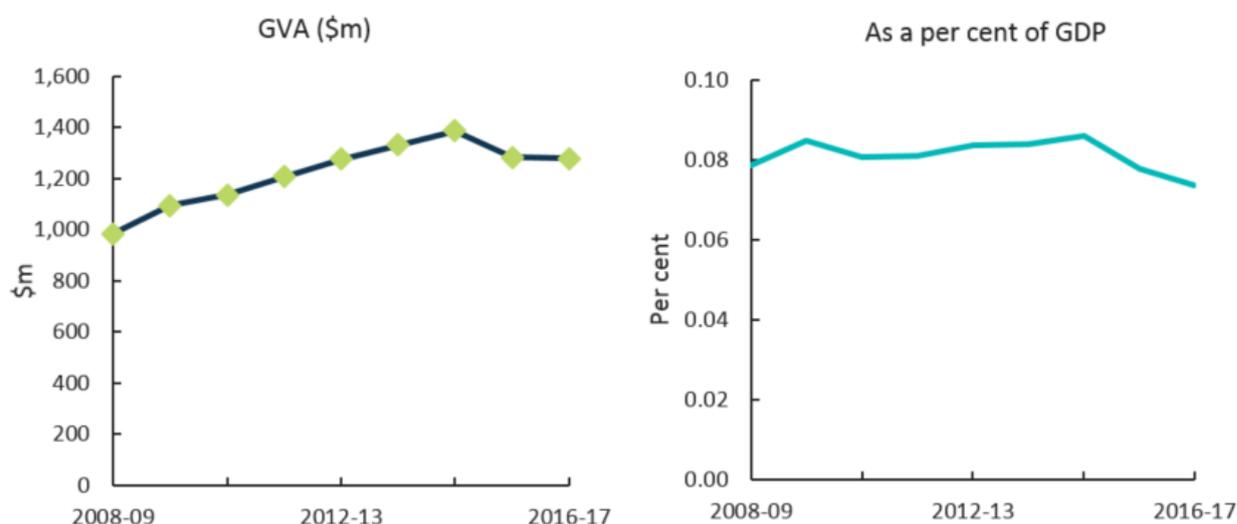
Government funding drives this domain's performance and it is highly sensitive to changes in funding arrangements.<sup>14</sup> GVA of cultural and creative activity in environmental heritage increased by \$295 million or 30.0 per cent from 2008-09 to 2016-17 while as a per cent of GDP, it has fallen slightly by the end of the period (Table 7 and Figure 17).

**Table 7.** Cultural and creative activity in environmental heritage, 2008-09 to 2016-17<sup>v</sup>

Environmental heritage	2008-09	2009-10	2010-11	2011-12	2012-13	2013-14	2014-15	2015-16	2016-17
Output (\$m)	2,194	2,523	2,747	2,907	2,436	2,568	2,593	2,705	2,850
COE (\$m)	421	452	493	526	433	442	426	450	459
GOS and GMI (\$m)	604	682	685	724	907	960	1,012	910	900
Taxes less subsidies on production (\$m)	-42	-39	-43	-45	-65	-70	-53	-77	-81
<b>GVA (\$m)</b>	<b>983</b>	<b>1,094</b>	<b>1,135</b>	<b>1,206</b>	<b>1,275</b>	<b>1,331</b>	<b>1,385</b>	<b>1,283</b>	<b>1,278</b>
<b>As a per cent of GDP</b>	<b>0.08</b>	<b>0.08</b>	<b>0.08</b>	<b>0.08</b>	<b>0.08</b>	<b>0.08</b>	<b>0.09</b>	<b>0.08</b>	<b>0.07</b>

Components of GDP are presented nominally. Further detail is provided at *Appendix D: Structure for cultural and creative activity of the domain tables*.

**Figure 17.** GVA, Cultural and creative activity in environmental heritage, 2008-09 to 2016-17



Source: ABS cat. 5204, 5209; BCAR calculations

<sup>v</sup> The table of cultural activity in the domain of *environmental heritage* is identical with Table 7 over the same period. There is no creative activity in the domain of *environmental heritage*.

## Libraries and archives

The libraries and archives domain is engaged primarily in providing library or archive services. This includes maintaining the collections of documents (e.g. books, journals, newspapers and music) and facilitating the use of such documents (recorded information regardless of its physical form and characteristics).<sup>15</sup>

This domain is funded primarily by governments with most industry services provided to users free of charge. Government funding accounts for more than 90 per cent of revenue and the domain is therefore highly sensitive to changes in these funding arrangements.<sup>16</sup> The remaining share of industry revenue is typically derived from fees and charges, as well as from private funding and donations.<sup>16</sup>

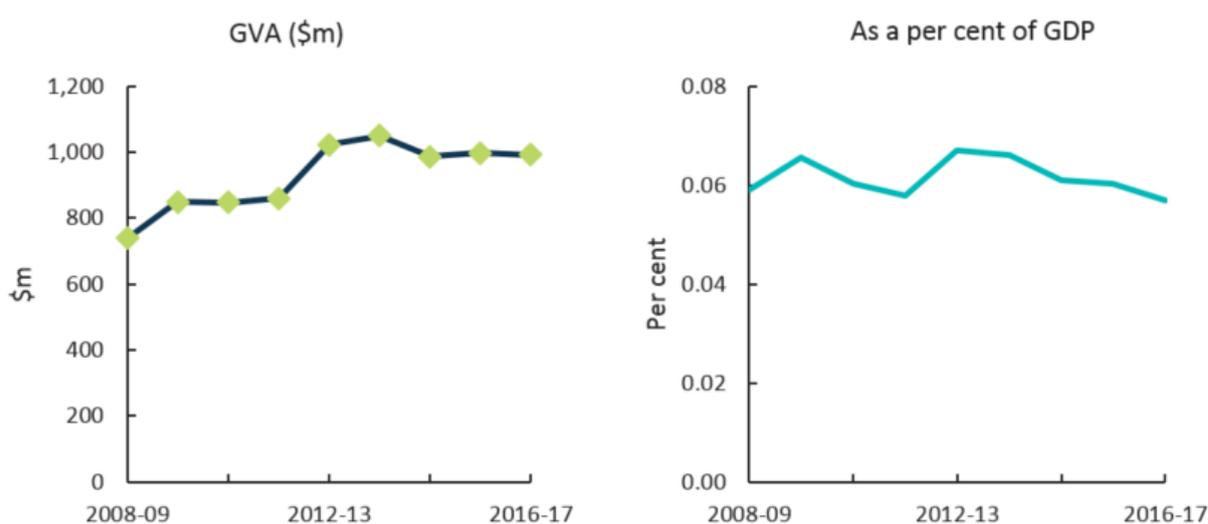
GVA of cultural and creative activity in libraries and archives has increased by \$252 million or 34.1 per cent from 2008-09 to 2016-17. However, as a share of GDP, it has remained relatively flat over the period (Table 8 and Figure 18).

**Table 8.** Cultural and creative activity in libraries and archives, 2008-09 to 2016-17<sup>vi</sup>

Libraries and archives	2008-09	2009-10	2010-11	2011-12	2012-13	2013-14	2014-15	2015-16	2016-17
Output (\$m)	1,303	1,308	1,424	1,507	1,428	1,447	1,449	1,521	1,603
COE (\$m)	442	425	464	496	494	504	457	483	494
GOS and GMI (\$m)	283	412	371	351	516	535	516	500	485
Taxes less subsidies on production (\$m)	14	12	13	14	11	11	13	13	13
<b>GVA (\$m)</b>	<b>739</b>	<b>849</b>	<b>848</b>	<b>860</b>	<b>1,021</b>	<b>1,050</b>	<b>986</b>	<b>996</b>	<b>991</b>
<b>As a per cent of GDP</b>	<b>0.06</b>	<b>0.07</b>	<b>0.06</b>	<b>0.06</b>	<b>0.07</b>	<b>0.07</b>	<b>0.06</b>	<b>0.06</b>	<b>0.06</b>

Components of GDP are presented nominally. Further detail is provided at *Appendix D: Structure for cultural and creative activity of the domain tables*.

**Figure 18.** GVA, Cultural and creative activity in libraries and archives, 2008-09 to 2016-17



Source: ABS cat. 5204, 5209; BCAR calculations

<sup>vi</sup> The table of cultural activity in the domain of *libraries and archives*, and the table of creative activity in this domain are identical with Table 8 over the same period since all activity in this domain is both cultural and creative.

## Literature and print media

Literature and print media consists of:

- Printing which includes the operation of printing and providing reprographic services.<sup>17</sup>
- Printing support services which includes services such as pre-press, post-press or finishing services.<sup>17</sup>
- Book and magazine wholesaling of books, periodicals and magazines.<sup>18</sup>
- Newspaper and book retailing of books, periodicals and newspapers.<sup>19</sup>
- Newspaper publishing which is the creating and disseminating of newspapers.<sup>20</sup>
- Magazine and other periodical publishing which is the creating and disseminating of magazines, journals and other periodicals.<sup>20</sup>
- Book publishing which is the creating and disseminating of books including atlases, textbooks and travel guides.<sup>21</sup>
- Other publishing (except software, music and internet) which includes the operation of other forms of creating and disseminating activities (except software, music and internet publishing) such as greeting card, postcard and art print publishing.<sup>21</sup>

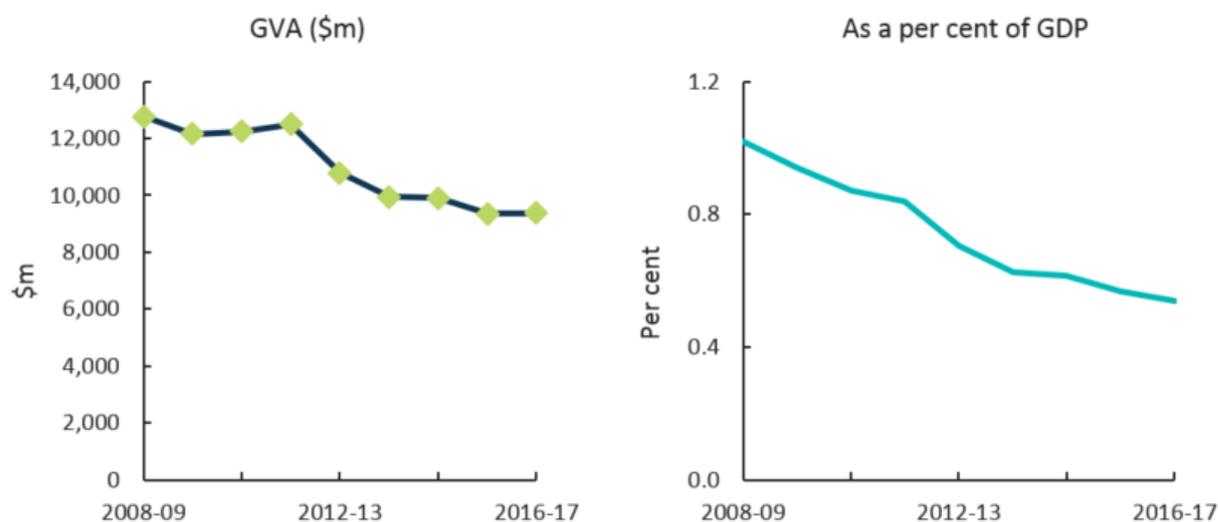
Literature and print media has declined significantly over the period with increased overseas competition creating strong price pressures that have led to falling demand for domestically produced materials.<sup>22</sup> Another contributing factor has been consumers moving to online platforms to obtain their information. Online platforms provide information quicker to customers than traditional print materials and are more cost effective in distributing information.<sup>23</sup> As a result, online platforms are increasingly being used by businesses to interact and engage with their customers while traditional printing services being phased out.<sup>24</sup>

GVA of cultural and creative activity in literature and print media has declined by \$3.4 billion or 26.6 per cent from 2008-09 to 2016-17. As a share of GDP, literature and print media has approximately halved during this period, from 1.0 per cent in 2008-09 to 0.5 per cent in 2016-17 (Table 9 and Figure 19).

**Table 9.** Cultural and creative activity in literature and print media, 2008-09 to 2016-17

Literature and print media	2008-09	2009-10	2010-11	2011-12	2012-13	2013-14	2014-15	2015-16	2016-17
Output (\$m)	22,971	23,127	25,176	26,645	20,329	19,975	17,771	18,068	19,036
COE (\$m)	6,361	6,008	6,552	7,001	6,007	5,836	5,881	5,757	5,878
GOS and GMI (\$m)	6,158	5,931	5,443	5,225	4,561	3,869	3,770	3,365	3,247
Taxes less subsidies on production (\$m)	250	231	251	266	225	238	263	234	246
<b>GVA (\$m)</b>	<b>12,770</b>	<b>12,170</b>	<b>12,247</b>	<b>12,492</b>	<b>10,793</b>	<b>9,942</b>	<b>9,915</b>	<b>9,356</b>	<b>9,371</b>
<b>As a per cent of GDP</b>	<b>1.02</b>	<b>0.94</b>	<b>0.87</b>	<b>0.84</b>	<b>0.71</b>	<b>0.63</b>	<b>0.61</b>	<b>0.57</b>	<b>0.54</b>

Components of GDP are presented nominally. Further detail is provided at *Appendix D: Structure for cultural and creative activity of the domain tables*.

**Figure 19.** GVA, Cultural and creative activity in literature and print media, 2008-09 to 2016-17

Source: ABS cat. 5204, 5209; BCAR calculations

Literature and print media is a domain that has different outcomes for the segments of cultural activity and creative activity. Each segment is showing a similar decline to cultural and creative activity in literature and print media. The outcomes for cultural activity during the period from 2008-09 to 2016-17 are presented in Table 10 and creative activity in Table 11.

**Table 10.** Cultural activity in literature and print media, 2008-09 to 2016-17

Literature and print media	2008-09	2009-10	2010-11	2011-12	2012-13	2013-14	2014-15	2015-16	2016-17
Output (\$m)	22,547	22,720	24,733	26,176	19,961	19,595	17,486	17,763	18,714
COE (\$m)	6,206	5,860	6,391	6,828	5,872	5,703	5,745	5,628	5,746
GOS and GMI (\$m)	6,087	5,853	5,387	5,183	4,490	3,817	3,732	3,321	3,211
Taxes less subsidies on production (\$m)	246	245	256	265	241	247	263	254	261
<b>GVA (\$m)</b>	<b>12,539</b>	<b>11,957</b>	<b>12,034</b>	<b>12,276</b>	<b>10,603</b>	<b>9,768</b>	<b>9,740</b>	<b>9,203</b>	<b>9,219</b>
<b>As a per cent of GDP</b>	<b>1.00</b>	<b>0.92</b>	<b>0.86</b>	<b>0.82</b>	<b>0.69</b>	<b>0.62</b>	<b>0.60</b>	<b>0.56</b>	<b>0.53</b>

**Table 11.** Creative activity in literature and print media, 2008-09 to 2016-17

Literature and print media	2008-09	2009-10	2010-11	2011-12	2012-13	2013-14	2014-15	2015-16	2016-17
Output (\$m)	12,202	12,567	13,680	14,478	9,772	9,100	8,874	8,508	8,964
COE (\$m)	2,930	2,644	2,883	3,080	2,693	2,538	2,504	2,432	2,483
GOS and GMI (\$m)	4,601	4,561	4,311	4,220	3,258	2,811	2,780	2,655	2,579
Taxes less subsidies on production (\$m)	115	115	115	116	115	115	115	115	115
<b>GVA (\$m)</b>	<b>7,646</b>	<b>7,319</b>	<b>7,309</b>	<b>7,416</b>	<b>6,066</b>	<b>5,464</b>	<b>5,400</b>	<b>5,202</b>	<b>5,177</b>
<b>As a per cent of GDP</b>	<b>0.61</b>	<b>0.57</b>	<b>0.52</b>	<b>0.50</b>	<b>0.40</b>	<b>0.34</b>	<b>0.33</b>	<b>0.31</b>	<b>0.30</b>

## Performing arts

Performing arts consists of:

- Performing arts operations which provide or produce live theatrical or musical presentations or performances.<sup>25</sup>
- Creative artists, musicians, writers and performers who are independent (freelance) individuals or groups mainly engaged in the regular creation of original artistic or cultural works who may or may not also produce and perform their works. This includes providing independent technical expertise necessary for these productions, and celebrities mainly engaged in endorsing products or making speeches or public appearances for which they receive a fee.<sup>25</sup>
- Performing arts venue operations of venues for the presentation and rehearsal of performing arts.<sup>26</sup>

Many business entities that engage in performing arts operations rely on government funding in addition to other sources of revenue.<sup>27</sup> This enables them to produce a diversity of works and to provide some services to users free of charge. However, other business entities, such as contemporary music producers, achieve higher profit margins by providing services to large audiences.<sup>27</sup>

GVA of cultural and creative activity in performing arts has experienced growth of \$403 million or 30.0 per cent from 2008-09 to 2016-17. However, as a share of GDP, it has fallen slightly over the period (Table 12 and Figure 20).

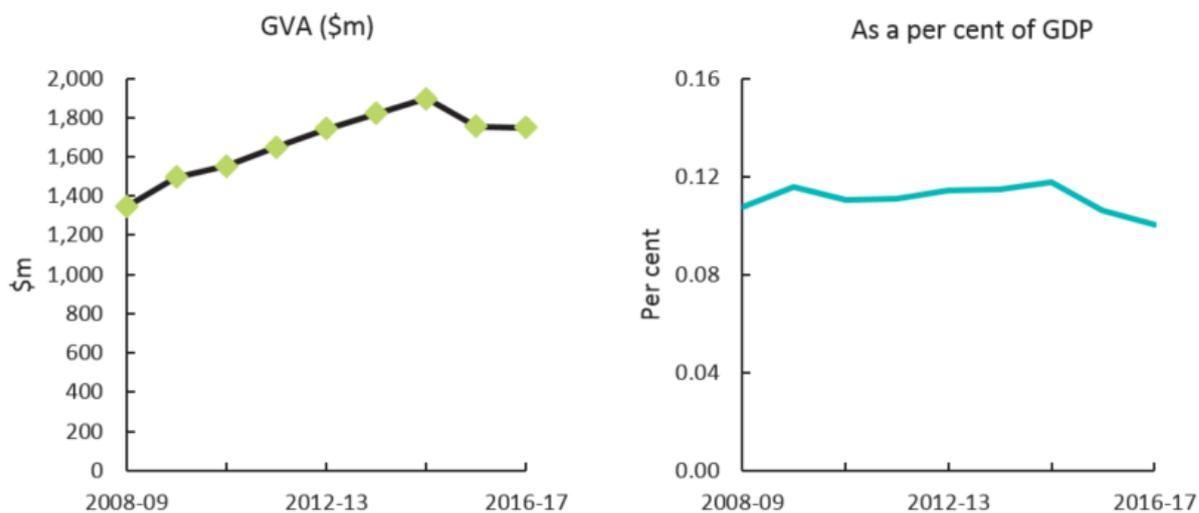
**Table 12.** Cultural and creative activity in performing arts, 2008-09 to 2016-17<sup>vii</sup>

Performing arts	2008-09	2009-10	2010-11	2011-12	2012-13	2013-14	2014-15	2015-16	2016-17
Output (\$m)	3,140	3,612	3,931	4,161	3,486	3,676	3,712	3,872	4,080
COE (\$m)	692	742	809	865	711	727	699	739	754
GOS and GMI (\$m)	713	810	805	849	1,126	1,195	1,271	1,125	1,109
Taxes less subsidies on production (\$m)	-59	-55	-60	-64	-92	-99	-75	-108	-114
<b>GVA (\$m)</b>	<b>1,346</b>	<b>1,497</b>	<b>1,554</b>	<b>1,650</b>	<b>1,744</b>	<b>1,822</b>	<b>1,895</b>	<b>1,756</b>	<b>1,749</b>
<b>As a per cent of GDP</b>	<b>0.11</b>	<b>0.12</b>	<b>0.11</b>	<b>0.11</b>	<b>0.11</b>	<b>0.11</b>	<b>0.12</b>	<b>0.11</b>	<b>0.10</b>

Components of GDP are presented nominally. Further detail is provided at *Appendix D: Structure for cultural and creative activity of the domain tables*.

<sup>vii</sup> The table of cultural activity in the domain of *performing arts*, and the table of creative activity in this domain are identical with Table 12 over the same period since all activity in this domain is both cultural and creative.

Figure 20. GVA, Cultural and creative activity in performing arts, 2008-09 to 2016-17



Source: ABS cat. 5204, 5209; BCAR calculations

## Design

Design consists of:

- Architectural services such as planning and designing buildings and structures; or planning and designing the development of land.<sup>28</sup>
- Other specialised design services that are not elsewhere classified.<sup>29</sup>
- Advertising services such as the creation of advertising campaigns and materials; and media planning and buying (i.e. placing advertisements).<sup>30</sup>
- Computer systems design and related services which is providing expertise in the field of information technologies 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.<sup>31</sup>

Design is the largest domain of cultural and creative activity. It has increased as a share of GDP by over 0.3 percentage points over the period. The growth is driven mainly by computer systems design and related services. Workplaces have increased their use of information technology in their processes which have then required regular upgrades and enhancements. Furthermore, financial services providers such as banks and insurers, have increased their use of online platforms to engage with their clients.<sup>32</sup>

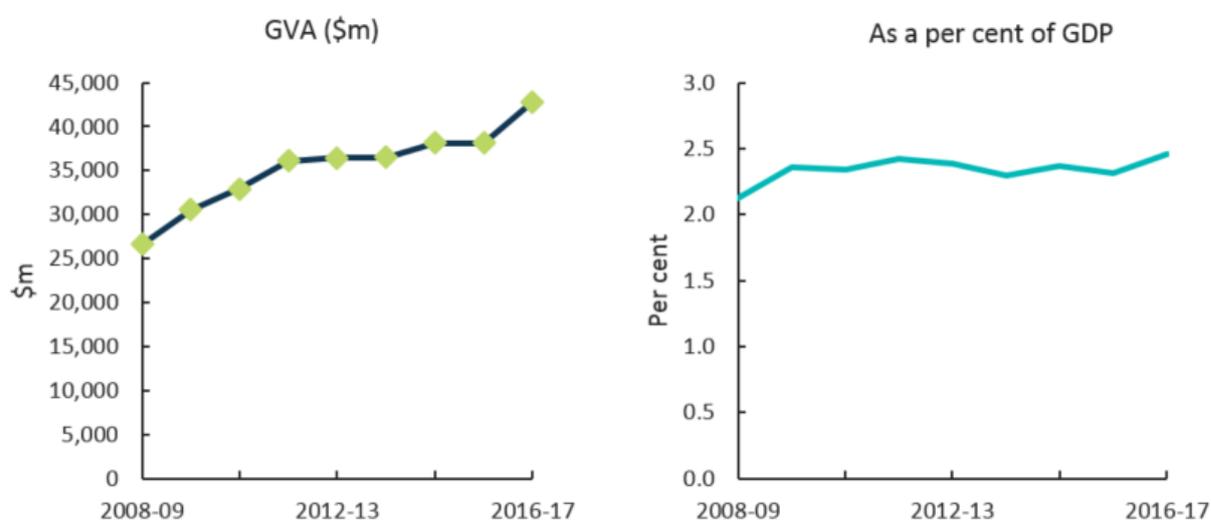
GVA of cultural and creative activity in design has experienced significant growth of \$16.2 billion or 60.7 per cent from 2008-09 to 2016-17 (Table 13 and Figure 21).

**Table 13.** Cultural and creative activity in design, 2008-09 to 2016-17<sup>viii</sup>

Design	2008-09	2009-10	2010-11	2011-12	2012-13	2013-14	2014-15	2015-16	2016-17
Output (\$m)	55,027	59,193	64,437	68,196	72,782	74,024	75,733	80,371	84,677
COE (\$m)	19,194	19,500	21,267	22,723	25,775	26,018	26,938	29,608	30,230
GOS and GMI (\$m)	6,662	10,286	10,861	12,485	9,794	9,599	10,227	7,524	11,493
Taxes less subsidies on production (\$m)	791	757	824	872	855	895	980	1,034	1,090
<b>GVA (\$m)</b>	<b>26,647</b>	<b>30,543</b>	<b>32,952</b>	<b>36,080</b>	<b>36,425</b>	<b>36,512</b>	<b>38,146</b>	<b>38,167</b>	<b>42,813</b>
<b>As a per cent of GDP</b>	<b>2.13</b>	<b>2.36</b>	<b>2.34</b>	<b>2.42</b>	<b>2.39</b>	<b>2.30</b>	<b>2.36</b>	<b>2.31</b>	<b>2.46</b>

Components of GDP are presented nominally. Further detail is provided at *Appendix D: Structure for cultural and creative activity of the domain tables*.

<sup>viii</sup> The table of creative activity in domain of *design* is identical with Table 13 over the same period since all of this domain is creative.

**Figure 21.** GVA, Cultural and creative activity in design, 2008-09 to 2016-17

Source: ABS cat. 5204, 5209; BCAR calculations

Cultural activity in design, increased from \$8.2 billion in 2008-09 to \$13.4 billion in 2016-17 (Table 14).

**Table 14.** Cultural activity in design, 2008-09 to 2016-17<sup>viii</sup>

Design	2008-09	2009-10	2010-11	2011-12	2012-13	2013-14	2014-15	2015-16	2016-17
Output (\$m)	22,471	22,910	24,939	26,394	26,548	27,805	28,148	29,283	30,852
COE (\$m)	5,866	5,939	6,477	6,921	8,073	8,452	8,449	9,700	9,904
GOS and GMI (\$m)	1,998	2,751	2,923	3,401	3,160	2,735	2,918	1,942	3,193
Taxes less subsidies on production (\$m)	307	307	307	307	307	307	307	307	307
<b>GVA (\$m)</b>	<b>8,171</b>	<b>8,998</b>	<b>9,707</b>	<b>10,629</b>	<b>11,540</b>	<b>11,494</b>	<b>11,674</b>	<b>11,949</b>	<b>13,404</b>
<b>As a per cent of GDP</b>	<b>0.65</b>	<b>0.70</b>	<b>0.69</b>	<b>0.71</b>	<b>0.76</b>	<b>0.72</b>	<b>0.72</b>	<b>0.72</b>	<b>0.77</b>

## Broadcasting, electronic or digital media, and film

Broadcasting, electronic or digital media, and film consists of:

- Software publishing which is the creation and dissemination of ready-made (non-customised) computer software.<sup>33</sup>
- Motion picture and video production which is the production of motion pictures, videos and television programs or commercials.<sup>34</sup>
- Motion picture and video distribution which is the acquiring of distribution rights and distribution of motion pictures and videos.<sup>34</sup>
- Motion picture exhibition which is the screening of motion pictures using a variety of visual media.<sup>35</sup>
- Post-production services and other motion picture and video activities including specialised motion picture or video post-production services such as editing, film/tape transfers, titling, subtitling, credits, closed captioning and computer-produced graphics, animation and special effects, as well as developing and processing motion picture film.<sup>35</sup>
- Radio broadcasting which is the broadcasting of audio signals, using radio broadcasting studios and facilities, to transmit aerial programming.<sup>36</sup>
- Free-to-air television broadcasting which is engaged in free-to-air television broadcast of visual content, in the form of electronic images together with sound, through broadcast studios and facilities.<sup>36</sup>
- Cable and other subscription broadcasting which is the broadcast of television programs on a subscription or fee basis to viewers.<sup>36</sup>
- Internet publishing and broadcasting which is the publishing and broadcast of content on the internet.<sup>37</sup>
- Video and other electronic media rental and hiring which is the rental or hire of pre-recorded video tapes, discs and other electronic media.<sup>38</sup>

Free-to-air television broadcasting, and cable and other subscription broadcasting are the two main contributors to this domain. While these two components have grown over the period, they may face future challenges as Australians consume content on a range of different platforms.<sup>39</sup>

GVA of cultural and creative activity in this domain has increased by \$2.4 billion or 32.2 per cent from 2008-09 to 2016-17. While broadcasting, electronic or digital media, and film has increased in absolute terms, it has remained relatively flat as a share of GDP over the period (Table 15 and Figure 22).

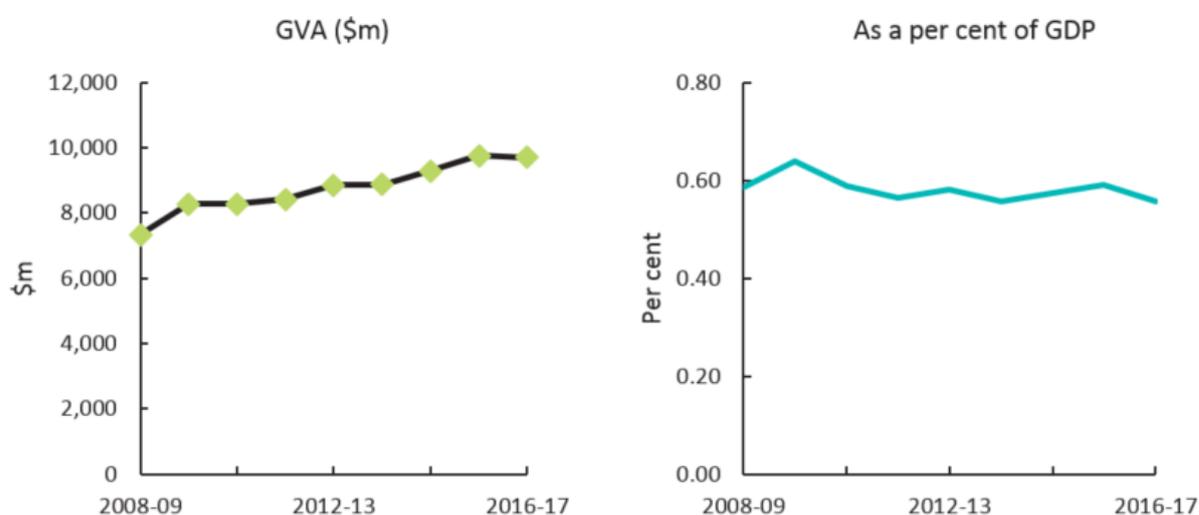
**Table 15.** Cultural and creative activity in broadcasting, electronic or digital media, and film, 2008-09 to 2016-17<sup>ix</sup>

Broadcasting, electronic or digital media, and film	2008-09	2009-10	2010-11	2011-12	2012-13	2013-14	2014-15	2015-16	2016-17
Output (\$m)	18,235	19,328	21,040	22,267	22,076	21,703	22,996	23,970	25,254
COE (\$m)	3,659	3,891	4,244	4,534	4,444	4,434	4,671	4,998	5,103
GOS and GMI (\$m)	3,503	4,195	3,823	3,662	4,213	4,219	4,373	4,517	4,357
Taxes less subsidies on production (\$m)	179	188	205	217	197	209	232	235	247
<b>GVA (\$m)</b>	<b>7,341</b>	<b>8,275</b>	<b>8,271</b>	<b>8,413</b>	<b>8,853</b>	<b>8,862</b>	<b>9,276</b>	<b>9,750</b>	<b>9,707</b>
<b>As a per cent of GDP</b>	<b>0.59</b>	<b>0.64</b>	<b>0.59</b>	<b>0.56</b>	<b>0.58</b>	<b>0.56</b>	<b>0.57</b>	<b>0.59</b>	<b>0.56</b>

Components of GDP are presented nominally. Further detail is provided at *Appendix D: Structure for cultural and creative activity of the domain tables*.

<sup>ix</sup> The table of cultural activity in *Broadcasting, electronic or digital media, and film* is identical with Table 15 over the same period since all of this domain is cultural.

**Figure 22.** GVA, Cultural and creative activity in broadcasting, electronic or digital media, and film, 2008-09 to 2016-17



Source: ABS cat. 5204, 5209; BCAR calculations

Creative activity in broadcasting, electronic or digital media, and film, increased from \$7.2 billion in 2008-09 to \$9.6 billion in 2016-17 (Table 14).

**Table 16.** Creative activity in broadcasting, electronic or digital media, and film, 2008-09 to 2016-17<sup>ix</sup>

Broadcasting, electronic or digital media, and film	2008-09	2009-10	2010-11	2011-12	2012-13	2013-14	2014-15	2015-16	2016-17
Output (\$m)	17,702	18,784	20,448	21,641	21,393	21,025	22,336	23,325	24,575
COE (\$m)	3,455	3,693	4,027	4,303	4,168	4,154	4,395	4,718	4,817
GOS and GMI (\$m)	3,591	4,266	3,919	3,763	4,352	4,391	4,561	4,715	4,568
Taxes less subsidies on production (\$m)	175	175	175	175	175	175	175	175	175
<b>GVA (\$m)</b>	<b>7,220</b>	<b>8,133</b>	<b>8,121</b>	<b>8,241</b>	<b>8,695</b>	<b>8,720</b>	<b>9,131</b>	<b>9,607</b>	<b>9,559</b>
<b>As a per cent of GDP</b>	<b>0.58</b>	<b>0.63</b>	<b>0.58</b>	<b>0.55</b>	<b>0.57</b>	<b>0.55</b>	<b>0.57</b>	<b>0.58</b>	<b>0.55</b>

## Music composition and publishing

Music composition and publishing consists of:

- Music publishing which is the acquisition and registration of copyright for musical compositions and the promotion and authorisation of the use of these compositions in recordings, radio, television, motion pictures, live performances, print, or other media.<sup>40</sup>
- Music and other sound recording activities which is the production of original (sound) master recordings such as tapes and CDs and the release and distribution of them to wholesalers, retailers or directly to the public. This also includes the operation of sound recording studios and in the production of pre-recorded radio programs.<sup>41</sup>

Music composition and publishing is a relatively small domain comprising less than 0.01 per cent of GDP. Technological changes have affected this domain's performance as consumers have adopted new ways of obtaining and streaming music content through online formats.<sup>42</sup> This is evident as business entities have moved towards an online distribution model and reduced the production of physical music content.<sup>42</sup>

New online copyright infringement legislation, lower pricing and increased online availability have decreased the amount of music consumed unlawfully over the past few years.<sup>x</sup> The move towards publishing music online has created challenges for musicians in obtaining royalties from their work. This concern has seen a rise in membership of copyright collecting societies with around 74 per cent of musicians currently members in Australia.<sup>43</sup> Alongside these changes, music composition and publishing has outpaced the economy since 2014-15 (see Figure 15).

GVA of cultural and creative activity in this domain increased by \$43 million or 41.1 per cent from 2008-09 to 2016-17 (Table 17 and Figure 23).

**Table 17.** Cultural and creative activity in music composition and publishing, 2008-09 to 2016-17<sup>xi</sup>

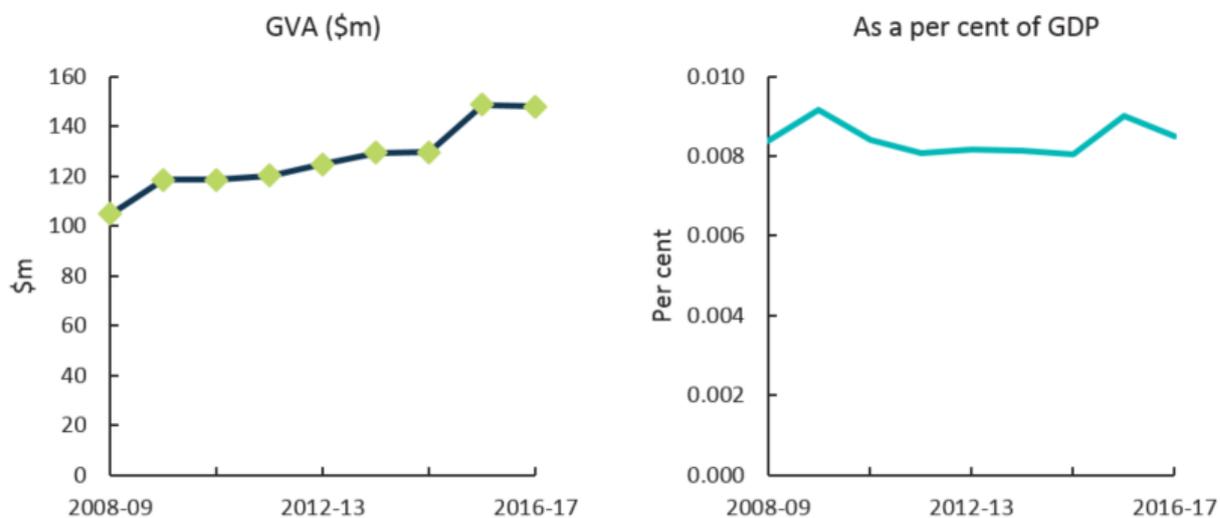
Music composition and publishing	2008-09	2009-10	2010-11	2011-12	2012-13	2013-14	2014-15	2015-16	2016-17
Output (\$m)	323	346	377	399	433	418	467	494	521
COE (\$m)	73	84	92	98	96	98	102	113	116
GOS and GMI (\$m)	28	29	21	16	24	26	21	29	26
Taxes less subsidies on production (\$m)	4	5	5	6	5	6	6	6	7
<b>GVA (\$m)</b>	<b>105</b>	<b>119</b>	<b>118</b>	<b>120</b>	<b>125</b>	<b>129</b>	<b>130</b>	<b>149</b>	<b>148</b>
<b>As a per cent of GDP</b>	<b>0.01</b>								

Components of GDP are presented nominally. Further detail is provided at *Appendix D: Structure for cultural and creative activity of the domain tables*.

<sup>x</sup> For more information on copyright infringement, please refer to the Department of Communications and the Arts Consumer Survey on Online Copyright Infringement 2017 – A marketing research report, June 2017.

<sup>xi</sup> The table of cultural activity in *music composition and publishing*, and table of creative activity in this domain are identical with Table 17 over the same period since all activity in this domain is both cultural and creative.

Figure 23. GVA, Cultural and creative activity in music composition and publishing, 2008-09 to 2016-17



Source: ABS cat. 5204, 5209; BCAR calculations

## Visual arts and crafts

Visual arts and crafts consists of:

- Jewellery and silverware manufacturing using precious or semi-precious metal and stones, and the cutting of such stones. This includes manufacturing custom-made or costume jewellery, trophies, badges or medals, or minting coins.<sup>44</sup>
- Jewellery and watch wholesaling of watches or clocks (including parts), jewellery, precious stones or precious metals.<sup>45</sup>
- Watch and jewellery retailing of new watches and jewellery (except clocks and silverware).<sup>46</sup>
- Professional photographic services of providing still, video or computer photography services, and includes the video taping of special events such as weddings.<sup>47</sup>

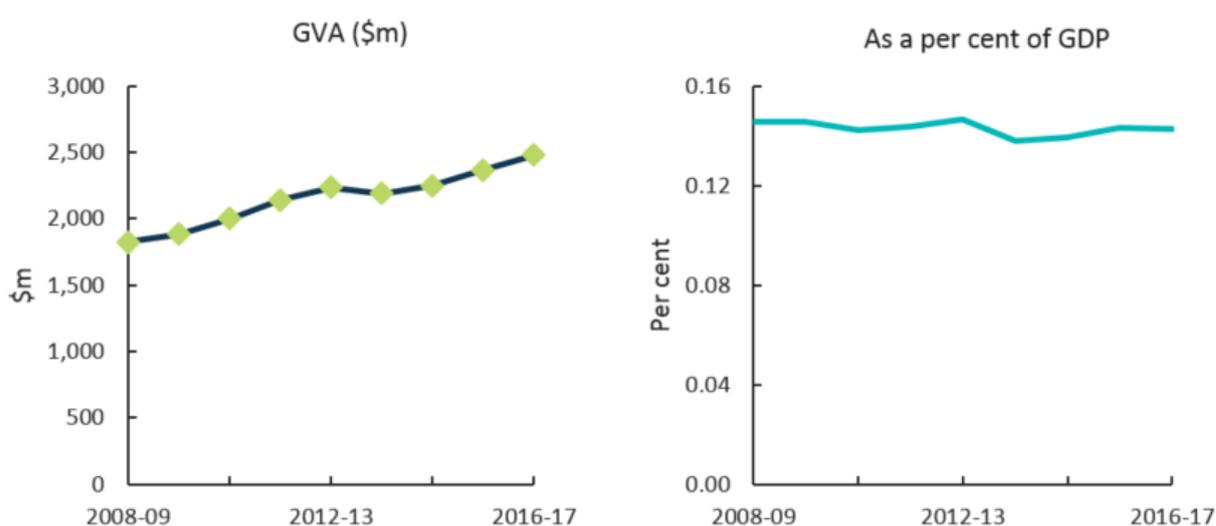
GVA of cultural and creative activity in this domain has experienced growth of \$657 million or 36.1 per cent from 2008-09 to 2016-17. Watch and jewellery retailing is the largest contributor to this growth, followed by professional photographic services. While visual arts and crafts have increased in absolute terms, it has remained relatively flat as a share of GDP over the period (Table 18 and Figure 24).

**Table 18.** Cultural and creative activity in visual arts and crafts, 2008-09 to 2016-17<sup>xii</sup>

Visual arts and crafts	2008-09	2009-10	2010-11	2011-12	2012-13	2013-14	2014-15	2015-16	2016-17
Output (\$m)	3,834	3,962	4,313	4,565	4,391	4,354	4,403	4,697	4,949
COE (\$m)	1,227	1,246	1,359	1,452	1,491	1,520	1,552	1,690	1,726
GOS and GMI (\$m)	537	582	578	623	683	605	626	608	681
Taxes less subsidies on production (\$m)	58	57	62	66	59	63	69	70	74
<b>GVA (\$m)</b>	<b>1,823</b>	<b>1,885</b>	<b>1,999</b>	<b>2,141</b>	<b>2,234</b>	<b>2,188</b>	<b>2,248</b>	<b>2,368</b>	<b>2,480</b>
<b>As a per cent of GDP</b>	<b>0.15</b>	<b>0.15</b>	<b>0.14</b>	<b>0.14</b>	<b>0.15</b>	<b>0.14</b>	<b>0.14</b>	<b>0.14</b>	<b>0.14</b>

Components of GDP are presented nominally. Further detail is provided at *Appendix D: Structure for cultural and creative activity of the domain tables*.

**Figure 24.** GVA, Cultural and creative activity in visual arts and crafts, 2008-09 to 2016-17



Source: ABS cat. 5204, 5209; BCAR calculations

<sup>xii</sup> The table of cultural activity in *visual arts and crafts*, and table of creative activity in this domain are identical with Table 18 over the same period since all activity in this domain is both cultural and creative.

## Fashion

Fashion consists of:

- Clothing manufacturing (except knitted clothing) which includes clothing trade services such as hem stitching, basque knitting or buttonholing.<sup>48</sup>
- Footwear manufacturing of footwear or footwear components such as uppers and upper parts, and outer and inner soles and heels.<sup>49</sup>
- Clothing and footwear wholesaling.<sup>50</sup>
- Clothing retailing of clothing or clothing accessories.<sup>51</sup>
- Footwear retailing of boots, shoes or other footwear.<sup>51</sup>

Cultural and creative activity in fashion has increased in absolute terms, due to growth in clothing and footwear wholesaling and retailing. However, these industries have faced a challenging operating environment with greater overseas competition and higher onshore rental costs.<sup>52</sup>

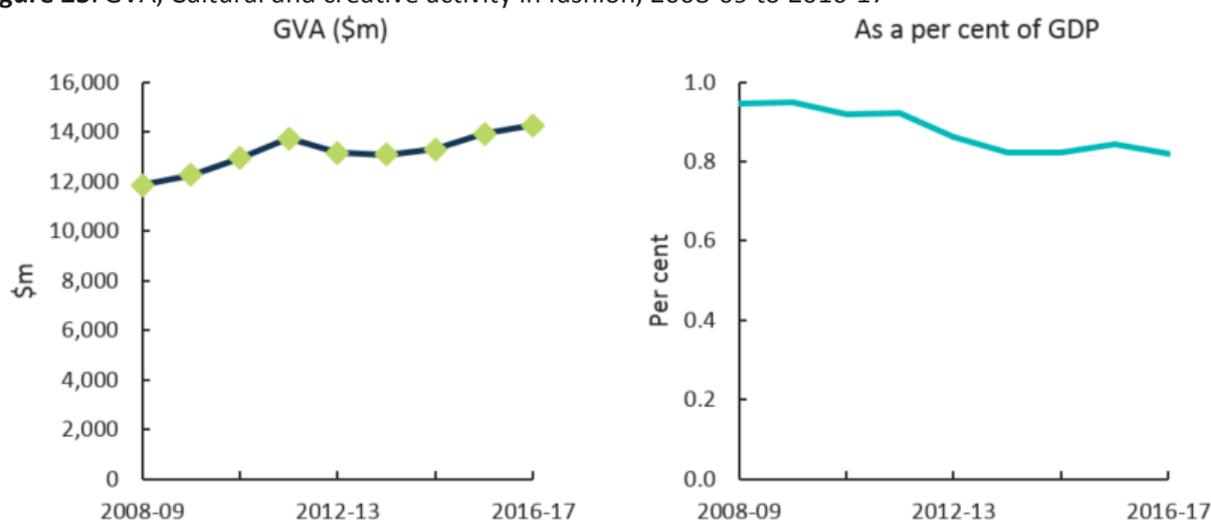
GVA of cultural and creative activity in fashion has increased by \$2.4 billion or 20.3 per cent from 2008-09 to 2016-17. However, as a per cent of GDP, this domain has fallen by 0.13 percentage points from 0.95 per cent in 2008-09 to 0.82 per cent in 2016-17 (Table 19 and Figure 25).

**Table 19.** Cultural and creative activity in fashion, 2008-09 to 2016-17<sup>xiii</sup>

Fashion	2008-09	2009-10	2010-11	2011-12	2012-13	2013-14	2014-15	2015-16	2016-17
Output (\$m)	20,164	21,205	23,084	24,430	22,001	21,313	21,430	22,502	23,708
COE (\$m)	6,627	6,613	7,212	7,706	7,606	7,516	7,712	8,028	8,197
GOS and GMI (\$m)	4,887	5,323	5,363	5,656	5,205	5,211	5,182	5,501	5,643
Taxes less subsidies on production (\$m)	329	325	354	374	331	350	389	388	408
<b>GVA (\$m)</b>	<b>11,843</b>	<b>12,261</b>	<b>12,928</b>	<b>13,736</b>	<b>13,143</b>	<b>13,076</b>	<b>13,282</b>	<b>13,917</b>	<b>14,249</b>
<b>As a per cent of GDP</b>	<b>0.95</b>	<b>0.95</b>	<b>0.92</b>	<b>0.92</b>	<b>0.86</b>	<b>0.82</b>	<b>0.82</b>	<b>0.84</b>	<b>0.82</b>

Components of GDP are presented nominally. Further detail is provided at *Appendix D: Structure for cultural and creative activity of the domain tables*.

**Figure 25.** GVA, Cultural and creative activity in fashion, 2008-09 to 2016-17



Source: ABS cat. 5204, 5209; BCAR calculations

<sup>xiii</sup> The table of creative activity in *fashion* is identical with Table 19 over the same period since all activity in this domain is creative. There is no cultural activity in this domain.

## Other culture goods manufacturing and sales

Other culture goods manufacturing and sales consists of:

- Reproduction of recorded media which is mainly the reproduction of pre-recorded audio, video, software and other data on electronic, optical and magnetic media.<sup>53</sup>
- Entertainment media retailing which includes audio tapes, compact discs, computer games, digital versatile discs or video cassettes.<sup>54</sup>

Other culture goods manufacturing and sales is primarily driven by the entertainment media retailing industry. This industry is affected by the increased use of digital formats as consumers adopt new ways of obtaining and streaming media content and the increased popularity of online shopping.<sup>55</sup>

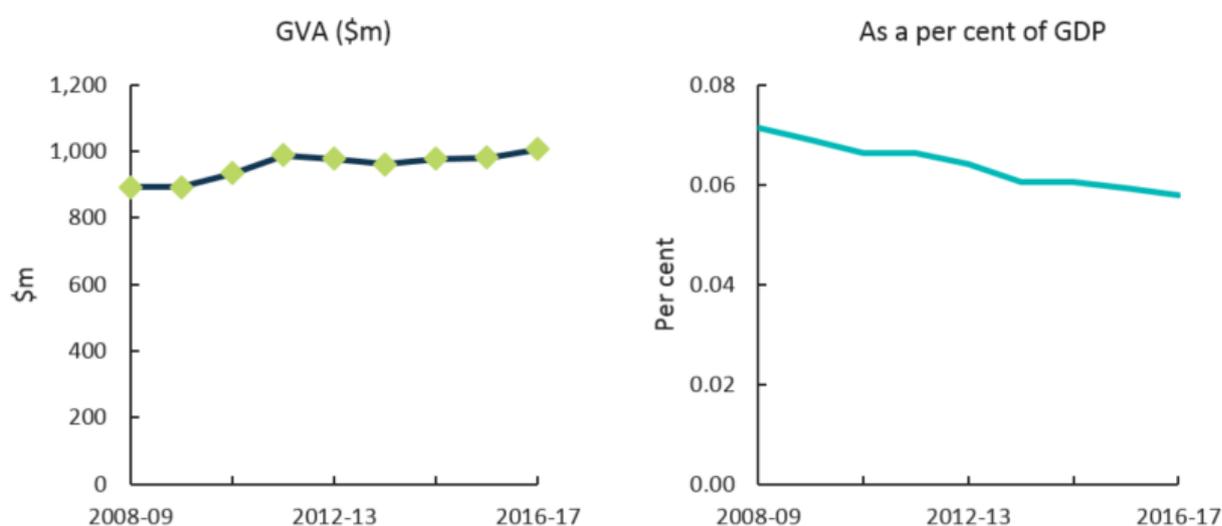
GVA of cultural and creative activity in this domain has increased by \$112 million or 12.6 per cent from 2008-09 to 2016-17. However, as a share of GDP, it has remained relatively flat over the period (Table 20 and Figure 26).

**Table 20.** Cultural and creative activity in other culture goods manufacturing and sales, 2008-09 to 2016-17<sup>xiv</sup>

Other culture goods manufacturing and sales	2008-09	2009-10	2010-11	2011-12	2012-13	2013-14	2014-15	2015-16	2016-17
Output (\$m)	2,540	2,523	2,747	2,907	2,583	2,629	2,225	2,405	2,534
COE (\$m)	508	511	557	595	560	560	574	593	605
GOS and GMI (\$m)	350	347	339	353	382	365	362	349	359
Taxes less subsidies on production (\$m)	36	35	39	41	35	37	41	39	41
<b>GVA (\$m)</b>	<b>893</b>	<b>893</b>	<b>934</b>	<b>989</b>	<b>977</b>	<b>962</b>	<b>977</b>	<b>981</b>	<b>1,005</b>
<b>As a per cent of GDP</b>	<b>0.07</b>	<b>0.07</b>	<b>0.07</b>	<b>0.07</b>	<b>0.06</b>	<b>0.06</b>	<b>0.06</b>	<b>0.06</b>	<b>0.06</b>

Components of GDP are presented nominally. Further detail is provided at *Appendix D: Structure for cultural and creative activity of the domain tables*.

**Figure 26.** GVA, Cultural and creative activity in other culture goods manufacturing and sales, 2008-09 to 2016-17



Source: ABS cat. 5204, 5209; BCAR calculations

<sup>xiv</sup> The table of cultural activity in *other culture goods manufacturing and sales* is identical with Table 20 over the same period since all activity in this domain is cultural. There is no creative activity in this domain.

## Supporting activities

Supporting activities consists of providing arts education which is engaged mainly in providing non-vocational instruction in the arts, including art, dance, drama and music.<sup>56</sup>

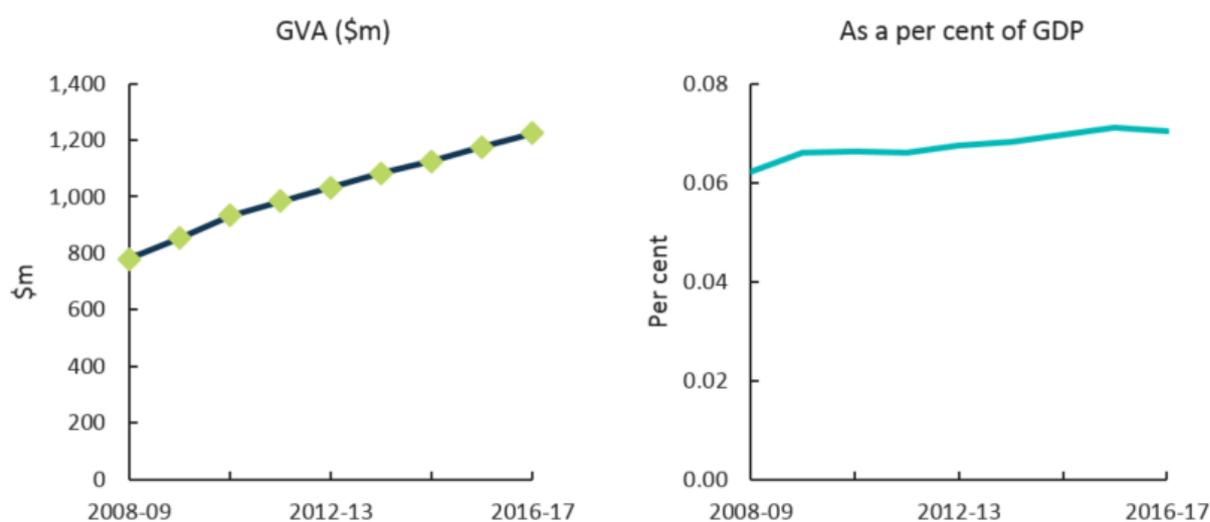
Operators within arts education are typically independent small enterprises and may be attached to schools.<sup>57</sup> GVA for supporting activities increased by \$445 million or 57.2 per cent from 2008-09 to 2016-17 while as a share of GDP, it has remained relatively flat over the period (Table 21 and Figure 27).

**Table 21.** Cultural and creative activity in supporting activities, 2008-09 to 2016-17<sup>xv</sup>

Supporting activities	2008-09	2009-10	2010-11	2011-12	2012-13	2013-14	2014-15	2015-16	2016-17
Output (\$m)	1,057	1,142	1,243	1,316	1,418	1,494	1,564	1,763	1,857
COE (\$m)	666	726	792	846	917	955	995	1,044	1,066
GOS and GMI (\$m)	105	116	129	124	104	116	121	120	146
Taxes less subsidies on production (\$m)	9	12	13	13	11	12	10	12	13
<b>GVA (\$m)</b>	<b>779</b>	<b>853</b>	<b>933</b>	<b>984</b>	<b>1,032</b>	<b>1,082</b>	<b>1,126</b>	<b>1,176</b>	<b>1,225</b>
<b>As a per cent of GDP</b>	<b>0.06</b>	<b>0.07</b>	<b>0.07</b>	<b>0.07</b>	<b>0.07</b>	<b>0.07</b>	<b>0.07</b>	<b>0.07</b>	<b>0.07</b>

Components of GDP are presented nominally. Further detail is provided at *Appendix D: Structure for cultural and creative activity of the domain tables*.

**Figure 27.** GVA, Cultural and creative activity in supporting activities, 2008-09 to 2016-17



Source: ABS cat. 5204, 5209; BCAR calculations

<sup>xv</sup> The table of cultural activity in *supporting activities* is identical with Table 21 over the same period since all activity in this domain is cultural. There is no creative activity in this domain.

## Appendix A: Methodology

### Components of cultural and creative activity

The ABS published *Australian National Accounts: Cultural and creative activity Satellite Accounts, Experiment* (cat. no. 5271.0) in 2014. This publication measured the economic contribution of cultural and creative activity on a satellite accounts basis in Australia. The satellite accounts consists of two boundaries: the national accounts basis and an extension beyond the national accounts production (as shown in Figure A1).<sup>58</sup> National accounts basis refers to those activities that fall within the national accounts production boundary, while the extension beyond the national accounts production boundary provides a more complete picture of the value of cultural and creative activity to society.<sup>58</sup>

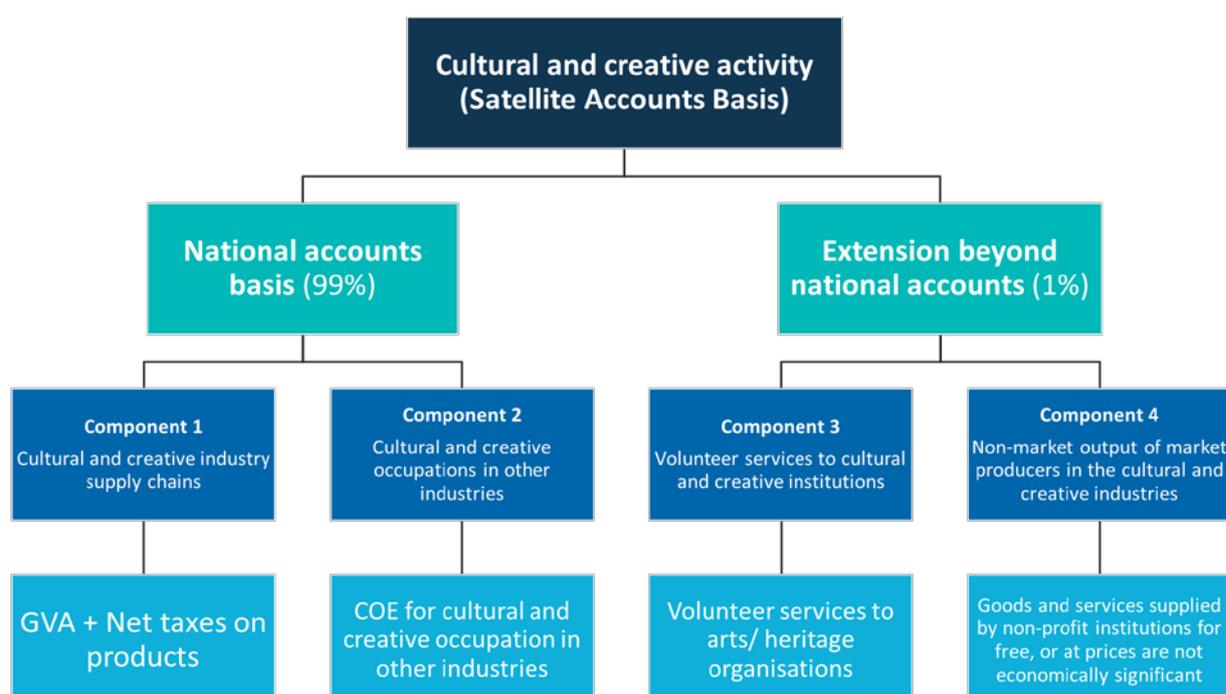
Within the national accounts production boundary, the economic contribution of this activity is split into two components (as specified in the Satellite Accounts 5271.0):

- **Component 1** is activity in industries which form the supply chains for cultural and creative goods and services. This component comprises gross value added and net taxes on products of cultural and creative industries.
- **Component 2** is activity in other industries performed by workers in cultural and creative occupations. This component comprises cultural and creative activity being carried out by people employed in industries outside the supply chains defined in component 1.

Outside national accounts, cultural and creative activity is measured by (also consistent with the Satellite Accounts 5271.0):

- **Component 3** is volunteer services to arts and heritage organisations. The ABS has measured this component by using the ‘replacement cost’ method, whereby each hour of a volunteer’s time is valued at what it would cost to replace with a paid hour.
- **Component 4** is non-market output of market producers in the cultural and/or creative industries. The ABS has measured this component by valuing the production of market non-profit institutions in cultural and creative industries.

**Figure A 1.** Boundary for cultural and creative activity satellite accounts



## Methodology used by Bureau of Communication and Arts Research (BCAR) in 2018

### Component 1: Cultural and creative industry supply chains

Indicator	BCAR 2018 Methodology
GVA of cultural and creative industries	<ol style="list-style-type: none"> <li>1. Replicate Satellite Accounts (5271.0) cultural and creative proportions within individual Input-Output Industry Groups (IOIG) for the 2008-09 year. This sets up 2008-09 as the base year, and aligns the GVA with 5271.0.</li> <li>2. Apply the current price movement from the 2016-17 publication of <i>Australian System of National Accounts</i> (5204.0) to step 1. This will generate the time series from 2008-09 to 2016-17 as well as incorporate any revisions during the period.</li> <li>3. Split total GVA into IOIGs by using the proportions from each corresponding Input-Output table (5209.0).</li> <li>4. Apply cultural and creative ratios to every financial year to derive each cultural and creative industry GVA.</li> <li>5. Aggregate all cultural and creative industry GVAs.</li> </ol>
Net taxes on products of cultural and creative industries	<ol style="list-style-type: none"> <li>1. Replicate Satellite Accounts (5271.0) cultural and creative proportions within individual IOIG for the 2008-09 year. This sets up 2008-09 as the base year, and aligns the net taxes on products with 5271.0.</li> <li>2. Apply the current price movement from the 2016-17 publication of <i>Australian System of National Accounts</i> (5204.0) to step 1. This will generate the time series from 2008-09 to 2016-17 as well as incorporate any revisions during the period.</li> <li>3. Split total net taxes on products into IOIGs by using the proportions from Input-Output tables (5209.0).</li> <li>4. Apply cultural and creative ratio to every financial year, to derive cultural and creative activity net taxes on products for each industry.</li> <li>5. Aggregate the net taxes on products for all cultural and creative industries.</li> <li>6. Apply the below ratio to Gross Fixed Capital Formation (Private) and Exports           <math display="block">\frac{\text{Total net taxes on products for cultural and creative industries}}{\text{Total net taxes on products for cultural and creative activity related IOIGs}} \times 100\%</math> </li> <li>7. Add figures from Step 5 and Step 6 to generate the total of net taxes on products for cultural and creative activity</li> </ol>

**Component 2: Cultural and creative occupations in other industries**

Indicator	BCAR 2018 Methodology
COE for cultural and creative occupations in other industries	<ol style="list-style-type: none"> <li>1. Replicate 2008-09 Satellite Accounts (5271.0) cultural and creative proportions of COE<sup>xvi</sup> for cultural and creative occupations in other industries by industry division. This sets up 2008-09 as the base year, and aligns the COE for cultural and creative occupations in other industries with 5271.0.</li> <li>2. Apply the proportions from step 1 to the COE data for financial years after 2008-09.</li> </ol>

**Component 3: Volunteer services to cultural and creative institutions**

Indicator	BCAR 2018 Methodology
Volunteer services to arts/ heritage organisations	The current approach assumes that the volunteer services to arts/heritage organisations retains a constant share of total cultural and creative activity on a national accounts basis over the period.

**Component 4: Non-market output of market producers in the cultural and creative industries**

Indicator	BCAR 2018 Methodology
Non-market output of market producers in the cultural and creative industries	The current approach assumes that non-market output of market producers in the cultural and creative industries retains a constant share of total cultural and creative activity on a national accounts basis over the period.

<sup>xvi</sup> The approach to derive cultural and creative COE is the same as methodology outlined in Component 1 GVA of cultural and creative industries.

## Differences from ABS methodology

### Net taxes on products for cultural and creative industries

The BCAR used a different methodology from the ABS to calculate net taxes on products when the segments of cultural and creative activity are measured separately due to the unavailability of data. Net taxes on products for cultural and creative activity, in total, is consistent with what was published in the Satellite Accounts, as shown in Table A2.

**Table A1.** BCAR's approach to calculating net taxes on products, 2008-09.

Net taxes on products of cultural and creative industries in 2008-09	BCAR calculations (\$m)
Net taxes on products of C&C activity - Total industries (a)	<b>518</b>
Total net taxes on products for C&C related IOIGs (b)	1,995
$(c) = \% \text{ of } (a)/(b)$	26%
Net taxes on products - Total GFCF-Private (d)	17,714
Net taxes on products - C&C activity GFCF- Private (e) $(e) = (c) \times (d)$	<b>4,603</b>
Net taxes on products - Total Export (f)	-592
Net taxes on products - C&C activity Export $(g) = (c) \times (f)$	<b>-154</b>
Total net taxes on products of cultural and creative industries (h) $(h) = (a) + (e) + (g)$	<b>4,967</b>

**Table A2.** Comparison of ABS and BCAR calculations, net taxes on products of cultural and creative industries, 2008-09.

By segment	ABS calculations (\$m)	BCAR calculations (\$m)
<b>Cultural (a)</b>	<b>-2,615</b>	469
<b>Creative (b)</b>	2,618	437
<b>Both(c)</b>	4,964	4,062
<b>Total cultural and creative activity (a)+(b)+(c)</b>	<b>4,967</b>	4,967

By activity	ABS calculations (\$m)	BCAR calculations (\$m)
<b>Cultural activity (a)+(c)</b>	2,349	4,531
<b>Creative activity (b)+(c)</b>	7,582	4,499
<b>Total cultural and creative activity (a)+(b)+(c)</b>	<b>4,967</b>	4,967

### Imputed COE for cultural and creative occupations in other industries

The BCAR used a different methodology from the ABS to calculate COE of cultural or creative occupations in non-cultural or non-creative industries in two industry divisions. These divisions were Division G: Retail Trade and Division M: Professional, Scientific and Technical Services (as shown in Table A3). The BCAR deviated from the ABS figures in these industry divisions because either cultural occupations or creative occupations exceeded 100 per cent of the total. The BCAR was also unable to replicate the ABS figures because of unavailability of data.

**Table A3.** Comparison of ABS and BCAR calculations, cultural and creative activity, imputed COE, Division G and Division M, 2008-09.

<b>Division G Retail Trade</b>	<b>ABS calculations (\$m)</b>	<b>BCAR calculations (\$m)</b>
<b>Cultural</b> occupations in non-cultural industries	697	595
<b>Creative</b> occupations in non-creative industries	587	676
<b>Cultural and creative</b> occupations in non-cultural and creative industries	693	693

<b>Division M Professional, Scientific and Technical Services</b>	<b>ABS calculations (\$m)</b>	<b>BCAR calculations (\$m)</b>
<b>Cultural</b> occupations in non-cultural industries	1,787	1,050
<b>Creative</b> occupations in non-creative industries	1,077	949
<b>Cultural and creative</b> occupations in non-cultural and creative industries	1,184	1,184

To derive the figures for Division G and Division M, the BCAR analysed the listing of which industries were in or out of scope. This can be found at Table 17 in the ABS Satellite Accounts (5271.0).

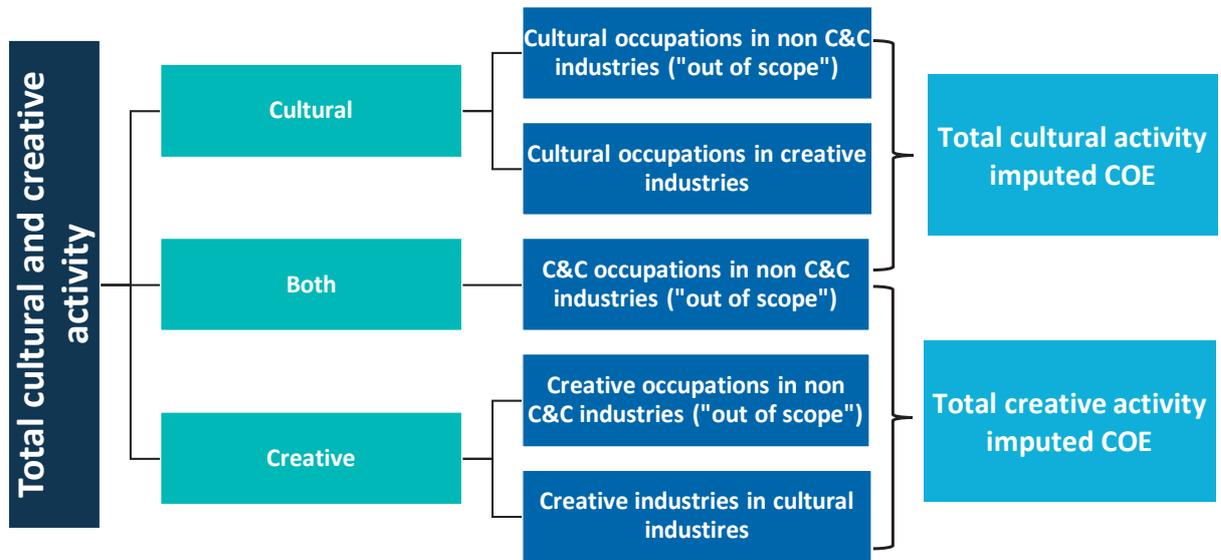
The COE received by individuals working in cultural occupations outside of cultural industries is derived from:

- Cultural occupations in creative industries;
- Cultural occupations in non-cultural and creative industries. The ABS Satellite Accounts identified these industries as “out of scope”; and
- Occupations identified as both cultural and creative in non-cultural and creative industries (also identified as “out of scope”).

Similarly, the COE received by individuals working in creative occupations outside the creative industries comprises of:

- Creative occupations in cultural industries
- Creative occupations in non-cultural and creative industries (“out of scope”); and
- Occupations identified as both cultural and creative in non-cultural and creative industries (also identified as “out of scope”).

Figure A 2. BCAR calculations, cultural and creative activity, imputed COE for Division G and M.



## Appendix B: Data gaps

Consistent with the Satellite Accounts 5271.0, some industries that are identified as in-scope have significant amounts of activity that stakeholders do not view as cultural or creative. An example used in the Satellite Accounts is higher education (a supporting industry) that covers entities engaged mainly in undergraduate or postgraduate teaching, of which only a small part is considered cultural or creative. In these cases, out-of-scope activities are removed from the Satellite Accounts through an apportioning process where possible, otherwise the industries are excluded to prevent the accounts being overstated. The industries excluded for this reason, as presented in the Satellite Accounts, are listed below. Cultural and creative activity in these industries is, however, captured partly by the second component of the Satellite Accounts (compensation of employees in cultural and creative occupations in other industries).<sup>59</sup>

<b>Code</b>	<b>ANZSIC class name</b>
1320	Leather Tanning, Fur Dressing and Leather Product Manufacturing
2029	Other Ceramic Product Manufacturing
2599	Other Manufacturing n.e.c.
3020	Non-Residential Building Construction
3109	Other Heavy and Civil Engineering Construction
4273	Antique and Used Goods Retailing
4520	Pubs, Taverns and Bars
4530	Clubs (Hospitality)
6639	Other Goods and Equipment Rental and Hiring n.e.c.
6962	Management Advice and Related Consulting Services
7211	Employment Placement and Recruitment Services
7212	Labour Supply Services
7299	Other Administrative Services n.e.c.
7510	Central Government Administration
7520	State Government Administration
7530	Local Government Administration
8101	Technical and Vocational Education and Training
8102	Higher Education
9499	Other Repair and Maintenance n.e.c.
9551	Business and Professional Association Services
9552	Labour Association Services
9559	Other Interest Group Services n.e.c.

## Appendix C: ANZSIC (2006) industry classes

Domain	Code	ANZSIC class name	Segment	Comments
Broadcasting, electronic or digital media, and film	5420	Software Publishing	Both	Wholly in-scope.
	5511	Motion Picture and Video Production	Both	Wholly in-scope.
	5512	Motion Picture and Video Distribution	Both	Wholly in-scope.
	5513	Motion Picture Exhibition	Both	Wholly in-scope.
	5514	Post-production Services and Other Motion Picture and Video Activities	Both	Wholly in-scope.
	5610	Radio Broadcasting	Both	Wholly in-scope.
	5621	Free-to-Air Television Broadcasting	Both	Wholly in-scope.
	5622	Cable and Other Subscription Broadcasting	Both	Wholly in-scope.
	5700	Internet Publishing and Broadcasting	Both	Wholly in-scope.
	6632	Video and Other Electronic Media Rental and Hiring	Cultural	Wholly in-scope.
Design	6921	Architectural Services	Both	Wholly in-scope.
	6924	Other Specialised Design Services	Both	Wholly in-scope.
	6940	Advertising Services	Both	Wholly in-scope.
	7000	Computer System Design and Related Services	Creative	Wholly in-scope.
Environmental heritage	8921	Zoological and Botanical Gardens Operation	Cultural	Wholly in-scope.
	8922	Nature Reserves and Conservation Parks Operation	Cultural	Wholly in-scope.
Fashion	1351	Clothing Manufacturing	Creative	Wholly in-scope.
	1352	Footwear Manufacturing	Creative	Wholly in-scope.
	3712	Clothing and Footwear Wholesaling	Creative	Wholly in-scope.
	4251	Clothing Retailing	Creative	Wholly in-scope.
	4252	Footwear Retailing	Creative	Wholly in-scope.
	4259	Other Personal Accessory Retailing	Creative	Partially in-scope. Briefcase and luggage retailing are out-of-scope.
Libraries and archives	6010	Libraries and Archives	Both	Wholly in-scope.
Literature and print media	1611	Printing	Cultural	Partially in-scope. Photocopying is out-of-scope.
	1612	Printing Support Services	Creative	Wholly in-scope.
	3735	Book and Magazine Wholesaling	Cultural	Wholly in-scope.
	4244	Newspaper and Book Retailing	Cultural	Wholly in-scope.
	5411	Newspaper Publishing	Both	Wholly in-scope.
	5412	Magazine and Other Periodical Publishing	Both	Partially in-scope. Racing forms publishing is out-of-scope.
	5413	Book Publishing	Both	Wholly in-scope.
5419	Other Publishing (except Software, Music and Internet)	Creative	Partially in-scope. Calendar and diary publishing is out-of-scope.	
Museums	8910	Museum Operation	Both	Wholly in-scope.

Domain	Code	ANZSIC class name	Segment	Comments
<b>Music composition and publishing</b>	<b>5521</b>	Music Publishing	<b>Both</b>	Wholly in-scope.
	<b>5522</b>	Music and Other Sound Recording Activities	<b>Both</b>	Wholly in-scope.
<b>Other culture goods manufacturing and sales</b>	<b>1620</b>	Reproduction of Recorded Media	<b>Cultural</b>	Wholly in-scope.
	<b>2599</b>	Other Manufacturing nec	<b>Cultural</b>	Partially in-scope. Included for musical instrument manufacturing.
	<b>3739</b>	Other Goods Wholesaling nec	<b>Cultural</b>	Partially in-scope. Included for musical instrument and recorded media wholesaling.
	<b>3800</b>	Commission-Based Wholesaling	<b>Cultural</b>	Partially in-scope. Included for its role in reselling cultural and creative goods.
	<b>4242</b>	Entertainment Media Retailing	<b>Cultural</b>	Wholly in-scope.
	<b>4273</b>	Antique and Used Goods Retailing	<b>Cultural</b>	Partially in-scope. Coin and stamp dealing are out-of-scope.
	<b>4279</b>	Other Store-Based Retailing nec	<b>Cultural</b>	Partially in-scope. Included for retail art gallery operation and musical instrument retailing.
	<b>4310</b>	Non-Store Retailing	<b>Cultural</b>	Partially in-scope. Included for direct selling of books.
	<b>4320</b>	Retail Commission-Based Buying and/or Selling	<b>Cultural</b>	Partially in-scope. Included for selling and buying of books.
	<b>6639</b>	Other Goods and Equipment Rental and Hiring nec	<b>Both</b>	Partially in-scope. Included for art work, video recorder and sound equipment rental.
<b>Performing arts</b>	<b>4520</b>	Pubs, Taverns and Bars	<b>Both</b>	Partially in-scope. Included for the activity generated at venues during live entertainment performances.
	<b>4530</b>	Clubs (Hospitality)	<b>Both</b>	Partially in-scope. Included for the activity generated at venues during live entertainment performances.
	<b>9001</b>	Performing Arts Operation	<b>Both</b>	Wholly in-scope.
	<b>9002</b>	Creative Artists, Musicians, Writers and Performers	<b>Both</b>	Wholly in-scope.
	<b>9003</b>	Performing Arts Venue Operation	<b>Both</b>	Wholly in-scope.
<b>Supporting activities</b>	<b>3020</b>	Non-Residential Building Construction	<b>Cultural</b>	Partially in-scope. Included for construction of cultural facilities.
	<b>3109</b>	Other Heavy and Civil Engineering Construction	<b>Cultural</b>	Partially in-scope. Included for construction of cultural facilities.
	<b>6962</b>	Management Advice and Related Consulting Services	<b>Cultural</b>	Partially in-scope. Included for artist / entertainer management services.

Domain	Code	ANZSIC class name	Segment	Comments
	7211	Employment Placement and Recruitment Services	Cultural	Partially in-scope. Included for casting agency operation.
	7212	Labour Supply Services	Cultural	Partially in-scope.
	7299	Other Administrative Services nec	Cultural	Partially in-scope. Included for cultural event management, arts promotion and theatre and concert booking services.
	7510	Central Government Administration	Cultural	Partially in-scope.
	7520	State Government Administration	Cultural	Partially in-scope.
	7530	Local Government Administration	Cultural	Partially in-scope.
	8101	Technical and Vocational Education and Training	Cultural	Partially in-scope.
	8102	Higher Education	Cultural	Partially in-scope.
	8212	Arts Education	Cultural	Wholly in-scope.
	9499	Other Repair and Maintenance nec	Cultural	Partially in-scope. Included for jewellery and musical instrument repair.
	9551	Business and Professional Association Services	Cultural	Partially in-scope.
	9552	Labour Association Services	Cultural	Partially in-scope.
	9559	Other Interest Group Services nec	Cultural	Partially in-scope.
Visual arts and crafts	1320	Leather Tanning, Fur Dressing and Leather Product Manufacturing	Both	Partially in-scope. Associated with crafts.
	2029	Other Ceramic Product Manufacturing	Both	Partially in-scope. Associated with crafts.
	2591	Jewellery and Silverware Manufacturing	Both	Partially in-scope. Coin minting is out-of-scope.
	3732	Jewellery and Watch Wholesaling	Both	Partially in-scope. Watch and clock wholesaling are out-of- scope.
	4253	Watch and Jewellery Retailing	Both	Partially in-scope. Watch retailing is out-of-scope.
	6991	Professional Photographic Services	Both	Wholly in-scope.

## Appendix D: Structure for cultural and creative activity of the domain tables

The table for cultural and creative activity in domains includes the following indicators:

**Output:** consists of those goods and services that are produced within, and become available for use outside an establishment, plus any goods and services produced for own final use.<sup>60</sup>

**GVA:** is defined as the value of output at basic prices minus the value of intermediate consumption at purchasers' prices. The term is used to describe gross product by industry and by sector. Basic prices valuation of output removes the distortion caused by variations in the incidence of commodity taxes and subsidies across the output of individual industries.<sup>61</sup>

GVA for each Australian industry in the cultural and creative satellite accounts has been decomposed into their primary inputs<sup>62</sup>:

- **Compensation of Employees (COE)**, which is the total remuneration payable by enterprises to employees in cash or in kind;
- **Gross Operating Surplus (GOS) and Gross Mixed Income (GMI)**, which are the incomes from production received by the owners of corporate enterprises (attributed to GOS) and unincorporated enterprises (attributed to GMI);
- **Other taxes less subsidies on production**, which includes employers' payroll tax, motor vehicle taxes, land taxes, municipal and improvement rates, and a number of other items.

## Appendix E: Glossary

The glossary provides a general guide to terms defined by the ABS and used in this report.

**Compensation of employees (COE):** Total remuneration received by an employee from their employer, either in cash or in kind. It excludes unpaid voluntary work and taxes payable by the employer on their wage and salary bill (e.g. payroll tax).

**Domain:** A set of categories that define cultural and creative activity by combining data for related industry classes. Domains are based on, but do not necessarily align with, the 2006 Australian and New Zealand Standard Industrial Classification (ANZSIC).

**Gross domestic product (GDP):** Is the total market value of goods and services produced in Australia within a given period after deducting the cost of goods and services used up in the process of production but before deducting allowances for the consumption of fixed capital. Thus gross domestic product, as here defined, is 'at market prices'. It is equivalent to gross national expenditure plus exports of goods and services less imports of goods and services.

**Gross mixed income of unincorporated enterprises (GMI):** Is the surplus accruing to owners of unincorporated enterprises from processes of production (as defined for gross operating surplus) before deducting any explicit or implicit interest, rents or other property income payable on the financial assets, non-produced non-financial natural resource assets (such as land) required to carry on the production and before deducting consumption of fixed capital. However, GMI is measured after the deduction of financial intermediation services indirectly measured (FISIM) and the insurance serving charge. The owners, or other members of their households, may work without receiving any wage or salary. Mixed income therefore includes both gross operating surplus for unincorporated enterprises and returns for the proprietors' own labour (akin to wages and salaries). In practice, all unincorporated enterprises owned by households that are not quasi-corporations are deemed to fall into this category, except owner-occupiers in their capacity as producers of housing services for own final consumption, and households employing paid domestic staff (an activity which is deemed to generate zero surplus).

**Gross operating surplus (GOS):** Is the surplus accruing to owners from processes of production before deducting any explicit or implicit interest charges, rents or other property incomes payable on the financial assets, non-produced non-financial natural resource assets (such as land) required to carry on the production and before deducting consumption of fixed capital. However, GOS is measured after the deduction of FISIM and the insurance service charge. It excludes gross mixed income which is the surplus accruing to owners of unincorporated enterprises. Gross operating surplus is also calculated for general government, where it equals general government's consumption of fixed capital.

**Gross value added (GVA):** The value of output at basic prices minus the value of intermediate consumption at purchasers' prices. The term is used to describe gross product by industry and by sector. Basic prices valuation of output removes the distortion caused by variations in the incidence of commodity taxes and subsidies across the output of individual industries.

**Input-Output Industry Group (IOIG):** IOIGs are based on the Australian and New Zealand Standard Industrial Classification (ANZSIC) and the I-O tables are published at this level of industry.

**Input-Output tables:** Input and output tables are a means of presenting a detailed analysis of the process of production and the use of goods and services (products) and the income generated in the production process. These tables can be either in the form of (a) supply and use tables or (b) symmetric input and output tables.

**National accounts:** The complete and consistent accounting approach for measuring the economic activity of a nation.

**National accounts basis:** The activity measured by the satellite accounts that falls within the national accounts production boundary. In the satellite accounts this comprises activity of cultural and creative industries, net taxes on their products, and activity in other industries performed by workers in cultural and creative occupations.

**Non-market output:** Goods and services produced by any institutional units that are supplied free or at prices that are not economically significant.

**Non-market output for market producers:** Is an imputation to measure the output of non-profit institutions engaged in market production that is not measured when output is valued through sales. It is calculated as the difference between output for market units when calculated by the prescribed valuation method for non-market units of cost summation, and output as calculated by the prescribed method for market units of valuation by sales. Where output on a cost valuation basis exceeds output on a sales valuation basis, the difference is taken to be the non-market output of market producers. Where output on a sales basis exceeds output on a cost basis, non-market output of market producers is assumed to equal zero.

**Other subsidies on production:** All subsidies, except subsidies on products, which resident enterprises may receive as a consequence of engaging in production. Other subsidies on production include: subsidies related to the payroll or workforce numbers (including subsidies payable on the total wage or salary bill), on numbers employed, or on the employment of particular types of persons, e.g. persons with disabilities or persons who have been unemployed for a long period.

**Other taxes on production:** All taxes that enterprises incur as a result of engaging in production, except taxes on products. Other taxes on production include: taxes related to the payroll or workforce numbers excluding compulsory social security contributions paid by employers and any taxes paid by the employees themselves out of their wages or salaries; recurrent taxes on land, buildings or other structures; some business and professional licences where no service is provided by the Government in return; taxes on the use of fixed assets or other activities; stamp duties; taxes on pollution; and taxes on international transactions.

**Output:** Goods and services that are produced by an establishment for use or consumption both within and outside that establishment.

**Production boundary:** The national accounts production boundary includes:

- the production of all individual or collective goods and services that are supplied to units other than the producers, or intended to be supplied, including the production of goods and services used up in the process of producing such goods and services;
- the own-account production of all goods that are retained by their producers for their own final consumption or gross capital formation; and
- the own-account production of housing services by owner-occupiers.

**Satellite account:** A framework linked to the national accounts, which enables focused attention on a particular aspect of economic or social life (e.g. cultural and creative activity) by combining national accounts estimates with the findings of other surveys and statistics.

**Satellite accounts basis:** Satellite accounts basis - in the example of cultural and creative activity - 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. Data presented on a satellite accounts basis are not directly comparable with national accounts aggregates.

**Subsidies on products:** Is a subsidy payable per unit of a good or service. The subsidy may be a specific amount of money per unit of quantity of a good or service, or it may be calculated ad valorem as a

specified percentage of the price per unit. A subsidy may also be calculated as the difference between a specified target price and the market price actually paid by a purchaser. A subsidy on a product usually becomes payable when the product is produced, sold or imported, but it may also become payable in other circumstances, such as when a product is exported, leased, transferred, delivered or used for own consumption or own capital formation.

**Taxes on products:** Is a tax that is payable per unit of a good or service. The tax may be a specific amount of money per unit of quantity of a good or service (quantity being measured either in terms of discrete units or continuous physical variables such as volume, weight, strength, distance, time, etc.), or it may be calculated ad valorem as a specified percentage of the price per unit or value of the goods or services transacted. A tax on a product usually becomes payable when it is produced, sold or imported, but it may also become payable in other circumstances, such as when a good is exported, leased, transferred, delivered, or used for own consumption or own capital formation.

## List of tables

<b>Table 1.</b> Cultural and creative activity 2008-09 and 2016-17.....	5
<b>Table 2.</b> Cultural and creative activity, share of GDP, 2008-09 to 2016-17 .....	10
<b>Table 3.</b> Cultural and creative activity, GVA by industry division, 2008-09 to 2016-17 .....	11
<b>Table 4.</b> Cultural activity, share of GDP, 2008-09 to 2016-17 .....	15
<b>Table 5.</b> Creative activity, share of GDP, 2008-09 to 2016-17.....	17
<b>Table 6.</b> Cultural and creative activity in museums, 2008-09 to 2016-17 .....	22
<b>Table 7.</b> Cultural and creative activity in environmental heritage, 2008-09 to 2016-17 .....	23
<b>Table 8.</b> Cultural and creative activity in libraries and archives, 2008-09 to 2016-17 .....	24
<b>Table 9.</b> Cultural and creative activity in literature and print media, 2008-09 to 2016-17.....	25
<b>Table 10.</b> Cultural activity in literature and print media, 2008-09 to 2016-17.....	26
<b>Table 11.</b> Creative activity in literature and print media, 2008-09 to 2016-17.....	26
<b>Table 12.</b> Cultural and creative activity in performing arts, 2008-09 to 2016-17 .....	27
<b>Table 13.</b> Cultural and creative activity in design, 2008-09 to 2016-17 .....	29
<b>Table 14.</b> Cultural activity in design, 2008-09 to 2016-17 .....	30
<b>Table 15.</b> Cultural and creative activity in broadcasting, electronic or digital media, and film, 2008-09 to 2016-17 .....	31
<b>Table 16.</b> Creative activity in broadcasting, electronic or digital media, and film, 2008-09 to 2016-17...	32
<b>Table 17.</b> Cultural and creative activity in music composition and publishing, 2008-09 to 2016-17.....	33
<b>Table 18.</b> Cultural and creative activity in visual arts and crafts, 2008-09 to 2016-17 .....	35
<b>Table 19.</b> Cultural and creative activity in fashion, 2008-09 to 2016-17 .....	36
<b>Table 20.</b> Cultural and creative activity in other culture goods manufacturing and sales, 2008-09 to 2016-17 .....	37
<b>Table 21.</b> Cultural and creative activity in supporting activities, 2008-09 to 2016-17 .....	38

## List of figures

<b>Figure 1.</b> Cultural and creative activity, 2016-17.....	7
<b>Figure 2.</b> Cultural and creative industries, Gross Value Added (GVA) by domain 2016-17.....	8
<b>Figure 3.</b> Cultural and creative activity, 2008-09 to 2016-17 .....	9
<b>Figure 4.</b> Cultural and creative activity relative to nominal GDP.....	10
<b>Figure 5.</b> Cultural and creative activity, share of GDP, 2008-09 to 2016-17 .....	11
<b>Figure 6.</b> GVA change by division, cultural and creative industries, 2008-09 to 2016-17 .....	12
<b>Figure 7.</b> GVA change of cultural and creative industries in manufacturing, 2008-09 to 2016-17 .....	13
<b>Figure 8.</b> Industry division's GVA relative to GDP.....	14
<b>Figure 9.</b> GVA by domain, cultural industries, 2016-17 (\$m) .....	16
<b>Figure 10.</b> Cultural activity, share of GDP, 2008-09 to 2016-17 .....	16
<b>Figure 11.</b> GVA by domain, creative industries, 2016-17 (\$m).....	18
<b>Figure 12.</b> Creative activity, share of GDP, 2008-09 to 2016-17.....	18
<b>Figure 13.</b> Contribution to cultural and creative activity, GVA (by domain), net taxes on products, and COE in other industries, 2008-09 and 2016-17.....	19
<b>Figure 14.</b> Nominal GVA growth by domain, cultural and creative industries, 2008-09 to 2016-17 .....	20
<b>Figure 15.</b> Domains' GVA relative to GDP.....	21
<b>Figure 16.</b> GVA, Cultural and creative activity in museums, 2008-09 to 2016-17.....	22
<b>Figure 17.</b> GVA, Cultural and creative activity in environmental heritage, 2008-09 to 2016-17 .....	23
<b>Figure 18.</b> GVA, Cultural and creative activity in libraries and archives, 2008-09 to 2016-17 .....	24
<b>Figure 19.</b> GVA, Cultural and creative activity in literature and print media, 2008-09 to 2016-17 .....	26
<b>Figure 20.</b> GVA, Cultural and creative activity in performing arts, 2008-09 to 2016-17 .....	28
<b>Figure 21.</b> GVA, Cultural and creative activity in design, 2008-09 to 2016-17.....	30
<b>Figure 22.</b> GVA, Cultural and creative activity in broadcasting, electronic or digital media, and film, 2008-09 to 2016-17.....	32
<b>Figure 23.</b> GVA, Cultural and creative activity in music composition and publishing, 2008-09 to 2016-17 .....	34
<b>Figure 24.</b> GVA, Cultural and creative activity in visual arts and crafts, 2008-09 to 2016-17 .....	35
<b>Figure 25.</b> GVA, Cultural and creative activity in fashion, 2008-09 to 2016-17.....	36
<b>Figure 26.</b> GVA, Cultural and creative activity in other culture goods manufacturing and sales, 2008-09 to 2016-17.....	37
<b>Figure 27.</b> GVA, Cultural and creative activity in supporting activities, 2008-09 to 2016-17.....	38

## References

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- <sup>2</sup> Australian Bureau of Statistics (2014), [Discussion Paper: Cultural and Creative Activity Satellite Accounts](#), Australia, 2013, cat. no. 5271.0.55.001, June 2013, p. 8
- <sup>3</sup> Australian Bureau of Statistics (2014), Australian national accounts: cultural and creative activity satellite accounts, experimental, 2008-09, cat. no. 5271.0
- <sup>4</sup> Wages and salaries, and employers' social contributions, is also known as Compensation of Employees.
- <sup>5</sup> IBISWorld industry report (2018), M7000 Computer system design services in Australia, April 2018, p. 5.
- <sup>6</sup> IBISWorld industry report (2017), G4251 Clothing Retailing in Australia, November 2017, p. 5.
- <sup>7</sup> IBISWorld industry report (2017), J5621 Free-to-Air Television Broadcasting in Australia, November 2017, p. 4.
- <sup>8</sup> IBISWorld industry report (2018), C1611 Printing in Australia, January 2018, p. 5.
- <sup>9</sup> IBISWorld industry report (2018), C1351B Women's and Girls Wear Manufacturing in Australia, March 2018, p. 4.
- <sup>10</sup> Australian Bureau of Statistics (2014), [Discussion Paper: Cultural and Creative Activity Satellite Accounts](#), Australia, 2013, cat. no. 5271.0.55.001, June 2013, p. 8
- <sup>11</sup> Australian Bureau of Statistics (2006), Australian and New Zealand Standard Industrial Classification 2006, cat. No. 1292.0, February 2006, p. 352.
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