NSW CREATIVE INDUSTRIES

ECONOMIC PROFILE

Prepared by NSW Trade & Investment

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Glossary of Commonly Used Terms

ABS – Australian Bureau of Statistics

B2B – Business to business

B2C – Business to consumer

Creative services – the group of creative industries segments that brings creative outputs to a mix of consumer and corporate clients, but is predominantly involved in business-to-business activities.

Cultural production – the group of creative industries segments that brings creative outputs predominantly to consumers

Direct employment – the total employment of an industry, including specialists and support workers

Embedded workers – workers whose occupation is creative, but who work in non-creative industries.

IDS – Internet and digital services, a creative segment

ISP – Internet service provider

IVA – Industry Value Added

LAM – Libraries, archives and museums, a creative segment

LGA – Local Government Area (council or shire area)

MPOP – Music, print and other publishing, a creative industries segment

MPVA – Music, performing and visual arts, a creative segment

Specialist workers – creative workers (defined as working in a creative occupation) who are employed in the creative industries. Part of the creative industries trident.

Support workers – non-creative workers (by occupation) who are employed in the creative industries. Part of the creative industries trident.

1. Executive Summary

The NSW creative industries are diverse and vibrant, applying a mix of skills and inspiration to produce a wide range of goods and services. These industries are a key part of the State economy and the major part of Australia's creative industries. This economic profile demonstrates NSW's strengths in creative industries and provides a status report on the importance of creative industries to NSW.

Key highlights of the economic profile:

- Direct employment growth for the creative industries is twice that of the NSW average
- NSW is home to 40% of Australia's creative industries workforce
- Australian IVA growth of the creative industries is forecast to be faster than Australian GDP growth over the next five years
- Creative services exports worth $1.4 billion each year to the NSW economy
- NSW is the source of 57% of Australia's creative industries services exports.

The creative industries directly employ almost 148,000 people in NSW, representing around 4.7% of total employment in the State. The industries also account for around 6.8% of NSW's total services exports, worth around $1.38 billion.

On a national scale, NSW creative industries represent 39.6% of Australia's direct employment within creative industries and account for 57.3% of Australia's creative industries' services exports.[1]

NSW creative services exports have demonstrated striking resilience in recent years, as both Australian creative services exports, and total NSW services exports performance have been sluggish in the wake of the GFC and its aftermath.

Within the creative industries' segments, important trends can be seen:

- **Internet and digital services (IDS)** is both the largest as well as one of the most dynamic segments in the creative industries. Over the last five years employment growth in NSW has averaged 4.6% per year, and in 2011 the IDS segment employed around 59,000 workers.
- Impressive growth in the IDS segment has been complemented followed by the **design** segment, which employed nearly 24,000 people in 2011 (the largest design sector in Australia) with annual average growth of 3.2%.

This is good news not only for creative industries, but also the broader economy. These segments are key enablers of innovation and competitive advantage across industry sectors. The competitive benefit of good design has, in particular, gained increasing and general prominence over the last decade.

Strong growth in employment since the 2006 Census was also recorded in a number of other creative industries segments, led by:

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1 2011-12 figure.

- **Music, performing and visual arts (MPVA)** – with 7.5% per annum average growth from 2006 to 2011, MPVA is the fastest growing segment in terms of employment
- **Media production and broadcasting (MPB)** (3.4% average growth)
- **Advertising services** (averaging 3.3% growth).

At the other end of the spectrum, the **music, print and other publishing (MPOP)** segment recorded an employment *decline* from 2006 to 2011 of 1.6% per year. However, 17,600 people are still employed in this industry in NSW (11% of the creative industries workforce). Australian industry value added (IVA) for this segment is also predicted to decline over the next five years, as technological innovations and and consumers' increasing adoption of digital media drives decline in traditional media (while driving strong growth in IDS).

Also highlighted in the economic profile is an increasing concentration of the industries around central Sydney, in particular in the local government areas (LGAs) of North Sydney, Willoughby, Lane Cove and the City of Sydney. Over 12% of the people who work in these LGAs are employed in creative industries.

Each area within Sydney has its particular strengths:

- **Sydney LGA** has very high concentrations of digital and other media publishing, advertising services, screen production, post-production, and broadcasting services

- **North Sydney, Ryde and Lane Cove LGAs** - the heart of Sydney's IT cluster – have a heavy concentration of Internet and digital services

- Free-to-air television is concentrated in the **Willoughby LGA**, largely due to the presence of Channel 9 studios and associated television industry firms

- There is a high concentration of design workers around the Sydney city fringes (**Leichhardt, Woollahra, Pittwater and North Sydney LGAs**)

- **Marrickville and Leichhardt LGAs** boast a high concentration of music, visual and performing arts activity.

Outside the Sydney metropolitan area, **Northern Rivers, Blue Mountains, Port Macquarie, Coffs Harbour**, and a south eastern belt stretching from the **Illawarra** into the **Yass Valley**, have higher concentrations of creative industries activity than the majority of regional NSW.

2. Creative Industries

Creative industries are defined as "those industries which have their origin in individual creativity, skill and talent, and that have a potential for wealth and job creation through the generation and exploitation of intellectual property."[2]

Broadly speaking, the creative industries can be broken down into two groups: *cultural production* and *creative services*.

Cultural production refers to activities that bring creative outputs predominantly to consumers (B2C), including the following segments:

- Music, performing and visual arts
- Libraries, archives and museums
- Music, print and other publishing (excluding digital publishing)
- Media production and broadcasting (excluding digital broadcasting).

Creative services refers to activities that bring creative outputs to a mix of consumer and corporate clients, but are predominantly involved in business-to-business (B2B) activities. Creative services comprise the following segments:

- Internet and digital services (including digital publishing and broadcasting, ISPs, and computer system design and related services)
- Advertising services
- Design (including architecture and industrial design).

3. Segment summary

- **Internet and digital services** (IDS) is by far the largest creative industries segment in terms of employment size, with around 59,000 workers in 2011.[3] What's more, it has seen both high employment growth in NSW over the last five years (4.6% per year), and is predicted to grow faster than any other Australian segment in industry value added (IVA) terms to 2017 (6.9% per annum).[4] This makes IDS the largest as well as one of the most dynamic subsectors in the creative industries.
- **Music, performing and visual arts** (MPVA) recorded the fastest employment growth over the 2006 to 2011 study period (7.5% per annum), bringing total NSW employment in the segment to 12,000. However, MVPA IVA growth to 2017 is expected to be just below forecast Australian GDP growth for the same period.
- At the other end of the spectrum, the **music, print and other publishing** (MPOP) segment recorded an employment decline from 2006 to 2011 of 1.6% per year. However, 17,600 people are still employed in this industry in NSW. Australian IVA

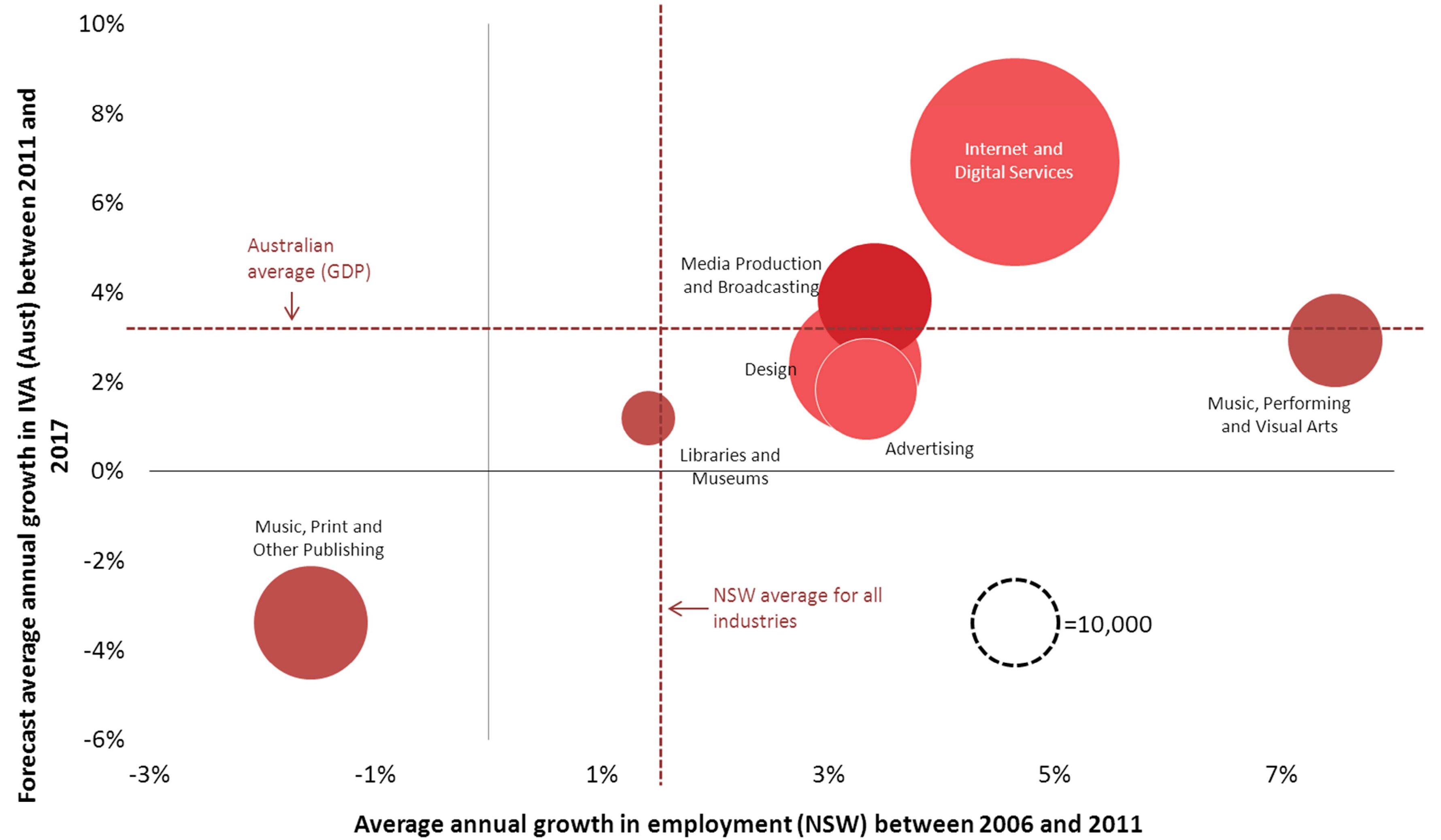
2 UK Department of Culture, Media and Sport.
3 All employment figures are derived from the ABS Census of Population & Housing (2006, 2011), unless otherwise specified.
4 All Australian IVA and global revenue estimates and forecasts are sourced from IBISWorld, unless otherwise specified.

for this segment is also predicted to decline over the next five years, by an average of 3.4% per year. As will be discussed in greater detail in following chapters, these declines are symptomatic of a segment in transition as a result of the digital revolution.

- The **design** segment is the second largest of the NSW creative industries, employing nearly 24,000 people in 2011. This is following a period of strong growth over the last five years, when employment has increased by an average of 3.2% per year. The segment is predicted to continue its growth trajectory, with Australian design IVA expected to outpace Australian GDP to 2017 to grow by 2.4% per year.
- Around 14,000 people are employed in the NSW **advertising** industry, the result of an average 3.3% growth from 2006 to 2011. The Australian advertising industry is expected to grow by 1.8% per year over the next five years, which is slightly below Australia's forecast GDP growth over the same period.
- Australia's **media production and broadcasting** (MPB) segment is expected to outperform Australia's overall GDP growth over the next five years, growing by an average of 3.8% per year to 2017. The segment currently employs over 17,000 people in NSW, and has seen strong employment growth of 3.4% over the five years to 2011.
- **Libraries, archives and museums** (LAM) represent the smallest creative industries segment in NSW, employing close to 4,000 people in 2011. Employment growth has been modest compared to most other segments at 1.4% per annum, but was still above NSW total employment growth over the last five years. The Australian LAM segment is predicted to grow at a modest pace over the next five years, at 1.2% per year to 2017.

The following bubble chart (Chart 3.1) indicates the relative sizes of these industries in NSW by employment, as well as representing past growth data (for employment) and future growth projections (for industry value added).

Chart 3.1 – Relative importance of creative industries segments (bubble size = NSW employment level in 2011)



Sources: ABS; IBISWorld, NSW T&I estimates

4. Exports

NSW dominates Australia's creative industries exports,[5] accounting for 57.3% of the national total in 2011-12 (valued at $1.38 billion). This was more than double the share of the next largest exporting state, Victoria (with 27.1%), and the highest share for the State in the last five years.

The NSW creative export sector has remained robust in the face of a wider slowdown in services exports growth, as total NSW services exports fell by 0.2% per year from 2006-07 to 2011-12. In contrast, creative industries services exports from NSW grew at 2.6% per year (nominal terms) in the five years to 2011-12, compared with 1.0% per year for Australia as a whole, while the value of equivalent services exports from Victoria actually fell 1.8% per year over the same period.

Chart 4.1 – Creative services exports ($ mill)

Sources: ABS cat. no. 5368.0.55.003; NSW Trade & Investment estimates

The growth in NSW creative services exports has largely been driven by advertising services, licences to reproduce and/or distribute computer services (such as royalties on software), and information services (e.g. database services, online periodicals and journals).

Creative industries services exports from NSW accounted for around 6.8% of the State's total services exports (which are dominated by tourism and education-related exports) in 2011-12, compared with 5.3% for Victoria and 4.8% for Australia

5 Creative industries exports are defined as services only (excluding goods) and include: royalties on computer services; music royalties; computer and information services; advertising, market research and public opinion polling services; audiovisual and related services; and architectural and industrial design services. Based on ABS data and NSW Trade & Investment estimates.

as a whole. Creative industries' share of total NSW services exports has shown a gradual increase (apart from a GFC-impacted year in 2009-10) over the last five years (was 5.9% in 2006-07). This is the opposite of Victoria's experience, which has recorded a steady decline in share, as computer services exports have generally followed a downward trend.

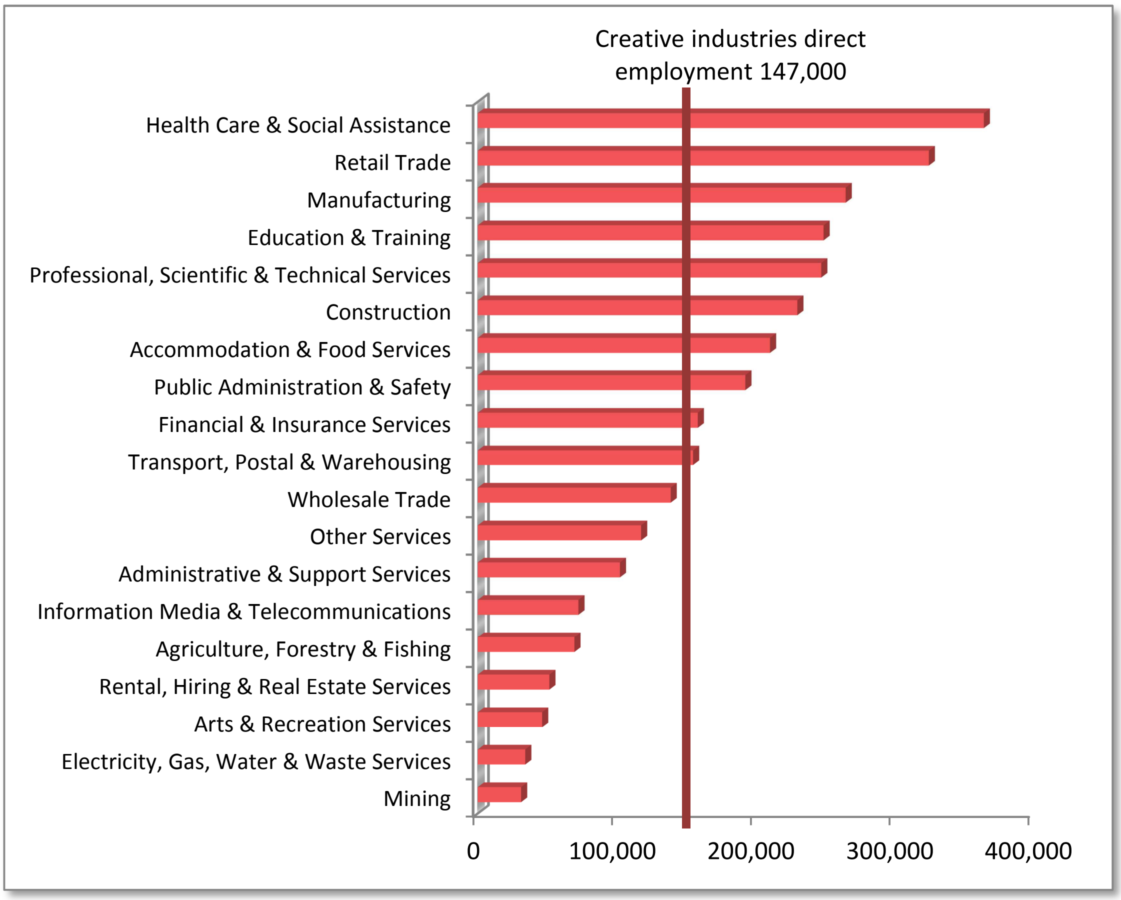
The recent growth in NSW creative industries services exports is particularly impressive when it is noted that traditional services export markets (including the United States, United Kingdom and Japan) continue to experience subdued economic conditions, and the Australian dollar remains at historically high levels against the US dollar.

5. Employment

NSW has the largest creative industries sector in Australia. Based on 2011 Census data, the NSW creative industries directly employed approximately 147,600 people, accounting for 39.6% of national employment in the creative sector.

The creative industries are more important to the NSW economy than they are for any other state, making up 4.7% of total NSW employment, which is above the concentration for Australia as a whole (3.7%) and Victoria (4.1%), which has the second highest concentration of creative industries of the Australian states.

Chart 5.1 – NSW direct employment, selected industries 2011

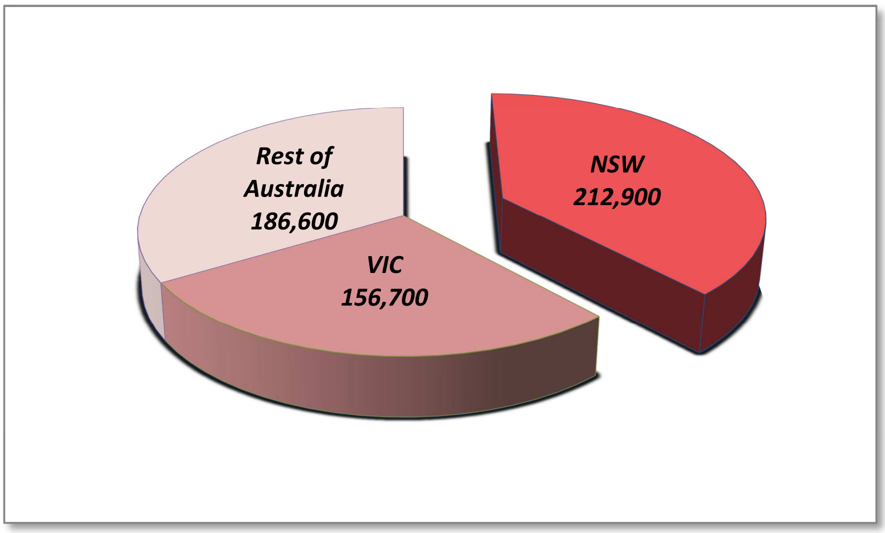


Sources: ABS Census of Population and Housing 2011; NSW Trade & Investment estimates

NSW creative industries directly employ almost as many people as the finance and insurance industry in NSW, and significantly more people than mining and agriculture.

In addition, approximately another 65,300 people in NSW worked in creative occupations within other (non-creative) industry sectors. These "embedded" workers include creative people working in non-creative industries, such as designers working in manufacturing. Together, creative specialist, embedded and support workers numbered nearly 213,000 in NSW – 38.3% of Australia's creative workforce.

Chart 5.2 - Total creative industries employment (direct + embedded), 2011 (persons)

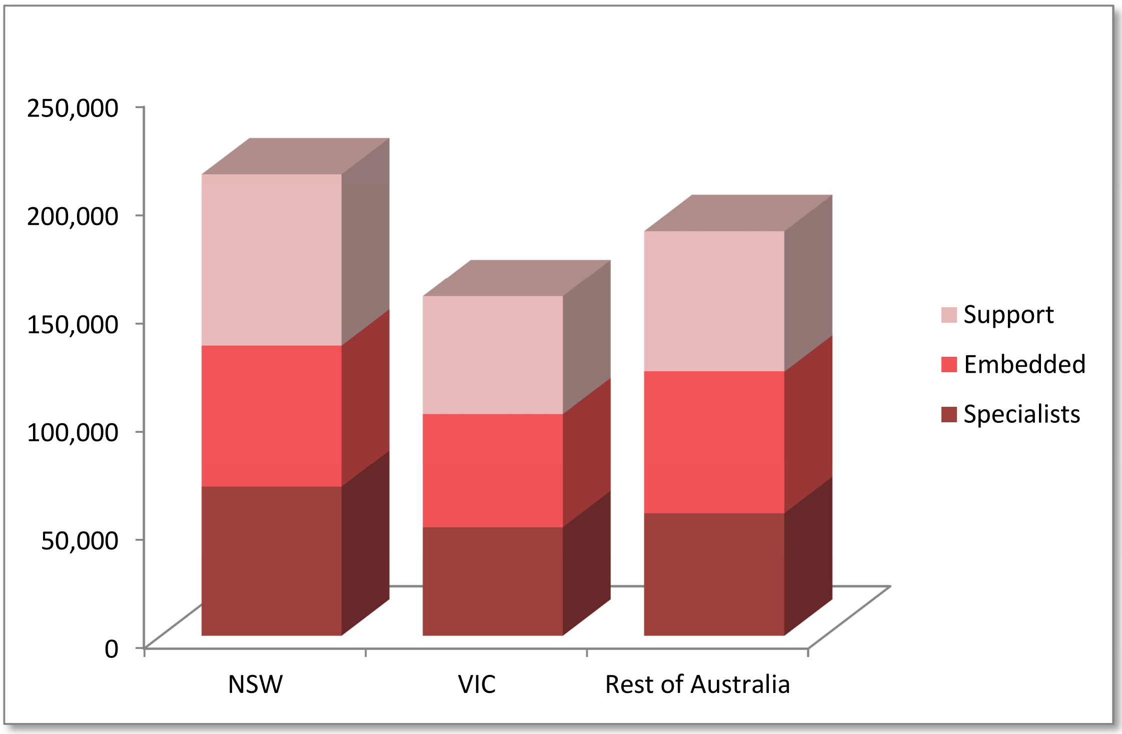


Sources: ABS Census of Population and Housing 2011; NSW Trade & Investment estimates

The latest Census highlights the changes in employment growth of various components of the NSW creative industries. In total (specialist, embedded and support workers combined), the creative industries grew by an average of 2.6% per year from 2006 to 2011. By segment, average annual employment growth over the 5 years to 2011 was:

- 4.8% per annum for 'Specialists' (creative occupations within the creative industries). This compares to national growth over the same period of 4.3% per annum.
- 2.3% per annum for 'Support' employees (non-creative occupations within the creative industries), compared to 2.4% per annum for Australia
- 1.0% per annum for 'Embedded' creative workers (creative occupations within 'non-creative' industry sectors). This compares to national growth of 1.4% per annum over this period.

Chart 5.3 – Creative industries employment by type, 2011



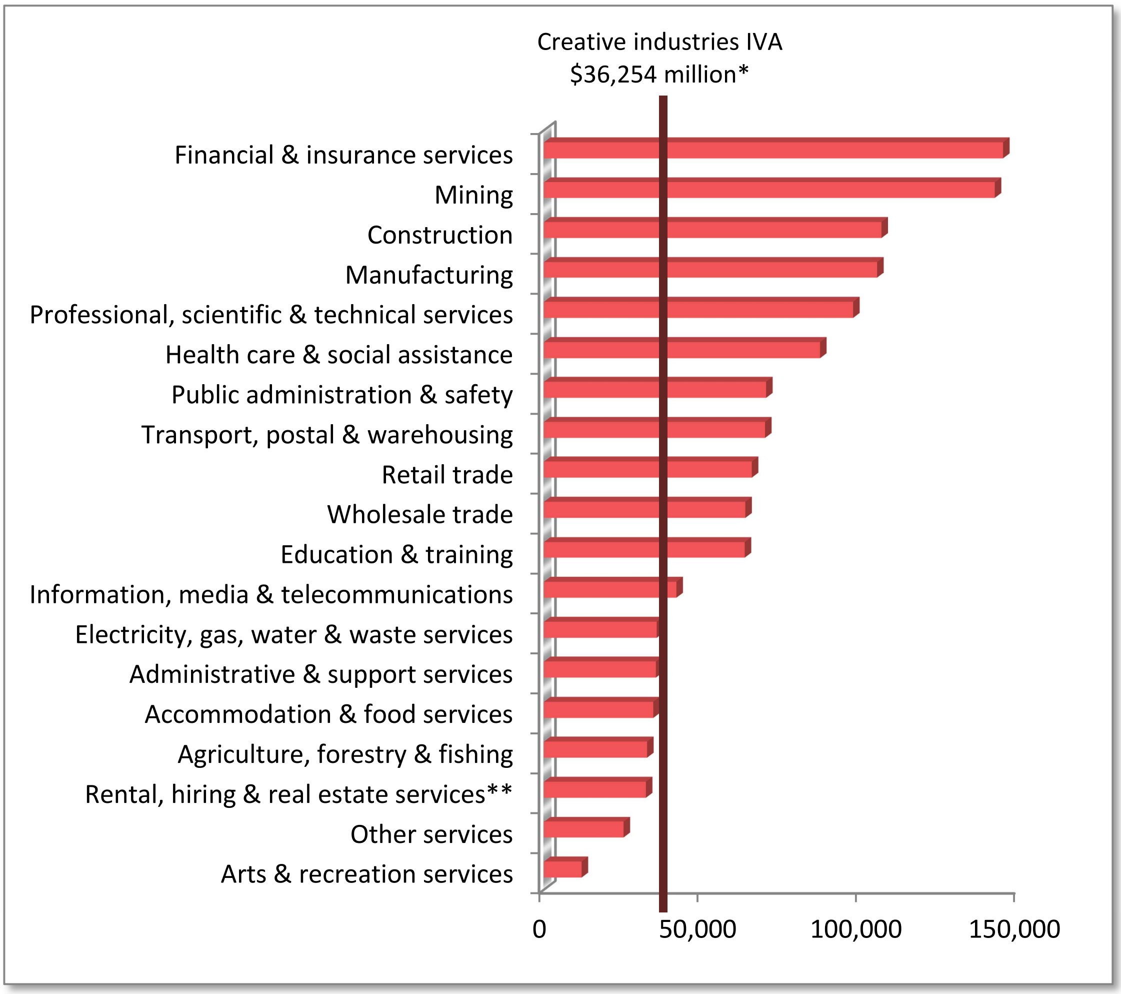
Sources: ABS Census of Population and Housing 2011; NSW Trade & Investment estimates

The natural attributes of the creative workforce, along with their education and training, also provide the creative industries with the capability to drive innovation and competitive advantage in *other industries*. Creative workers embedded in other industries have the ability to generate new ideas, approaches, and to reframe issues through a creative lens, helping to enhance innovative capability in these industries. This is particularly the case with design-related creative occupations (see section 7.3 for further discussion of this).

6. Industry Value Added

Industry value added (IVA) is a measure of an industry's economic size in terms of its contribution to the value of goods and services produced in a country or region. Estimates for the IVA of Australia's creative industries indicate that the size of the sector was at over $36 billion in 2012. This ranks the creative industries 13 out of 20 among Australian industries in terms of economic size.

Chart 6.1 – Australian industry value added, 2011-12 ($ mill)



**Includes components from other industries included in this analysis. **Excludes dwellings owned by persons. Sources: IBISWorld; ABS cat. no. 5204.0; NSW Trade & Investment estimates*

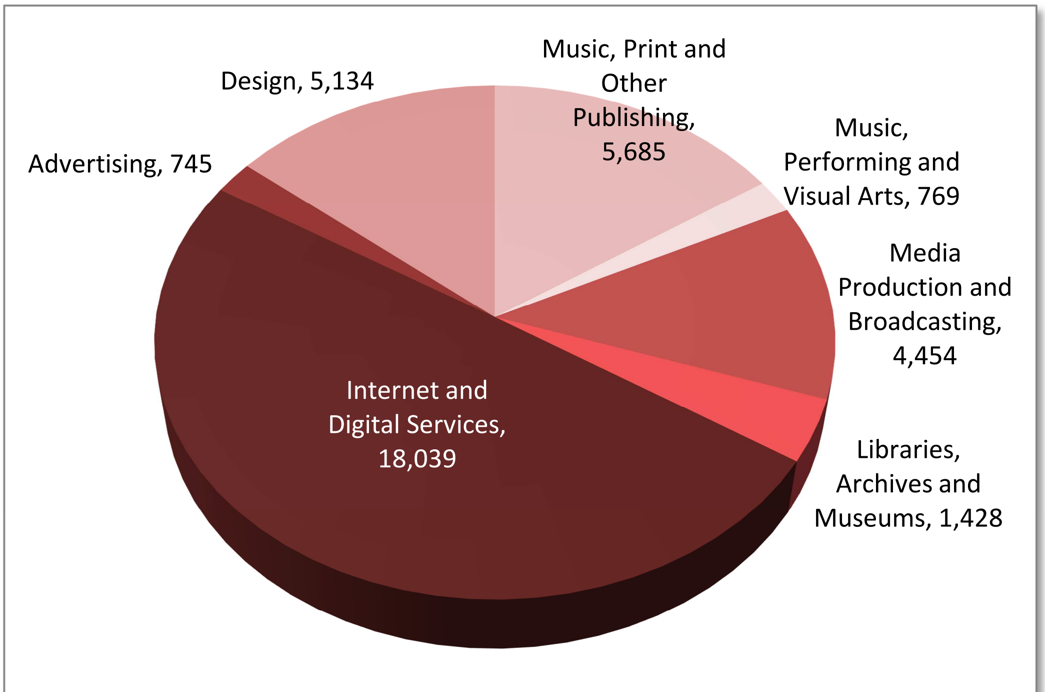
Creative services accounts for two thirds of the industry value added of the total Australian creative industries, with cultural production making up the remainder. Internet and digital services is by far the largest segment in terms of IVA, accounting for half of all Australia's creative industries IVA. Music, print and other publishing, followed by design, and media production and broadcasting are the next largest segments by IVA.

Table 6.2 – Australian industry value added by creative industries segment ($ mill)

Segment	IVA 2012	IVA 2017 (*f*)
Internet and Digital Services	18,039	25,196
Music, Print and Other Publishing	5,685	4,785
Design	5,134	5,773
Media Production and Broadcasting	4,454	5,375
Libraries and Museums	1,428	1,515
Music, Performing and Visual Arts	769	888
Advertising	745	815
Cultural Production (B2C)	**12,336**	**12,563**
Creative Services (B2B)	**23,918**	**31,783**
TOTAL Creative Industries	**36,254**	**44,346**

Sources: IBISWorld; NSW Trade & Investment estimates

Chart 6.3 – Australian industry value added by segment, 2012 ($ mill)



Sources: IBISWorld; NSW Trade & Investment estimates

7. Business Counts

Like most industries, there is a high proportion of small businesses to total businesses in the creative sector. The creative industries accounted for 7% of all NSW small businesses in 2011.[6] Of the approximately 50,000 businesses operating within the NSW creative industries, 97.4% were small businesses (0-19 employees), 2.3% were medium (20-199 employees) and 0.3% were large[7].

NSW had the largest share of creative businesses, with 36.6% of Australia's creative enterprises based in the State. This is above NSW's share of all businesses (33.1%), indicating a higher concentration of creative organisations here.

Creative services accounted for over three quarters of creative industries businesses, with cultural production organisations making up the remaining quarter. By sheer numbers of organisations, the largest segment in the NSW creative industries was Internet and digital services, followed by design, and music and performing arts.

Table 7.1 – NSW business counts by creative industries segment, June 2011

Segment	Total Businesses	% of total Creative Businesses
Internet and Digital Services	20,198	41.1
Design	12,951	26.3
Music, Performing and Visual Arts	6,649	13.5
Advertising	4,621	9.4
Media Production and Broadcasting	3,328	6.8
Music, Print and Other Publishing	1,319	2.7
Libraries and Museums	112	0.2
TOTAL Creative Industries	**49,178**	**100.0**

Sources: ABS Cat. No. 8165.0; NSW Trade & Investment estimates

8. Regional Analysis

Where creatives live

Sydney is truly NSW's creative capital, with 86.3% of the State's creative workforce based in the emerald city as of 2011. This is far above its share of total employment in the State, which stands at about 65%. Not only is Sydney home to the most creative workers (127,000), but it has the highest concentration of creative industries employees in the State. Furthermore, the number of creative workers in Sydney has increased faster than the rest of the State over the past five years, with

6 SME defined as a business which has 0-19 employees (includes sole traders).
7 ABS Business Counts, Australia: 8165.0

the result that regional NSW's share of creative industries workers has fallen over the same period. Indeed, only Sydney has managed to increase its share of the State's creative industries workers over the five years to 2011.

Aside from Sydney, the largest centres of creative activity (measured by the number of creative industries workers) were the satellite regions of Hunter (including Newcastle) and Illawarra (including Wollongong). However, these regions, along with the remainder of regional NSW, have seen a fall in their share of the State's creative workforce. Sydney's further growth as a centre of gravity for the creative industries may be due to a clustering effect, where its critical mass of creative workers and infrastructure attracts other creative workers away from the regions. However, more work is required to understand the factors driving the relative growth of the creative industries in Sydney and Regional NSW.

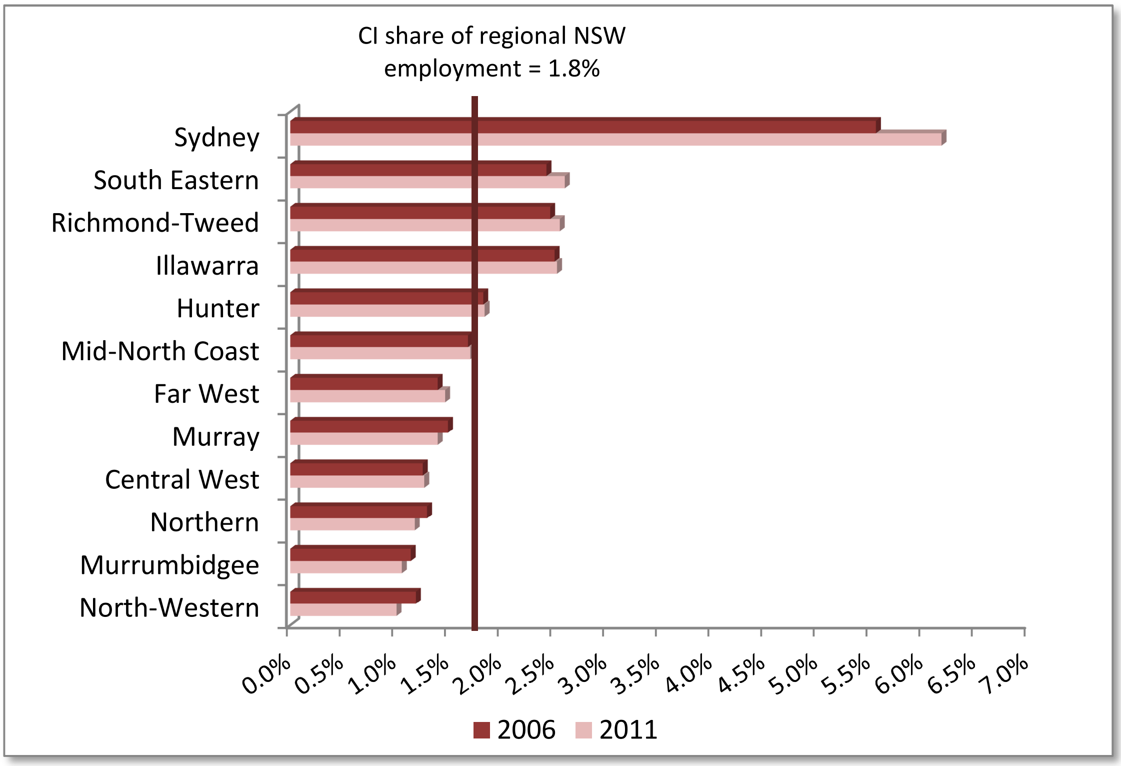
Table 8.1 – NSW regional creative industries (CI) employment summary

Region	Total CI	Share of NSW %	CI Share of Total Employment %	Concentration change % pts	Growth 2006 - 2011
Sydney	127,421	86.3	6.2	0.6	20.5
Far West	121	0.1	1.5	0.1	7.1
South Eastern	2,464	1.7	2.6	0.2	15.7
Richmond-Tweed	2,349	1.6	2.6	0.1	10.3
Hunter	5,063	3.4	1.8	0.0	11.7
Mid-North Coast	1,882	1.3	1.7	0.0	8.5
Illawarra	4,367	3.0	2.5	0.0	8.6
Central West	981	0.7	1.3	0.0	6.5
Murrumbidgee	719	0.5	1.1	-0.1	-5.4
Murray	703	0.5	1.4	-0.1	-6.6
Northern	893	0.6	1.2	-0.1	-5.3
North-Western	488	0.3	1.0	-0.2	-12.7
Total NSW	**147,662**	**100.0**	**4.7**	**0.4**	**18.6**
Regional NSW	**20,241**	**34.3**	**1.9**	**0.0**	**7.9**

Sources: ABS Census of Population & Housing 2006, 2011; NSW Trade & Investment estimates

Nevertheless, several regions increased their concentration of creative employees (the number of creatives as a proportion of the total workforce in the region). The South Eastern, Far West, and Richmond-Tweed regions saw significant increases in their creative industries employee concentrations from 2006 to 2011. The North Western, Northern, Murrumbidgee, and Murray and regions saw declines in their creative workers as a share of their total employment over the same period.

Chart 8.2 – Creative industries' (CI) share of total employment, NSW regions



Sources: ABS Census of Population & Housing 2006, 2011; NSW Trade & Investment estimates. Based on place of residence.

Where creatives work

It is worthwhile noting that, although NSW's regions generally host a lower concentration of creative industries workers than the State average, these figures mask the presence of "creative hotspots" where the concentration of creative industries activity is high, although concentrated in a small area. Detailed data about where creative actually work in NSW is useful in pinpointing these "creative hotspots" within their larger regions.

The largest and hottest area of creative activity is around central Sydney, in particular the local government areas (LGAs) of North Sydney, Willoughby, Lane Cove and the City of Sydney. The number of creatives who work in these areas, as a proportion of total workers, exceeds 12% - that is, over 12% of people who go to work in these LGAs work in the creative industries.

In terms of particular strengths in certain areas:

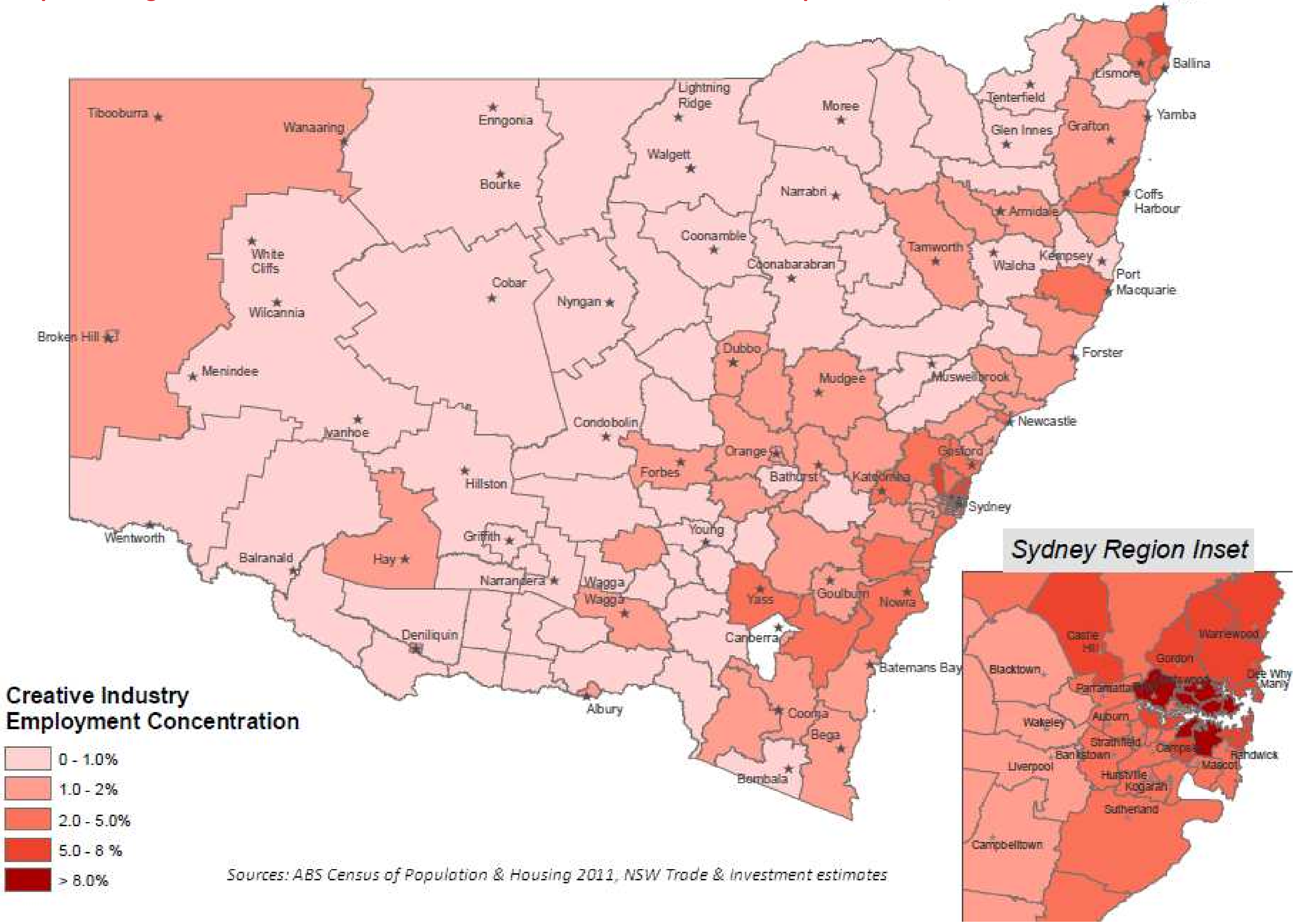
- Internet and digital services is a prominent subset of the creative industries within the North Sydney, Ryde and Lane Cove LGAs. These areas traditionally represent the heart of Sydney's IT cluster

- Free-to-air television is concentrated in the Willoughby area, largely due to the presence of Channel 9 studios and other television industry businesses
- There is a heavy concentration of architects and other designers in and around the city fringes (Leichhardt, Woollahra and Pittwater, and North Sydney)
- Marrickville and Leichhardt LGAs boast a high concentration of music, visual and performing arts activity.

Outside of the Sydney metropolitan area, there are a number of creative industries hotspots.

- Byron Bay is the hottest of these areas in terms of the proportion of workers that are active in the creative industries in general
- Byron Shire is also a regional leader in terms of the concentration of design workers, as well as music, visual and performing artists (MVPA)
- Palerang LGA and Blue Mountains LGA are regional hotspots for MVPA activity
- The Northern Rivers, Port Macquarie, Coffs Harbour, and a south eastern "creative belt" stretching from south of Sydney into the Yass Valley have higher concentrations of creative industries activity than the majority of regional NSW.

Map 8.3 – Regional concentration of creative industries workers based on place of work, 2011



Sources: ABS Census of Population & Housing 2011, NSW Trade & Investment estimates

9. Sector Analysis – Cultural Production

The cultural production sector within the creative industries includes businesses involved in bringing creative outputs predominantly to consumers (B2C).

- Cultural production employed 51,000 workers, or 35% of total creative industries employment in 2011.
- Employment growth over the past five years has averaged 2.1% per annum in NSW, which now accounts for 41.9% of Australia’s cultural production employment.
- Cultural production accounted for 23% of creative industries businesses (11,400 as of 2011). NSW was home to the lion’s share of these, with 41.9%.
- Australian IVA for cultural production industries in 2012 was $12.3 billion, or 34% of total creative industries IVA. This is expected to grow at only 0.4% per annum over the next five years to 2017.
- Total household spending on cultural expenditure items was estimated at $886.7 million in 2009-10 in Sydney.[8] This was nearly 20% more than the expenditure of Melbourne households. On a per household basis, Sydney households spent more on cultural expenditure than any other city with the exception of Canberra. These data give some indication of the direct economic impact of the cultural production sector, as measured by direct expenditure by household consumers themselves.

9.1 Music, Performing and Visual Arts

The music, performing and visual arts (MPVA) segment is part of the cultural production sector within the creative industries. The major types of activities undertaken in this segment include music performance and recording; artistic performances and venue operation (e.g. theatres), and; artistic activities such as writing and visual arts.

There were over 12,000 people employed within MPVA in 2011 in NSW, representing 40% of Australia’s workers in the segment. Employment growth in NSW averaged an impressive 7.5% per annum from 2006-2011, well above the creative industries average of 2.1%. This growth was largely driven by strong growth in the number of creative artists, musicians, writers and performers, as well as a corresponding increase in employees of performing arts venues over the five years to 2011. Specialists also make up the bulk of workers in this segment (66%).

Of the 16,500 MPVA businesses in Australia, over 40% were located in NSW. There is a higher concentration of small businesses within this sector than in the creative industries as a whole, with 99.1% of MPVA firms employing less than 20 workers (the creative industries average is 97.4%).

8 Expenditure items used are cultural fees and charges (110205) and culture courses (1102990301). Source: ABS Cat No 6530.0.

Table 9.1.1 – Music, visual & performing arts summary

	Business Counts (BC)	NSW share of Aust BC (%)	Direct Employment (persons)	NSW share of Aust Emp (%)	Growth 2006 to 2011 (%)	IVA 12 ($m)
Music, Performing & Visual Arts	**6,649**	**40.3**	**12,006**	**39.6**	**7.5**	**769**
Music and Other Sound Recording Activities	604	46.1	337	39.6	1.2	-
Performing Arts Operation	579	42.2	1,937	35.6	2.2	543
Performing Arts Venue Operation	158	39.2	1,222	36.5	5.1	227
Creative Artists, Musicians, Writers & Performers	5,308	39.6	8,510	41.2	9.7	-

Sources: ABS; IBISWorld; NSW Trade & Investment estimates

Australian MVPA industry value added (IVA) was estimated at around $770 million in 2012. This makes it the sixth largest creative industries segment by estimated IVA value. However, IVA is expected to grow to $890 million in 2017, putting MVPA among the top three creative segments in terms of future growth (but still below the creative industries average of 4.1%).

9.2 Libraries, Archives and Museums

Libraries, archives and museums (LAM) is a mixed sector, with constituent organisations receiving significant amounts of both public and private funding. Museums are involved in the preservation and exhibition of heritage objects, and/or visual arts and crafts with aesthetic, historical, cultural and/or education value. Libraries and archives maintain collections of documents (such as books, journals, newspapers and music) and facilitate the use of such documents, physically and/or electronically.

There were nearly 4,000 people employed in the LAM segment in 2011, making this the smallest creative industries segment by workforce. NSW only accounted for 27% of Australia's LAM employment, making it the only segment for which NSW was responsible for a lower share than its share of total Australian employment.

Furthermore, roughly half the sector was comprised of support workers, which is slightly higher than the average creative industries profile.

There were 112 LAM organisations operating in NSW in 2011,[9] representing 32% of Australian LAM organisations in 2011 (roughly equivalent to the State's share of all businesses).

Estimated IVA for the LAM segment was $1.4 billion in 2012 (3.9% of total creative industries IVA). This is expected to grow to $1.5 billion over the next five years, representing 1.2% growth per annum (below the creative industries average of 4.1% growth per year). IBISWorld notes that high levels of government assistance and low levels of competition are the key drivers of these performance estimates.

Table 9.2.1 – Libraries, archives and museums summary

	Business Counts (BC)	NSW share of Aust BC (%)	Direct Employment (persons)	NSW share of Aust Emp (%)	Growth 2006 to 2011 (%)	IVA 12 ($m)
Libraries, Archives & Museums	**112**	**32.2**	**3,981**	**26.8**	**1.4**	**1,428**
Libraries & Archives	64	40.8	1,863	25.4	0.2	724
Museum Operation	48	25.1	2,118	28.2	2.6	705

Sources: ABS; IBISWorld; NSW Trade & Investment estimates

According to the ABS, Sydney households spent $21 million on art gallery and museum fees and charges, compared to $14 million by Melbourne households. Sydney consumers were responsible for 42% of Australia's capital city spending on art gallery and museum fees and charges in 2009-10.

9.3 Music, Print and Other Publishing

The music, print and other publishing (MPOP) segment is comprised of organisations engaged in music publishing, and traditional media publishing (e.g. newspapers, books, but excluding digital publishing). These firms are integral in bringing creative work to a large consumer audience. However, the rise of self-published artists and users' preference for digital media has threatened the business models upon which many MPOP organisations have traditionally relied.

There were around 18,000 people employed in the MPOP segment in 2011 in NSW, representing 42% of Australia's MPOP workforce. MPOP accounted for 11% of

9 Business counts data compiled by the ABS are based on active ABN registrations and exclude the general government institutional sector and other entities not actively trading in the market sector. As such, some larger libraries, museums and archives may be excluded if they do not have an active or unique Australian Business Number or are part of larger local or state government organisations.

NSW's total creative industries employment in 2011, with 41% being specialists, with the remainder support workers. Employment has shrunk over the past five years, at an annual average rate of 1.6%. This reflects the transference from traditional (e.g. print) media to digital, which is inherently a less labour intensive method of delivering content.

Around 95% of the MPOP segment's 1,300 businesses in NSW were small businesses in 2011. This is below the creative industries average (97.4%), indicating that a higher proportion of firms in this segment employ 20 people or more. NSW is a centre for Australia's MPOP activity, with 40% of the country's firms based in NSW.

Table 9.3.1 – Music, print and other publishing summary

	Business Counts (BC)	NSW share of Aust BC (%)	Direct Employment (persons)	NSW share of Aust Emp (%)	Growth 2006 to 2011 (%)	IVA 12 ($m)
Music, Print and Other Publishing	**1,319**	**39.8**	**17,596**	**41.8**	**-1.6**	**5,685**
Music Publishing	105	54.4	162	54.9	3.1	202
Directory and Mailing List Publishing	17	24.3	1,069	26.8	-0.8	-
Newspaper Publishing	180	39.4	8,593	36.6	-2.8	3,354
Magazine and Other Periodical Publishing	510	42.5	5,356	66.8	-0.8	1,551
Book Publishing	444	36.7	2,361	38.8	1.1	578
Other Publishing (not Software, Music, Internet)	63	34.6	55	26.6	-11.1	-

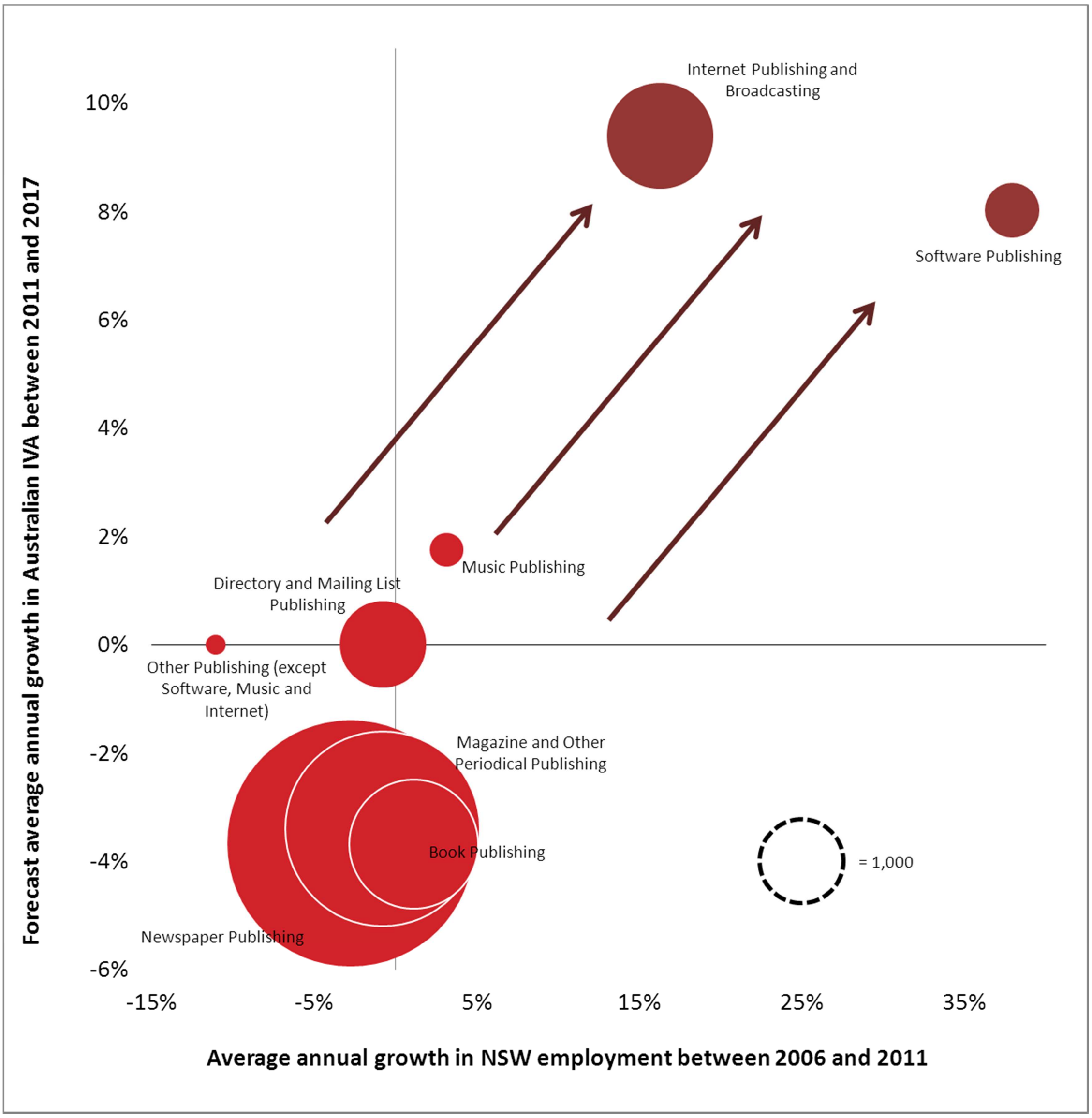
Sources: ABS; IBISWorld; NSW Trade & Investment estimates

Despite declines in total employment in the segment, MPOP has the second highest IVA of any creative industries segment, with Australian IVA valued at $5.7 billion in 2012. This represents 15.7% of all creative industries' IVA in Australia. Forecasts however indicate that the total value of this industry is set to decline by 3.4% per annum nationally over the next five years, as more content migrates to online publishing.

Global revenues are expected to rise, however, on the back of continuing demand from emerging markets for traditional, as well as new media. IBISWorld analysis indicates that increasing global competition, and the status of traditional media publishing as either mature of declining industries will be major factors affecting the performance of the MPOP segment into the medium term.

Technological change is also a factor in the MPOP segment's decline. The growth in consumers' appetite for digital media is evidenced by the increase in digital content downloads. Across Australia, the amount of total downloaded data via mobiles grew by more than eight fold from 700 terabytes to 6,600 terabytes in the two years to June 2012. Chart 6.3.2 highlights the disparity between the performance of traditional and digital media publishing.

Chart 9.3.2 – Relative size and growth of traditional media publishing and digital media publishing industries (bubble size = NSW employment level in 2011)



Sources: ABS; IBISWorld; NSW Trade & Investment estimates

It should be noted, however, that although content delivery has largely migrated to digital media, traditional media firms have had moderate success in adapting to these changes, and as such many now have a mix of traditional and digital business models.

9.4 Media Production and Broadcasting

Organisations in the media production and broadcasting (MPB) segment engage in a range of creative activities including movie and television production, post production services, and television and radio broadcasting.

Of the roughly 18,000 people employed in the NSW MPB segment, nearly 60% were specialist creative workers, which is well above the creative industries average of 46.5%. NSW also accounts for the largest share of Australian MPB employment – 50.6% (the highest NSW concentration of any creative industries segment employment).

The MPB segment in NSW has seen robust growth in employment over the last five years, averaging a 3.4% annual increase in employment from 2006 to 2011. This is despite falls in employment in radio broadcasting and the reproduction of recorded media. The latter has been especially threatened by the rise of digital media and broadcasting, as demand for CDs and other recorded media has been superseded by online digital content.

Table 9.4.1 – Media production and broadcasting summary

	Business Counts (BC)	NSW share of Aust BC (%)	Direct Employment (persons)	NSW share of Aust Emp (%)	Growth 2006 to 2011 (%)	IVA 12 ($m)
Media Production & Broadcasting	**3,328**	**47.3**	**17,491**	**50.6**	**3.4**	**4,454**
Motion Picture & Video Production	2,597	47.3	4,733	54.6	5.8	677
Post-production Services & Other Motion Picture & Video Activities	394	48.0	575	47.5	5.3	244
Cable & Other Subscription Broadcasting	50	53.2	1,951	60.3	6.5	953
Free-to-Air Television Broadcasting	63	43.4	7,298	52.0	3.2	1,919
Radio Broadcasting	121	51.1	1,839	33.6	-0.1	532
Reproduction of Recorded Media	103	39.8	1,095	56.1	-2.8	129

Sources: ABS; IBISWorld; NSW Trade & Investment estimates

There were 3,300 MPB businesses in NSW in 2011, representing 47.3% of Australia's MPB firms. Again, this is NSW's largest concentration of any creative industries segment business counts. Only 94.2% of these businesses employed less than 20 people, the lowest proportion of any creative industries segment, indicating a relative concentration of firms at the larger end of the scale in this industry.

In economic terms, the MPB industry is significant, estimated to be worth $4.5 billion to the Australian economy in 2012, representing 12.3% of total creative industries IVA. MPB is also forecast to experience strong growth through to 2017, when it is predicted to reach $5.4 billion in IVA terms. This would require a growth rate of 3.8% per year over the next five years, which would make MPB the second fastest growing segment. NSW is likely to benefit from the lion's share of this growth, given the concentration of both MPB employment and businesses in the State.

10. Sector Analysis – Creative Services

The creative services sector of the creative industries includes firms involved in bringing creative outputs to a mix of business and consumer customers, but predominantly involved in business-to-business (B2B) activities.

- Creative services accounted for 65% of NSW's creative industries employment in 2011, or 97,000 jobs.
- Creative services has been the major driver of employment growth for the creative industries, averaging 4.1% per annum growth from 2006 to 2011.
- NSW is a centre for creative services, with 38.4% of employment, and 38.7% of businesses located in this state (37,800 creative services businesses were based in NSW in 2011).
- Australian IVA for creative services was $23.9 billion in 2012 – 66% of the nation's total creative industries' IVA. Creative services are forecast to be the major driver of future creative industries growth, (5.9% per annum to 2017).
- Global creative services revenue growth is tipped to be even stronger at 6.2% per annum from 2012 to 2016, growing from $609 billion to $774 billion.[10]

10.1 Internet and Digital Services

Internet and digital services (IDS) is by far the largest creative industries segment, almost by any measure. It also has particular characteristics, aside from its sheer size, which set it apart from the other creative industries discussed in this paper.

Certain areas of the IDS segment involve intrinsically creative activities, such as Internet publishing and broadcasting, and software publishing (in the case of electronic games). However, many firms in the IDS segment do not directly produce or significantly affect creative content. Rather, businesses such as Internet service providers (ISPs), data processors and web hosting services businesses are enablers for the transmission of creative output. Although these businesses are not "creative" in the same sense as firms in other creative industries segments, their importance to the future development of the creative sector (and the economy) as a whole cannot be underestimated in an increasingly digitised and connected world.

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10 Global creative services includes revenue data for global ISPs; advertising agencies; graphic designers; architectural services. Sources: IBISWorld; NSW Trade & Investment estimates.

The global size of IDS is hard to accurately quantify given the diverse nature of the segment. According to PricewaterhouseCoopers, global ISP and interactive games industry revenue alone stood at over $500 billion in 2012.[11] Of this, Australia was estimated to have accounted for 2.3% (or 12% of the Asia-Pacific region's share) of global revenue.

Within NSW and Australia, the IDS segment is the largest of the creative industries. In this state alone it employed nearly 60,000 people, up from 47,000 in 2006. This represents 4.6% annual average growth over the five year period. Interestingly the vast majority of workers in this segment are in non-creative occupations, with only 18,000 classified as specialists (as opposed to 41,000 support workers).

The IDS segment accounted for 41.1% of all NSW creative industries firms in 2011, with 92% of those businesses classified as computer system design and related services, largely as a result of a lack of greater definition in the ABS's industry classification.[12] NSW accounted for 38.7% of IDS businesses, which is above the State's share of total businesses.

Table 10.1.1 – Internet and digital services summary

	Business Counts (BC)	NSW share of Aust BC (%)	Direct Employment (persons)	NSW share of Aust Emp (%)	Growth 2006 to 2011 (%)	IVA 12 ($m)
Internet and Digital Services	**20,198**	**38.7**	**58,700**	**38.8**	**4.6**	**18,039**
Internet Service Providers & Web Search Portals	499	37.3	2,743	35.2	3.2	2,067
Data Processing & Web Hosting Services	427	39.7	460	37.6	2.7	713
Computer System Design & Related Services	18,451	38.8	53,475	38.4	4.4	14,191
Software Publishing	164	34.0	415	59.5	37.9	567
Internet Publishing & Broadcasting	657	38.4	1,607	70.7	16.3	502

Sources: ABS; IBISWorld; NSW Trade & Investment estimates

11 Defined as revenue from ISP access and subscription fees, and excludes revenue from digital content downloads, such as music downloads (which are ascribed to the music industry).
12 The ABS industry classification system was last updated in 2006, and as such many new digital businesses are classified according to a system which represented the economy at the time it was drafted – essentially meaning they are assigned to "computer system design and related services" as a catch all classification.

At an estimated value of over $18 billion, IDS was the largest creative industries segment in terms of Australian IVA in 2012. IDS fully represented half of the entire direct economic impact of the creative sector in Australia last year, and is expected to also be the fastest growing segment over the next five years. By 2017 it is estimated IDS industry value added will be $25.2 billion, recording a growth rate of 6.9% per annum. This growth will be fuelled by increasing digitisation of the economy in general, from the proliferation of online content to the growth of e-commerce. The rise and rise of social media will also fuel economic and creative opportunities for IDS firms into the future.

10.2 Advertising

The advertising industry engages in the creation of advertising campaigns and materials, and much of this work is of a directly creative nature. The global advertising industry recorded global revenues of US$105.2 billion in 2012, of which Australia accounted for US$1.2 billion (or 1.1%). This demonstrates that the global industry has recovered from a severe revenue decline in 2009 associated with the GFC and its aftermath, and it is predicted global advertising revenue will continue to grow strongly to US$133 billion by 2016 (6% per annum growth).

Advertising is a significant employer in NSW, with 14,000 people working either as support workers (7,700) or creative specialists (6,200). NSW dominates Australia's advertising employment, with 45.8% of the workforce based in this state, having grown by 3.3% per annum over the five years to 2011.

There were over 4,600 advertising businesses in NSW in 2011, or 41% of the national total. Interestingly, only 94.8% were classified as small businesses, indicating a weighting of larger employing firms in this industry compared to the creative industries average.

Advertising's estimated net contribution to the Australian economy was $745 million in 2012, or 2.1% of total creative industries IVA. However, growth is expected to slow over the next five years, at 1.8% per annum through to 2017 due to increased industry and pricing competition according to IBISWorld.

Table 10.2.1 – Advertising summary

	Business Counts (BC)	NSW share of Aust BC (%)	Direct Employment (persons)	NSW share of Aust Emp (%)	Growth 2006 to 2011 (%)	IVA 12 ($m)
Advertising	**4,621**	**40.9**	**13,942**	**45.8%**	**3.3**	**745**

Sources: ABS; IBISWorld; NSW Trade & Investment estimates

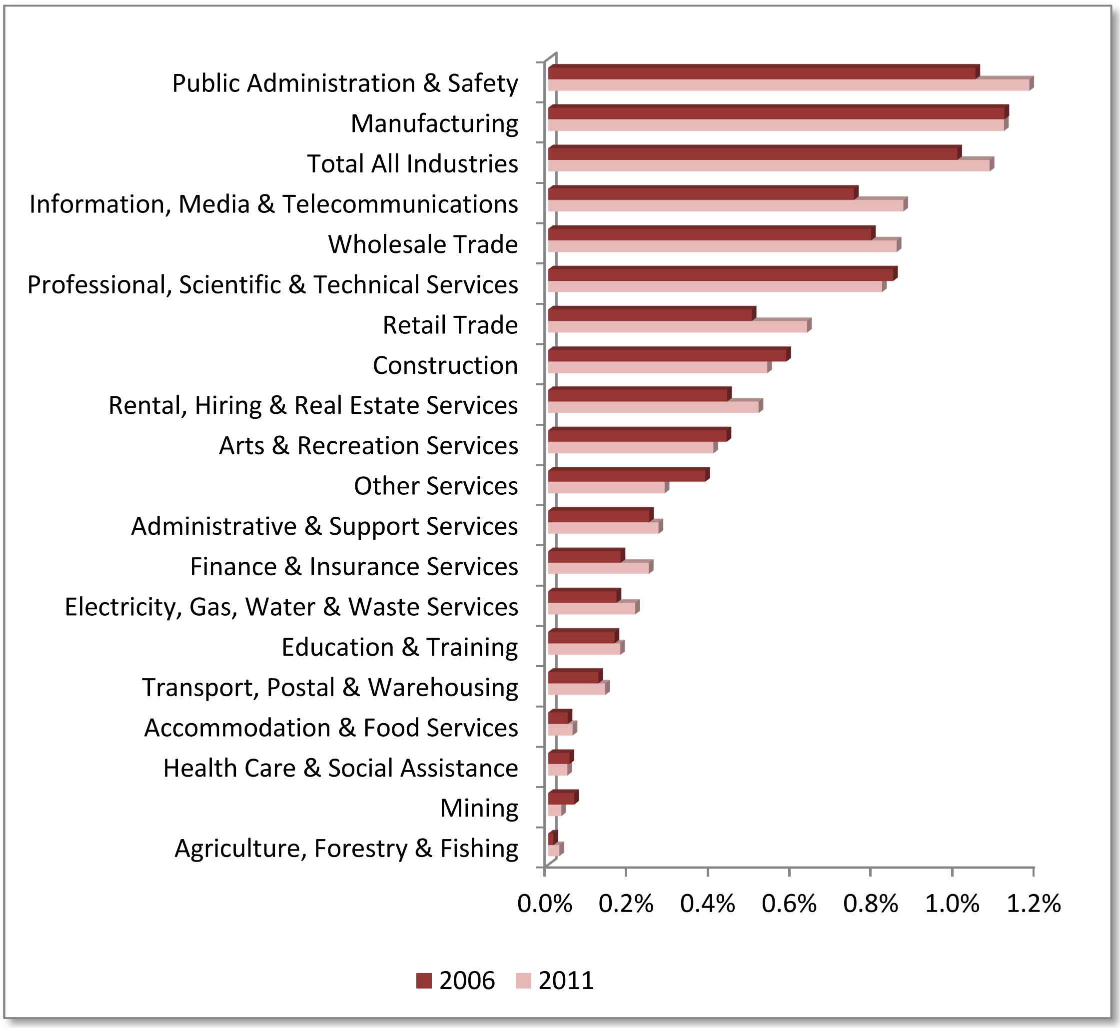
10.3 Design

The design segment is vibrant and intrinsically creative. The major activities of design firms are architectural services, and other specialised design services (such as graphic and industrial design). One of the key characteristics of the design segment is that many design workers do not work in design related industries, but rather add value to other sectors of the economy from public administration to manufacturing.

There were 24,000 people directly employed in design-related industries in 2011, making design the second largest employing creative industries segment behind IDS in NSW. Of those, 16,600 were specialist creative workers – 69.5% - the highest ratio of any creative segment. When design workers employed in non-design industries are also included, the total employed in the segment climbs to 44,000. NSW also boasted the largest design sector of any state (with 34.4% of national direct employment).

Design workers are scattered throughout the general economy, with the largest contingent as a proportion of total employment working within the public administration and safety industry. The largest concentration of design workers here is in local government, (mostly urban and regional planners).

Chart 10.3.1 – Embedded design workers, non-creative 1-digit industries*



** 1-digit industries exclude 4-digit industries classified as creative industries. Sources: ABS; NSW Trade & Investment estimates.*

Manufacturing is the next most heavily populated industry in terms of design activity (it also has the highest sheer number of embedded designers), followed by information, media and telecommunications, and wholesale trade. Interestingly, the proportion of embedded design workers has increased across the economy in NSW by 8% from 2006 to 2011, though manufacturing has seen a slight decline in designers within its ranks over the sample period, both in absolute and proportionate terms.

10.3.2 – Case Study: Breville

Breville is well-known for some truly iconic appliances, such as the Kitchen Wizz™ food processor and classic scissor-action jaffle maker. Today, Breville sells its products in more than 50 countries around the world from Breville Group Limited's product research and development and corporate headquarters in Botany, Sydney.

Design is a crucial success factor for Breville, from concept to realisation. Key to their successful expansion into international markets is ensuring every Breville product is designed with a unique point of difference in the features offered.

Through 'food thinking' (their twist on applying design strategically) the design team is focused on deeply understanding the challenges around food and beverages, and pushing the creative boundaries to solve those challenges in simpler and smarter ways. Design is underscoring a focus on truly satisfying the consumer's experience and end result.

Breville's 'food thinking' has blended end-user insights, rigorous product testing, and integration of more sophisticated and intuitive technology to deliver a leap in domestic appliance technology. For example, in 2011 Breville launched the Dual Boiler™ (BES900) espresso machine. A world-first, it compresses the benefits of a large-scale commercial machine into a home-friendly footprint with an affordable price tag for passionate coffee enthusiasts. The machine has seen incredible success in the Australian, New Zealand and North American markets.

This has been one part of a clear strategy that Breville established in 2010 linking its strengths around 'food thinking' with a pure focus on kitchen appliances. Aligning product and brand offerings, Breville tirelessly builds its brand to successfully compete with the best in the world.

And the journey continues. In May 2013, the Breville Group entered the UK small appliance market with a 16-product range in partnership with chef and global brand ambassador Heston Blumenthal.

It is important to note that the competitiveness of the Australian manufacturing sector, especially with an historically high Australian dollar, must rely on innovation and superior design as competitive advantages over cheaper priced rivals overseas. However, the fall in designers within manufacturing may not be all bad news, and could simply reflect a trend towards the outsourcing of product and industrial design by manufacturers to specialist design firms, in place of increases in manufacturers' in-house design capabilities. Conversely, it could be due to the outsourcing of actual manufacturing activity offshore of NSW, and a re-classification of businesses formerly engaged in manufacturing here, but now concerned largely with high value design activities for goods that are produced offshore. Furthermore, the actual manufacturers that remain active in NSW may be involved in less design-oriented activities, meaning they employ fewer designers. As to which of these trends is more prominent, this is not immediately clear from the data.

Table 10.3.3 – Percentage of embedded design workers by industry, NSW

Industry*	Embedded Design Workers		
	2011 (%)	**2006 (%)**	**2011 (000s)**
Public Administration & Safety	1.18	1.05	2,273
Manufacturing	1.12	1.12	2,936
Information, Media & Telecommunications	0.87	0.75	257
Wholesale Trade	0.85	0.79	1,187
Professional, Scientific & Technical Services	0.82	0.85	1,286
Retail Trade	0.63	0.50	2,061
Construction	0.54	0.58	1,236
Rental, Hiring & Real Estate Services	0.52	0.44	266
Arts & Recreation Services	0.41	0.44	130
Other Services	0.29	0.39	336
Administrative & Support Services	0.27	0.25	277
Finance & Insurance Services	0.25	0.18	391
Electricity, Gas, Water & Waste Services	0.21	0.17	73
Education & Training	0.18	0.16	440
Transport, Postal & Warehousing	0.14	0.12	217
Accommodation & Food Services	0.06	0.05	126
Health Care & Social Assistance	0.05	0.05	171
Mining	0.03	0.06	10
Agriculture, Forestry & Fishing	0.03	0.01	19
Inadequately described	1.05	1.38	423
Not stated	0.37	0.37	136
Total All Industries	**1.08**	**1.00**	**33,975**

**Excludes detailed industries defined as creative industries, as well as related industries which are "not further defined" and "not elsewhere classified". Sources: ABS Census of Population &Housing 2006, 2011; NSW Trade & Investment estimates*

There were nearly 13,000 design businesses in NSW in 2011, which represented 35.6% of the Australian total. This is above NSW's share of all businesses, indicating a design concentration in the State. The concentration of other specialized design services (including graphic design) is particularly acute.

Design was estimated to have directly contributed $5.1 billion to the Australian economy in 2012 (14% of creative industries' total IVA). Growth is predicted to be steady at 2.4% per annum, with design IVA tipped to reach $5.8 billion by 2017. It is highly likely however, given the number of embedded design workers and their oft-attributed role of improving products and processes, that the full impact of the design sector on the State and national economies is much larger.

Globally, design was estimated to have recorded revenue in excess of US$170 billion, with architectural services accounting for US$129 billion, and graphic design US$44 billion. According to best estimates, Australia punches above its weight in terms of its share of global design industry revenue; Australia accounted for 6% of design revenue, and 4.8% of architectural services revenue worldwide.[13] Global design revenue is expected to grow to US$190 billion by 2016 (equivalent to 2.5% annual growth over the next four years), and Australia's share of this increased total will rise to 6.1%.

Table 10.3.4 – Design summary

	Business Counts (BC)	NSW share of Aust BC (%)	Direct Employment (persons)	NSW share of Aust Emp (%)	Growth 2006 to 2011 (%)	IVA 12 ($m)
Design	**12,951**	**35.6**	**23,906**	**34.4**	**3.2**	**5,134**
Jewellery & Silverware Manufacturing	577	35.2	1,099	28.5	-4.1	260
Architectural Services	4,550	32.5	10,407	30.8	1.3	3,254
Other Specialised Design Services	5,569	38.1	9,008	40.1	6.2	1,240
Professional Photographic Services	2,255	36.7	3,392	36.5	5.3	380

Sources: ABS; IBISWorld; NSW Trade & Investment estimates

13 Design revenue for Australia includes architectural services and other specialised design services; global design revenue is for architectural services and graphic designers.

11. Appendices

11.1 List of creative industries by segment

Segment/Industry Name	ABS Industry Code (ANZSIC 2006)
Cultural Production	
Music, Performing and Visual Arts	
Music and Other Sound Recording Activities	5522
Performing Arts Operation	9001
Performing Arts Venue Operation	9003
Creative Artists, Musicians, Writers and Performers	9002
Libraries, Archives and Museums	
Libraries and Archives	6010
Museum Operation	8910
Music, Print and Other Publishing	
Music Publishing	5521
Directory and Mailing List Publishing	5414
Newspaper Publishing	5411
Magazine and Other Periodical Publishing	5412
Book Publishing	5413
Other Publishing (except Software, Music and Internet)	5419
Media Production and Broadcasting	
Motion Picture and Video Production	5511
Post-production Services and Other Motion Picture and Video Activities	5514
Cable and Other Subscription Broadcasting	5622
Free-to-Air Television Broadcasting	5621
Radio Broadcasting	5610
Reproduction of Recorded Media	1620

Creative Services	
Internet and Digital Services	
Internet Service Providers and Web Search Portals	5910
Data Processing and Web Hosting Services	5921
Computer System Design and Related Services	7000
Software Publishing	5420
Internet Publishing and Broadcasting	5700
Advertising	
Advertising Services	6940
Design	
Jewellery and Silverware Manufacturing	2591
Architectural Services	6921
Other Specialised Design Services	6924
Professional Photographic Services	6991

11.2 List of creative occupations

Occupation Name*	ABS Occupation Code (ANZSCO 2006)	Occupation Name*	ABS Occupation Code (ANZSCO 2006)
Actor	211111	Jewellery Designer	232313
Actors, Dancers and Other Entertainers, nec	211199	Journalists and Other Writers, nec	212499
Actors, Dancers and Other Entertainers, nfd	211100	Journalists and Other Writers, nfd	212400
Advertising and Marketing Professionals, nfd	225100	Landscape Architect	232112
Advertising Manager	131113	Librarian	224611
Advertising Specialist	225111	Library Assistant	599711
Analyst Programmer	261311	Library Technician	399312
Architect	232111	Light Technician	399513
Architects and Landscape Architects, nfd	232100	Make Up Artist	399514
Architects, Designers, Planners and Surveyors, nfd	232000	Marketing Specialist	225113
Architectural Draftsperson	312111	Media Producer (excluding Video)	212112
Archivist	224211	Media Professionals, nfd	212000
Archivists, Curators and Records Managers, nfd	224200	Multimedia Designer	232413
Art Director (Film, Television or Stage)	212311	Multimedia Specialist	261211
Artistic Director	212111	Multimedia Specialists and Web Developers, nfd	261200
Artistic Directors, and Media Producers and Presenters, nfd	212100	Music Director	211212
Arts Administrator or Manager	139911	Music Professionals, nec	211299
Arts and Media Professionals, nfd	210000	Music Professionals, nfd	211200
Arts Professionals, nfd	211000	Musical Instrument Maker or Repairer	399515
Author	212211	Musician (Instrumental)	211213
Authors, and Book and Script Editors, nfd	212200	Naval Architect	233916
Book or Script Editor	212212	Newspaper or Periodical Editor	212412
Broadcast Transmitter Operator	399511	Painter (Visual Arts)	211411
Camera Operator (Film, Television or Video)	399512	Performing Arts Technicians, nec	399599

Composer	211211	Performing Arts Technicians, nfd	399500
Conservator	234911	Photographer	211311
Copywriter	212411	Photographer's Assistant	399915
Dancer or Choreographer	211112	Potter or Ceramic Artist	211412
Developer Programmer	261312	Print Journalist	212413
Director (Film, Television, Radio or Stage)	212312	Production Assistant (Film, Television, Radio or Stage)	599912
Director of Photography	212313	Program Director (Television or Radio)	212315
Entertainer or Variety Artist	211113	Proof Reader	599913
Fashion Designer	232311	Radio Journalist	212414
Fashion, Industrial and Jewellery Designers, nfd	232300	Radio Presenter	212113
Film and Video Editor	212314	Sculptor	211413
Film, Television, Radio and Stage Directors, nec	212399	Singer	211214
Film, Television, Radio and Stage Directors, nfd	212300	Software and Applications Programmers, nfd	261300
Gallery or Museum Curator	224212	Software Engineer	261313
Gallery or Museum Technician	399311	Sound Technician	399516
Graphic and Web Designers, and Illustrators, nfd	232400	Stage Manager	212316
Graphic Designer	232411	Systems Analyst	261112
Graphic Pre-press Trades Worker	392211	Technical Director	212317
ICT Account Manager	225211	Technical Writer	212415
ICT Business Analyst	261111	Television Equipment Operator	399517
ICT Business and Systems Analysts, nfd	261100	Television Journalist	212416
ICT Business Development Manager	225212	Television Presenter	212114
ICT Quality Assurance Engineer	263211	Urban and Regional Planner	232611
ICT Support and Test Engineers, nec	263299	Video Producer	212318
ICT Support and Test Engineers, nfd	263200	Visual Arts and Crafts Professionals, nec	211499
ICT Systems Test Engineer	263213	Visual Arts and Crafts Professionals, nfd	211400
Illustrator	232412	Web Administrator	313113
Industrial Designer	232312	Web Designer	232414
Interior Designer	232511	Web Developer	261212
Jeweller	399411		

*nfd = “not further defined”; nec = “not elsewhere classified”

11.3 List of design industries and occupations

Design Industries	ABS Code
Jewellery and Silverware Manufacturing	2591
Architectural Services	6921
Other Specialised Design Services	6924
Professional Photographic Services	6991

Design Occupations	ABS Code
Photographer	211311
Architects, Designers, Planners and Surveyors, nfd	232000
Architects and Landscape Architects, nfd	232100
Architect	232111
Landscape Architect	232112
Fashion, Industrial and Jewellery Designers, nfd	232300
Fashion Designer	232311
Industrial Designer	232312
Jewellery Designer	232313
Graphic and Web Designers, and Illustrators, nfd	232400
Graphic Designer	232411
Illustrator	232412
Multimedia Designer	232413
Web Designer	232414
Interior Designer	232511
Urban and Regional Planner	232611
Naval Architect	233916
Jeweller	399411
Photographer's Assistant	399915

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