



Australian Government
Department of Education, Employment
and Workplace Relations



Employment Outlook for Arts and Recreation Services



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Introduction

The Arts and Recreation Services industry is a relatively small employing industry in the Australian economy, employing 206 300 people (or 1.9 per cent of the total workforce) as at February 2009.

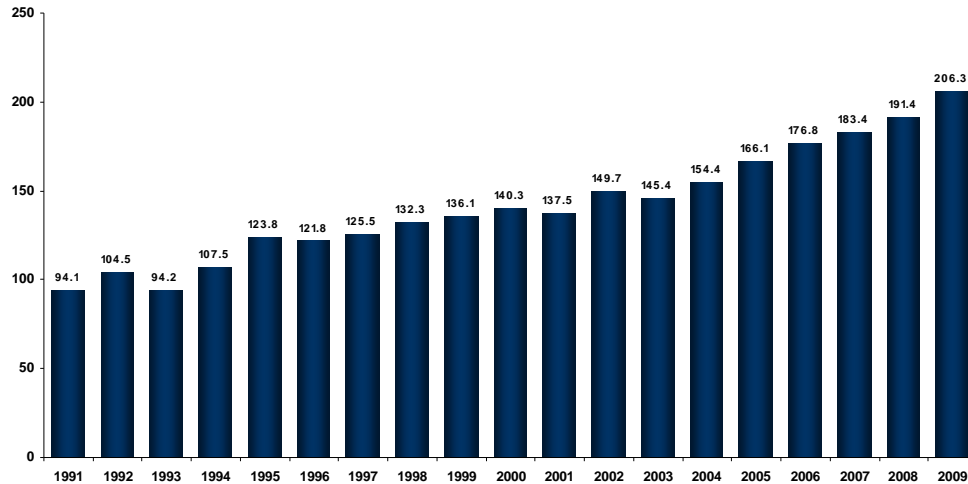
The industry is divided into seven sectors: Sports and Physical Recreation Activities, Creative and Performing Arts Activities, Gambling Activities, Parks and Gardens Operations, Horse and Dog Racing Activities, Amusement and Other Recreation Activities and Museum Operation.

The discussion below focuses on employment characteristics, trends and prospects in the Arts and Recreation Services industry, and highlights sectors where job growth is strongest. The analysis of characteristics includes workforce ageing, employment share by gender, educational profile, weekly earnings, average hours worked, regional and occupational employment.

Employment Growth

In the five years to February 2009, employment in Arts and Recreation Services increased by 51 900 (or 33.6 per cent) to 206 300 (see Figure 1). This equates to an increase, on average, of 6.0 per cent per annum. This growth has been relatively steady since the early 1990s, albeit with some annual fluctuations.

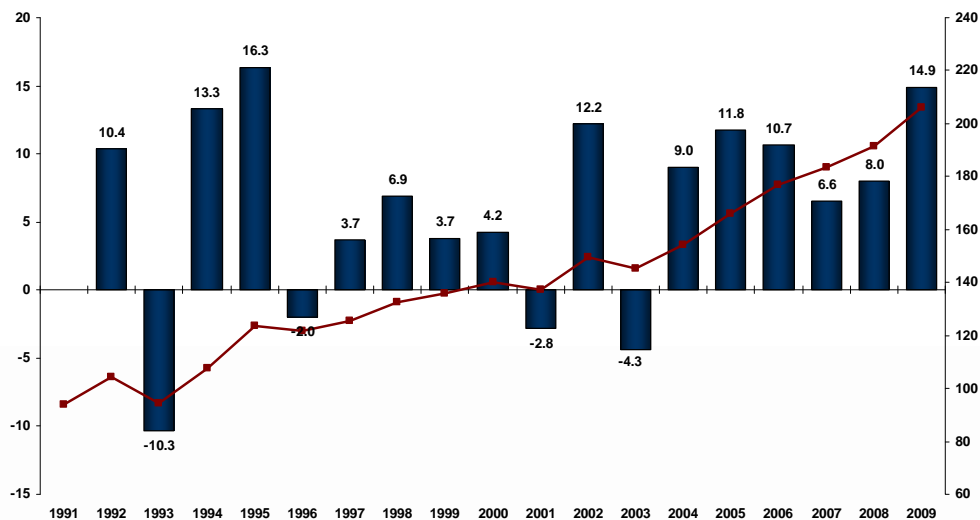
Figure 1: Employment Level ('000) - February 1991 to February 2009



Source: ABS Labour Force Survey (DEEWR trend data)

Employment in Arts and Recreation Services has been trending upwards since February 1991 (see Figure 2). In the early 1990s, the industry experienced volatility with increases in the year to February 1994 and the year to February 1995 (up by 13 300 and 16 300 respectively) followed by a decrease in the year to February 1996 (down by 2000). This was followed by four years of growth totalling 18 500 new jobs. In the year to February 2009, the industry experienced its second largest increase in employment since 1991 (up by 14 900).

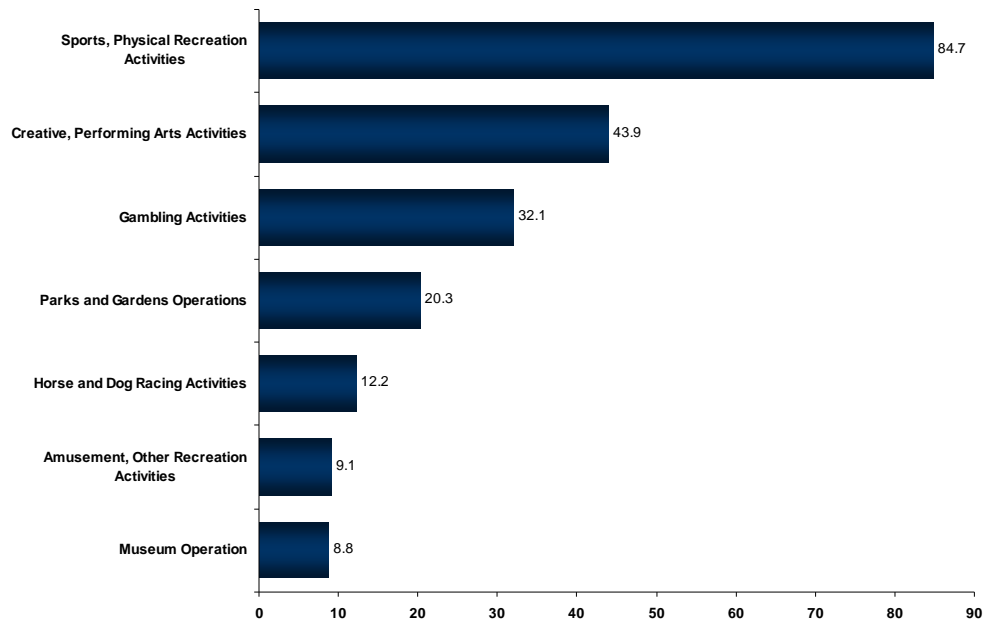
Figure 2: Employment Level (line RHS) and Annual Change ('000) - year to February (cols LHS)



Source: ABS Labour Force Survey (DEEWR trend data)

When employment in the Arts and Recreation Services industry is broken down into specific sectors, the main contributors to employment can be identified. In February 2009, 84 700 workers (or 40.2 per cent of workers employed in the industry) were employed in Sports and Physical Recreation Activities (see Figure 3), followed by workers employed in Creative and Performing Arts Activities (43 900 or 20.8 per cent) and in Gambling Activities (32 100 or 15.2 per cent). Only a small number of workers were employed in Museum Operation (8800 or 4.1 per cent) and Amusement and Other Recreation Activities (9100 or 4.3 per cent).

Figure 3: Arts and Recreation Services Sectors - Employment Levels ('000) - February 2009



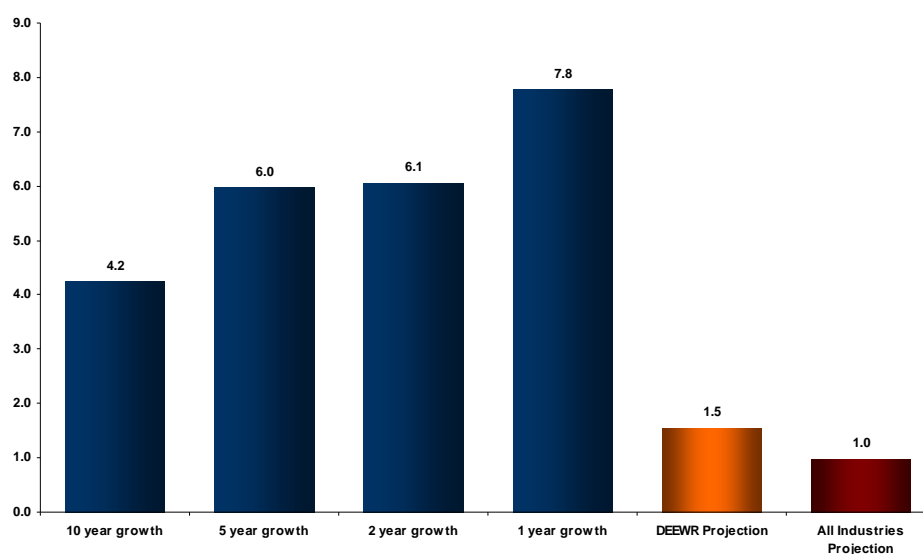
Source: ABS Labour Force Survey (DEEWR trend data)

Employment Prospects

The Department of Education, Employment and Workplace Relations (DEEWR) prepares annual updates of employment projections for industries for the next five years. These are based in part on the Monash model developed by the Centre of Policy Studies at Monash University, but also take into account recent employment trends and prospective industry developments. It should be noted that a certain degree of risk is attached to these employment projections, especially for sectors within the broader Arts and Recreation Services industry.

Employment growth in Arts and Recreation Services has been strong over the past 10 years (4.2 per cent per annum, see Figure 4), and especially in the year to February 2009 (7.8 per cent). In the five years to 2013-14, employment in the industry is expected to grow at an average rate of 1.5 per cent per annum, which equates to around 16 400 new jobs. This compares with an average annual growth rate of 1.0 per cent across all industries over the same period.

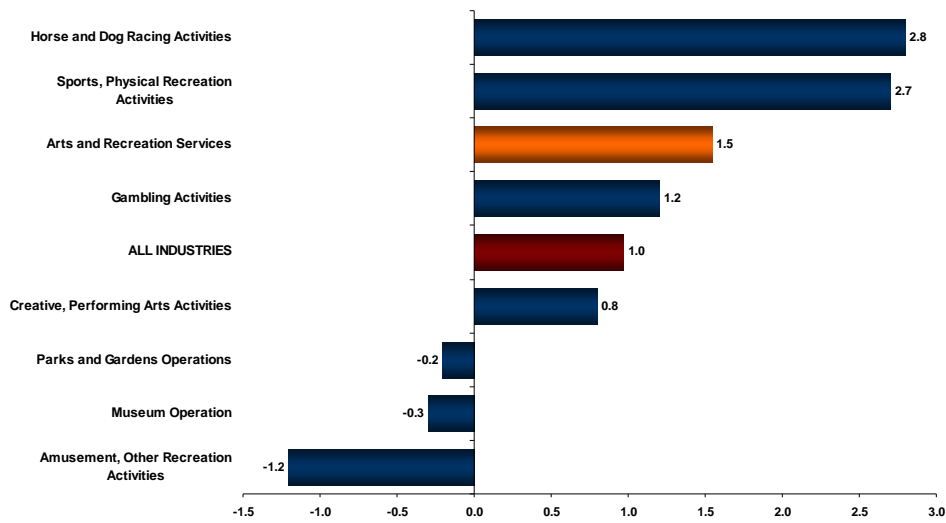
Figure 4: Recent and Projected Employment Growth (% pa) - February 2009 (past) and 5 years to 2013-2014 (projected)



Source: ABS Labour Force Survey (DEEWR trend data); DEEWR projections

Employment is expected to increase in four of the seven sectors within Arts and Recreation Services in the five years to 2013-14 (see Figure 5). Horse and Dog Racing Activities are projected to grow by 2.8 per cent per annum over the next five years, closely followed by Sports and Physical Recreation Activities (2.7 per cent). Declines in employment are projected for Amusement and Other Recreation Activities (down by 1.2 per cent), Museum Operation (0.3 per cent) and Parks and Gardens Operations (0.2 per cent).

Figure 5: Arts and Recreation Services Sectors – Projected Employment Growth (% pa) to 2013-2014

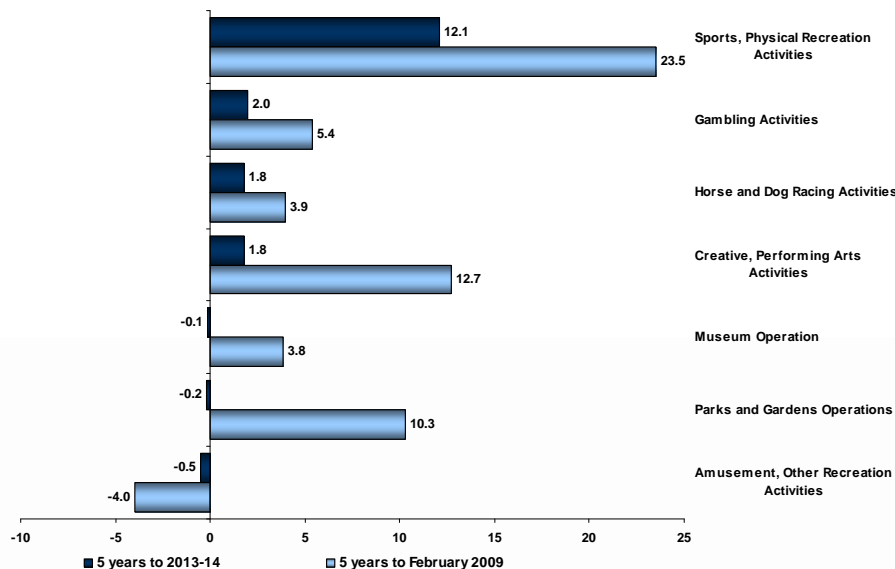


Source: DEEWR projections

Recent and projected growth figures vary across the seven Arts and Recreation Services sectors (see Figure 6). In the five years to February 2009, Sports and Physical Recreation Activities gained by far the highest number of jobs (up by 23 500). This was followed by Creative and Performing Arts Activities (12 700) and Parks and Gardens Operations (10 300). Negative employment growth occurred only in Amusement and Other Recreation Activities (down by 4000).

Looking ahead, in the five years to 2013-14, four of the seven Arts and Recreation Services sectors are expected to experience employment growth. The main contributor to future growth in the industry is projected to be Sports and Physical Recreation Activities (up by 12 100). This is followed by Gambling Activities (2000), Horse and Dog Racing Activities (1800) and Creative and Performing Arts Activities (1800). Small declines in employment are projected for Amusement and Other Recreation Activities (down by 500), Parks and Gardens Operations (200) and Museum Operation (100).

Figure 6: Arts and Recreation Services Sectors – Recent and Future Employment Growth ('000) 5 years to February 2009 (past) and to 2013-14 (projected)

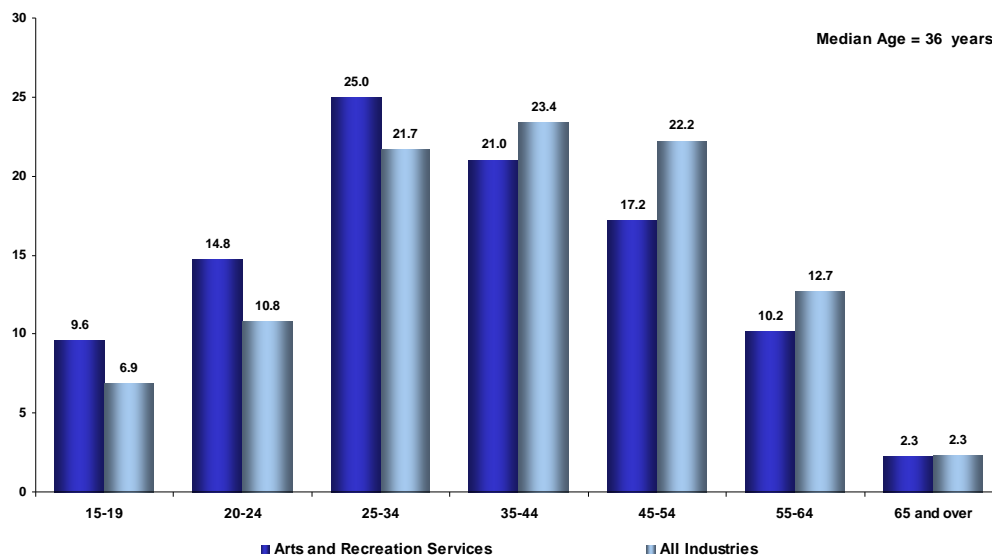


Source: ABS Labour Force Survey (DEEWR trend data); DEEWR projections

Workforce Ageing

In comparison to all industries, Arts and Recreation Services has a workforce that is skewed towards younger workers, with 49.4 per cent of the workforce aged less than 35 years, and a relatively low 29.7 per cent of workers aged 45 years and older (see Figure 7). This reflects a higher proportion of youth employment, with many changing careers as they reach mature age.

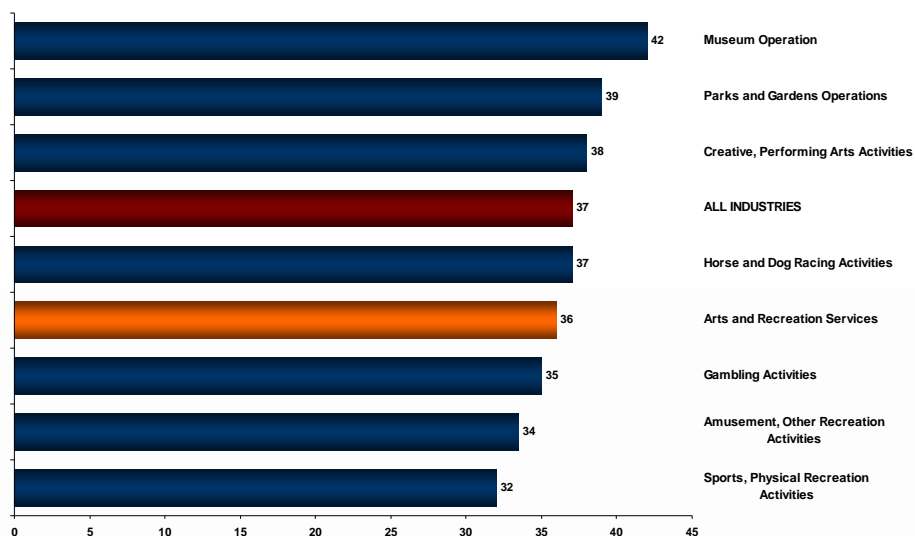
Figure 7: Employed Persons by Age compared with All Industries (% share of employment) - 2008



Source: ABS Labour Force Survey

In 2008, the median age for Arts and Recreation Services was 36 years and three sectors in the industry had a median age which was below that of all industries (37 years). Sports and Physical Recreation Activities had the lowest median age of 32 years, followed by Amusement and Other Recreation Activities (34 years) and Gambling Activities (35 years). Museum Operation had the highest median age in the industry (42 years), followed by Parks and Gardens Operations (39 years) and Creative and Performing Arts Activities (38 years).

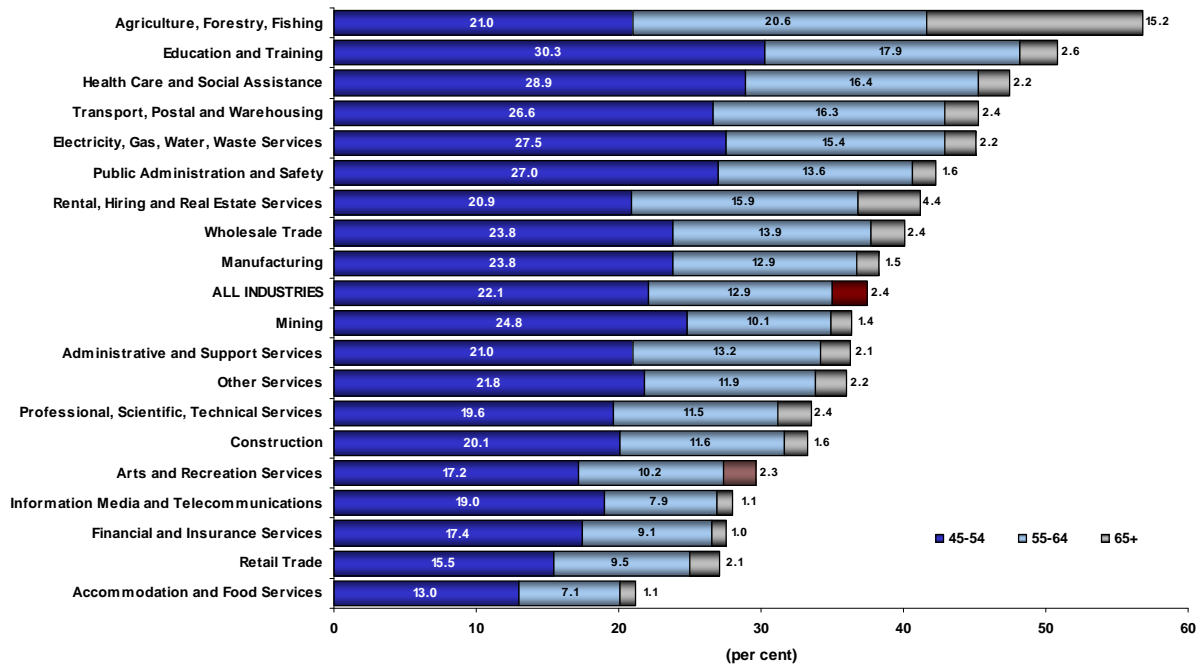
Figure 8: Arts and Recreation Services Sectors - Median Age (years) - 2008



Source: ABS Labour Force Survey

Of the 19 Australian and New Zealand Industrial Classification 2006 (ANZSIC 2006) industries, Arts and Recreation Services has the fifth lowest percentage of workers aged 45 years and over. Only 10.2 per cent of the industry workforce is aged 55 to 64 years, compared with 12.9 per cent for all industries. The industry also has the third lowest share of workers aged 45 to 54 years (17.2 per cent).

Figure 9: Mature Age workers (45+ years) - % share of employment – 2008

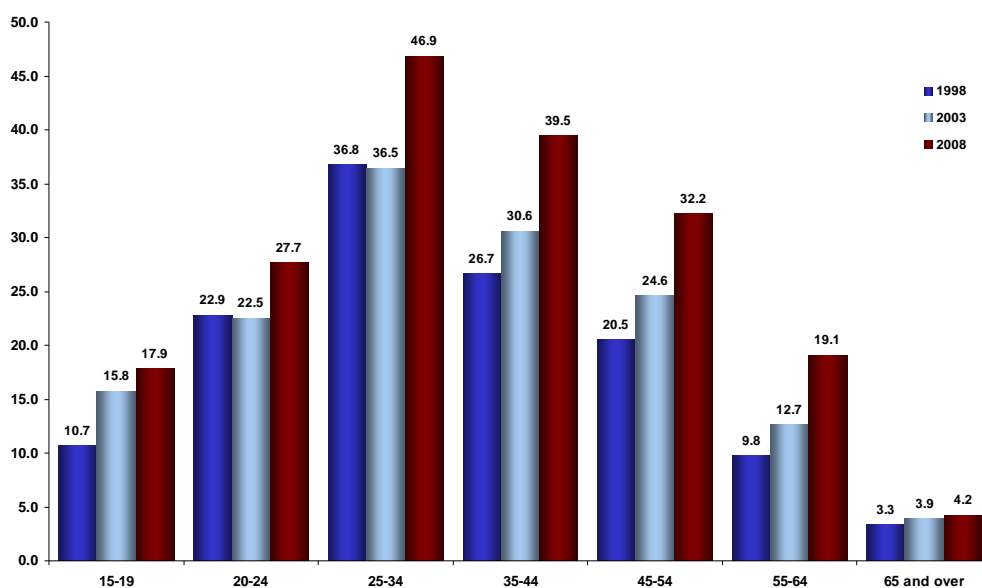


Source: ABS Labour Force Survey

Figure 10 shows employment by age group for three calendar years: 1998, 2003 and 2008. This provides a guide to changes in the employment mix by age group in the industry. As the Australian workforce experiences an increase in the median age of the population, it is important that there is a supply of prime age and mature age workers entering the workforce.

In the past decade, the Arts and Recreation Services industry has employed more workers in all age groups. Growth has been strongest in the 35 to 44 years category, with an increase of 12 800 workers. Strong growth also occurred for workers aged 45 to 54 years (up by 11 700) and for workers aged 25 to 34 years (10 100). The 55 to 64 years age group held the highest percentage growth rate (94.9 cent) over the same time period, although it should be noted that in 1998 workers in this age group had a low share of total employment in the industry.

Figure 10: Employment by Age ('000) - 1998, 2003 and 2008

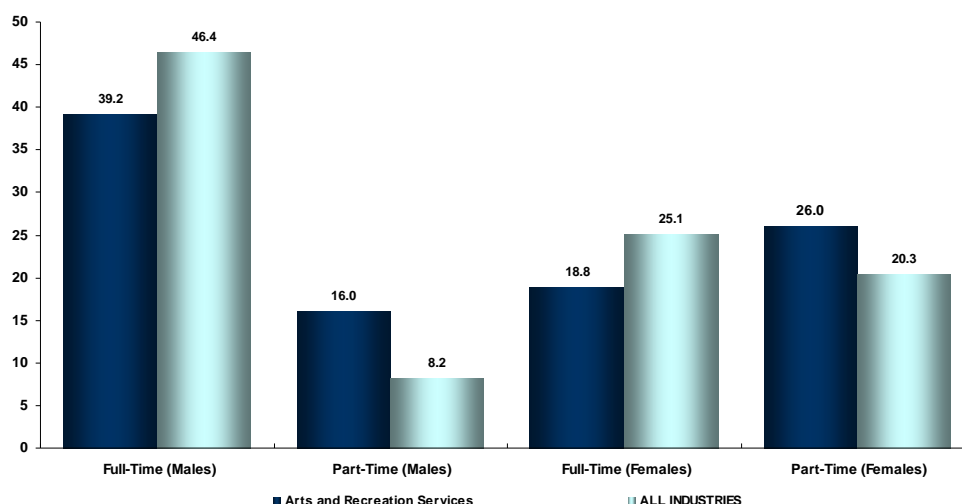


Source: ABS Labour Force Survey

Employment by Gender and Full-time/Part-time

There are slightly more male workers (55.2 per cent, see Figure 11) in Arts and Recreation Services than female workers (44.8 per cent). This is especially apparent in full-time employment in this industry. Male workers accounted for 39.2 per cent of full-time employment while female full-time workers only recorded 18.8 per cent. Overall, there are more part-time male and female workers employed (16.0 and 26.0 per cent respectively) in Arts and Recreation Services than in all industries (8.2 and 20.3 respectively).

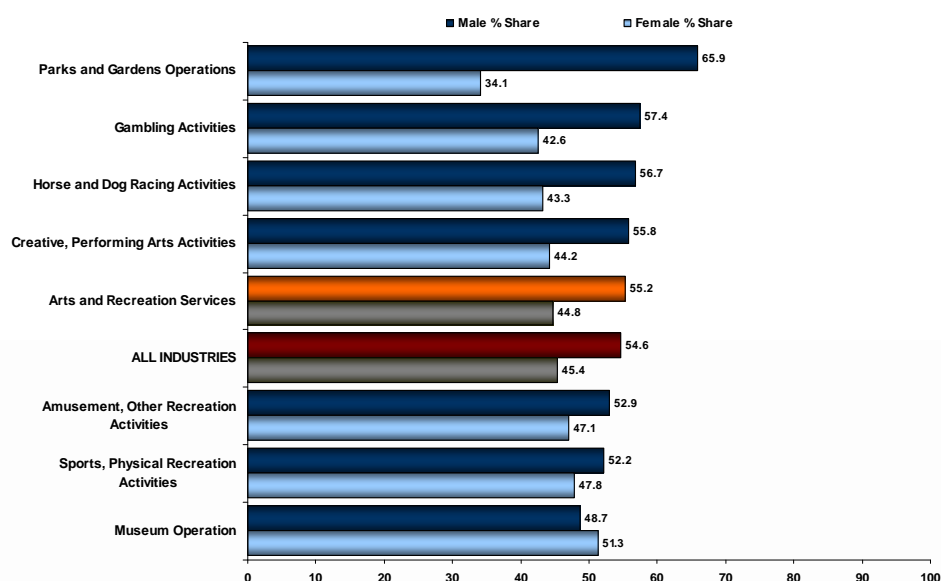
Figure 11: Employment by Gender and Full-Time/Part-time – year to February 2009



Source: ABS Labour Force Survey

All of the seven sectors of the Arts and Recreation Services industry are male dominated, with the exception of Museum Operation (see Figure 12). The Parks and Gardens Operations sector has the greatest share of male workers (65.9 per cent), followed by Gambling Activities (57.4 per cent) and Horse and Dog Racing Activities (56.7 per cent) while Museum Operation has the greatest share of female workers (51.3 per cent).

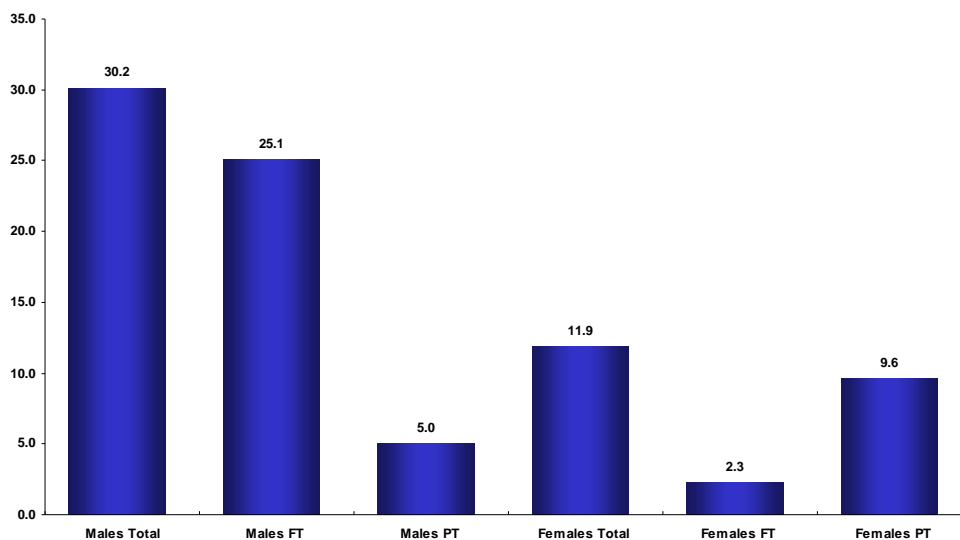
Figure 12: Arts and Recreation Services Sectors - Employment by Gender (% share) year to February 2009



Source: ABS Labour Force Survey

Both male and female employment in Arts and Recreation Services has increased (up by 30 200 and 11 900 respectively) over the five years to February 2009. The largest employment increase has been experienced by male full-time workers (up by 25 100 since February 2004) while female full-time employment increased only by 2300.

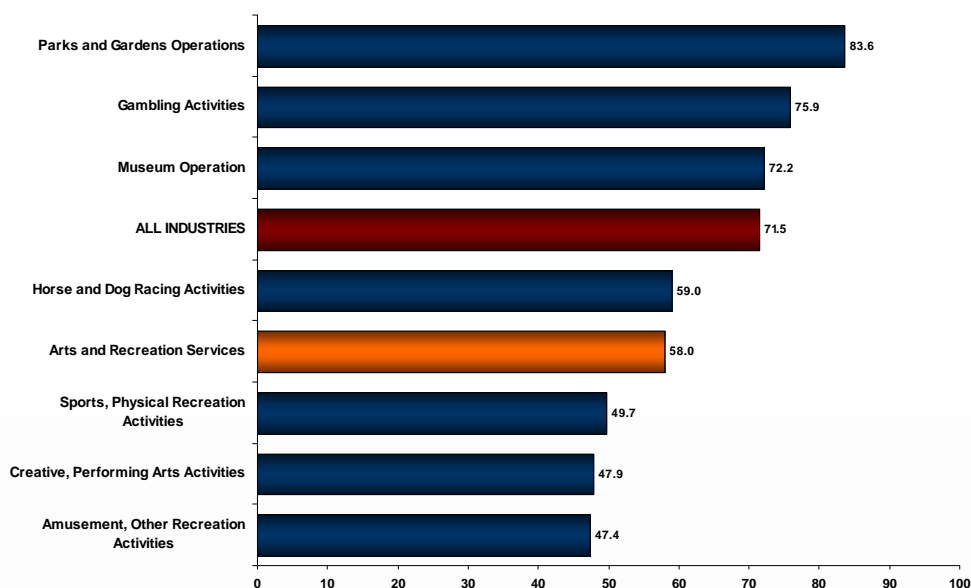
Figure 13: Employment Growth by Gender (5 years) Full-Time/Part-Time year to February 2009 ('000)



Source: ABS Labour Force Survey

Four of the seven Arts and Recreation Services industry sectors have a lower full-time employment share than all industries (see Figure 14). The highest full-time employment share can be found in Parks and Gardens Operations (83.6 per cent), followed by Gambling Activities (75.9 per cent). Amusement and Other Recreation Activities (47.4 per cent), Creative and Performing Arts Activities (47.9 per cent) and Sports and Physical Recreation Activities (49.7 per cent) have the lowest shares of full-time employment.

Figure 14: Arts and Recreation Services Sectors - % working full-time - year to February 2009

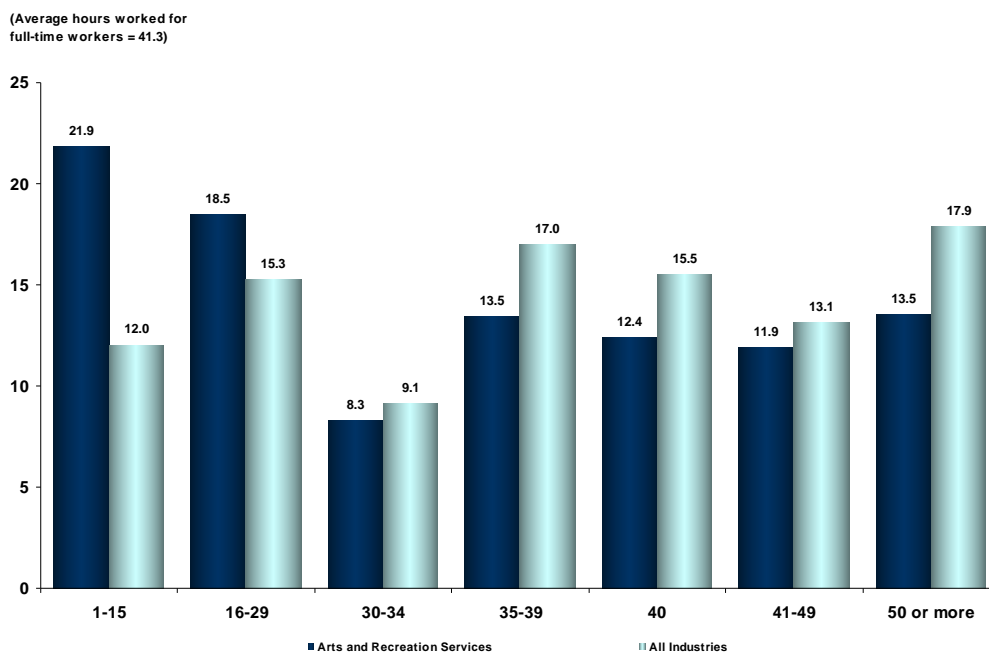


Source: ABS Labour Force Survey

Hours Worked

Average weekly hours worked in the Arts and Recreation Services industry are equal to those of all industries (41.3 hours). The highest shares of workers in the industry, however, were recorded in the 1 to 15 hours and the 16 to 29 hours categories (21.9 per cent and 18.5 per cent respectively). Those working 30 hours or more were below the shares for all industries, especially in the 50 hours or more category (13.5 per cent compared to 17.9 per cent for all industries).

Figure 15: Hours of Work - year to February 2009 (% share)



Source: ABS Labour Force Survey

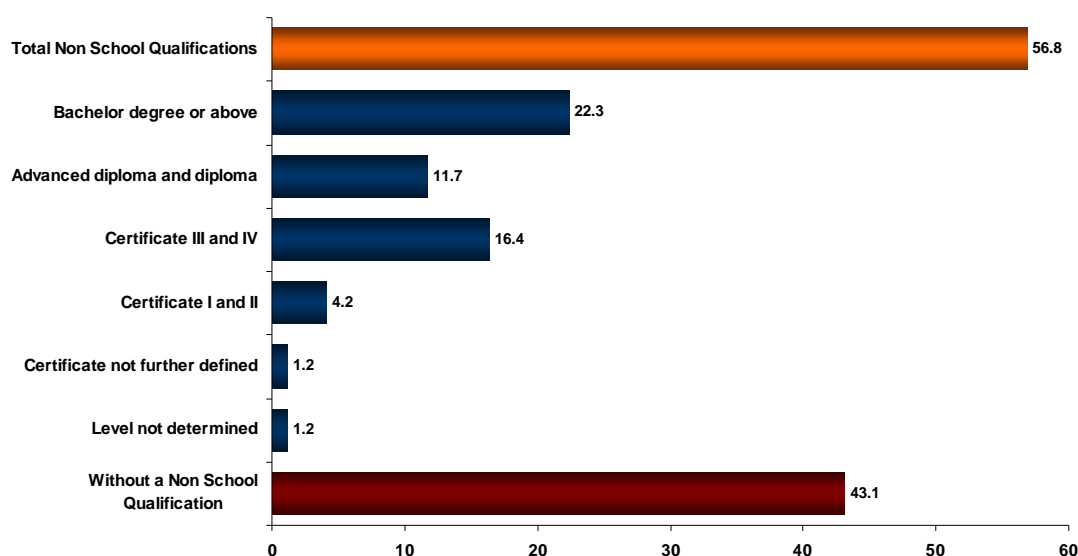
Employment Characteristics

Educational Profile

In May 2008, more than half of all workers (56.8 per cent) within the Arts and Recreation Services industry had a non-school qualification, compared with 60.2 per cent for all industries. The most prevalent non-school qualification in the industry was a Bachelor degree or above (22.3 per cent), followed by a Certificate III or IV (16.4 per cent).

While formal education is important in the industry, there was also a large share of workers without a non-school qualification (43.1 per cent). The Arts and Recreation Services industry provides a diverse range of employment opportunities at all educational and skill levels and plays a vital role in providing jobs for low skilled workers.

Figure 16: Educational Attainment (% share of employment) – May 2008

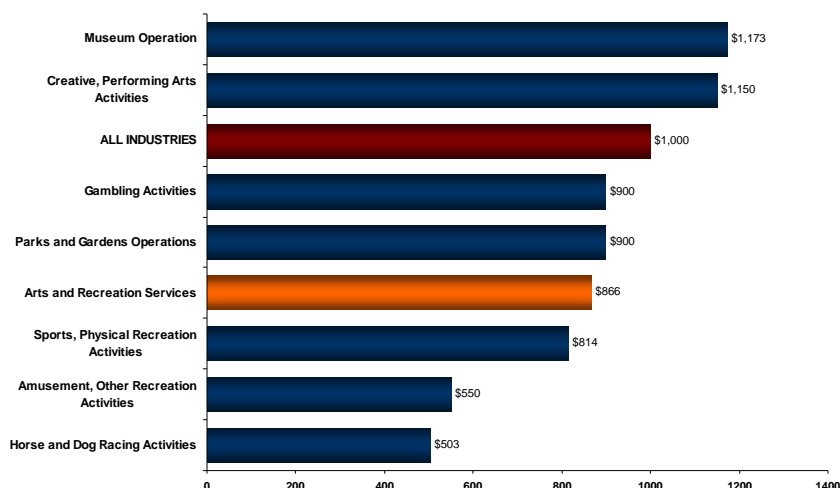


Source: ABS Education and Work, cat. no. 6227.0

Median Weekly Earnings

Median weekly full-time earnings in Arts and Recreation Services in February 2008 (\$866) were lower than earnings for all industries (\$1000) as shown in Figure 17. The industry sector with the highest median weekly full-time earnings was Museum Operation (\$1173), followed by Creative and Performing Arts Activities (\$1150) and Gambling Activities (\$900). The lowest earnings in the industry were recorded in Horse and Dog Racing Activities (\$503) and Amusement and Other Recreation Activities (\$550). The broad range in earnings in Arts and Recreation Services can be attributed in part to the varying skill levels of workers within the industry.

Figure 17: Arts and Recreation Services Sectors - Median weekly earnings (full-time and before tax) August 2008

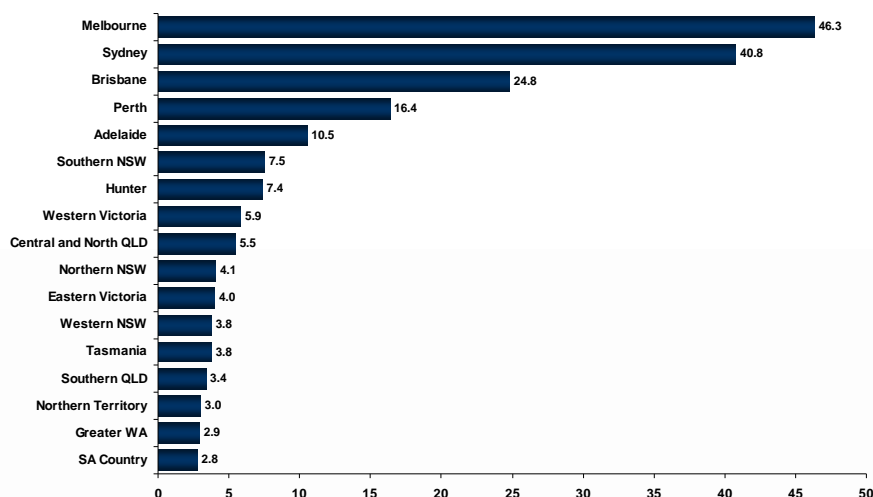


Source: ABS Employee Earnings, Benefits and Trade Union Membership, cat. no. 6310.0

Main Employing Regions

As demonstrated in Figure 18, the largest number of workers in Arts and Recreation Services is employed in Melbourne (46 300), followed by Sydney (40 800) and Brisbane (24 800). The Arts and Recreation Services industry is largely based in highly populated metropolitan areas, with relatively few workers in smaller and more remote locations such as South Australia Country (2800), Greater Western Australia (2900) and the Northern Territory (3000).

Figure 18: Main Employing Regions ('000) - year to February 2009

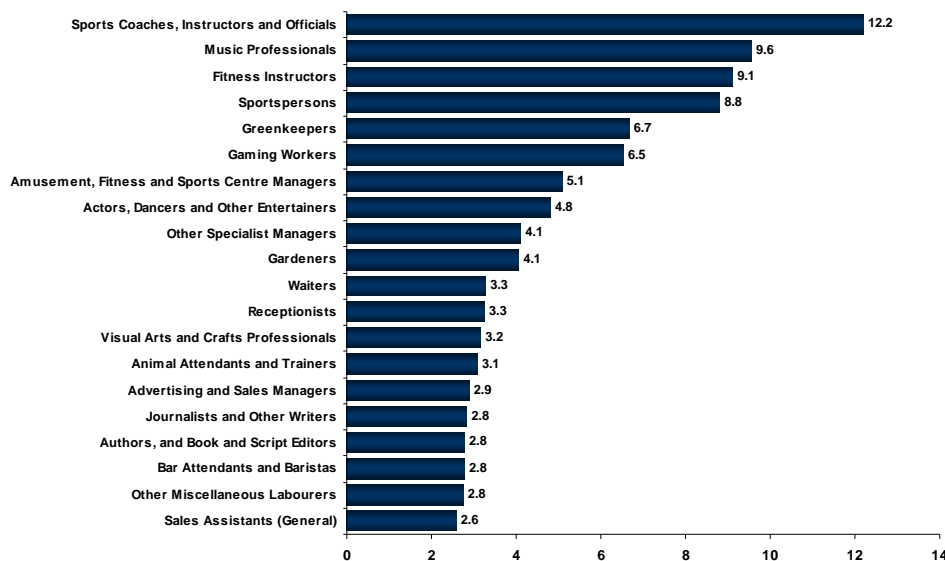


Source: ABS Labour Force Survey

Main Employing Occupations

It is useful for job seeking and career advice to identify key occupations within an industry. Occupations are generally spread across a variety of industries and may not normally be associated with particular industries. In 2008, the largest employing occupations in Arts and Recreation Services were Sports Coaches, Instructors and Officials (12 200), followed by Music Professionals (9600) and Fitness Instructors (9100). A lower number of employees were working as Sales Assistants (2600), Other Miscellaneous Labourers (2800), Bar Attendants and Baristas (2800), Authors, Book and Script Editors (2800) and Journalists and Other Writers (2800).

Figure 19: Top 20 Employing Occupations ('000) - 2008



Source: ABS Labour Force Survey

Further information on occupations is available on the Job Outlook website (www.joboutlook.gov.au)

For further information on the Arts and Recreation Services industry (or other industries), visit the SkillsInfo website at skillsinfo.gov.au. SkillsInfo provides a range of skills related information for industries and regions. The website offers a broad range of information on employment, careers, education and training and skills issues - including workforce ageing, skills in demand, labour force data, ICT and employability skills, as well as quick links to skills information. Data are sourced mainly from the ABS Labour Force Survey.

SkillsInfo also brings together a large collection of links to external industry and skills related websites.