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.

This suite of Industry Snapshots complements *Future Focus*, the 2013 National Workforce Development Strategy. These snapshots provide additional information and analysis on each industry to assist stakeholders in planning for the future of their industry or sector. It should be noted that the longer term data contained in this publication is based on AWPA's four scenarios for Australia to 2025 and is not intended to be compared to other data sources or projections.

Key points

- Arts and recreation services employ approximately 204,300 people, accounting for just under two per cent of the total Australian workforce.
- 39 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 33 per cent in large-sized enterprises (i.e. those that employ 200 workers or more).
- 34 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 (44 per cent) is employed part-time, compared to 30 per cent for all industries.
- The industry has a relatively even representation of males and female workers, with females accounting for 47 per cent of the total workforce.
- Education attainment within the sector is similar to the Australian average, with approximately one quarter of workers (26 per cent) holding a Bachelor degree or higher qualification.
- 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 $11.9b (0.9 per cent) to the Australian economy in 2011–12 total in terms of industry value added.[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 (2012) *Australian System of National Accounts*, cat. no. 5204.0.

Short-term growth

Employment growth in the arts and recreation services sector was slightly under the average for all industries over the past five years. However, growth has been variable by industry subsector. While employment in Sports and Recreation Activities and Gambling Activities increased by more than twice the all-industry average during this time, Heritage Activities decreased by 15.4 per cent.

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	**204.3**	**1.8**	**12.6**	**6.6**
Heritage Activities	25.9	0.2	-4.7	-15.4
Creative and Performing Arts Activities	39.4	0.4	-0.7	-1.6
Sports and Recreation Activities	109.2	1.0	14.1	14.8
Gambling Activities	27.6	0.2	4.0	16.7
All industries	**11,588.7**	**100.0**	**798.1**	**7.4**

Note: Data for industry subsectors may not sum to the industry total because data for each subsector have been separately seasonally adjusted and trended and at the higher levels include 'not further defined' categories.
Source: ABS (2013) *Labour Force Australia*, February, cat. no. 6291.0.55.003 (DEEWR trend).

Long-term growth

Australia needs to position itself in a world where work is changing rapidly. Technological innovation, globalisation, the Asian century and new patterns of work are impacting on the demand for skills and the speed of change is making it hard to predict and plan for the future.

To deal with this uncertainty, AWPA has adopted a scenario planning approach to help us overcome these limitations in making projections about the future. Scenarios are alternative visions of potential futures, and provide a means to make decisions that take account of uncertainty.

AWPA developed four possible, plausible scenarios for Australia to 2025.

- In the **Long Boom** scenario, the high demand for resources traded with China and other countries continues. Industries challenged by the high terms of trade undertake structural adjustment. This results in a scenario of sustained prosperity and a restructured economy.
- In **Smart Recovery**, the challenges facing Europe and the United States affect financial markets. This means low growth for Australia to 2014–15. Growth then improves and Australia benefits from industry and government strategies to implement a knowledge economy.
- In **Terms of Trade Shock**, resource prices fall mainly due to increased supply from other countries, the Australian dollar falls and we move to a broader-based economy.
- **Ring of Fire** is a risky world with multiple economic and environmental shocks resulting in ongoing lower growth.

Economic modelling against each of these four scenarios was undertaken by Deloitte Access Economics (DAE) to determine the skills demand for the economy into the future.[3]

As Table 2 shows, employment growth in the arts and recreation services sector is forecast to exceed the national average across all scenarios to 2025. The decline in employment experienced in the Heritage Activities subsector over the past five years (see Table 1) is expected to reverse in the future, with strong growth forecast to 2018 and 2025 irrespective of which scenario eventuates. Conversely, employment in the Gambling Activities subsector is expected to see a decline across all scenarios.

Table 2 Average annual industry employment growth in four scenarios, 2011–18 and 2011–25 (% per annum)

Industry	Long Boom		Smart Recovery		Terms of Trade Shock		Ring of Fire	
	2018	2025	2018	2025	2018	2025	2018	2025
Arts and Recreation Services	**1.6**	**2.2**	**1.2**	**2.1**	**1.9**	**2.3**	**0.9**	**1.4**
Heritage Activities	6.2	5.2	5.8	5.0	6.5	5.3	5.4	4.3
Creative and Performing Arts Activities	2.5	2.4	2.1	2.3	2.8	2.5	1.7	1.5
Sports and Recreation Activities	0.3	1.6	-0.1	1.5	0.6	1.7	-0.4	0.8
Gambling Activities	-1.2	-0.2	-1.6	-0.3	-0.9	-0.1	-1.9	-1.0
All industries	**2.1**	**2.0**	**1.5**	**1.5**	**1.7**	**1.6**	**0.8**	**0.7**

Source: Deloitte Access Economics (2012) *Economic modelling of skills demand and supply*, Scenario output—detailed employment results.

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 diverse sector which encompasses a wide range of occupations. The largest occupations within the industry are Sports Coaches, Instructors and Officials (which comprises 8.5 per cent of total employment in the sector); followed by Sportspersons (4.1); and Fitness Instructors (3.9).

[3] A description of the scenarios and the Deloitte Access Economics modeling of employment in each, with state and territory breakdowns, is available at the AWPA website www.awpa.gov.au.

Table 3 Top ten arts and recreation services occupations

Occupation		People employed	Industry employment
		'000	% of total
4523	Sports Coaches, Instructors and Officials	18.0	8.5
4524	Sportspersons	8.8	4.1
4521	Fitness Instructors	8.3	3.9
2112	Music Professionals	7.0	3.3
5421	Receptionists	6.9	3.3
3622	Gardeners	6.8	3.2
3623	Greenkeepers	6.7	3.2
4313	Gaming Workers	6.0	2.8
1491	Amusement, Fitness and Sports Centre Managers	5.2	2.5
2114	Visual Arts and Crafts Professionals	5.1	2.4
Total arts and recreation services		**211.5**	**37.2**

Source: ABS (2013) *Labour Force Australia*, detailed quarterly report, 2012 average of four quarters, cat. no. 6291.0.55.003.

Short-term growth

Table 4 shows current employment and past growth for the occupations that feature prominently 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 experienced the highest rates of growth in the sector over the past five years. Employment growth among Gaming Workers; Sports Coaches, Instructors and Officials; Amusement, Fitness and Sports Centre Managers; and Fitness Instructors has exceeded the national average by a wide margin, while employment has declined among Music Professionals; and Visual Arts and Crafts Professionals.

Table 4 Current and past employment in key occupations

Occupation		Current employment (all industries)		Past growth: five years	
		'000	% of total	'000	%
4523	Sports Coaches, Instructors and Officials	41.9	0.4	17.2	69.5
4524	Sportspersons	12.0	0.1	1.7	16.1
4521	Fitness Instructors	26.7	0.2	6.5	32.4
2112	Music Professionals	9.1	0.1	-3.8	-29.5
5421	Receptionists	176.4	1.6	-3.1	-1.7
3622	Gardeners	70.3	0.6	10.7	17.9
3623	Greenkeepers	15.4	0.1	1.4	10.2
4313	Gaming Workers	9.8	0.1	4.5	82.8
1491	Amusement, Fitness and Sports Centre Managers	11.5	0.1	3.1	36.7
2114	Visual Arts and Crafts Professionals	6.0	0.1	-2.1	-25.9
All employed		**11,588.7**	**100.0**	**798.1**	**7.4**

Source: ABS (2013) *Labour Force Australia*, February, cat. no. 6291.0.55.003 (DEEWR trend).

Long-term growth and job openings

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

The recent growth in sport and leisure-related occupations is expected to continue into the future, with strong employment growth forecast for Sports Coaches, Instructors and Officials; Fitness Instructors; and Sportspersons in the years to 2025 across all scenarios. Music Professionals and Visual Arts and Crafts Professionals are also predicted to have strong growth, reversing recent declines in these occupations.

Table 5 Average annual occupation growth in four scenarios, 2011–18 and 2011–25 (%pa)

Industry		Long Boom		Smart Recovery		Terms of Trade Shock		Ring of Fire	
		2018	2025	2018	2025	2018	2025	2018	2025
4523	Sports Coaches, Instructors and Officials	4.7	5.5	4.4	5.3	5.4	5.6	3.9	4.3
4524	Sportspersons	2.8	3.2	2.5	2.9	3.2	3.2	2.1	2.2
4521	Fitness Instructors	2.7	3.9	2.4	3.6	3.2	3.9	1.8	2.6
2112	Music Professionals	3.0	3.2	2.4	2.9	3.3	3.2	1.8	1.9
5421	Receptionists	2.0	1.8	1.3	1.3	1.9	1.5	0.7	0.4
3622	Gardeners	1.6	1.3	0.0	0.7	-0.2	0.4	-1.1	-0.3
3623	Greenkeepers	3.3	2.2	2.8	1.9	3.3	2.0	2.3	1.2
4313	Gaming Workers	-3.1	-1.5	-3.4	-1.8	-2.4	-1.4	-3.9	-2.7
1491	Amusement, Fitness and Sports Centre Managers	-4.4	0.5	-4.9	0.3	-4.0	0.6	-5.5	-0.8
2114	Visual Arts and Crafts Professionals	3.1	2.2	2.7	1.9	3.3	2.2	2.6	1.5
All occupations		**2.1**	**2.0**	**1.5**	**1.5**	**1.7**	**1.6**	**0.8**	**0.7**

Source: Deloitte Access Economics (2012) *Economic modelling of skills demand and supply*, Scenario output—detailed employment results.

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 occupations to 2025. Sports Coaches, Instructors and Officials; Sportspersons; Music Professionals; Greenkeepers; and Receptionists are all expected to have a job opening rate above the national average across all four scenarios. By contrast, Gaming Workers; Amusement, Fitness and Sports Centre Managers; and Gardeners are forecast to have comparatively low rates of job openings to 2025.

Table 6 Average annual job openings per annum, 2011 to 2025, in four scenarios

Occupation		Long Boom		Smart Recovery		Terms of Trade Shock		Ring of Fire	
		('000)	%	('000)	%	('000)	%	('000)	%
4523	Sports Coaches, Instructors and Officials	5.1	8.3	4.9	8.1	5.2	8.4	4.3	7.1
4524	Sportspersons	1.3	7.4	1.2	7.2	1.3	7.5	1.1	6.5
4521	Fitness Instructors	2.0	4.0	1.9	3.8	2.0	4.0	1.6	2.8
2112	Music Professionals	0.7	5.8	0.7	5.5	0.7	5.8	0.5	4.5
5421	Receptionists	9.3	4.8	8.1	4.3	8.7	4.5	6.2	3.4
3622	Gardeners	2.5	2.2	2.1	1.6	1.8	1.3	1.5	0.6
3623	Greenkeepers	1.0	5.5	0.9	5.2	0.9	5.3	0.7	4.5
4313	Gaming Workers	0.2	0.7	0.1	0.4	0.2	0.8	0.1	-0.6
1491	Amusement, Fitness and Sports Centre Managers	0.8	1.9	0.8	1.6	0.8	1.9	0.6	0.6
2114	Visual Arts and Crafts Professionals	0.5	5.5	0.4	5.2	0.5	5.4	0.4	4.8
All occupations		**576.4**	**4.4**	**500.9**	**3.9**	**513.3**	**4.0**	**391.4**	**3.1**

Source: Deloitte Access Economics (2012) *Economic modelling of skills demand and supply*, Scenario output—detailed employment results. Net replacement demand by AWPA (2013).

As Table 7 shows, job openings in a number of key occupations are created primarily by replacement demands rather than new growth. Under the Long Boom scenario, the majority of job openings among Gaming Workers; Receptionists; Greenkeepers; and Visual Arts and Crafts is expected to be driven by replacement requirements. This may reflect the age profile of these occupations or workforce dynamics such as the rate of job turnover. Conversely, job openings among occupations such as Fitness Instructors; Amusement, Fitness and Sports Centre Managers; and Gardeners are expected to be created primarily by new growth (that is, new jobs) to 2025.

Table 7 Total job openings (growth and net replacement) in four scenarios, 2011 to 2025

7.1 Long Boom

Occupation		Total growth (persons)		Net replacement estimates (persons)		Total job openings (persons)	
		('000)	%	('000)	%	('000)	%
4523	Sports Coaches, Instructors and Officials	54.7	71.4	21.9	28.6	76.7	100.0
4524	Sportspersons	9.4	49.8	9.5	50.2	18.8	100.0
4521	Fitness Instructors	29.6	97.2	0.9	2.8	30.5	100.0
2112	Music Professionals	6.0	55.0	4.9	45.0	10.9	100.0
5421	Receptionists	49.3	35.4	90.1	64.6	139.4	100.0
3622	Gardeners	26.9	71.2	10.9	28.8	37.8	100.0
3623	Greenkeepers	5.3	36.8	9.0	63.2	14.3	100.0
4313	Gaming Workers	0.5	23.4	1.8	76.6	2.3	100.0
1491	Amusement, Fitness and Sports Centre Managers	9.8	82.0	2.2	18.0	12.0	100.0
2114	Visual Arts and Crafts Professionals	2.7	37.5	4.4	62.5	7.1	100.0
All occupations		**3,889.7**	**45.0**	**4,755.6**	**55.0**	**8,645.3**	**100.0**

7.2 *Smart Recovery*

Occupation		Total growth (persons)		Net replacement estimates (persons)		Total job openings (persons)	
		('000)	%	('000)	%	('000)	%
4523	Sports Coaches, Instructors and Officials	52.5	70.9	21.5	29.1	74.0	100.0
4524	Sportspersons	8.8	48.8	9.3	51.2	18.1	100.0
4521	Fitness Instructors	28.1	97.1	0.8	2.9	28.9	100.0
2112	Music Professionals	5.4	53.1	4.7	46.9	10.1	100.0
5421	Receptionists	34.7	28.6	86.5	71.4	121.2	100.0
3622	Gardeners	21.4	68.1	10.0	31.9	31.5	100.0
3623	Greenkeepers	4.7	34.9	8.8	65.1	13.5	100.0
4313	Gaming Workers	0.4	17.9	1.8	82.1	2.1	100.0
1491	Amusement, Fitness and Sports Centre Managers	9.3	81.7	2.1	18.3	11.4	100.0
2114	Visual Arts and Crafts Professionals	2.4	35.7	4.3	64.3	6.7	100.0
All occupations		**2,953.2**	**39.3**	**4,559.6**	**60.7**	**7,512.9**	**100.0**

7.3 *Terms of Trade Shock*

Occupation		Total growth (persons)		Net replacement estimates (persons)		Total job openings (persons)	
		('000)	%	('000)	%	('000)	%
4523	Sports Coaches, Instructors and Officials	55.4	71.1	22.5	28.9	78.0	100.0
4524	Sportspersons	9.5	49.6	9.6	50.4	19.1	100.0
4521	Fitness Instructors	29.7	97.1	0.9	2.9	30.5	100.0
2112	Music Professionals	6.0	54.6	5.0	45.4	10.9	100.0
5421	Receptionists	41.5	31.8	89.0	68.2	130.5	100.0
3622	Gardeners	17.7	64.0	9.9	36.0	27.6	100.0
3623	Greenkeepers	4.9	35.0	9.0	65.0	13.8	100.0
4313	Gaming Workers	0.7	27.9	1.8	72.1	2.6	100.0
1491	Amusement, Fitness and Sports Centre Managers	9.9	81.8	2.2	18.2	12.1	100.0
2114	Visual Arts and Crafts Professionals	2.6	36.9	4.5	63.1	7.1	100.0
All occupations		**3,080.4**	**40.0**	**4,619.3**	**60.0**	**7,699.6**	**100.0**

7.4 Ring of Fire

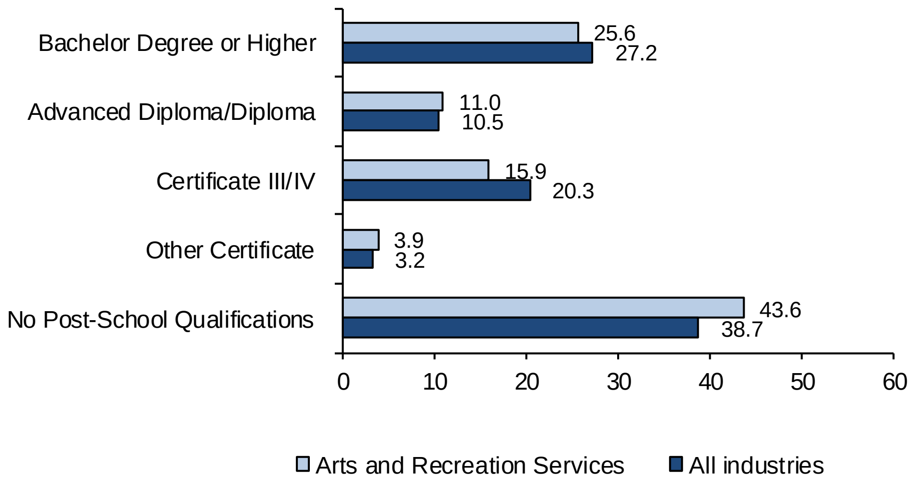
Occupation		Total growth (persons)		Net replacement estimates (persons)		Total job openings (persons)	
		('000)	%	('000)	%	('000)	%
4523	Sports Coaches, Instructors and Officials	43.6	68.2	20.3	31.8	64.0	100.0
4524	Sportspersons	7.1	44.4	8.9	55.6	16.0	100.0
4521	Fitness Instructors	22.7	96.6	0.8	3.4	23.5	100.0
2112	Music Professionals	3.5	43.7	4.5	56.3	8.0	100.0
5421	Receptionists	10.4	11.2	81.9	88.8	92.3	100.0
3622	Gardeners	13.6	59.3	9.4	40.7	23.0	100.0
3623	Greenkeepers	2.8	25.1	8.4	74.9	11.2	100.0
4313	Gaming Workers	0.3	16.0	1.7	84.0	2.0	100.0
1491	Amusement, Fitness and Sports Centre Managers	7.4	79.2	2.0	20.8	9.4	100.0
2114	Visual Arts and Crafts Professionals	1.9	30.6	4.3	69.4	6.1	100.0
All occupations		**1,532.9**	**26.1**	**4,338.5**	**73.9**	**5,871.4**	**100.0**

Source: Deloitte Access Economics (2012) *Economic modelling of skills demand and supply*, Scenario output—detailed employment results. Net replacement demand by AWPA (2013).

Education and training profile

The educational attainment of the arts and recreation services industry is comparable with the all-industry average, with 25.6 per cent of workers holding a Bachelor degree or higher qualification and 11 per cent holding a Diploma or Advanced Diploma. A slightly higher percentage of workers in arts and recreation services do not hold post-school qualifications, at 43.6 per cent, compared to all industries, at 38.7 per cent.

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



Note: Excludes 'Level of education not stated' from total.
Source: DEEWR (2012) *Australian Jobs 2012* (ABS 2011 Census data).

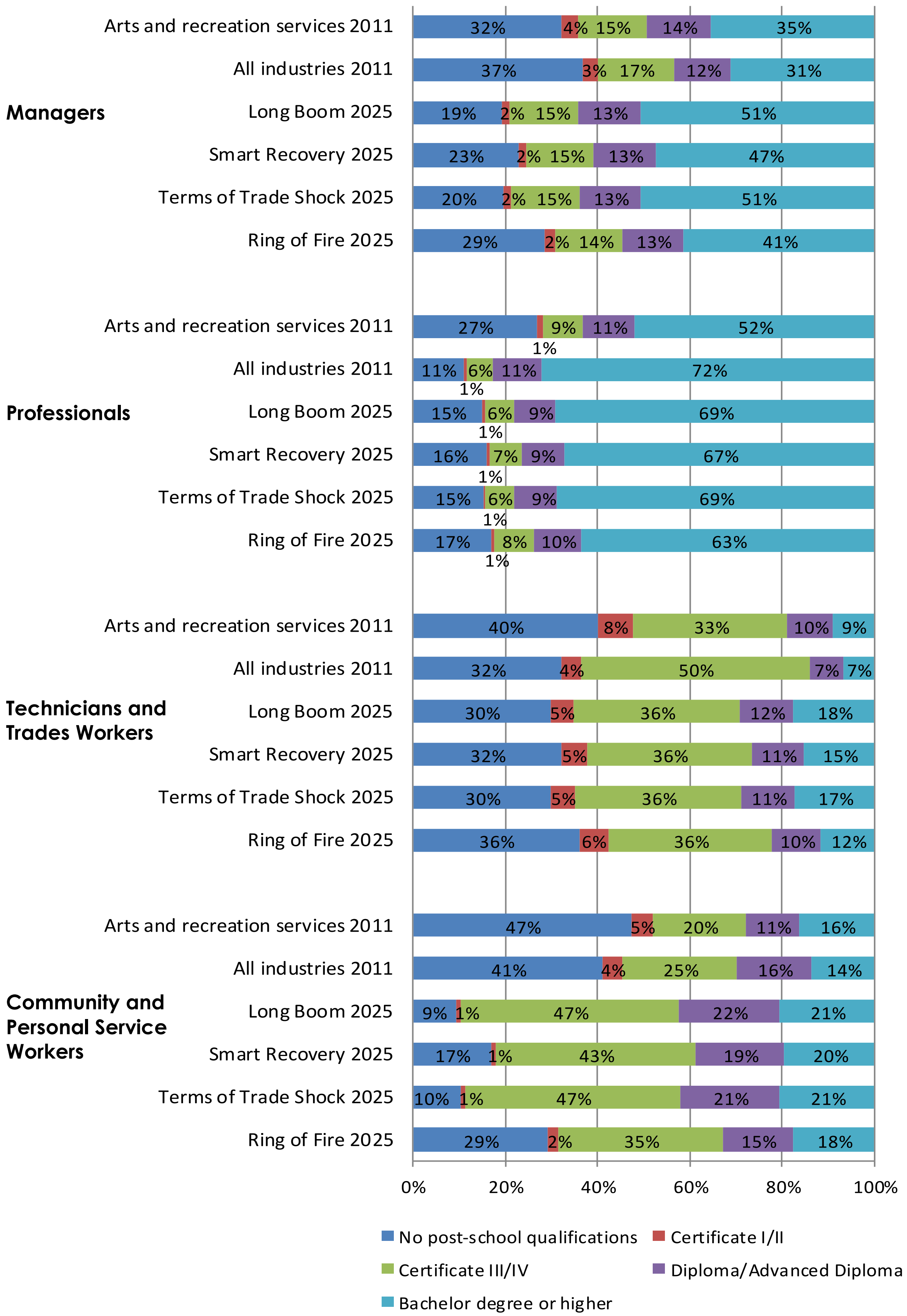
Figure 2 illustrates how demand for qualifications is expected to change over time. It shows the current education profile for each respective occupation: across all industries and within the arts and recreation services industry. It also shows projected levels of educational attainment to 2025 by each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

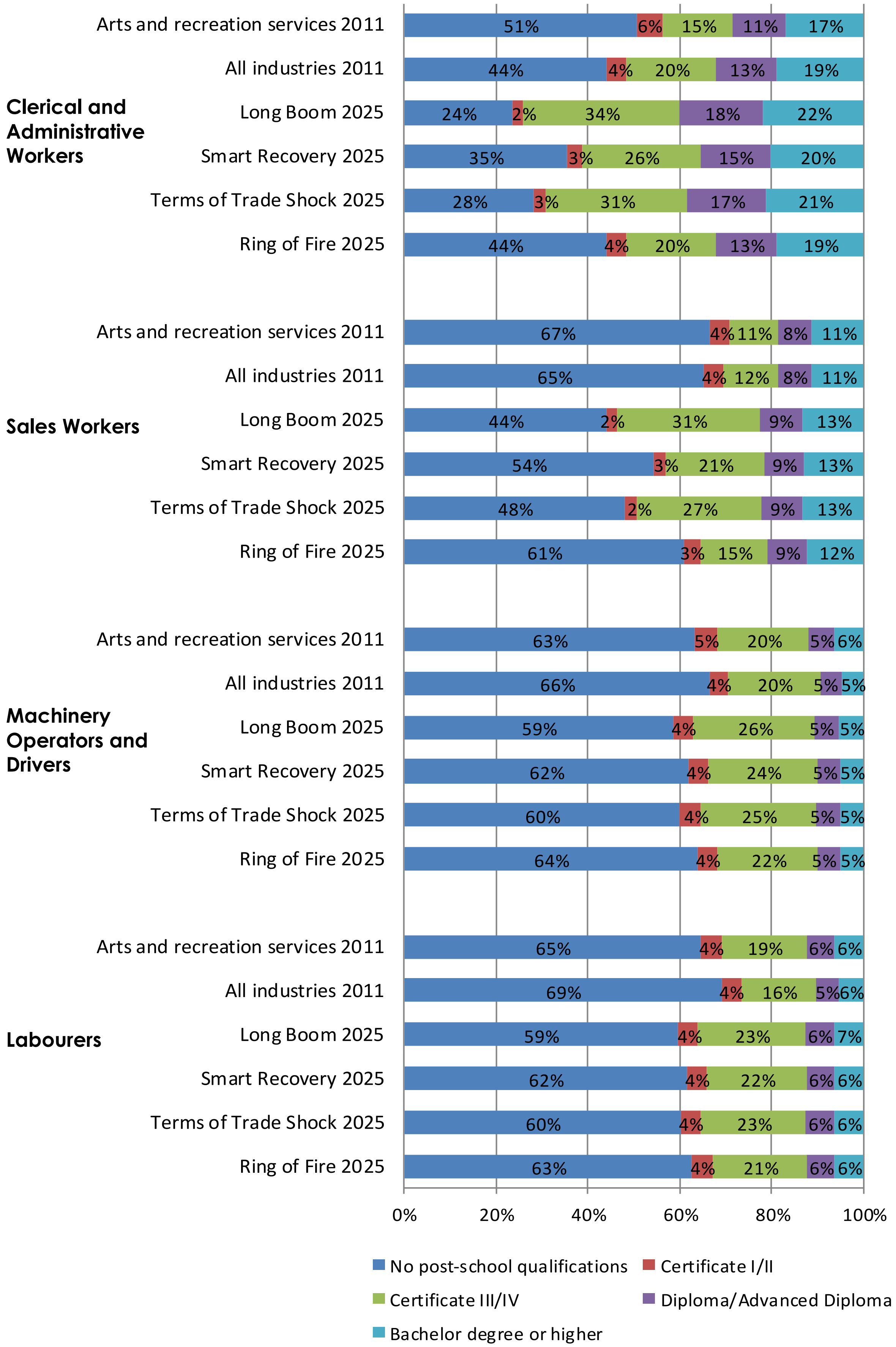
As Figure 2 shows, the majority of higher level qualifications within the sector are currently concentrated among the managerial and professional occupations. However, a further rise in the proportion of managers and professionals holding a Bachelor degree or higher qualification is expected in the years to 2025, irrespective of which scenario eventuates.

The proportion of workers without post-school qualifications is expected to decrease dramatically among community and Personal Service Workers; Clerical and Administrative Workers; and Sales Workers, particularly under the three higher growth scenarios. For example, under the Long Boom and the Terms of Trade scenarios, the proportion of Community and Personal Service Workers without post-school qualification in 2025 is around a fifth of that reported in 2011.

Finally, while the majority of Machinery Operators and Drivers and Labourers are predicted not to have post-school qualifications in the years to 2025, all scenarios show a modest increase in qualification holding during this time.

Figure 2 Educational attainment in the arts and recreation services industry by occupation, 2011 and projections to 2025 (%)





Source: ABS (2012) *Survey of Education and Work 2012*, cat. no. 6227.0; and DAE (2012) Unpublished data.

Specialised occupations

In *Future Focus*, the 2013 National Workforce Development Strategy, AWPA has proposed that national planning for skills and industry workforce development 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.

Monitoring skills supply, especially for specialised occupations, will remain a critical element in meeting our workforce needs.

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 occupations defined as 'specialised' that are relevant for this industry.

In some cases (e.g. sports and leisure-related occupations), this is due to not meeting the requirement of 'long lead time', with specialised occupations requiring a commitment of at least four years for university study; 3 or 4 years for apprenticeships; or at least 1000 hours for vocational courses.

In the case of other occupational clusters (e.g. those associated with arts and heritage activities), there is a low degree of occupational 'fit' within these roles, where a substantial number of people may have qualifications in this field, but comparatively few actually work within the sector.

In other types of occupations associated with the industry, such as Receptionists; Greenkeepers; and Gaming Workers, there is currently little requirement for formal qualifications.

While the overall level of education attainment for the arts and recreation services industry is on par with the Australian average (including more than a quarter of the workforce holding a Bachelor degree or higher), most occupations do not currently require a duration of training above the average.

However, as Figure 2 shows, demand for qualifications within the industry may change over time, depending on which future scenario unfolds.

More detailed information about specialised occupations is available in *Future Focus, 2013 National Workforce Development Strategy* at http://www.awpa.gov.au.

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:

- Innovation & Business Skills Australia is identifying training requirements and delivery options to enable more accessible training in visual arts to Aboriginal and Torres Straight Islanders. For further information, see www.ibsa.org.au.
- Innovation & Business Skills Australia has, in collaboration with industry stakeholders, developed a **Galleries, Libraries, Archives, Records and Museums Workforce Development Strategy** to assist industry to achieve their skilled workforces needed to meet current and future demand. For further information, see www.ibsa.org.au.

[4] Skills Australia (2012) *Better use of skills, better outcomes: A research report on skills utilisation in Australia.*