



Australian Government



# Employment Outlook for **Cultural and Recreational Services**



July 2008

**SkillsInfo** 

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The Cultural and Recreational Services industry is a relatively small employing industry in the Australian economy, employing 286 700 people (or 2.7 per cent of the total workforce) as at February 2008.

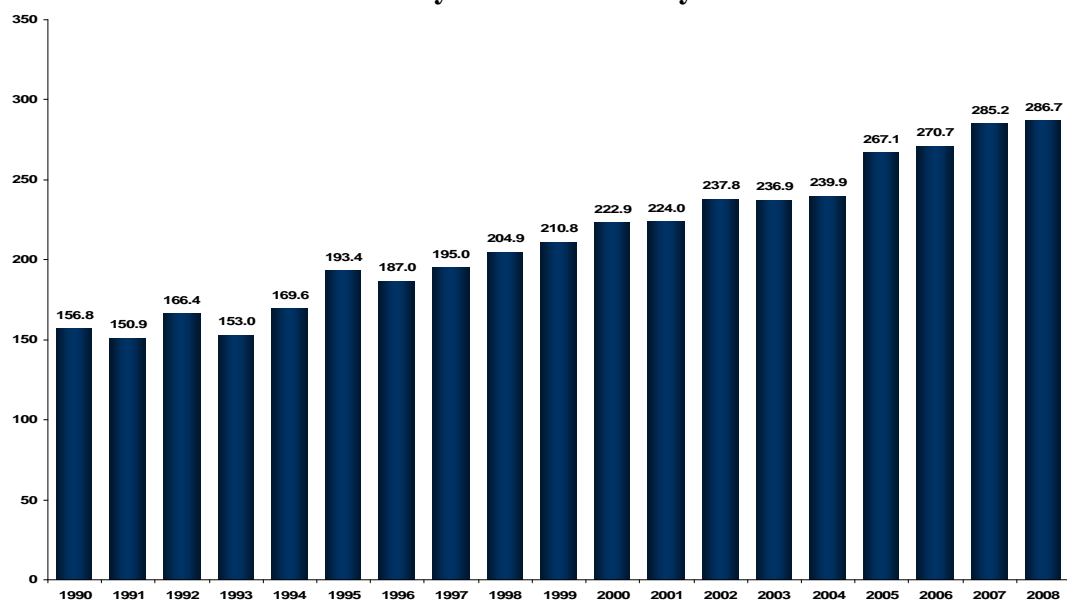
The industry is divided into ten sectors: Film and Video Services, Radio and Television Services, Libraries, Museums, Parks and Gardens, Arts, Services to the Arts, Sport, Gambling Services and Other Recreation Services<sup>1</sup>.

The discussion below focuses on employment characteristics, trends and prospects in the Cultural and Recreational 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 workers, regional and occupational employment and vacancies.

### **Employment Growth**

In the five years to February 2008, employment in Cultural and Recreational Services increased by 49 800 (or 21.0 per cent) to 286 700 (see Figure 1). This equates to an increase, on average, of 3.9 per cent per year. This growth has been relatively steady since the early 1990s, albeit with some annual fluctuations.

**Figure 1: Cultural and Recreational Services – Employment Level ('000)  
February 1990 to February 2008**



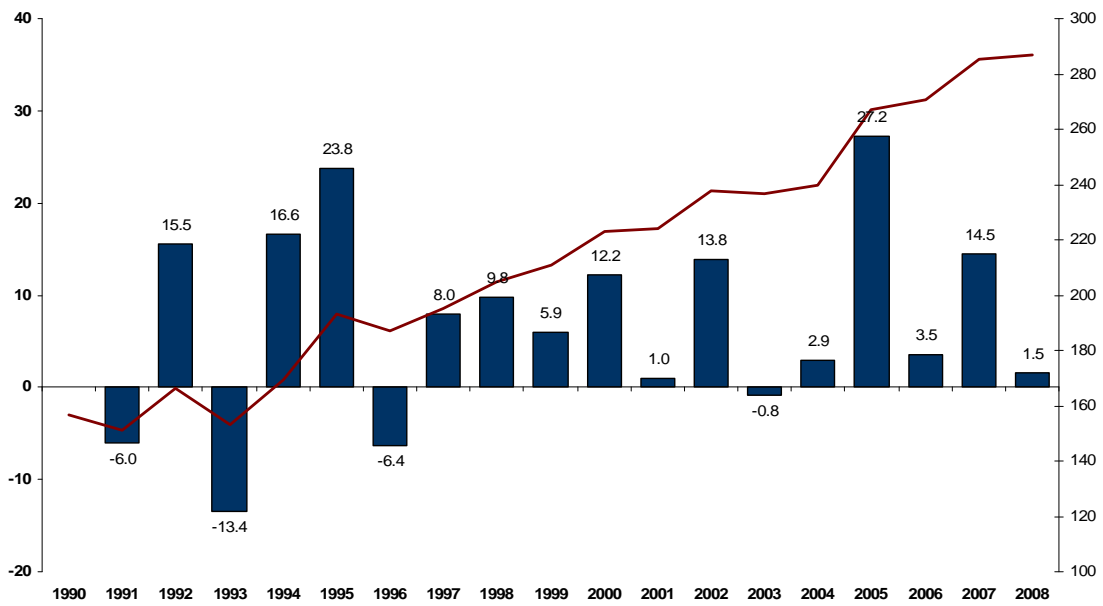
Source: ABS Labour Force Survey (DEEWR trend data)

Employment in Cultural and Recreational Services has been trending upwards<sup>2</sup>, since February 1990 (see Figure 2). In the early 1990s, this industry experienced volatility with increases in the year to February 1994 and the year to February 1995 (up by 16 600 and 23 800 respectively) followed by a decrease in the year to February 1996 (down by 6400). This was followed by four years of growth totalling 35 900 new jobs. The largest increase occurred in the year to February 2005 (up by 27 200).

<sup>1</sup> Other Recreation Services includes the operation of amusement parks or arcades, side shows, circuses, agricultural shows or shooting galleries

<sup>2</sup> It is important to note that as this industry is relatively small, yearly figures should be treated with caution.

**Figure 2: Cultural and Recreational Services – Employment Level (line RHS) and Annual Change ('000) in Year to February (cols LHS)**

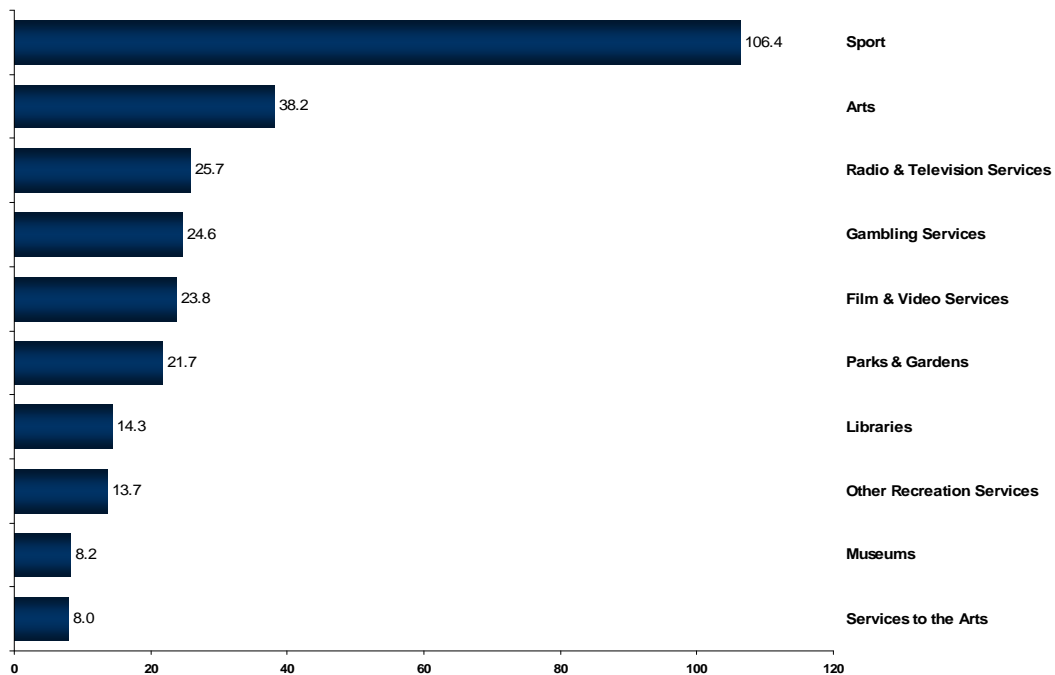


Source: ABS Labour Force Survey (DEEWR trend data)

In February 2008, 37.4 per cent (106 400) of persons employed in Cultural and Recreational Services were employed in Sport (see Figure 3), followed by 13.4 per cent (38 200) in Arts and 9.0 per cent (25 700) in Radio and Television Services.

- Only a small proportion of workers were employed in Museums (2.9 per cent) and Services to the Arts (2.8 per cent).

**Figure 3: Cultural and Recreational Services - Employment Levels ('000) February 2008**



Source: ABS Labour Force Survey (DEEWR trend data)

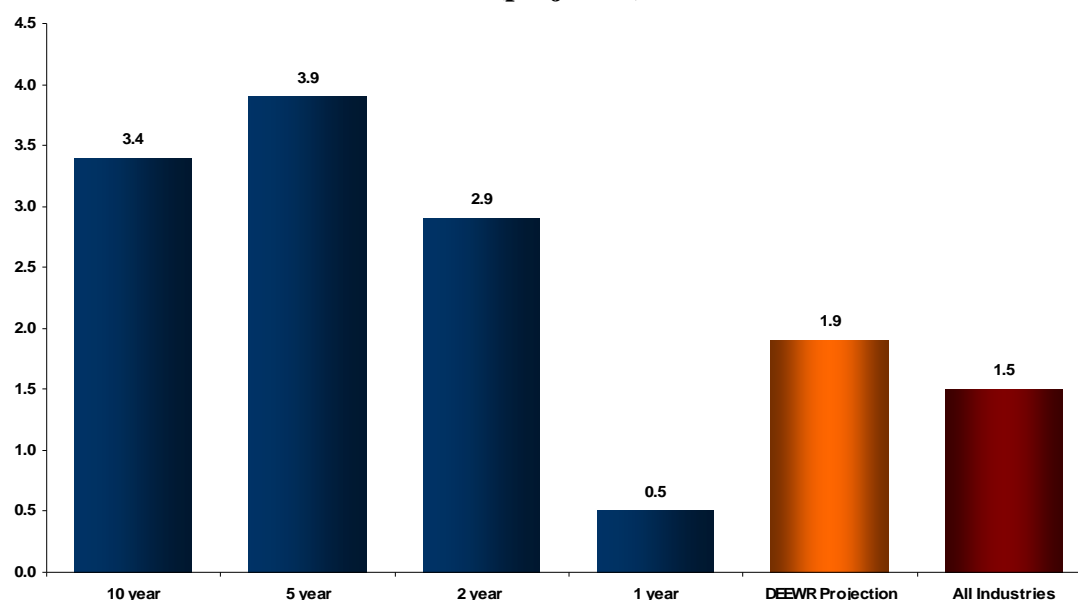
## **Employment Prospects**

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 Cultural and Recreational Services industry.

In line with past trends, Cultural and Recreational Services employment is expected to continue to increase over the next five years. In the five years to 2012-13, employment in Cultural and Recreational Services is expected to increase at an average rate of 1.9 per cent per annum (see Figure 4).

- The projection over the five years to 2012-13 for all industries is an average increase of 1.5 per cent per annum.

**Figure 4: Cultural and Recreational Services – Recent and Projected Employment Growth (% pa) to February 2008 (past) and 5 years to 2012-13 (projected)**

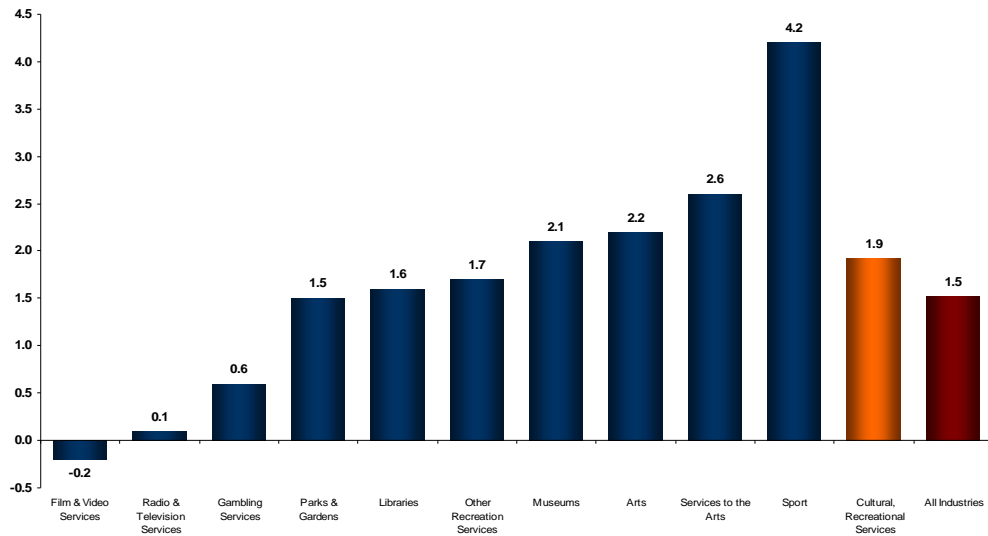


Source: ABS Labour Force Survey (DEEWR trend data); DEEWR projections

Employment is expected to increase in nine of the ten sectors within Cultural and Recreational Services. Sport is projected to grow by 4.2 per cent per annum over the five years to 2012-13, followed by Services to the Arts (2.6 per cent), Arts (2.2 per cent) and Museums (2.1 per cent). Employment in Film and Video Services is expected to decline (down by 0.2 per cent).

Employment in Cultural and Recreational Services is influenced by household spending. Higher interest rates and prices are likely to keep household spending in check. On the other hand, continuing employment and earnings growth, coupled with the recent tax cuts, will raise disposable incomes thus boosting consumption. This could provide some support for the Cultural and Recreational Services industry.

**Figure 5: Cultural and Recreational Services Sectors – Projected Employment Growth (%pa) to 2012-13**



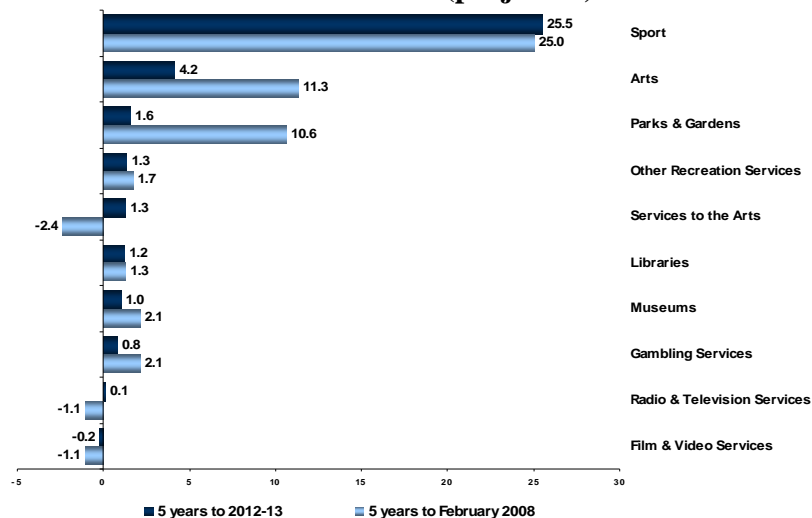
Source: DEEWR projections

When employment growth in the Cultural and Recreational Services industry is broken down by sectors, the main contributors to past growth can be identified (see Figure 6). In the five years to February 2008, Sport experienced the largest growth (up by 25 000), followed by Arts (11 300) and Parks and Gardens (10 600).

- The largest decline occurred in Services to the Arts (down by 2400), followed by Radio and Television Services and Film and Video Services (both down by 1100).

Looking ahead, in the five years to 2012-13, employment growth of 29 500 jobs is projected for Cultural and Recreational Services with growth expected for nine of the ten sectors. The largest gains are projected for Sport (up by 25 500) followed by Arts (4200) and Parks and Gardens (1600). A decline is projected for Film and Video Services (down by 200).

**Figure 6: Cultural and Recreational Services Sectors – Recent and Future Employment Growth ('000) 5 years to February 2008 (past) and to 2012-13 (projected)**

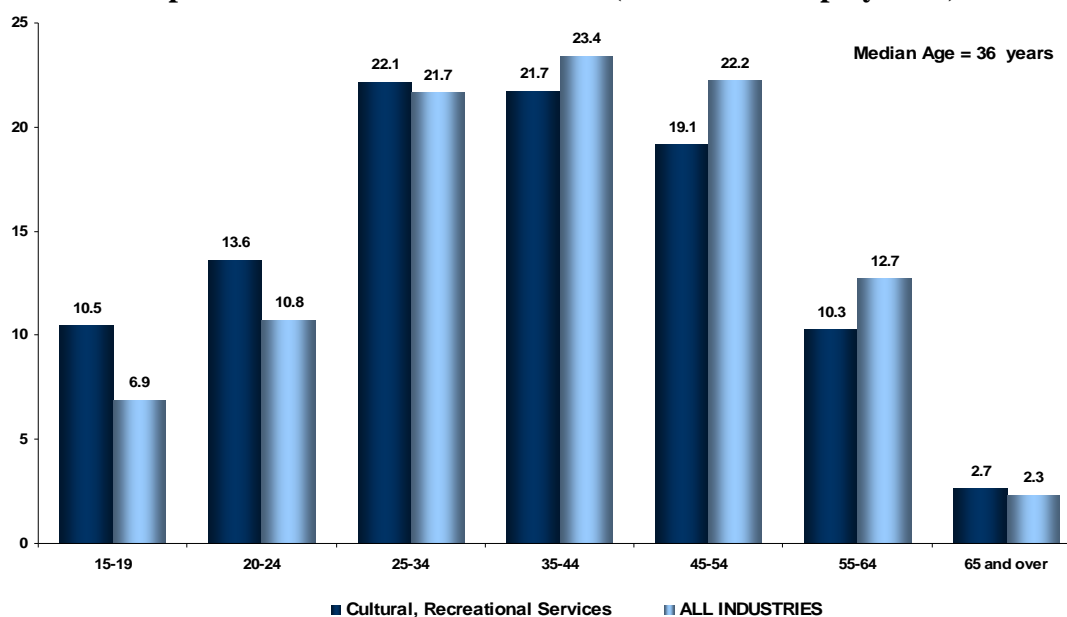


Source: ABS Labour Force Survey (DEEWR trend data); DEEWR projections

## Workforce Ageing

The largest share of employment in the Cultural and Recreational Services industry is for workers aged 25 years to 34 years (22.1 per cent), with a large number of workers also aged between 35 and 44 years (21.7 per cent). The age profile of the Cultural and Recreational Services industry is younger than average, with a median age of 36 years, compared with 39 years for all industries.

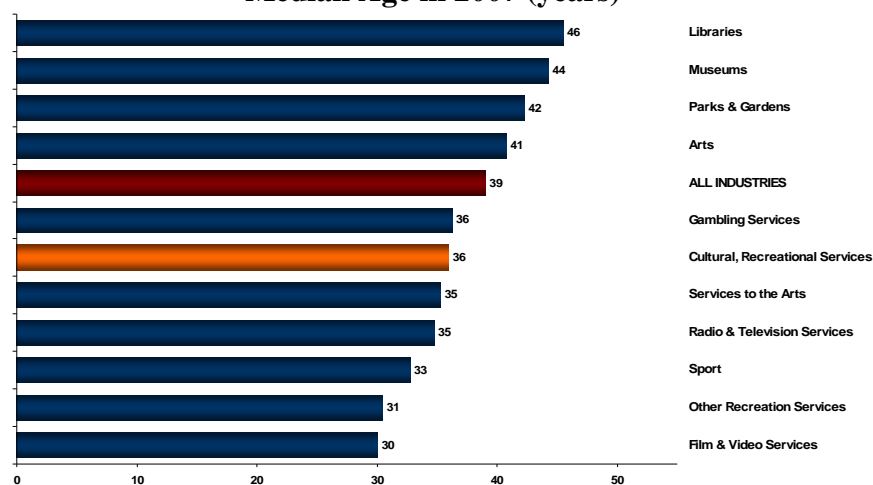
**Figure 7: Cultural and Recreational Services – Employed by Age compared with All Industries - 2007 (% share of employment)**



Source: ABS Labour Force Survey

When examining the median age of each sector (see Figure 8), Libraries has the highest median age of 46 years, followed by Museums (44 years). Film and Video Services and Other Recreation Services have the lowest median ages (30 and 31 years respectively) due to the nature of the work involved in these sectors.

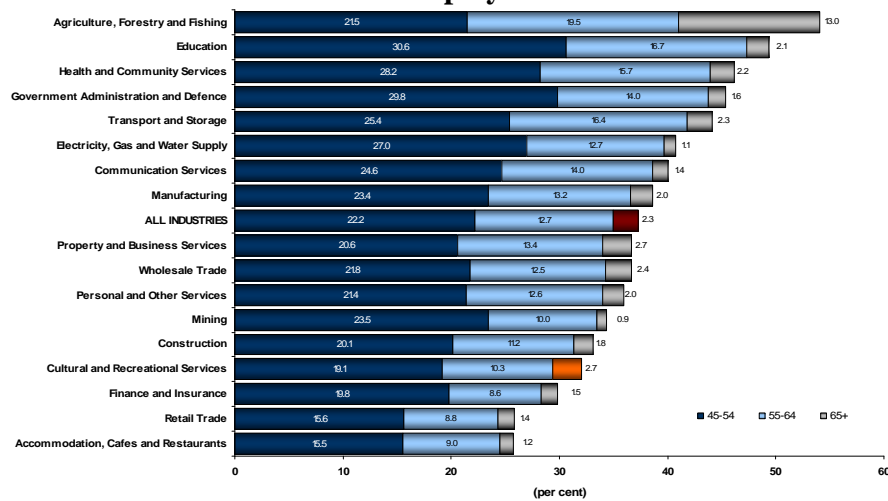
**Figure 8: Cultural and Recreational Services Sectors Median Age in 2007 (years)**



Source: ABS Labour Force Survey

- Cultural and Recreational Services has a slightly younger than average age profile, with 32.1 per cent of workers over the age of 45 years in 2007 (see Figure 9), including 2.7 per cent of workers who are aged 65 years and over.

**Figure 9: Cultural and Recreational Services – Mature Age Workers (45+ years)  
% share of employment - 2007**

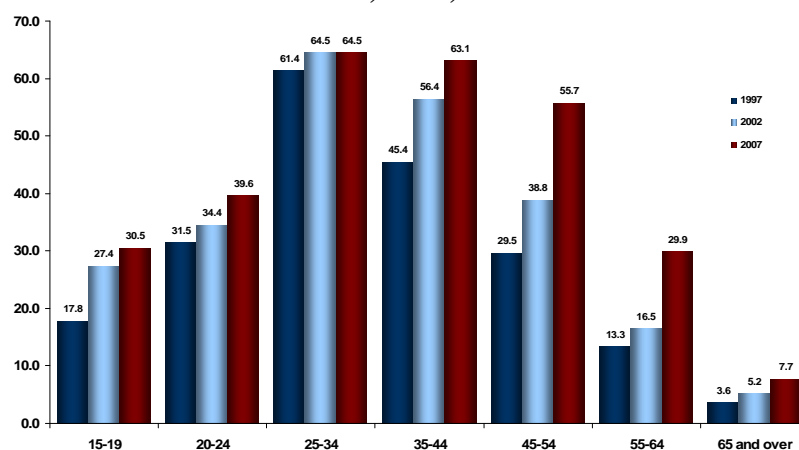


Source: ABS Labour Force Survey

Figure 10 shows employment by age group for three calendar years: 1997, 2002 and 2007. This provides a guide to the changes in employment mix by age group in the Cultural and Recreational Services industry.

In response to the strong growth in employment, there has been an influx of new workers in the industry for all age groups over the past decade (see Figure 10). Mature age workers have significantly contributed to the job growth in the industry, with workers aged between 55 and 64 years experiencing the strongest employment growth in the ten years to 2007 (up by 124.8 per cent). This reflects existing workers taking their jobs with them as they move into mature age cohorts as well as new workers entering the industry. Over the same period, workers aged between 45 and 54 years (some of whom are approaching retirement) also experienced strong growth (88.8 per cent).

**Figure 10: Cultural and Recreational Services – Employment by Age ('000)  
1997, 2002, 2007**

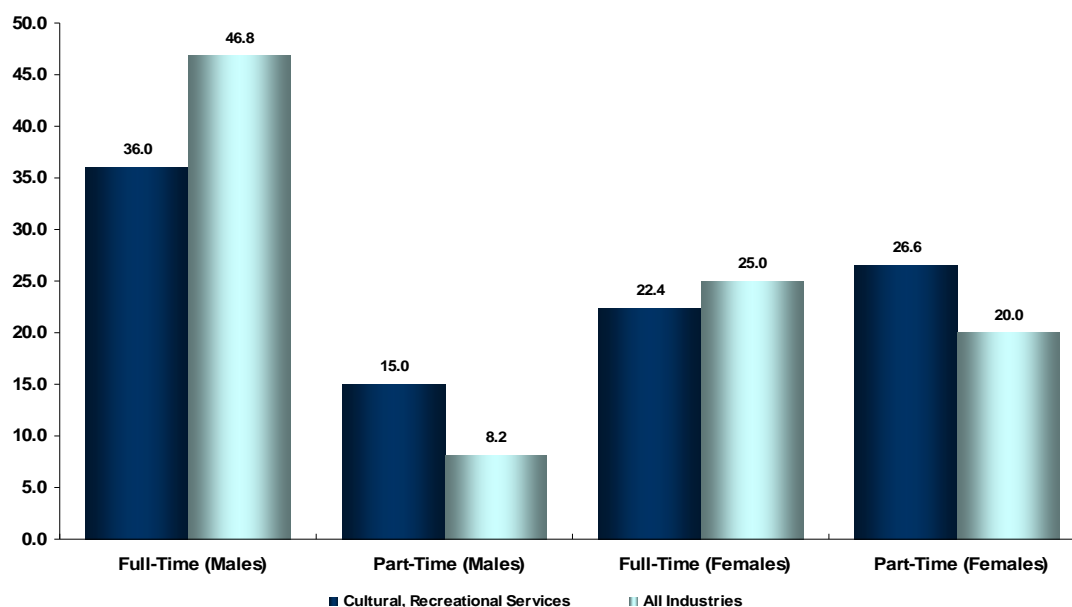


Source: ABS Labour Force Survey

## **Employment by Gender and Full-time/Part-time**

The majority of workers in Cultural and Recreational Services are male workers employed full-time (see Figure 11). In the year to February 2008, this category made up 36.0 per cent of workers in the industry, compared with 46.8 per cent of male full-time workers in all industries. Female full-time workers account for 22.4 per cent of the industry, and female part-time workers account for 26.6 per cent.

**Figure 11: Cultural and Recreational Services – Employment by Gender and Full-Time/Part-time – Year to February 2008**

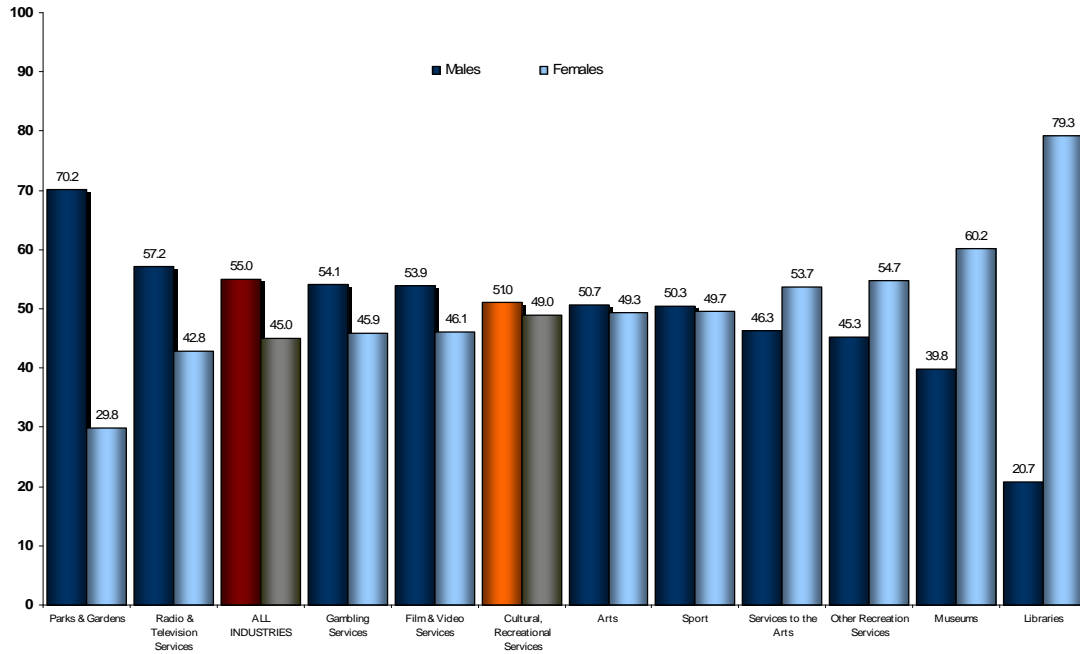


Source: ABS Labour Force Survey

Six of the ten sectors of the Cultural and Recreational Services industry (see Figure 12) are male dominated, demonstrating the breadth of occupations involved in this industry. The Libraries sector has the greatest percentage share of female workers (79.3 per cent).

- The Parks and Gardens sector has the greatest percentage of male workers with a 70.2 per cent share.

**Figure 12: Cultural and Recreational Services Sectors  
Employment by Gender (% share) - Year to February 2008**

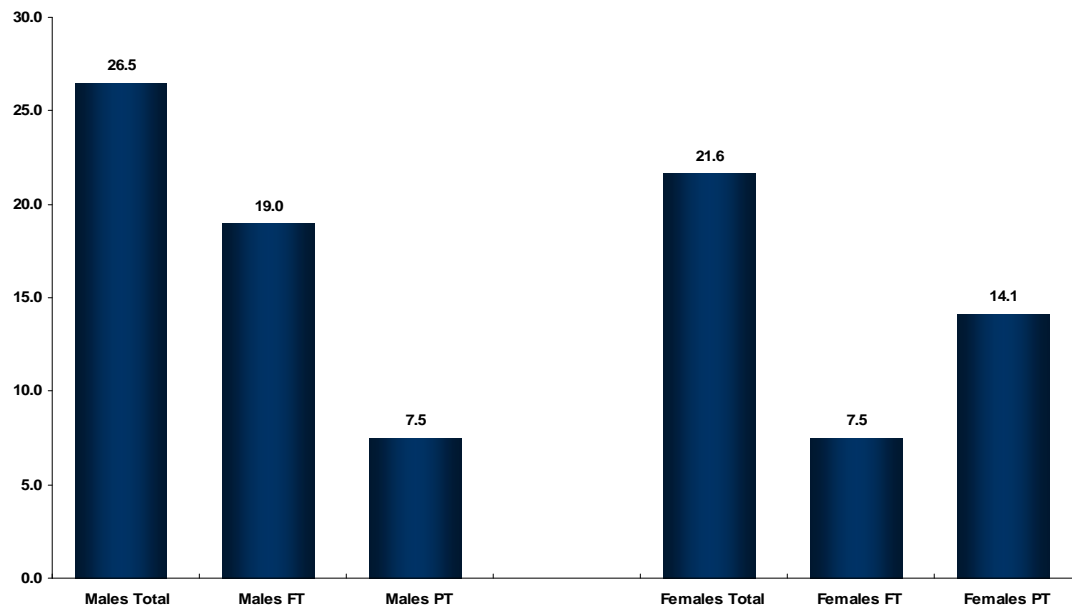


Source: ABS Labour Force Survey

Both male and female employment in Cultural and Recreational Services has increased (up by 26 500 and 21 600 respectively) over the five years to February 2008.

- The largest employment increase has been experienced by male full-time workers (up by 19 000) since February 2003.

**Figure 13: Cultural and Recreational Services – Employment Growth by Gender (5 years) Full-Time – Part-Time, Year to February 2008 ('000)**

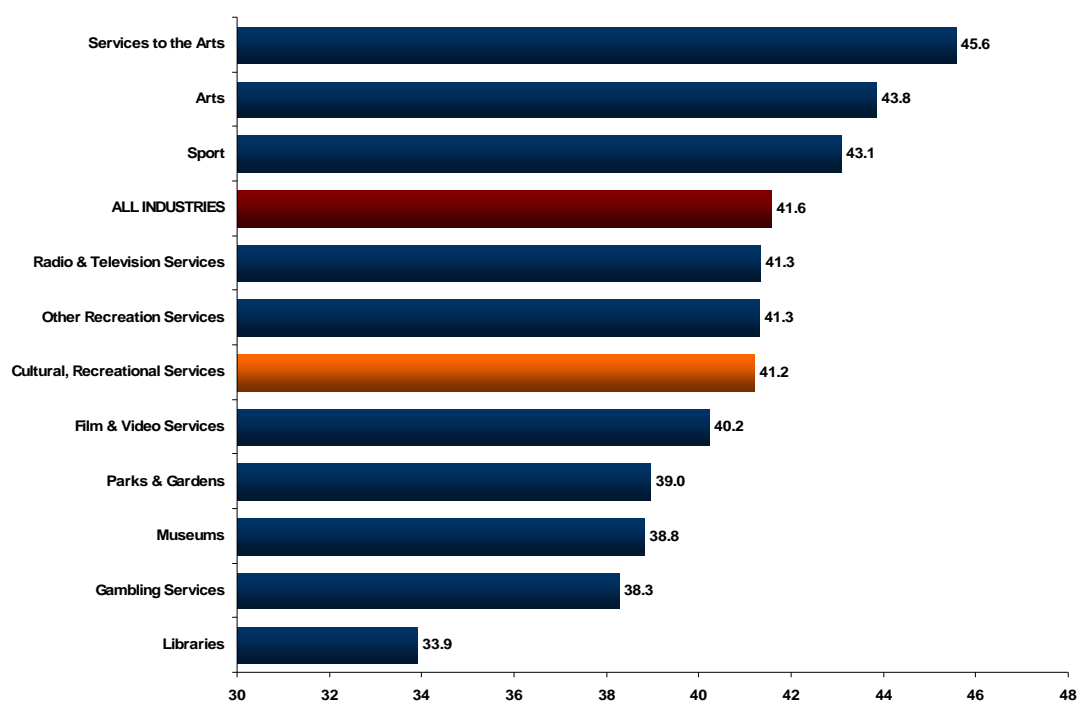


Source: ABS Labour Force Survey

## Hours Worked

The Cultural and Recreational Services industry has slightly lower average weekly hours worked than that of all industries (41.2 hours compared with 41.6 hours). Service to the Arts was the sector with the highest weekly hours (45.6 hours), followed by Arts (43.8 hours). The lowest average weekly hours were for Libraries (33.9 hours).

**Figure 14: Cultural and Recreational Services Sectors – Average Full-Time Weekly Hours in 2007**



Source: ABS Labour Force Survey

## Employment Characteristics

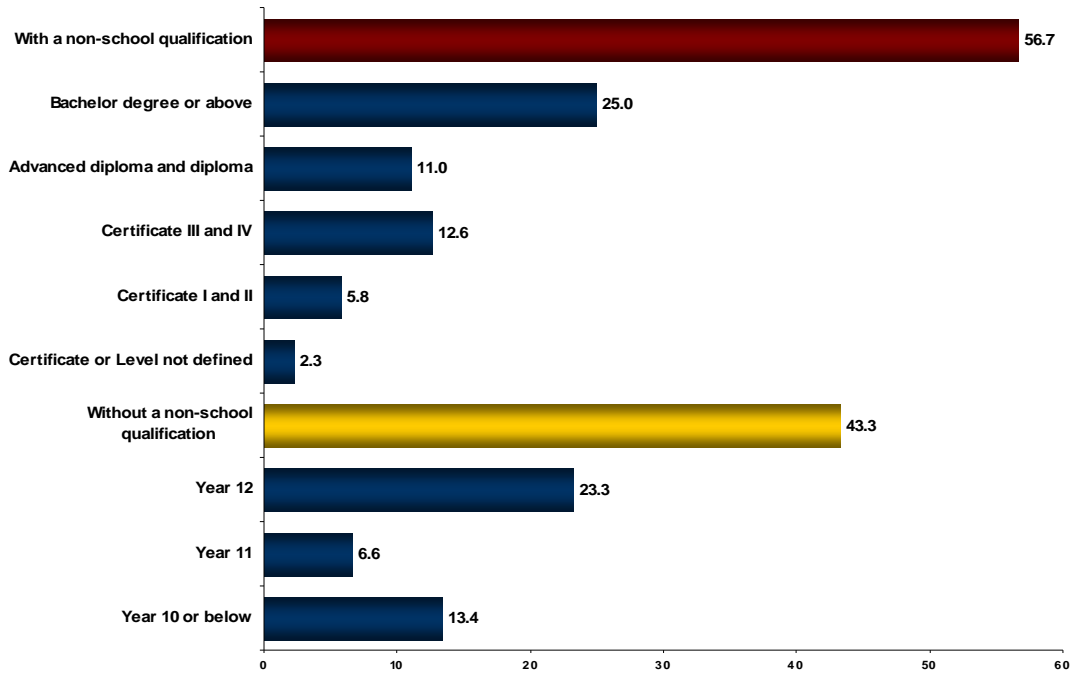
### Educational Profile

More than half of all workers (56.7 per cent) within the Cultural and Recreational Services industry have a non-school qualification. This compares with 59.0 per cent for all industries. The most prevalent non-school qualification in the industry is a Bachelor degree or above (25.0 per cent).

While formal education is important in the industry, there is also a large share of workers with a low educational attainment. Cultural and Recreational Services plays a vital role in providing job opportunities for low skilled workers through new jobs and through job turnover. Accordingly, 13.4 per cent of workers have an educational attainment of Year 10 or below<sup>3</sup>. The Cultural and Recreational Services industry provides a diverse range of occupations and employment opportunities at all educational/skill levels.

<sup>3</sup> Year 10 or below includes no educational attainment.

**Figure 15: Cultural and Recreational Services – Educational Attainment  
(% share of employment) – May 2007**

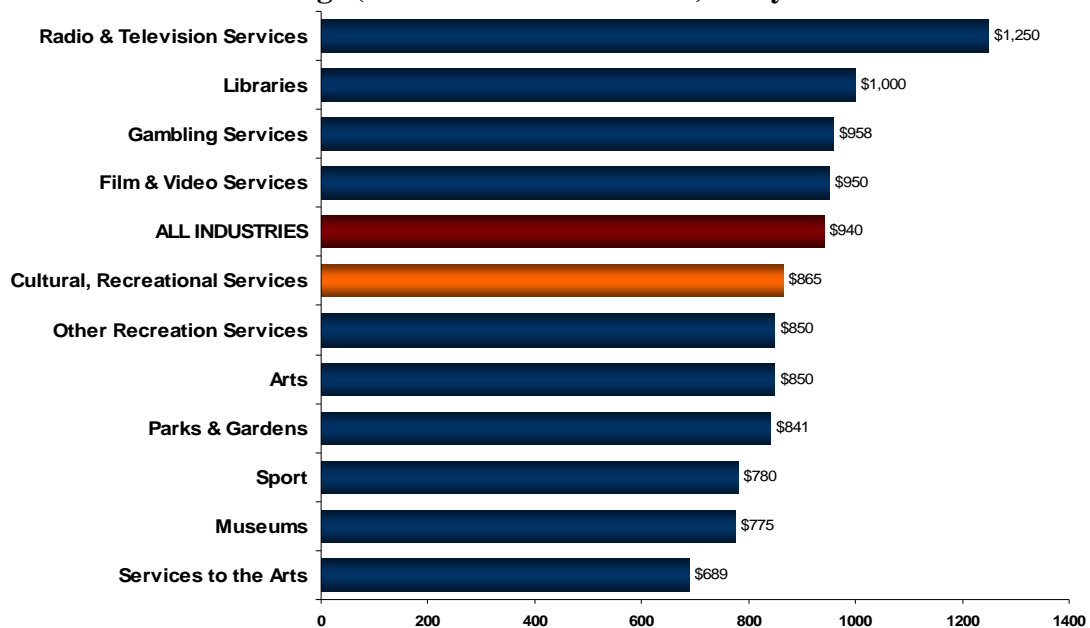


Source: ABS Education and Work, cat. no. 6227.0

### Median Weekly Earnings

The median weekly full-time earnings for Cultural and Recreational Services in May 2007 are slightly below the average all industries (\$865 compared with \$940). The lowest earning sector in the industry is Services to the Arts (\$689). Radio and Television Services is the highest earning sector (\$1250).

**Figure 16: Cultural and Recreational Services Sectors – Median Weekly Earnings (Full-time and before tax)- May 2007**

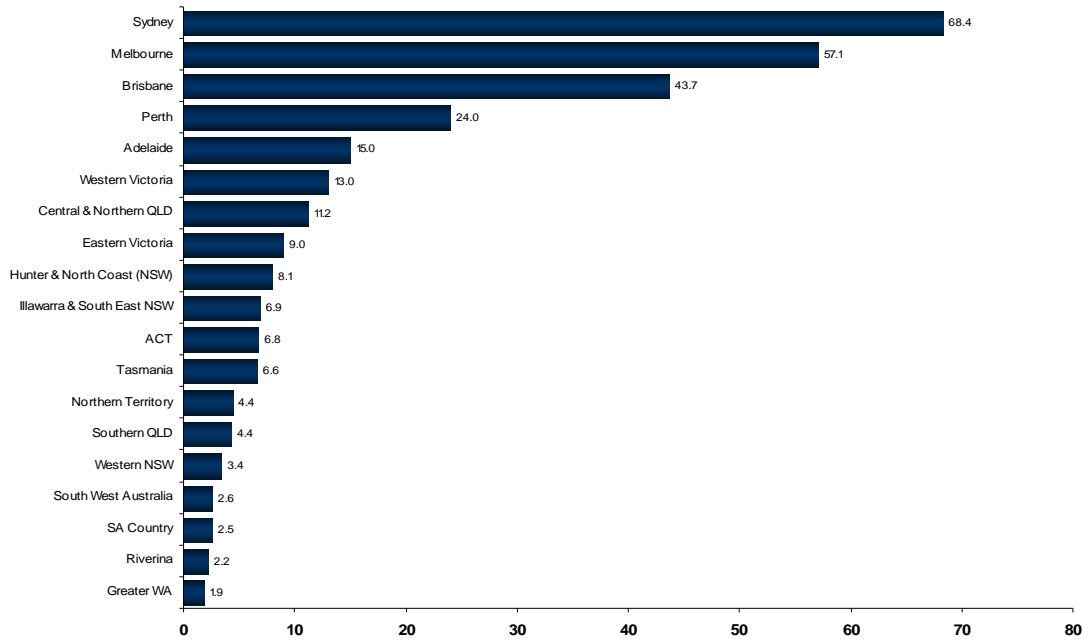


Source: ABS Employee Earnings, Benefits and Trade Union Membership, cat. no. 6310.0

## **Main Employing Regions**

As demonstrated in Figure 17, the largest number of workers in Cultural and Recreational Services is employed in Sydney (68 400), followed by Melbourne (57 100) and Brisbane (43 700). The Cultural and Recreational Services industry is largely based in highly populated metropolitan areas, with relatively few workers in smaller and more remote locations such as Greater Western Australia (1900) and Riverina (2200).

**Figure 17: Cultural and Recreational Services – Main Employing Regions ('000)  
November 2007**



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 2007, the largest employing occupations in the Cultural and Recreational industry were Fitness Instructors (25 000), followed by Sportspersons and Coaches (22 900) and Musicians and Singers (8200).

**Table 1: Cultural and Recreational Services  
Top 20 Employing Occupations ('000) - 2007**

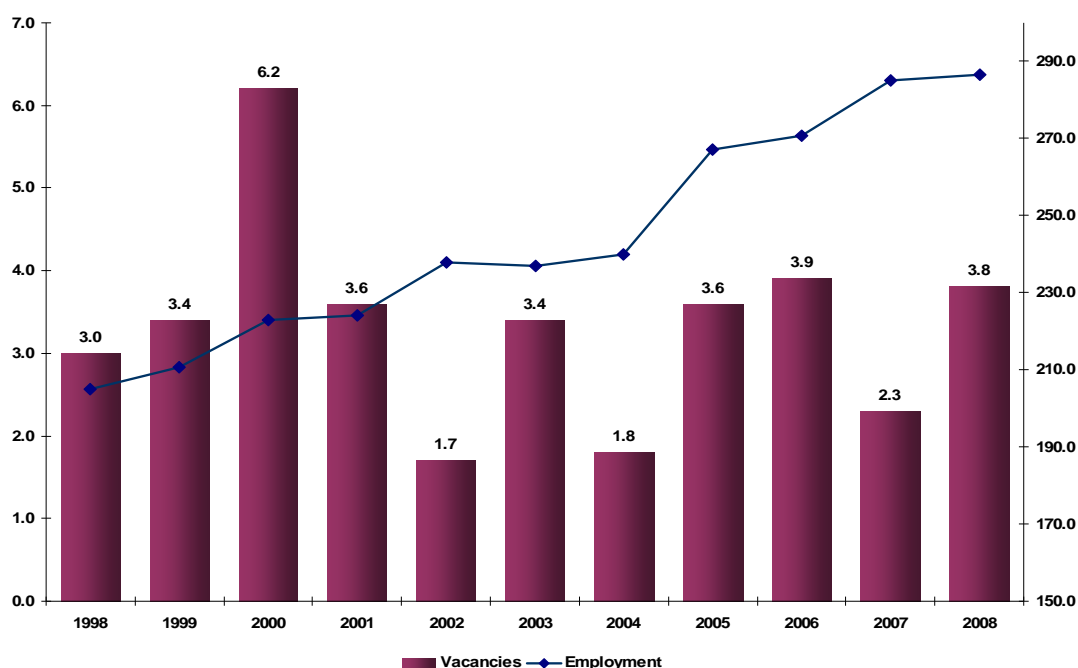
<b>Occupation</b>	<b>Number employed in Cultural and Recreational Services ('000)</b>
Fitness Instructors	25.0
Sportspersons, Coaches and Sporting Officials	22.9
Musicians and Singers	8.2
Sales Assistants	7.5
Media Equipment Operators	7.0
Painters, Potters and Sculptors	6.8
Gaming Workers	6.4
Greenkeepers	6.3
Sport and Recreation Managers	6.3
Receptionists	6.2
Librarians	6.1
General and Landscape Gardeners	6.1
Film, Television, Radio and Stage Directors	5.8
Journalists	5.7
Project and Program Administrators	5.1
Authors and Book Editors	4.8
Media Producers	4.3
Bar Attendants	4.1
Library Assistants	4.0
Specialist Managers	3.9

Source: ABS Labour Force Survey

## Vacancies

The ABS Job Vacancy Survey provides data on the number of vacancies for each industry. The data are based on an employer survey that estimates the number of vacancies available at a particular date. Figure 18 shows the number of vacancies in the Cultural and Recreational Services industry in the past decade, compared with the trend in employment. The strong growth in Cultural and Recreational Services employment has been reflected in rising vacancies. This upward trend may, in part, be associated with more widespread skill shortages in Cultural and Recreational Services.

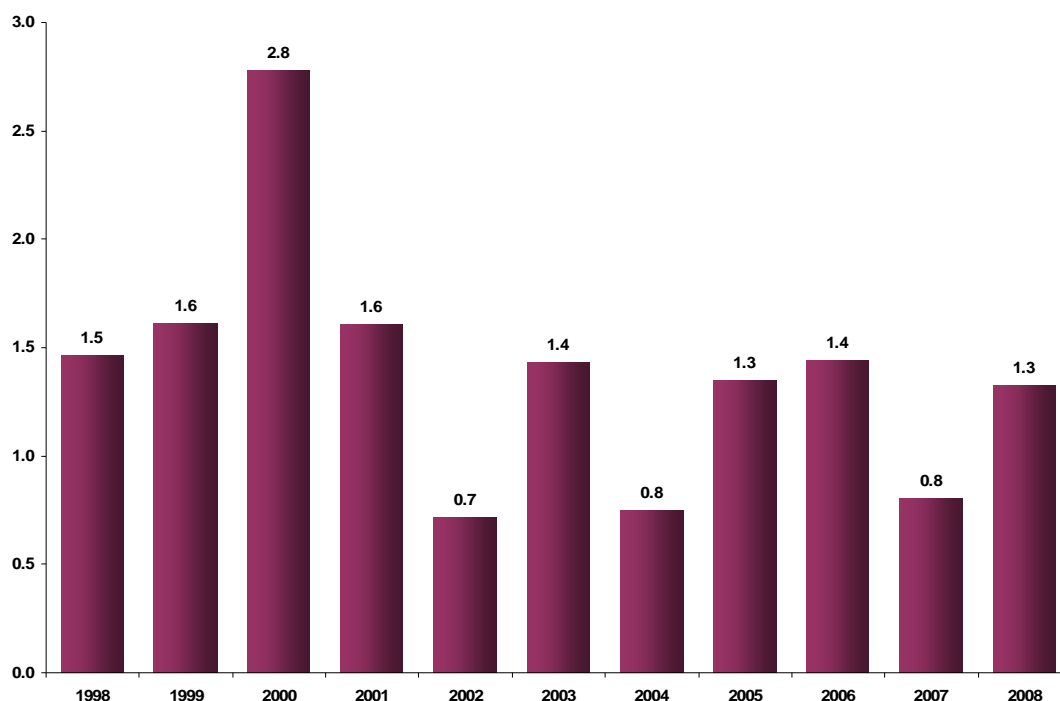
**Figure 18: Cultural and Recreational Services - Employment Level (line RHS) and Number of Vacancies ('000s) February 1998 to February 2008 (column LHS)**



Source: ABS Labour Force Survey (DEEWR trend data); ABS Job Vacancies, Cat. no. 6354.0

The growth of vacancies in Cultural and Recreational Services is due in part to rising employment. Vacancies expressed as a percentage of employment are a better guide to labour demand pressures. As shown in Figure 19, the percentage of vacancies to employment for Cultural and Recreational Services has been variable in the past four years (up from 0.8 in February 2004 to 1.3 in February 2008).

**Figure 19: Cultural and Recreational Services - Vacancies as a percentage of total employment - February 1998 to February 2008**



Source: ABS Labour Force Survey (DEEWR trend data); ABS Job Vacancies, Cat. no. 6354.0

For further information on the Cultural and Recreational Services industry (or other industries), visit the SkillsInfo website at [skillsinfo.gov.au](http://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.