Arts and recreation services

…covers heritage activities including museum operation, and parks and gardens operations; creative and performing arts activities, sports and physical recreation activities, horse and dog racing activities, amusement and outdoor recreation activities and gambling activities.

Key points

- Arts and recreation services employ approximately 198,200 people, accounting for around two per cent of the total Australian workforce
- 42 per cent of the arts and recreation services workforce is employed in small-sized enterprises (i.e. those that employ less than 20 workers), with 31 per cent in large-sized enterprises (i.e. those that employ 200 workers or more) and 27 per cent in medium-sized enterprises (i.e. those that employ between 20 and 199 workers)
- 35 per cent of employment in arts and recreation services occurs in regional and remote areas, slightly below the all-industry average of 37 per cent[1]
- Nearly half of the workforce (45 per cent) is employed part-time, compared to 30 per cent for all industries
- The industry has a relatively even representation of males and females, with female workers accounting for 48 per cent of the total workforce
- Education attainment within the sector is similar to the Australian average, with 26 per cent having completed a Bachelor degree or higher and 40 per cent without post-school qualifications
- A detailed employment profile for arts and recreation services (including information on its workforce, industry and occupational characteristics) can be found at www.skillsinfo.gov.au

Industry outlook

The arts and recreation services sector is a small industry within the Australian economy, contributing around $9.9b (less than one per cent) to the total industry value added in 2009-10.[2]

[1] Regional and remote areas are defined as those outside state capital cities.
[2] 'Industry value added' is the measure of the contribution by industry to gross domestic product (GDP) at basic prices. ABS (2010) *Australian System of National Accounts* (Cat. no. 5204.0).

Short-term growth

The recent employment growth experienced over the past five years is expected to slow somewhat in the years to 2014-15.

Table 1 Current and past employment in arts and recreation services

Industry	Current employment		Past growth: five years	
	'000	% of total	'000	%
Arts and recreation services	198.2	1.8	24.3	14.0
All employed	**11,044.6**	**100.0**	**1,060.1**	**10.6**

Population: Employed people.
Source: DEEWR analysis of ABS trend data, May 2010 (Cat no: 6291.0.55.003).

Long-term growth

Skills Australia used scenario planning and economic modelling undertaken by Access Economics to calculate the skills demand for the economy into the future. The three scenarios are:

- Open Doors – assumes an industry and occupation structure that is driven by greater global openness, high economic growth and high productivity
- Low Trust Globalisation – assumes global competition but with more moderate participation rates, productivity growth and rates of growth of net migration, and accordingly, medium economic growth
- Flags – assumes a more protectionist economy, with a greater move to domestic self-sufficiency, a lower rate of net migration and productivity growth, and accordingly, assumes a low rate of economic growth.

As Table 2 shows, employment in the arts and recreation services industry is forecast to grow relatively strongly within the Open Doors and Low Trust Globalisation scenarios, however negative employment growth is expected in the Flags world.[3]

Heritage activities and creative and performing arts activities are expected to grow particularly strongly in the Open Doors and Low-Trust Globalisation worlds, at around double the rate for all industries. However, this trend is reversed in the Flags world, with these industry subsectors forecast to contract under the low economic growth conditions of Flags.

[3] A description of the scenarios and the Access Economics modeling of employment in each, with state and territory break-downs, is available at the Skills Australia web-site www.skillsaustralia.gov.au

Table 2 Average annual industry employment growth in three scenarios, 2010-15 and 2010-25 (%pa)

Industry	Open Doors		Low-Trust Globalisation		Flags	
	2015	2025	2015	2025	2015	2025
Arts and recreation services	**3.5**	**2.6**	**2.9**	**2.0**	**0.1**	**-0.7**
Heritage activities	4.0	3.1	3.5	2.6	-0.4	-1.2
Creative and performing arts activities	4.0	3.0	3.4	2.5	-0.3	-1.1
Sports and recreation activities	3.2	2.3	2.6	1.7	0.4	-0.5
Gambling activities	3.2	2.3	2.6	1.7	0.4	-0.5
All industries	**2.6**	**2.1**	**1.9**	**1.5**	**1.3**	**0.9**

Source: Access Economics (2009) *Economic modelling of skills demand*, Table D1; conversion to ANZSIC by CEET (2010).

Occupation outlook

Key occupations

The top ten arts and recreation services occupations account for 37.2 per cent of total employment in the industry, indicating that it is a broad-based sector which encompasses a large number of different roles. The largest occupations are sports coaches, instructors and officials, and fitness instructors, which account for 5.9 and 5.2 per cent of the workforce, respectively.

Table 3 Top ten arts and recreation services occupations

Occupation		People employed	Industry employment
ANZSCO		'000	% of total
4523	Sports coaches, instructors and officials	12.6	5.9
4521	Fitness instructors	11.2	5.2
2112	Music professionals	9.5	4.4
3623	Greenkeepers	8.8	4.1
4524	Sportspersons	8.5	3.9
4313	Gaming workers	7.8	3.6
5421	Receptionists	5.9	2.7
2114	Visual arts and crafts professionals	5.5	2.6
3622	Gardeners	5.3	2.4
4311	Bar attendants and baristas	5.1	2.4
Total		**215.7**	**37.2**

Source: ABS (2010) *Labour Force Australia*, detailed quarterly report, 2009 average of four quarters (Cat. no. 6291.0.55.003).

Short-term growth

Table 4 shows recent past and forecast growth rates for the occupations that feature prominantly within the industry. **Note that the figures refer to the expected number of people in these occupations across all industries, not just in arts and recreation services**.

Occupations associated with sport and leisure have the highest rates of expected employment growth to 2014-15, such as fitness instructors, sports coaches, and bar attendants and baristas. Creative arts occupations, on the other hand – such as music professionals and visual artists – are expected to show negative net growth over the next five years.

Table 4 Current and past employment in key occupations

Occupation		Current employment (all industries)		Past growth: five years	
ANZSCO		'000	% of total	'000	%
2112	Music professionals	10.6	0.1	-1.4	-11.9
2114	Visual arts and crafts professionals	9.3	0.1	-1.4	-13.3
3622	Gardeners	59.2	0.5	8.3	16.4
3623	Greenkeepers	17.1	0.2	5.8	51.8
4311	Bar attendants and baristas	76.8	0.7	6.0	8.4
4313	Gaming workers	9.3	0.1	3.1	50.0
4521	Fitness instructors	19.1	0.2	4.9	34.9
4523	Sports coaches, instructors and officials	22.2	0.2	-4.0	-15.3
4524	Sportspersons	9.8	0.1	1.6	19.2
5421	Receptionists	175.5	1.6	8.5	5.1
All employed		**11,044.6**	**100.0**	**1,060.1**	**10.6**

Population: Employed people.
Source: DEEWR analysis of ABS trend data, May 2010 (Cat no: 6291.0.55.003).

Long-term growth and job openings

Table 5 indicates the long-term net job growth per annum expected in these occupation groups, according to Access Economics' scenario modelling.

Hospitality and sales workers are anticipated to experience relatively strong growth under the Open Doors and Low-Trust scenarios, while employment growth in sports, horticultural and administrative occupations is expected to slow in the Flags world to 2025.

Table 5 Average annual occupation growth in three scenarios, 2010-15 and 2010-25 (%pa)

Industry		Open doors		Low-trust globalisation		Flags	
ANZSCO		2015	2025	2015	2025	2015	2025
149	Miscellaneous hospitality, retail and service managers	3.0	2.3	2.4	1.7	1.5	0.8
211	Arts professionals	2.5	1.8	1.8	1.2	1.3	0.6
362	Horticultural trades workers	2.3	2.1	1.6	1.4	0.4	0.2
431	Hospitality workers	3.6	2.5	2.8	1.8	1.5	0.5
452	Sports and fitness workers	2.7	2.1	2.2	1.5	0.9	0.3
542	Receptionists	2.3	2.1	1.7	1.5	0.9	0.6
621	Sales assistants and salespersons	3.5	2.5	2.9	1.9	1.8	0.8
All occupations		**2.6**	**2.1**	**1.9**	**1.5**	**1.3**	**0.9**

Source: Access Economics (2009) *Economic modelling of skills demand*, Table D4 (ASCO); conversion to ANZSCO by CEET (2009). Three-digit ANZSCO job titles are used in this analysis.

As noted, the data in Table 5 concerns employment growth in an industry. The number of total **job openings** which includes both employment growth and **the replacement resulting from individuals leaving the occupation net of those re-entering** can also be estimated. This replacement requirement is particularly significant in industries where there are high numbers of people retiring or leaving the occupation.

Table 6 shows the average annual job openings projected in key mining occupations to 2025. Hospitality and administrative workers (such as gaming workers, and bar attendants and baristas) are expected to have a high proportion of job openings under all three scenarios. Sales assistants and salespersons, for example, are expected to have 65,500 job openings each year in the Open Doors world, representing an increase of 8.2 per cent per annum. However, this is across all industries, not just in arts and recreation services. Sports and fitness workers and arts professionals, on the other hand, are expected to show smaller increases of 3,400 (3.4 per cent) and 1,400 (2.9 per cent) each year, respectively, under Open Doors.

Table 6 Average annual job openings, pa 2010 to 2025, in three scenarios

Occupation		Open doors		Low trust globalisation		Flags	
ANZSCO		no.	%	no.	%	no.	%
149	Miscellaneous hospitality, retail and service managers	6.5	3.6	5.1	2.9	3.4	2.1
211	Arts professionals	1.4	2.9	1.1	2.3	0.8	1.7
362	Horticultural trades workers	2.9	2.9	2.1	2.2	0.9	1.0
431	Hospitality workers	21.5	8.1	18.6	7.5	14.1	6.2
452	Sports and fitness workers	3.4	4.0	2.8	3.5	1.7	2.3
542	Receptionists	11.0	5.2	9.4	4.6	7.2	3.8
621	Sales assistants and salespersons	65.5	8.2	57.7	7.6	45.5	6.5
All occupations		**579.1**	**4.4**	**465.9**	**3.8**	**373.7**	**3.2**

Source: Access Economics (2009) *Economic modelling of skills demand*, Table D4 (ASCO); conversion to ANZSCO and net replacement demand by CEET (2009). Three-digit ANZSCO job titles are used in this analysis.

As Table 7 shows, job openings in some occupation groups are created primarily by replacement demands rather than new growth. This is certainly true of sales assistants and salespersons, hospitality workers, and receptionists under Open Doors – each of which is expected to have the majority of job openings driven by replacement requirements in the period to 2025.

Conversely, more than twice as many jobs for horticultural trades workers will be created by new growth (32,700) than by replacement demand (13,400) under Open Doors. Miscellaneous hospitality, retail and service managers; arts professionals; and sports and fitness workers are also forecast to have the majority of job openings driven by new growth.

Table 7 Total job openings (growth and net replacement) in three scenarios, 2010 to 2025

7.1 Open Doors

Occupation		Total growth (persons)		Net replacement estimates (persons)		Total job openings (persons)	
ANZSCO		('000)	%	('000)	%	('000)	%
149	Miscellaneous hospitality, retail and service managers	67.0	64.4	37.0	35.6	104.0	100.0
211	Arts professionals	14.0	61.6	8.8	38.4	22.8	100.0
362	Horticultural trades workers	32.7	71.0	13.4	29.0	46.1	100.0
431	Hospitality workers	103.0	30.0	240.4	70.0	343.4	100.0
452	Sports and fitness workers	27.9	50.6	27.3	49.4	55.2	100.0
542	Receptionists	68.5	38.8	108.1	61.2	176.6	100.0
621	Sales assistants and salespersons	309.2	29.5	739.0	70.5	1,048.3	100.0
All occupations		**4,425.7**	**47.8**	**4,840.1**	**52.2**	**9,265.8**	**100.0**

7.2 Low-Trust Globalisation

Occupation		Total growth (persons)		Net replacement estimates (persons)		Total job openings (persons)	
ANZSCO		('000)	%	('000)	%	('000)	%
149	Miscellaneous hospitality, retail and service managers	47.3	57.5	35.0	42.5	82.3	100.0
211	Arts professionals	9.0	52.0	8.3	48.0	17.2	100.0
362	Horticultural trades workers	20.4	62.1	12.5	37.9	32.9	100.0
431	Hospitality workers	71.4	24.0	226.3	76.0	297.6	100.0
452	Sports and fitness workers	19.6	43.0	26.0	57.0	45.6	100.0
542	Receptionists	47.0	31.4	102.8	68.6	149.7	100.0
621	Sales assistants and salespersons	222.5	24.1	700.3	75.9	922.9	100.0
All occupations		**2,892.9**	**38.8**	**4,561.3**	**61.2**	**7,454.2**	**100.0**

7.3 Flags

Occupation		Total growth (persons)		Net replacement estimates (persons)		Total job openings (persons)	
ANZSCO		('000)	%	('000)	%	('000)	%
149	Miscellaneous hospitality, retail and service managers	21.9	40.3	32.3	59.7	54.2	100.0
211	Arts professionals	4.5	36.2	7.9	63.8	12.4	100.0
362	Horticultural trades workers	2.9	20.6	11.2	79.4	14.2	100.0
431	Hospitality workers	22.5	10.0	202.3	90.0	224.9	100.0
452	Sports and fitness workers	4.4	15.7	23.4	84.3	27.8	100.0
542	Receptionists	19.3	16.8	95.7	83.2	115.0	100.0
621	Sales assistants and salespersons	89.5	12.3	637.8	87.7	727.3	100.0
All occupations		**1,681.7**	**28.1**	**4,297.2**	**71.9**	**5,978.9**	**100.0**

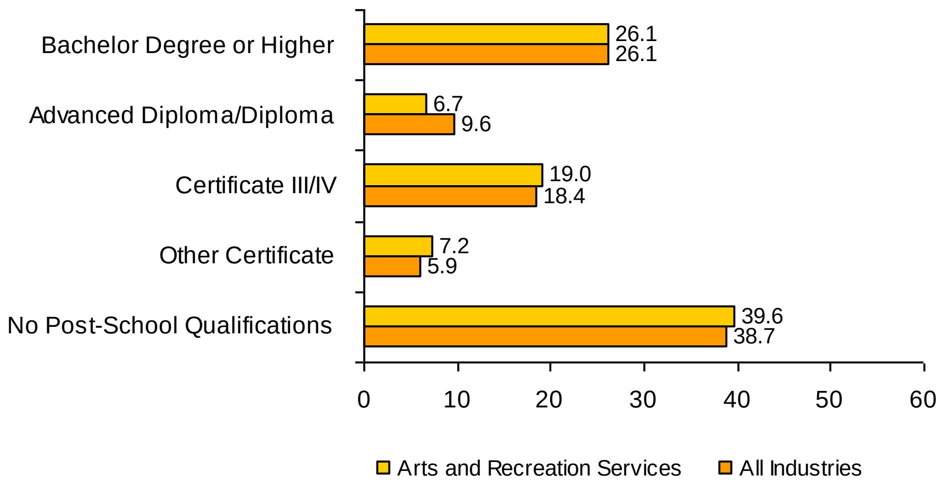
Source: Access Economics (2009) *Economic modelling of skills demand*, Table D4 (ASCO); conversion to ANZSCO and net replacement demand by CEET (2009). Three-digit ANZSCO job titles are used in this analysis.

With a slower rate of annual growth forecast under the Flags scenario, however, replacement demand is predicted to outstrip new growth in all key occupations by 2025.

Education and training profile

The educational attainment of the arts and recreation services industry is on par with the all-industry average, with 26.1 per cent of workers having completed a Bachelor degree or higher qualification, and 39.6 per cent of workers without post-school qualifications.

Figure 1 Education profile of the arts and recreation services workforce (%)



Source: DEEWR (2010) *Australian Jobs 2010*.

Figure 2 shows how demand for qualifications is expected to change over time. It shows the current education profile for each respective occupation: across all industries and within the arts and recreation services industry. It also shows projected levels of educational attainment to 2015 and 2025 by each occupation group depending on which of the three scenarios eventuates.

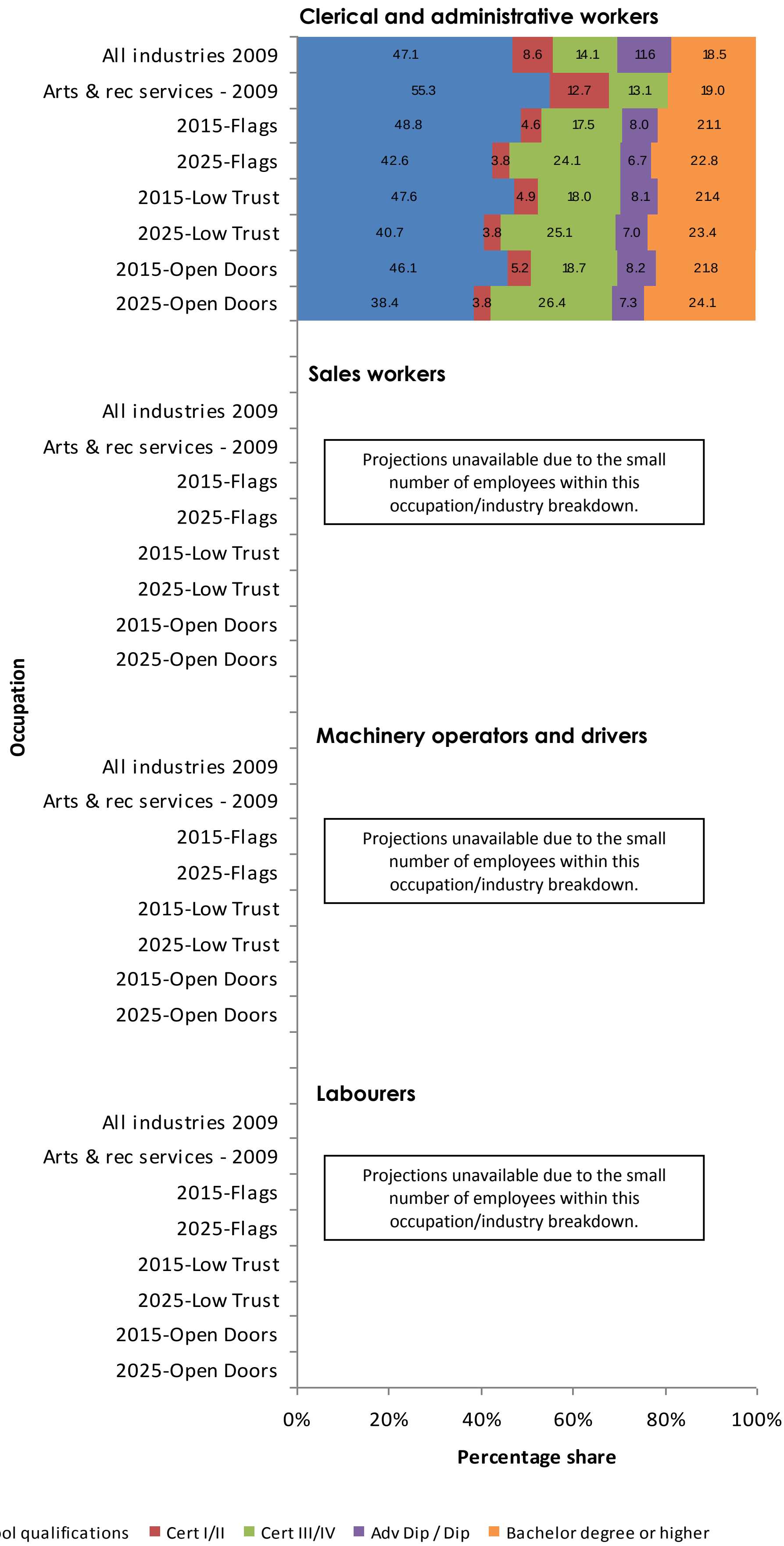
As Figure 2 shows, there is an expected decrease in the proportion of managers and professionals with no post school qualifications. Under Open Doors, the largest rise in educational attainment occurs at the Diploma/Advanced Diploma level, with managers increasing from 11.1 per cent in 2009 to 25 per cent in 2025, and professionals from 10 to 23.4 per cent.

Technicians and trades workers are projected to have a significant increase in the proportion of Certificate III/IV level qualifications, from 38.7 per cent in 2009 to 62.8 per cent in 2025 under Open Doors.

Under all three scenarios, community and personal service workers are projected to show an increase in the proportion of workers with no post school qualifications in 2015, before decreasing in 2025 to levels below than those in 2009. The share of Bachelor degree and higher qualifications is projected to fall from 22.3 per cent in 2009 to 16.1 per cent in 2025 under Open Doors however; Certificate III/IV level qualifications are expected to increase by 13.1 per cent in the same period.

Small employment numbers in this industry make it difficult to compile future projections for some lower-skilled occupations such as sales workers, machinery operators and drivers, and labourers.

Figure 2 Level of educational attainment in the arts and recreation services industry by occupation, 2009 and projections to 2015 and 2025 (%)



Source: ABS (2009) *Survey of Education and Work 2009* (Cat. no. 6227.0).

Specialised occupations

In *Workforce Futures*, Skills Australia has proposed that national skills and workforce planning should focus on **specialised occupations**. Specialised occupations are defined as those 'where specialised skills, learned in formal education and training, are needed at entry level and where the impact of market failure is potentially significant for the economy and/or the community.'

Specialised occupations demonstrate these characteristics:

- long lead time—skills are highly specialised and require extended learning and preparation time over several years;
- high use—skills are deployed for the uses intended (i.e. good occupational 'fit');
- high risk—the disruption caused by the skills being in short supply is great, resulting either in bottlenecks in supply chains or imposing significant economic or community costs because an organisation cannot operate; and
- high information—the quality of information about the occupation is adequate to the task of assessing future demand and evaluating the first three criteria.

As the arts and recreation services sector consists primarily of music, arts and crafts professionals, sports and fitness workers, gardening and horticultural workers, and administrative support workers, there are few 'specialised' occupations relevant for this industry.

This is primarily because the industry does not presently require the majority of its workforce to have formal qualifications necessitating 'long lead time'. While the level of education attainment within the industry is on par with the Australian average for all industries (including more than a quarter of the workforce holding a Bachelor degree or higher), these qualifications do not currently require an extensive training commitment.

Specialised occupations, however, require a commitment of at least four years for university study; 3 or 4 years for apprenticeships; or at least 1000 hours for vocational courses. Given the 'long lead time' requirement, the specialised occupations criteria will not be as relevant for the arts and recreation services sector as will be the case for other industries. However, as Figure 2 shows, this demand may change over time, depending on which future scenario unfolds.

More detailed information about specialised occupations is available from *Australian Workforce Futures: A National Workforce Development Strategy* at http://www.skillsaustralia.gov.au/PDFs_RTFs/WWF_strategy.pdf.

Example workforce development initiatives

Investment in workforce development has been shown to maximise people's capabilities, lift productivity and increase workforce participation. Employee satisfaction levels and engagement also increase when enterprises make better use of their employees' skills.[4] Current workforce development initiatives in arts and recreation services include the following examples:

- The **Skills for Growth Workforce Development Program** is a Victorian government initiative that funds Verve, the industry training advisory board for the arts and culture and sport and recreation sectors in Victoria to run a program supporting small and medium businesses (SMEs) in the identification of skills development opportunities and tailored training solutions. The program provides the opportunity for SMEs to work with an independent specialist free of charge to assist in developing their workforce skills. For further information access http://verve.org.au/projects/skills-for-growth/.
- **Cultural Industries National Project Reference Groups** and **Sector Advisory Committees** are a pivotal component of IBSA's overarching Stakeholder Engagement Strategy. The groups and committees promote activities and initiatives and provide a forum for targeted project guidance and industry content expertise to IBSA. This enables the identification of and the development of appropriate solutions and facilitates open dialogue on workforce development in the cultural industries sector. For further information, see www.ibsa.org.au.
- The Australian Government's **Enterprise Based Productivity Places Program** has enabled IBSA to broker funding for upskilling existing workers in the Cultural and Creative sector for a number of enterprises – the Victorian Arts Centre developing Venue and Events and Live Production skills that is also being undertaken by TTOC. Cultural and Creative organisations are also upskilling to business and management skills through EBPPP.

[4] Skills Australia (2010) *Australian Workforce Futures: A National Workforce Development Strategy.*