



CAIRNS REGIONAL COUNCIL

ARTS AND CULTURE INDUSTRY

2021/22



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Industry Snapshot - 2022



\$158M

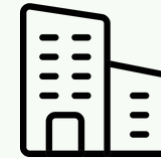
Output / Total Sales



1,092

Local Jobs

1.3% of total local jobs



347

Local Businesses

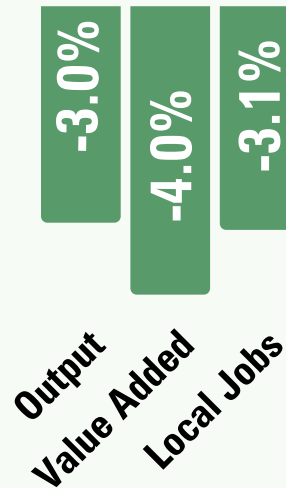


\$79M

Gross Value Added

0.9% of total industry value added

**5YR
GROWTH**



KEY SUB-INDUSTRIES



Arts Education

\$6M Value Added

170 Jobs



Specialised Design Services

\$19M Value Added

162 Jobs

Sources: NIEIR, 2023; ABS, 2022

Industry Size and Composition



Output/Sales



Value Added



Employment

Direct

\$158M

\$79M

1,092

Indirect/Flow-on Impacts

Industrial

\$39M

\$19M

104

+

+

+

Consumption

\$52M

\$27M

261

Total Impact

\$249M

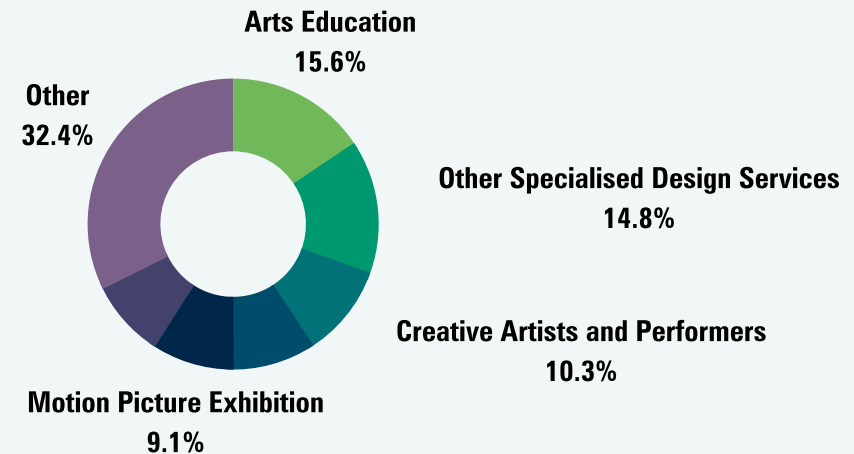
\$126M

1,457

In 2021/22, the Arts and Culture industry in Cairns was estimated to have generated \$79M in direct plus an additional \$46M in indirect impacts for a total contribution of \$126M in Value Added.

The industry supported 1,092 jobs directly and an additional 365 in indirect employment. The largest sub-industry for direct employment was estimated to be Arts Education with 15.6% of the total sector's employment.

Share of Total Sector Employment, 2021/22 Top Sub-Industries

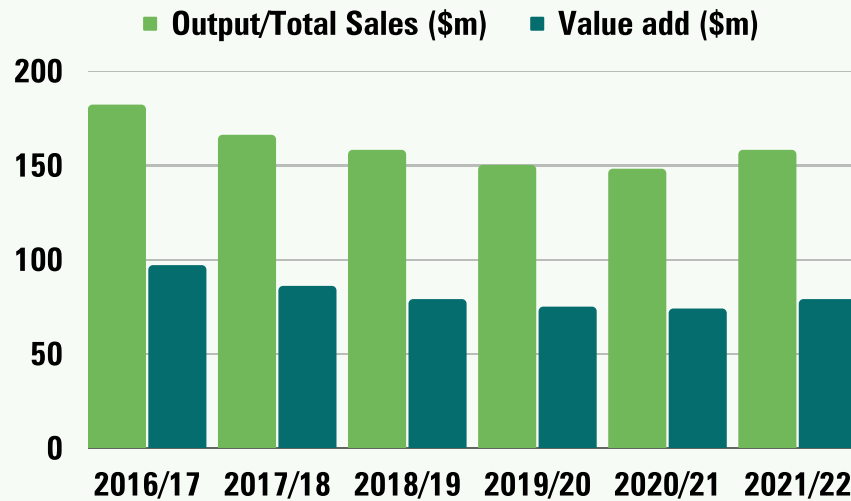


Sources: NIEIR, 2022

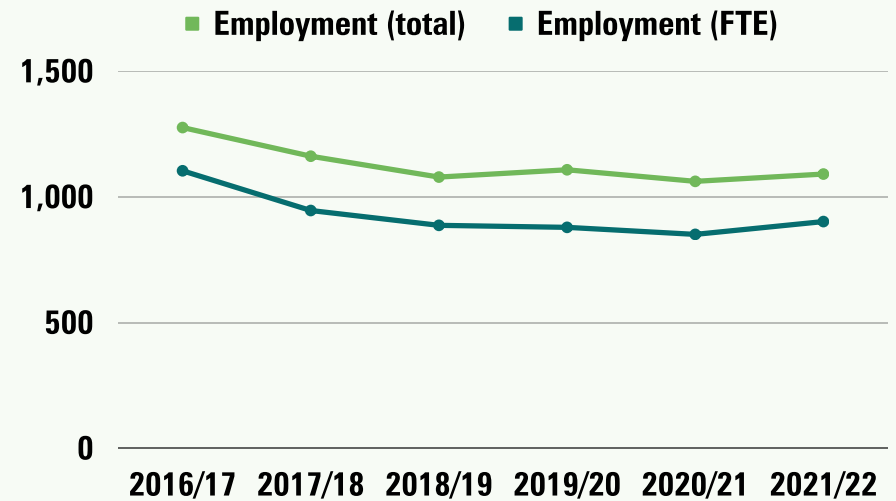
GROWTH TRENDS

In 2021/22, there were an estimated 1,092 employees working in the Arts and Culture Industry in Cairns and 902 full-time equivalents. The industry generated \$79M in direct Value Added, or \$72,410 per employee (\$87,583/FTE). Change in the industry has averaged -3.1% p.a. for employment over the last five years and -4.0% p.a. for value added, both below the state average.

Economic Value, Cairns Region, Financial Year



Average Employment, Cairns Region, Financial Year



**5 YEAR
AVERAGE
ANNUAL
INDUSTRY
GROWTH**

-2.8%

Output/Sales

-2.9% p.a.

-4.0%

Value Added

2.0% p.a.

**5 YEAR
AVERAGE
ANNUAL
INDUSTRY
GROWTH**

-3.1%

Employment

0.2% p.a.

-4.0%

FTEs

-0.7% p.a.

Sources: NIEIR, 2022



COMPETITIVE ANALYSIS



Cairns has a number of key facilities that support Arts and Culture industry development including the Tanks Art Centre, Cairns Art Gallery, Cairns Museum, Bulmba-ja Arts Centre, Cairns Performing Arts Centre, Munro Martin Parklands and The Court House.



Cairns' close proximity to natural assets, such as the Great Barrier Reef and Wet Tropics Rainforests, provides inspiration for visual arts and backdrops for the film industry.



With almost 10% of residents identifying as Aboriginal and/or Torres Strait Islander, more than double the QLD average, the Cairns region has a natural cultural asset to grow events around e.g. Cairns Indigenous Art Fair.



Cairns has the largest number of workers in Motion Picture and Video Production outside SE QLD and employment is set to expand with the new Screen Queensland Studios.

Sources: ABS Census 2021

WORKFORCE PROFILE

KEY CHARACTERISTICS OF THE ARTS AND CULTURE INDUSTRY, 2021 - CAIRNS REGION

Workers in the Arts and Culture Industry in Cairns in 2021 were older than the state as a whole with a median age of 43. The workforce was female orientated and 24% were born overseas.

Just over 1 in 3 were degree educated, compared to 41% at the state level, and 71% were working in professional or managerial roles.

In 2021, the FTE median income of the local workforce was lower than the state median. This was influenced by lower qualifications compared to the state.



43 years

Median Age

QLD - 39 years



\$58,999

Median Income FTE

QLD - \$67,572



44%

Male



56%

Female

QLD - 43%/57%



55%

Full Time

QLD - 53%



24%

Born Overseas

QLD - 23%



46%

Owner Manager

QLD - 42%



34%

Degree or Above

QLD - 41%

33%

Certificate III to Advanced Diploma

QLD - 31%



71%

Professionals/Managers

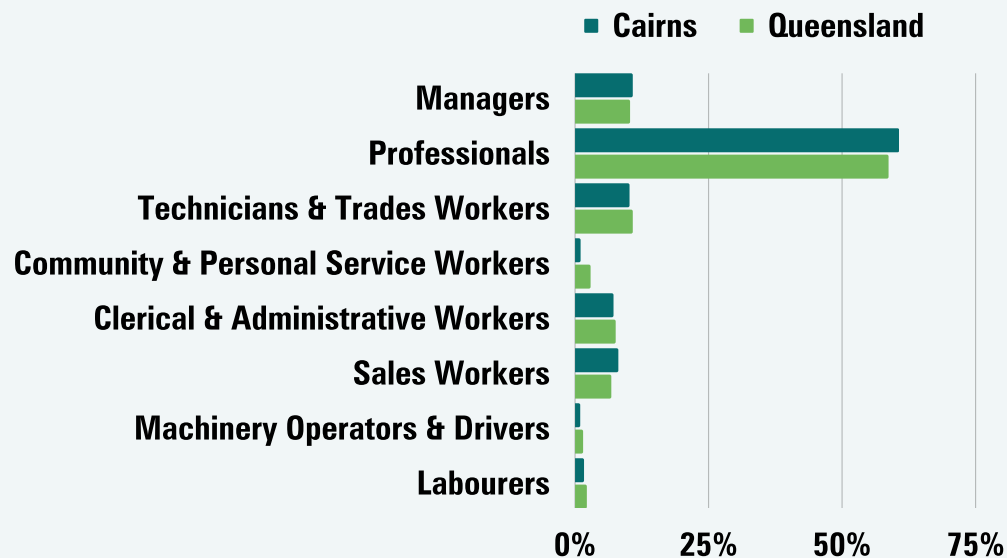
QLD - 69%

Sources: ABS Census of Population and Housing, 2022

EDUCATION & SKILLS

The Arts and Culture Industry in Cairns had a higher share of workers in professional occupations in 2021 (61%) compared to the QLD average (59%). The top occupations were Private Tutors and Teachers and Photographers. The industry had a lower share of qualified workers (68%) than the QLD average (73%), and a slightly lower share with post-graduate degree level qualifications (7% vs 10% for QLD).

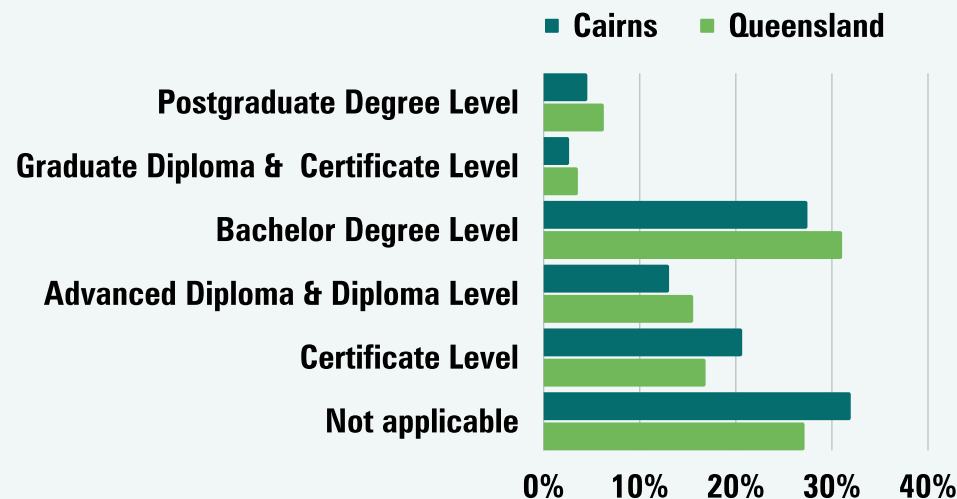
Local Workforce Occupations, 2021



Top Occupations

- Private Tutors and Teachers
- Photographers
- Graphic and Web Designers, and Illustrators
- Journalists and Other Writers

Local Workforce Qualifications, 2021



Top Study Fields

- Graphic Arts and Design Studies
- Journalism
- Music
- Communication and Media Studies

Sources: NIEIR, 2022

Main employment precincts



Estimated Industry Jobs, 2021



Key sites/ facilities

- Bulmba-ja Arts Centre
- Cairns Art Gallery
- Cairns Museum
- Cairns Performing Arts Centre
- Court House Gallery
- Screen Queensland Studio
- Tanks Arts Centre

Sources: ABS Census of Population and Housing, 2022



PROJECTS & TRENDS SHAPING THE FUTURE



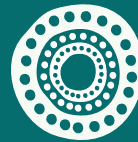
Upgraded major facilities

Key art facilities in the city are being or have recently been redeveloped. The Cairns Performing Arts Centre opened in 2018, Bulmba-ja Arts Centre opened in 2020 and The Court House has been refurbished as part of the ongoing Cairns Gallery Precinct project.



Screen Queensland Studios

A new studio complex is being built in Cairns and will house a sound stage and support facilities including production offices, construction, wardrobe, and hair and makeup departments, along with an events space and permanent creative tenancy opportunities.



Enhancing Indigenous Cultural Experience

Cairns is well positioned to develop an enhanced tourism offering focusing on the unique culture and traditions of local Aboriginal and Torres Strait Islanders. The State Government's Creative Together 2020-2030 strategy can be leveraged for investment and promotional support.

SWOT Analysis

STRENGTHS

- A range of key arts and culture facilities catering to multiple demographics
- History of successfully accessing arts funding above other regions in the state
- Strong Indigenous culture to build events and arts offer around
- Natural assets that provide inspiration, set backdrops for films/events, and can support unique arts/cultural offer



WEAKNESSES

- Over-reliance on Government funding for growth
- Under-developed private philanthropic support
- Physical connection barriers between the city's arts and culture infrastructure
- Perceived unbalanced focus between Council run assets and not-for-profit sector facilities
- Climate creates additional preservation costs for arts and artifacts
- Broadcasting under-represented compared to state



THREATS

- Diminishing support for creative arts courses/training
- Industry continues to lose out to other industries for major investment and/or major government funding
- Over-reliance on volunteers for some facilities leaves them operationally vulnerable



OPPORTUNITIES

- New facilities such as Bulmba-ja can help attract larger events/exhibitions and generate more industry awareness
- Further development of Cairns Gallery Precinct can generate cultural and economic spillover benefits
- Screen Queensland's new studio can help boost the local TV/film industry and supporting supply chains
- Greater promotion and facilitation of cultural experiences offer in Cairns can boost tourism economy
- Digital technology is making arts collections and performances more accessible to wider audiences





For more economic data on the
Cairns Region, visit economy.id

