Measuring the Economic Contribution of Arts and Culture to the Tasmanian Economy

A NEW METHODOLOGY

INKHORN PROJECTS

MAY 2026

This document has been developed for Creative Tasmania

**by Tony Bonney and Duncan Buckeridge,
with additional support from Nicholas Andrews.**

Inkhorn Projects acknowledges that it meets, works and travels on the lands of First Nations peoples. We pay our respects to Elders past and present and emerging, and to all First Nations peoples.

DISCLAIMER

INKHORN PROJECTS CONNECTING, CONSULTING + CO-CREATING

2 Ridgeway Road, Ridgeway Tasmania 7054 Australia

M: **[+610] 434 369 666** | T: **[+61] 03 6294 6474** | W: **www.inkhorn.com.au** | abn 30055029793

Contents

1. Executive Summary

While the primary purpose of this report is to create a new methodology for measuring the economic contribution of the broader arts and cultural sector to the Tasmanian economy, the process of developing that methodology has raised a range of questions requiring deeper consideration of how the sector is defined and valued.

Some of these questions are definitional: what constitutes the creative industries sector, how it is classified industrially, and whether it operates in ways distinct from other sectors. Others are specific to Tasmania's scale and cultural ecosystem, particularly the relationship between cultural presentation and cultural tourism. Underlying both is the ongoing challenge of sustaining the creative sector pipeline: the linkages between education, training, creative and technical capacity, and audiences. The economic value of the sector is therefore only one dimension of its importance to government and community, alongside well-documented contributions to health, social inclusion, liveability and community identity.

A finding of recent scholarship is that three decades of justifying arts and cultural investment in primarily economic terms has not resulted in commensurate policy recognition and provision of resources to the sector (arguably the reverse) and has in some respects narrowed the language available to articulate its broader value. This report sits within that discussion.

Where a requirement exists to express the sector's value in economic terms, the methodology presented here provides the most defensible approach to that task, grounded in the particular nature of Tasmania's arts and cultural sector.

The difference between the existing and new methodology is straightforward:

- The current Bureau of Communications, Arts and Regional Research (BCARR) approach applies a single 0.372 attribution factor to the Arts and Recreation Services sector under ABS 5220.0 Table 7 and excludes cultural tourism and cultural education entirely.
- **The new methodology** extends the measurement scope to include cultural tourism (Component 2) and cultural education (Component 3), consistent with the 2025 UNESCO Framework for Cultural Statistics and the direction of the national Revive cultural strategy (2023–2028).

The new methodology takes a macroeconomic approach, moving away from reliance on event multipliers and generic interpretation of standardised federal data. It comprises three components:

- **Component 1 – Arts and Recreation sector:** Is unchanged from the existing approach. This has been maintained for national comparability.
  - *Direct Gross State Product (GSP) contribution: $176.3 million (2024–25).*
- **Component 2 – Cultural Tourism:** The methodology applies a 40% cultural tourism attribution to the holiday-visitor proportion of interstate and international tourism spend (71.1%), yielding an overall attribution of 28.4% of total tourism spend, applied to State Tourism Satellite Account (STSA) data with double-counting adjustments.
  - *Direct GSP contribution: $434.7 million (2024–25 est.).*
  - *Sensitivity range: $326m–$543m at 30%–50% attribution.*
- **Component 3 – Cultural Education:** The methodology applies the relative share of arts and cultural education salaries within total Education and Training compensation to that sector's GSP contribution.
  - *Direct GSP contribution: $7.9 million minimum (2024–25).*

From this approach we can present these headline figures

- **Direct economic contribution to Tasmanian GSP (2024–25 est.):** $618.8 million.
- **Indirect economic contribution (2024–25 est.):** $435.7 million – flow-on effects of cultural tourism to supplier sectors.
- **Combined direct and indirect contribution (2024–25 est.):** $1,054.5 million.

The increase from $176.3 million to $618.8 million is a measurement change, not an economic change. The Tasmanian arts and cultural economy has not grown by $442.5 million. The new figure reflects a deliberate broadening of what is counted, consistent with the 2025 UNESCO framework.

Cultural tourism ($434.7m) accounts for the entirety of the increase, which reflects the distinctive relationship between the cultural and tourism sectors in Tasmania. Tasmania's tourism-to-GSP ratio (5.4% direct contribution in 2023–24) is substantially higher than the national average, making a cultural tourism attribution proportionally more significant here than in any other Australian jurisdiction.

In addition to the revised economic contribution figures, the report provides an analysis of creative sector workforce size and composition through applying the "creative Trident Approach" over extant and amortised data. The Creative Trident is an employment measurement framework that recognises 3 components of the Creative workforce (Specialist Creatives, Embedded Creatives and Support Workers). It is the most widely accepted methodology for measuring creative economy employment in Australia and directly underpins the ABS Cultural and Creative Activity Satellite Accounts used by BCARR.

Through this analysis the following is noted:

- Tasmania's creative sector employs an estimated 13,500–14,200 workers on a Creative Trident basis (2021–2022/23), rising to over 15,000 on the high estimate.
- Only 4,100–4,300 of these workers are captured by TCI-type industry classification, less than one-third of the probable total. The remaining two-thirds comprise support workers in creative industries and embedded creatives employed across tourism, education, government and health.
- The sector's high proportion of sole traders (79.2% of 6,683 ABN-registered creative businesses in 2016) compounds this undercounting: sole traders with mixed-portfolio income are systematically undercounted in industry-based employment figures.

The report also proposes a Real-Time Sector Health Index as a supplementary annual measure to address the ten-month data lag inherent in the GSP-based calculation. The index involves an annual survey of a basket of 25 major Tasmanian arts and cultural entities, capturing current financial performance and twelve-month forward sentiment across artform, geography and organisational type.

The entity basket is to be agreed with Creative Tasmania prior to first administration, with attention to representation of First Nations cultural practice, live music, performance, screen and digital sectors. The basket is to be reviewed every three years.

Finally, the following actions are required to complete and maintain the methodology:

- Establish data-sharing protocols with TasTAFE and the Department of Children, Education and Young People (DECYP) to enable quantification of the vocational and secondary education contribution in future methodology iterations.
- Commission an ABS Census query to enable direct calculation of a Tasmania-specific Division R attribution factor, replacing the 0.372 national proxy.
- Administer a student retention survey with the University of Tasmania (UTAS) to quantify the proportion of creative arts students retained in Tasmania by local study availability and their contribution to state GSP.
- Five-year review of the cultural tourism attribution: the 40% holiday tourism attribution and 28.4% overall attribution are to be reviewed in 2030, incorporating updated OECD, UNWTO and Tasmanian Visitor Survey data.

The methodology demonstrates that the arts and cultural sector contributes over $1 billion to the Tasmanian economy and employs an estimated 13,500–14,200 people on a full 'Creative Trident' basis. These figures establish the sector as a significant component of the state's economy and a particularly significant one given Tasmania's distinctive relationship between cultural life and the visitor economy.

The economic case, however, is one register among several. The sector's contribution to health outcomes, social inclusion, liveability and community identity sits alongside its economic significance, and policy frameworks that address only economic value will continue to risk undervaluing what the sector actually provides.

A plain English introduction to this methodology and its finding is included in Section 8.5.

2. Introduction and Context

2.1 Purpose of this report

This report presents a new methodology for measuring and reporting the direct and indirect economic contribution of arts and culture to the Tasmanian economy. It has been prepared by Inkhorn Projects for Creative Tasmania, part of the Department of State Growth, in response to a research initiative announced in January 2025.

The report is designed to replace the current methodology used to report on the contribution of the arts to Tasmania's Gross State Product (GSP) in the Tasmanian Budget Papers, while extending that methodology to provide a more comprehensive and internationally aligned picture of the sector's economic significance.

2.2 Government investment in arts and culture

The Tasmanian Government is a significant investor in the state's arts and cultural ecology. In 2024–25, the Tasmanian Government allocated $33,644,000 through Output Group 5: Cultural and Tourism Development (which includes the Tasmanian Museum and Art Gallery, Arts Industry Development and Screen Industry Development). Additional investment flows through the Events portfolio ($11,020,299 administered through Events Tasmania for arts and cultural activities in 2023–24) and through the Treasurer's Instruction PF4, Section 23 for the Tasmanian Government Art Site Scheme ($908,000 in 2023–24). High level analysis of the impact of this investment is included in Appendix C.

There is also a significant non-government-funded sector comprising pro-am and amateur theatre, arts activities and organisations funded by local governments and the Australian Government, privately-owned and commercial galleries, community museums and collections, and in-community arts and music education providers.

UTAS's School of Creative Arts and Media provides tertiary education and delivers research across the Fine Arts, Design, Media and Communications, Music and Theatre disciplines. DECYP provides and administers arts education through formal school settings.

2.3 Scope of the initiative

This research initiative and the framework it delivers respond to the four scope requirements set out in the Terms of Reference:

- Replace the current methodology used to report on the contribution of the arts to Tasmania's GSP (reported annually in the Tasmanian Budget Papers).
- Provide a figure for the direct economic contribution of the arts and cultural sectors to Tasmanian GSP.
- Provide a figure for the indirect economic contribution of the arts and cultural sectors to Tasmanian GSP.

This report addresses each of these requirements. Sections 6 and 7 present the updated methodology for direct and indirect economic contribution measurement respectively. Section 8 summarises the resulting figures. Section 9 introduces a supplementary sector health index to address the limitations of retrospective economic data.

3. Economic Instrumentalism in Cultural Policy

Economic Instrumentalism refers to the practice of justifying arts and culture funding primarily, or even exclusively, on the basis of economic benefits rather than intrinsic cultural or social value.

Instead of funding the arts because they matter in and of themselves (for meaning, identity, expression, wellbeing), governments and funders justify that spending by pointing to what the arts produce economically: jobs, tourism dollars, GDP contributions, industry growth. The arts become a means to an economic end, rather than an end in themselves.

In 1994, Australia's first cultural policy, Creative Nation, noted that cultural policy "is also an economic policy". The turn towards an economic justification for arts and cultural investment has proved a double-edged bargain and has been seen to create policy incoherence in justifying cultural and creative imperatives through an increasingly economic rationale.

Undertaken by the state's creative sector peak body in 2017, Tasmania's own sector analysis similarly noted that two decades of justifying culture in economic terms had also had limited leverage on state support: governments cut cultural funding anyway, and the exercise hollowed out the language of cultural value itself (TCI, 2017).

This critique is, however, not a case for inaction. A New Approach's (ANA) Insight Report Government, Culture and Creativity: It's about more than just funding (2025) reflects a more pragmatic evolution of the same problem. The report states that in a constrained budget environment, the question is not only how to justify public investment but how governments can deploy a broader toolkit of non-funding enablers be it regulatory, legislative, educational and infrastructural to sustain cultural ecosystems. This framing is itself a response to the limits of the funding debate, acknowledging that culture's relationship with government has always been about more than dollar transfers.

The damage of economic instrumentalism arises not when economic considerations are brought to bear, but when narrow proxies such as GDP contribution, aggregate employment, visitor expenditure become the sole justification for public investment. Key consequences include:

- **Hollowed-out sector capacity:** Arts education, vocational training and early career development, what ANA identifies as a core government enabler category ("measures to develop skills, career pathways and knowledge sharing"), are systematically undervalued because their returns are diffuse and long-term. When schools lose arts programmes and early career practitioners cannot sustain practice, the sector loses the generational renewal on which its future depends.
- **Precarious workforce:** Cultural workers, already among the lowest paid in the economy, face compounding disadvantage when funding is tied to

output metrics that obscure wage stagnation and income insecurity. ANA's acknowledgement that workforce challenges are structural, not incidental, underscores this.

- **Self-undermining cultural tourism:** When visitor expenditure becomes the primary measure of cultural value, programming is calibrated to tourist expectations rather than genuine local creative expression. As the Creative Island report warns, drawing on the experiences of Venice and Barcelona, over-reliance on tourism can destroy the very qualities of place it came to see (TCI, 2017). Authentic cultural tourism is a downstream consequence of a healthy cultural ecosystem – not a substitute for investing in one.
- **Loss of distinctive place identity:** The creative distinctiveness that drives high-quality cultural tourism cannot be manufactured on demand. It depends on the grassroots ecosystem of artists, community practitioners and cultural organisations whose everyday activity constitutes the lived culture visitors actually seek.

Sustainable cultural policy requires investment in what economic frameworks tend to devalue most: diverse local practice, equitable pay, meaningful education pathways, and the long-term accumulation of genuine creative identity in place. ANA's broader point, that government's role encompasses regulation, procurement, taxation, infrastructure and advocacy, not only grants, is a useful corrective to a policy debate that has too often reduced the question of cultural investment to a single funding number.

4. Current Methodology and its Limitations

4.1 The BCARR approach

The current Bureau of Communications, Arts and Regional Research (BCARR) approach to measurement of the economic impact of the arts and cultural sectors to the Tasmanian economy utilises the methodology developed by the Cultural and Creative Statistics Working Group, a working subcommittee of the Cultural Ministers Meeting. It applies an attribution factor to the Arts and Recreation Services industry sector within Table 7 of the ABS publication 5220.0 Australian National Accounts: State Accounts, released on or around 21 November each year.

Key features of the current approach include:

- The approved attribution factor for hours worked in arts divided by hours worked in recreation is 0.372. This factor was last updated in 2015-16.
- The latest ABS 5220.0 Table 7 data (released 21 November 2025) provides estimates for the 2024–25 financial year. The Arts and Recreation sector had total factor income of $448 million, which multiplied by 0.372 gives a value of $166.7 million for the direct Total Factor Income (TFI) of the arts.
- Total Factor Income is closely related to contribution to Gross State Product. In 2024–25, Tasmanian GSP was 1.058 x total all-sectors TFI. Applying this conversion gives a contribution to GSP figure of $176.3 million for the arts in 2024–25.
- Actual figures are subject to change due to ongoing revision of data supplied by the Australian Bureau of Statistics, including historical figures for previous financial years.

4.2 Key benefits of the current approach

The key benefits of the current BCARR approach are that:

- It is simple and requires no additional data collection or analysis beyond reading ABS data.
- It allows for direct comparison of the arts sector contribution across Australian jurisdictions.
- It is valid from a macroeconomic perspective as it avoids double-counting of any sectoral contributions to GSP.

4.3 Limitations of the current approach

The key limitations of the current BCARR approach are that:

- It takes a very narrow view of what the arts and cultural sectors are, excluding significant economic activity associated with arts and culture.
- It is out of step with the new broader UNESCO approach to valuing arts and cultural heritage (described in Section 5).
- It excludes cultural tourism, which is a particular issue in Tasmania where tourism makes up a substantial share of GSP. The State Tourism Satellite Accounts show that for 2023–24, tourism directly contributed 5.4% of Tasmanian GSP, compared with 2.9% in NSW.
- It contains data time-lags and therefore does not provide real-time insights into current activity levels or the direction of those activity levels.

The goal of this project is to update the approach to measurement of the economic impacts of the arts and cultural sector in Tasmania to keep the benefits of the existing approach while addressing its limitations. Importantly, the new methodology maintains compatibility with national reporting frameworks and avoids double-counting.

4.4 Current usage within Tasmania

The value that is generated by the BCARR approach is used solely in State Budgetary papers and reports to provide an estimation of the value of the Arts and cultural sector to the overall state economy (GSP). This allows a coarse comparison with other sector "values".

Tasmania, is the only state that reports the net economic contribution in this specific manner.

4.5 Why simple economic multiplier analysis is not recommended

When assessing the economic impact of the arts and cultural sectors, analysis has often involved simple unconstrained economic multiplier modelling for particular arts and cultural events, with multipliers across a range of events tallied to an overall economic contribution figure.

While simple multiplier analysis has utility when comparing the localised impact of different events, it is inappropriate for measuring the economy-wide contribution of a sector to GSP. A Computable General Equilibrium (CGE) model would be required to more realistically measure the indirect impact of the sector. However, CGE modelling would be costly and unlikely to show a multiplier effect materially different from 1.0 for the non-cultural tourism components of the arts and cultural sector. A materially higher multiplier would require the sector to be a substantially higher-productivity sector than the norm for other Tasmanian industries.

For cultural tourism, CGE analysis would be more justified because interstate and international visitor expenditure injects genuinely new money into the state economy. The State Tourism Satellite Account analysis provides a more rigorous, input-output based estimate of this indirect impact.

Table 1: Analysis Comparison.

FEATURE	MULTIPLIER ANALYSIS	CGE MODELS
Resource constraints	Ignored	Included
Price adjustments	None	Full price system
Behavioural responses	Fixed	Elasticities allow substitution
Macro consistency	Can be violated	Fully enforced
Best for	Small, local shocks	Large, complex, economy-wide impacts
Typical accuracy	Over-estimates impacts	More realistic

Source: Inkhorn Projects analysis, drawing on standard economic methodology.

5. The 2025 UNESCO Framework for Cultural Statistics

In September 2025, UNESCO launched an updated Framework for Cultural Statistics (FCS). This new FCS redefines how culture is conceptualised for statistical purposes, using a 'cultural and creative ecosystem' model.

Key elements of the 2025 FCS include:

- An updated value-generation model that captures the economic value arts and cultural assets generate through mechanisms such as cultural tourism, reflecting more diverse and contemporary cultural practices, not just heritage sites or traditional arts.
- Standardised definitions and indicators across different cultural 'domains', including heritage, creative industries, and participation.
- A design orientation toward data that is harmonised, globally comparable, and able to inform evidence-based policy.
- An explicit goal of making cultural value more visible in decision-making, particularly for policymakers who allocate resources.

As highlighted in the ANA report, The arts, culture and creativity system in Australia: How it works, the UNESCO framework contributes two key elements: a broadened sector definition, and the inclusion of Cultural Tourism and Cultural Education as core components of the arts and cultural sectors.

5.1 Alignment with Australia's Revive cultural strategy

Australia's national cultural policy Revive (2023–2028) identifies improvements to cultural and creative data collection as a priority action, with the BCARR methodology refresh (December 2024) representing a key deliverable under that strategy. The 0.372 attribution factor applied in the current Tasmanian methodology was last updated in 2015-16 and is cited under the Revive strategy as a specific area requiring review by Creative Australia.

The UNESCO 2025 FCS update, with its explicit inclusion of cultural tourism and cultural education as core measurement domains, provides additional international impetus for revision of the national methodology. The Inkhorn approach for Tasmania anticipates the likely direction of that revision by extending the measurement scope beyond the existing Arts and Recreation Services category. Should the national 0.372 factor be revised as part of Revive strategy work, Component 1 of this methodology can be updated immediately without affecting the cultural tourism or cultural education components.

6. Direct Economic Contribution

The recommended approach to measuring the direct economic impacts of arts and cultural activity in Tasmania has three components:

- **Component 1: The Arts and Recreation sector**
  (existing BCARR approach, maintained for comparability).
- **Component 2: Cultural Tourism**
  (new addition, drawing on ABS Tourism Satellite Accounts).
- **Component 3: Cultural Education**
  (new addition, drawing on employer salary data and ABS State Accounts).

6.1 Component 1 – Arts and Recreation sector

The first component follows the methodological approach set out in the Bureau of Communications, Arts and Regional Research report Cultural and Creative Activity in Australia, 2008-09 to 2022–23 (Methodology Refresh), Statistical Working Paper, December 2024. This approach utilises ABS publication 5220.0 Table 7 and applies the 0.372 attribution factor to the Arts and Recreation Services sector.

For 2024–25, this calculation yields:

Table 2: Arts and Culture Calculation Yields.

ITEM	VALUE
Arts and Recreation sector total factor income (ABS 5220.0, Table 7, 2024–25)	$448M
Attribution factor (hours worked in arts / hours worked in recreation)	0.372
Direct Total Factor Income of Arts sector	$166.7M
GSP conversion factor (1.058 x TFI)	1.058
Arts sector direct contribution to Tasmanian GSP, 2024–25	$176.3M

Note: The 0.372 attribution factor was last updated in 2015-16 and may be reviewed as part of the Revive cultural strategy work. If and when an updated factor is published, it should be applied to subsequent annual calculations.

6.2 Component 2 – Cultural Tourism

6.2.1 Rationale for inclusion

The exclusion of cultural tourism from existing arts and culture economic impact measurement is a particular limitation in Tasmania, where tourism makes up a substantially higher share of GSP than in larger jurisdictions. State Tourism Satellite Accounts data shows that for 2023–24, tourism directly contributed 5.4% of Tasmanian GSP, compared to 2.9% in NSW. The UNESCO 2025 FCS explicitly identifies cultural tourism as a core element of the cultural and creative ecosystem.

6.2.2 Determining the cultural tourism attribution percentage

To determine what share of Tasmanian tourism industry activity should be classified as cultural tourism, an analysis of the international literature was undertaken, and available Tasmanian visitor data was reviewed.

International evidence indicates:

- The OECD (2022 report Maximising Synergies Between Tourism and Cultural and Creative Sectors) found that cultural tourism accounts for 40% of total tourism in developed countries.
- The UN World Tourism Organisation (2018 report Tourism and Culture Synergies) found between 16% (narrow definition) and 47% (broad definition) of tourism is cultural tourism across a range of studies, with a KPMG cross-country study of major European countries finding between 28% and 39%.
- The overall international consensus is that around 40% of holiday visitors are motivated by cultural tourism reasons.

The Tasmanian Visitor Survey Data provides corroborating evidence. Analysis of the most common activities undertaken by visitors shows that 5 of the top 10 activities are arts and cultural activities (ranked 2nd, 3rd, 7th, 8th and 9th), supporting the use of a 40% cultural tourism attribution for holiday visitors.

The Tasmania Visitor Survey Data for Year Ending June 2025 (accessed through TVSanalyser.com.au) shows that 71.1% of total interstate and international visitor spend was from visitors whose purpose of visit was 'holiday'.

Applying the 40% cultural tourism attribution to the 71.1% holiday proportion gives:

0.40 x 71.1% = 28.4% of total interstate and international tourism spend attributable to cultural tourism.

Sensitivity Analysis – Impact of varying the 40% attribution

Because the 40% attribution is a judgement call based on multiple data sources, the table below shows the effect on the cultural tourism GSP contribution, and the total direct contribution to GSP, if the attribution percentage were set at 30% or 50% instead of the base case of 40%.

Table 3: Sensitivity Analysis – Cultural Tourism Attribution.

ITEM	30% ATTRIBUTION	40% (BASE CASE)	50% ATTRIBUTION
Holiday tourism attribution to cultural tourism	30%	40%	50%
Overall % of total interstate/intl tourism attributed to cultural tourism	21.3%	28.4%	35.6%
Cultural tourism direct contribution to GSP (2023–24)	$315M	$420M	$525M
Cultural tourism direct contribution to GSP (2024–25 est.)	$326M	$435M	$543M
Cultural tourism indirect contribution to GSP (2024–25 est.)	$327M	$436M	$544M
TOTAL DIRECT contribution to GSP (2024–25 est., incl. all 3 components)	$510M	$619M	$727M

Note: The sensitivity range ($510m to $727m direct contribution) indicates that even at the conservative 30% attribution the new methodology substantially exceeds the current $176.3m BCARR figure. The base case of 40% sits in the middle of the international evidence range of 28%–47% and is well-supported by Tasmanian Visitor Survey activity data. This attribution percentage is to be reviewed every five years; next review is due in 2030.

6.2.3 Calculating the Direct Contribution of Cultural Tourism to GSP

The ABS 5249.0 Tourism Satellite Account is released in December each year. These accounts are analysed by Tourism Research Australia to produce State Tourism Satellite Account (STSA) analysis, released in April each year. The STSA calculates the direct and indirect economic contribution of tourism to Gross State Product.

The calculation of the direct contribution of cultural tourism proceeds as follows:

Table 4: Direct Contribution of Cultural Tourism.

LABEL	ELEMENT	2023–24 ($M)	DATA SOURCE
A	Total direct contribution of Tourism to GSP	$2,268M	STSA Table 1, Cell G31
B	Minus: contribution already captured in Arts sector data (to avoid double-counting)	$81M	STSA Table 5, Cell L16
C	Minus: intrastate and same-day tourism contribution to GSP not in Arts data	$701M	STSA Table 2, Cells G13, G22, G49
D	= Interstate and International Tourism GSP contribution not in Arts data (A-B-C)	$1,476M	Calculated
E	Minus: non-holiday interstate/international tourism contribution	$420M	TVS data, Total vs Holiday spend
F	Minus: holiday tourism GSP NOT attributable to cultural tourism (D-E) x 0.60	$630M	40% cultural tourism attribution
G	= Direct cultural tourism contribution to GSP (D-E-F)	$420M	Calculated as 19.2% (label G ÷ label A)

Note: For 2024–25: interstate and international visitor spend grew by 3.5% in 2024–25 (TVS data). Applying this growth factor to the 2023–24 direct cultural tourism figure of $420m gives an estimated 2024–25 direct cultural tourism contribution to GSP of $434.7m. The 2024–25 STSA analysis will be released in April 2026, at which point this estimate should be replaced with the calculated figure.

6.3 Component 3 – Cultural Education

The direct economic impacts of the cultural education sector are assessed by determining the total salaries of staff employed in the delivery of arts and culture education in Tasmania as a proportion of total salaries for all those employed in Education and Training. This proportion is then applied to the Education and Training sector's contribution to GSP.

6.3.1 Methodology

Data is sought from the major providers of arts and cultural education services in Tasmania (UTAS, TasTAFE, DECYP). The relative share of arts and cultural education compensation to total Education and Training compensation is calculated and applied to the Education and Training sector's contribution to GSP.

The ABS 5220.0 Australian National Accounts: State Accounts shows total compensation to employees in Education and Training in Tasmania in 2024–25 was $2,611 million. The Education and Training sector's contribution to GSP (TFI contribution of $2,727m x 1.058) was $2,885 million.

6.3.2 UTAS data

UTAS has supplied salary and employment data for the following FOE codes: Other Creative Arts; Performing Arts; Visual Arts and Crafts; and Written Communication, Language and Literature. As at September 2025:

- 65.7 FTE employed in these areas
- Total salaries: $7.1 million per annum
- Relative share of UTAS arts and cultural education compensation to total Education and Training compensation: 0.272%
- Direct contribution to GSP (0.272% x $2,885m): $7.85 million per annum (minimum – UTAS only)

6.3.3 TasTAFE and DECYP data

The CUA Creative Arts and Culture Training Package (Release 7.0, May 2025) provides the national framework for vocational education and training in the arts and cultural sector, encompassing 43 qualifications from Certificate I to Advanced Diploma level across visual arts, design, music, screen and media, dance, live production, photography, professional writing and editing, arts and cultural administration, community arts, ceramics, arts and health, and Aboriginal and/or Torres Strait Islander Cultural Arts.

TasTAFE delivers a subset of this package, providing pathways from Certificate III to Diploma level across visual arts, graphic design, music and sound production, and screen and media. This represents meaningful but partial coverage. Significant gaps exist in dance, live production, photography, professional writing and editing, arts and cultural administration, community arts, and the full Aboriginal and/or Torres

Strait Islander Cultural Arts pathway – all actively delivered by TAFE providers in other jurisdictions. Qualifications in interior decoration and applied fashion, while available through TasTAFE, are delivered under separate industry training packages (MSF and MST respectively) and fall outside the CUA framework. No identifiable third-party Registered Training Organisations were found to be filling these gaps within Tasmania.

At the time of completing this report, TasTAFE and the Department for Education, Children and Young People (DECYP) were unable to provide the participant enrolment, completion, and employment outcome data necessary to support a quantified estimate. On the basis of available qualitative evidence, any economic contribution attributable to this stream is considered materially smaller than that generated by the University of Tasmania and unlikely to exceed one percent of total measured arts and cultural sector value-add.

It is recommended that a data-sharing protocol with TasTAFE and DECYP be established as a priority in future iterations of the methodology, to allow this stream to be properly quantified.

7. Indirect Economic Contribution

7.1 Overview

The broadening of the sector definition to include cultural tourism and cultural education moves substantial economic impacts that were previously viewed as indirect benefits into the category of direct economic benefits. Given this and the macroeconomic validity issues associated with unconstrained multiplier analysis (discussed in Section 4.5), the remaining quantifiable indirect impacts are primarily limited to the indirect economic impacts of cultural tourism.

7.2 Indirect contribution of cultural tourism

The State Tourism Satellite Account (STSA) analysis produced by Tourism Research Australia calculates both the direct and indirect (flow-on expenditure effects to other sectors) economic contribution of tourism to GSP. This indirect contribution captures the economic activity generated in sectors that supply goods and services to tourism businesses.

Applying the implied cultural tourism share of direct tourism GSP (19.2%, derived as label G ÷ label A, Table 4, page 18) to the indirect tourism GSP contribution:

Table 5: Indirect Contribution of Cultural Tourism.

ITEM	VALUE
Total indirect contribution of Tourism to Tasmanian GSP (2023–24, STSA Table 9)	$2,277M
Less: Arts sector already captured (1.99% of tourism value added)	$45M
Adjusted indirect tourism contribution	$2,232M
Cultural tourism attribution (19.2%)	19.2%
Indirect cultural tourism contribution to GSP (2023–24)	$421M
Estimated 2024–25 figure (x 1.035 growth factor)	$435.7M

Note: The 2024–25 STSA analysis will be released in April 2026, at which point the estimated 2024–25 indirect cultural tourism contribution should be replaced with the calculated figure.

7.3 Student retention indirect benefit – Future measurement

One additional substantive indirect benefit has been identified that is amenable to practical, low-cost measurement: the impact of post-secondary arts and cultural education availability in Tasmania on the retention of students in the state.

UTAS reports that there are currently 934.25 Equivalent Full Time Students studying in-state in the relevant Field of Education (FOE) codes (Other Creative Arts; Performing Arts; Visual Arts and Crafts; and Written Communication, Language and Literature). In the absence of these study areas being available at UTAS, it is reasonable to assume that some proportion of these students would have relocated interstate.

By way of illustrative example: if 20% of the 934 students are deemed to have been retained in Tasmania due to the availability of study areas, and each retained student contributed $25,000 per annum to Tasmanian consumption expenditure, the retained students would contribute approximately $4.7 million per annum to state consumption expenditure, equivalent to approximately $4.8 million contribution to GSP annually.

A survey of these students has been developed to explore the likelihood of them choosing to move interstate if these study areas were unavailable at UTAS. UTAS has agreed in principle to administer this survey. Once the survey has been administered, the number of students retained in-state will be able to be better estimated and their contribution to Tasmania's economy assessed.

8. Summary of Economic Contribution

8.1 Direct contribution

Table 6: Summary of Direct Contribution.

COMPONENT	2023–24	2024–25 (est.)
Component 1: Arts and Recreation sector (BCARR 0.372 x ABS Table 7)	N/A (see note)	$176.3M
Component 2: Cultural Tourism (direct)	$420.0M	$434.7M (est.)
Component 3: Cultural Education (UTAS only – minimum estimate)	N/A	$7.9M
Total Direct Contribution (minimum estimate)	–	$618.8M

Note: The 2023–24 Arts and Recreation sector figure (Component 1) is not shown separately as the 2023–24 ABS State Accounts release has been superseded by the 2024–25 release. The cultural education figure ($7.9m) is a minimum estimate based on UTAS data only; the figure will increase once TasTAFE and DECYP data is incorporated. The 2024–25 cultural tourism figure is an estimate pending the April 2026 STSA release.

8.2 Indirect contribution

Table 7 : Summary of Indirect Contribution.

COMPONENT	2023–24	2024–25 (est.)
Cultural Tourism (indirect flow-on effects)	$421M	$435.7m (est.)
Student retention (arts/cultural education) – to be quantified	–	–
Total Indirect Contribution (current estimate)	$421M	$435.7M

8.3 Old vs new methodology comparison

The table below presents a direct comparison between what the current BCARR methodology measures and what the new methodology measures. The increase from $176.3 million to $618.8 million does not reflect growth in the Tasmanian arts and cultural economy, it reflects a deliberate expansion of what is counted, consistent with the 2025 UNESCO Framework for Cultural Statistics and the direction of the national Revive strategy.

Table 8: Comparison of Existing and New Methodology.

COMPONENT	CURRENT BCARR	NEW METHODOLOGY	CHANGE
Arts and Recreation sector (ABS 5220 × 0.372 factor)	$176.3M	$176.3M	No change
Cultural tourism – direct GSP contribution	Not measured	$434.7M (est.)	+$434.7M
Cultural education – direct GSP contribution	Not measured	$7.9M (minimum)	+$7.9M
TOTAL DIRECT CONTRIBUTION	$176.3M	$618.8M (est.)	+$442.5M
Cultural tourism – indirect GSP contribution	Not measured	$435.7M (est.)	+$435.7M
Student retention benefit – indirect	Not measured	To be quantified	–
TOTAL INDIRECT CONTRIBUTION	Not measured	$435.7M (est.)	+$435.7M
TOTAL DIRECT + INDIRECT	$176.3M	$1,054.5M (est.)	+$878.2M

8.4 Key points for budget papers and communications:

- The increase is a measurement change, not an economic change. The Tasmanian arts and cultural economy *has not grown* by $442.5 million
- Cultural tourism ($434.7m) is the largest new component, reflecting Tasmania's unusually high tourism-to-GSP ratio. Tourism directly contributed 5.4% of Tasmanian GSP in 2023–24 compared with 2.9% in NSW, meaning a cultural tourism attribution has proportionally greater impact here than in any other Australian jurisdiction.
- The cultural education component ($7.9m) is a minimum estimate based on UTAS data only and will increase once TasTAFE and DECYP data is incorporated.
- The new methodology is consistent with the 2025 UNESCO Framework for Cultural Statistics and aligns with the direction of the national Revive cultural strategy, which also recommends broadening the measurement scope.

8.5 Public facing introduction to the revised methodology

What this Report is about

Tasmania has a thriving arts and cultural sector – from galleries and festivals to screen production, live music, and First Nations cultural practice. But how much does all of this actually contribute to the state's economy?

This report answers that question. It has been commissioned by Creative Tasmania to develop a new, rigorous way of measuring the economic contribution of arts and culture to Tasmania, one that reflects the full scope of the sector, not just the parts that are easiest to count.

Arts and culture contribute over $1 billion to the Tasmanian economy each year and employ an estimated 13,500–14,200 people – more than one in twenty Tasmanian workers.

Why a New Methodology?

Until now, the standard national measure used by all Australian governments counted only one part of the picture, the direct output of arts and recreation businesses. For Tasmania, that produced a figure of $176.3 million (component 1).

That number isn't wrong – but it is incomplete. It left out two things that are especially significant for Tasmania:

- Cultural tourism (component 2) – the visitors who come to Tasmania specifically because of its cultural life: its festivals, galleries, heritage sites and distinctive creative identity.
- Cultural education (component 3) – the contribution of arts teaching at school and university level to the broader education economy.

When these are included, using a methodology consistent with international best practice, the direct economic contribution rises to $618.8 million. Adding the flow-on effects through the wider economy brings the total to over $1 billion.

IMPORTANT: The increase from $176.3 million to $618.8 million is a measurement change, not an economic change. The sector hasn't suddenly grown. We are now counting more of what was always there.

Why cultural tourism matters so much here

Tasmania is unusual among Australian states. Tourism plays a proportionally larger role in the Tasmanian economy than anywhere else in the country, directly contributing 5.4% of Tasmania's GSP, compared with 2.9% in NSW.

And Tasmania's tourism is distinctively cultural. Visitors come for MONA, for Dark Mofo, for the Salamanca Market, for remote wilderness experiences shaped by Indigenous cultural knowledge, for a creative scene that feels unlike anywhere else in Australia.

This means that when a proper cultural tourism attribution is applied, how much of Tasmania's tourism economy is driven by cultural motivations, the result is proportionally more significant here than it would be in any other Australian jurisdiction.

Cultural tourism direct contribution: $434.7 million (2024–25 estimate) (or between $326m–$543m depending on the attribution used)

How many people does the sector employ?

The report uses a framework that recognises three types of creative workers, not just people employed directly in arts businesses, but also those whose creative skills are embedded in other industries, and those in support roles that keep creative organisations running.

On this basis, **the creative sector in Tasmania employs an estimated 13,500–14,200 people**, rising to over 15,000 on the high estimate. Fewer than a third of these workers are captured by the standard industry classification most governments use.

This gap matters for policy. If governments are making funding and workforce decisions based on a figure that undercounts the sector by two-thirds, those decisions are built on an incomplete picture.

Economic value is not the only value

One finding in this report deserves particular attention: three decades of justifying arts investment in primarily economic terms has not delivered commensurate policy recognition or resources for the sector. In some respects, it has narrowed the language available to make the case for arts and culture at all.

The economic contribution of arts and culture is real and significant. But it sits alongside equally significant contributions to health outcomes, social inclusion, community identity, and liveability – contributions that do not appear in any GSP figure and that economic measurement alone cannot capture.

This report provides the strongest possible economic evidence base. The sector and its advocates are best placed to decide how to deploy it.

Key figures at a glance

- **Direct contribution to Tasmanian GSP (2024–25): $618.8 million**
- **Indirect (flow-on) contribution: $435.7 million**
- **Combined direct and indirect contribution: $1,054.5 million**
- **Creative sector employment (Creative Trident estimate): 13,500–14,200 workers**
- **Arts and recreation sector (Component 1): $176.3 million**
- **Cultural tourism (Component 2): $434.7 million**
- **Cultural education (Component 3): $7.9 million minimum**

9. Real-Time Sector Health Index

9.1 Rationale

A key limitation of the economic impact calculation for the arts and cultural sector is that it is necessarily a snapshot of the past. The most recent full-year data available for the comprehensive GSP calculation is from the prior financial year, with a time lag of approximately 10 months from year-end to publication of the complete set of required data inputs. This reduces the utility of the information to policymakers wishing to identify in a timely manner any emerging strengths and weaknesses of the sector.

In addition to the annual economic impact measurement, an annual survey is proposed to provide:

- A more current snapshot of the health of the most significant entities among sector participants.
- A forward-looking sentiment index for the most significant entities in the sector, capturing expectations for the coming year.
- Longitudinal analysis of core metrics across the whole sector over time.

9.2 Entity basket

The following is a draft basket of 25 major Tasmanian arts and cultural industry entities proposed for inclusion in the annual survey. The basket has been constructed to reflect the full breadth of the sector across artform, geography (Hobart, Launceston, regional), organisational type (funded/for-purpose and commercial/for-profit), and scale. The final list is to be agreed with Creative Tasmania before the first survey is administered.

Table 9: Suggested Initial Basket of Organisations.

#	ENTITY	CATEGORY	RATIONALE FOR INCLUSION
1	Tasmanian Symphony Orchestra	Performing Arts	Largest performing arts employer in the state; significant ticket and touring revenue
2	Theatre Royal	Performing Arts	Premier performing arts venue, Hobart; high throughput of events and visitors
3	Tasmanian Museum and Art Gallery (TMAG)	Museum and Art Gallery	Major cultural institution; anchor for Hobart cultural tourism; 1m+ visits per year
4	Queen Victoria Museum and Art Gallery (QVMAG)	Museum and Art Gallery	Major regional cultural institution; anchor for Launceston cultural tourism
5	Salamanca Arts Centre	Multi Arts Centre	Multi-artform hub with 60+ resident organisations; significant employment and event activity
6	Mona (Museum of Old and New Art)	Multi Arts, Tourism	Single largest cultural tourism driver in the state; significant interstate visitor draw
7	Dark Mofo / Dark Lab	Festival and Events	Major annual winter festival; significant interstate and international visitor impact
8	Tasmanian Youth Orchestra / Orchestra Development Program	Performing Arts, Youth	Representative of the youth and education performing arts pipeline
9	Ten Days on the Island	Festival	State-wide biennial arts festival; significant regional reach
10	Junction Arts Festival	Festival	Major Launceston-based annual arts festival; strong community and commercial impact
11	Terrapin Puppet Theatre	Performing Arts	National-touring performing arts company; significant arts education program
12	Tasdance / Assembly 197	Performing Arts	Contemporary dance company; education and community programs
13	Van Diemen's Band	Performing Arts	Major national ensemble with Tasmanian residency; significant touring and education activity
14	Island Magazine	Writing and Publishing	Peak body for literary sector; delivers programs across state
15	Bett Gallery	Visual Arts	Significant commercial gallery representing contemporary Tasmanian artists; interstate collector base
16	Handmark Gallery	Visual Arts	Established commercial gallery with retail; significant cultural tourism footfall
17	Burnie Arts and Function Centre	Multi Arts	Major NW Coast performing arts and events venue
18	Devonport Regional Gallery	Multi Arts	Major regional visual arts institution; NW Coast
19	Festivale	Festival	Major Launceston summer event combining food, wine and cultural performance
20	TBC		
21	TBC		
22	TBC		
23	TBC		
24	TBC		
25	TBC		

Note: This draft basket is to be developed subject to agreement with Creative Tasmania. Substitutions or additions may be required to reflect the current funding landscape, to include entities significant to First Nations cultural practice, or to ensure adequate coverage of the live music, screen and digital creative sectors. The basket should be reviewed every three years to account for changes in the sector.

9.3 Survey design

See Appendix B

9.4 Administration and publication

The annual survey is proposed to be administered by Creative Tasmania or undertaken by an external body (Inkhorn projects or other) under the guidance of Creative Tasmania. The following arrangements are proposed, subject to agreement.

Survey window and timing: The survey should be open for a four-week period during September and October each year. This timing captures the current financial year (which ends 30 June) while allowing sufficient time to compile and publish results before the release of the ABS 5220.0 data in late November. Results would typically be published in November alongside the updated Component 1 calculation, giving a combined current-year health picture and prior-year economic contribution figure.

Administration: Creative Tasmania staff will distribute the survey to the agreed entity basket using a secure online survey tool (suggested: SurveyMonkey or Microsoft Forms, using Creative Tasmania's existing government licences). A direct contact within each entity should be identified and maintained in a contact register.

Aggregation and publication: Results will be reported as:

- An aggregate sector health index score (0-100) derived from the revenue, employment and confidence questions, published as a standalone Creative Tasmania data insight.
- An anonymised summary table showing the distribution of responses across each question, without identifying individual entities.
- A trend chart once three or more years of data are available, showing the index over time.

Privacy and confidentiality: Individual entity responses will not be published or shared with third parties (including other government agencies) without explicit consent. Commercially sensitive financial data (question A – revenue) will be presented only in aggregate. Creative Tasmania's existing privacy policy governs data storage and handling. Entities should be informed at the outset that their individual responses are confidential and that only aggregate results will be published.

Non-response and data quality: A response rate of at least 70% of the agreed basket (i.e., 18 of 25 entities) is required for the index to be published in any given year. Creative Tasmania should follow up non-respondents directly. If response rates fall below this threshold, the index should note the reduced sample and exercise caution in interpreting results.

10. Implementation Framework and Annual Update Process

10.1 Annual update workflow

The following sets out the step-by-step process for Creative Tasmania staff to update the economic contribution calculation each year. All three components can be calculated using publicly available data following this workflow.

Table 10: Suggested Workflow.

MONTH	ACTION	DATA SOURCE / STEPS
November	Update Component 1 (Arts and Recreation)	Access ABS 5220.0 Table 7 (released ~21 Nov). Apply 0.372 factor to Arts and Recreation TFI. Multiply by current-year GSP/TFI ratio.
December	Check ABS Tourism Satellite Account release	ABS 5249.0 released ~December. Note release date for STSA input.
January-March	Update Cultural Education component	Request updated salary/FTE data from UTAS, TasTAFE, DECYP. Apply to Education & Training GSP from November ABS data.
April	Update Component 2 (Cultural Tourism)	Access STSA analysis from Tourism Research Australia (released April). Apply calculation formula from Section 7.2.3 using current year TVS expenditure data.
April-May	Compile full report update	Combine all three components. Update summary table. Prepare Budget Papers input.
Every 5 years	Review cultural tourism attribution percentage	Reassess current 40% holiday attribution based on updated TVS activity data and international literature, after next review.

10.2 Data sources reference

The table below provides the standing reference for all data sources required for the annual economic contribution update. All sources are publicly available except the employer salary data (Component 3), which requires an annual direct request to each employer.

Table 11: Data Sources Required.

DATA SOURCE	PUBLISHER / ACCESS	TABLES / REFERENCES	TYPICAL RELEASE	LAG FROM FY END
ABS 5220.0 Australian National Accounts: State Accounts	abs.gov.au/ statistics National accounts State accounts	Table 7: Total Factor Income by industry. Arts and Recreation row, TFI column; Total all sectors TFI for GSP conversion ratio	~21 November each year	~5 months
ABS 5249.0 Australian National Accounts: Tourism Satellite Account	abs.gov.au/ statistics National accounts Tourism	National tourism GDP and GVA figures. State-level data sourced from TRA STSA below.	~December each year	~6 months
TRA State Tourism Satellite Account (STSA)	tra.gov.au Research State Tourism Satellite Accounts	Table 1 Cell G31 (direct tourism GSP); Table 2 Cells G13, G22, G40, G49 (intrastate/interstate breakdown); Table 4 Cell L16 (arts sector cultural services already captured); Table 8 (indirect tourism GSP)	~April each year	~10 months
Tasmanian Visitor Survey (TVS)	TVSanalyser.com.au (Tourism Tasmania portal)	Expenditure & Nights tab. Set Visitor Type to All Visitors, Metric to Total Spend $. Use Total and Holiday $ figures under Purpose heading	Year-ending figures updated quarterly; June year-end released ~September	~3 months
UTAS cultural education salary data	Direct from UTAS Human Resources / Planning	FTE and total salaries for FOE codes: Other Creative Arts; Performing Arts; Visual Arts and Crafts; Written Communication, Language and Literature	Annual request, January–March	N/A – direct request
TasTAFE cultural education salary data	Direct from TasTAFE Human Resources	FTE and total salaries for equivalent arts and cultural education delivery roles	Annual request, January–March	N/A – direct request
DECYP cultural education salary data	Direct from DECYP Workforce Planning	FTE and total salaries for arts and cultural education staff in government schools (art, music, drama teachers)	Annual request, January–March	N/A – direct request
ABS 5220.0 Table 7 Education and Training sector TFI	Same release as above (ABS 5220.0)	Education and Training sector Total Factor Income; multiply by GSP/TFI ratio for GSP contribution	~21 November each year	~5 months

Note: All ABS data is subject to revision. Historical figures for prior financial years may change in subsequent ABS releases. The STSA is the last data input to arrive (April) and therefore determines the earliest date at which a complete annual calculation can be produced.

10.3 Budget papers reporting

The new total figure of direct and indirect contribution will be incorporated into the Budget papers within the 2026-27 financial year. The legacy BCARR derived figure will not be.

The new estimation will be accompanied with the following notation:

> *The uplift in Contribution to GSP of selected arts industries is due to a change in methodology. The updated methodology reflects the new UNESCO approach to valuing arts and cultural heritage (comprehensive measurement via the 2025 Framework for Cultural Statistics). In 2025–26 a project was undertaken to update the approach to measurement of the economic impacts of the arts and cultural sector in Tasmania, consistent with the UNESCO framework. The resulting report, A new methodology for measuring the contribution of arts and culture to the Tasmanian Economy, is to be published on the Arts Tasmania website. This document itemises the factors contributing to the overall figure and explains in detail the methodology used.*

10.4 Five-year review of cultural tourism attribution

The cultural tourism attribution percentage (currently 40% of holiday tourism, giving an overall attribution of 28.4% of total interstate and international tourism spend) should be reviewed every five years. The review should:

- Assess updated Tasmanian Visitor Survey data on the most common activities undertaken by visitors.
- Review any updated international literature on cultural tourism attribution.
- Consider any significant changes in the tourism or arts and cultural landscape in Tasmania (e.g., opening of major new cultural infrastructure).
- Apply any revised attribution percentage to the following five years of annual calculations.

Appendix A
Detailed calculation workings: Cultural Tourism

The table below sets out the detailed calculation methodology for each element required to calculate the direct contribution of Cultural Tourism to GSP. This table should be updated annually as new STSA data becomes available.

Table 12: Detailed Calculations–Cultural Tourism.

LABEL	ELEMENT	2023–24	DATA SOURCE	CALCULATION
A	Direct contribution of Tourism to GSP	$2,268M	STSA Table 1, Cell G31	A = Cell G31
B	Direct contribution already captured in Arts sector data	$82M	STSA Table 5, Cell L16	B = Cell L16
C	Intrastate and same-day tourism to GSP (not in Arts data)	$710M	STSA Table 2, Cells G13, G22, G49	C = (A-B) x [(G13+G22)/ G49]
D	Interstate and international tourism GSP (not in Arts data)	$1,476M	Amounts A, B and C; STSA Table 2, Cells G31 and G40	D = A-B-C
E	Non-holiday interstate and international tourism GSP	$426M	TVS Data, Expenditure & Nights tab, Total vs Holiday spend	E = D x [(Total - Holiday)/ Total]
F	Holiday tourism GSP NOT attributable to cultural tourism	$630M	Amounts D and E; 40% cultural tourism attribution	F = (D-E) x (1-0.4)
G	Cultural tourism direct contribution to GSP	$420M	Amounts D, E and F	G = D-E-F

Appendix B
Sector Health Index Survey Instrument

The following is the full survey instrument for the annual Tasmanian Arts and Cultural Sector Health Index. The survey is to be administered annually to the agreed basket of 20–30 major Tasmanian arts and cultural industry entities.

B.1 Tasmanian arts and cultural sector health index – Annual survey

Thank you for participating in this survey. Your responses will be used to compile the annual Tasmanian Arts and Cultural Sector Health Index, which is used by Creative Tasmania and the Department of State Growth to monitor the health of the sector and inform policy responses. All responses will be reported in aggregate only; no individual organisation's data will be identified.

Section A – Operational Data

A1. How has your organisation's revenue over the past 12 months compared to the previous 12-month period?

- Significantly higher (20%+ growth)
- Moderately higher (6-20% growth)
- Similar (within +/ – 5%)
- Moderately lower (6-20% decline)
- Significantly lower (20%+ decline)

A2. How has your organisation's total FTE employed over the past 12 months compared to the previous 12-month period? [Same response options]

A3. Over the next 12 months, what is your organisation's revenue outlook compared to the most recent 12 months? [Same response options]

A4. Over the next 12 months, what is your organisation's total FTE employed outlook? [Same response options]

Section B – Key Issues And Confidence

B1. Please rate the following factors on a 1-4 scale (1 = Not a constraint at all; 2 = Minor constraint; 3 = Moderate constraint; 4 = Significant constraint):

- Customer demand levels
- Availability of qualified staff
- Availability of reliable suppliers
- Administrative and compliance requirements

B2. How would you rate your overall confidence levels for the performance of your organisation for the coming 12 months?

- High confidence in improved performance
- Medium confidence in improved performance
- Low confidence in improved performance
- Significant concerns regarding future performance

B3. How would you rate your overall confidence levels in the performance of the wider Arts and Cultural Sectors in Tasmania for the coming 12 months? [Same response options]

B4 [OPTIONAL – add qualitative questions as agreed with Creative Tasmania, e.g. 'What are the two or three most significant issues facing your organisation in the coming year?']

Appendix C
Estimating the size of Tasmania's Creative Sector and implications for the BCARR/ABS Division R calculation

C.1 Purpose and scope

This appendix addresses two related questions that sit alongside the main Inkhorn methodology but are not fully resolved within it. First: how large is Tasmania's creative sector, and how reliably can it be measured with available data? Second: does the ABS Division R (Arts and Recreation Services) employment composition in Tasmania differ from the national average in ways that make the BCARR attribution factor of 0.372 an unreliable proxy for calculating Tasmania's arts sector GSP contribution?

Both questions are addressed by drawing on the same body of data: ABS 2016 Census employment figures as analysed by Lehman, Yanotti, Angelopoulos and de Silva in the Creative Island Sector Analysis 2017 ('Creative Island'), supplemented by structural reasoning and forward projection using national Creative Trident benchmarks. The two bodies of analysis are presented in sequence and then integrated in the conclusions.

The findings in this appendix are analytical estimates rather than precisely calculated figures. The recommended data actions in Section C.8 identify the specific ABS data extractions that would convert these estimates into a verified baseline.

C.2 Definitional Frameworks: What counts as the Creative Sector?

A significant source of confusion in Tasmanian creative sector data is that different publications and strategies use materially different definitions of the sector. Before any employment figure can be interpreted, the definitional framework it uses must be understood. Four frameworks are relevant to the Tasmanian context:

Table 13: Definitional Frameworks for Tasmania's Creative Sector, with 2016 Employment and Scope Notes.

FRAMEWORK	SCOPE	2016 EMPLOYMENT	% TAS. WORKFORCE	NOTES
TCI definition	Music and performing arts; visual arts; architecture and design; media and publishing; screen, radio and television; festivals, events and museums; online and interactive entertainment	3,489	1.65%	Industry-based only. Excludes creative workers in non-creative industries. Lower bound.
CIP definition	TCI industries plus: architectural services; advertising services; computer system design and related services; printing; wooden furniture manufacturing	6,200	2.94%	Industry-based only. Middle bound. Computer design and architecture inclusion is contested (see O'Connor 2017).
CCIS 2015 near-Trident	Cultural and creative occupation and/or industry – approximates Trident by including creative occupation workers across all industries	9,311 (2011 Census)	~4.4% (2011)	State of Tasmania Cultural and Creative Industries Strategy 2015. Nearest confirmed near-Trident baseline for Tasmania.
Creative Trident (Cunningham/ McCutcheon)	Specialist Creatives (creative occupation in creative industry) + Support Workers (non-creative occupation in creative industry) + Embedded Creatives (creative occupation in any industry)	~11,000 (2016 est.)	~5.2% (est.)	Full Trident. Includes invisible embedded creatives. Upper bound. National 2021 Census Trident = 409,193.

Sources: Lehman et al. (2018); State of Tasmania (2015); Cunningham and McCutcheon (2018).

The fourfold difference between the TCI figure (3,489) and the near-Trident CCIS figure (9,311) is not evidence of measurement error, it reflects genuine differences in what each definition counts. The TCI and CIP figures count all workers (creative and non-creative occupations) in designated creative industries. The CCIS near-Trident figure adds workers with creative occupations who are employed outside those industries. The Trident central estimate adds the full spectrum of support workers in creative industries.

For the purposes of this Report, the relevant measure for GSP and TFI calculations is the industry-based component (Specialist Creatives and Support Workers in creative industries), as these are the workers captured by ABS industry accounts. The Embedded Creative category contributes to GSP through their employing industries but is not separately measurable through the BCARR/ABS 5220.0 framework.

C.3 The Creative Trident: Framework and Tasmanian relevance

The Creative Trident is an employment measurement framework developed by Cunningham, Higgs and colleagues at Queensland University of Technology, and subsequently applied nationally by McCutcheon, Cunningham and Creative Australia using ABS Census data. It is the most widely accepted methodology for measuring creative economy employment in Australia and directly underpins the ABS Cultural and Creative Activity Satellite Accounts used by BCARR.

Unlike industry-classification approaches (TCI, CIP), the Trident cross-tabulates industry codes (ANZSIC) with occupation codes (ANZSCO) to identify three distinct categories:

Table 14: The Three Components of the Creative Trident Framework.

CATEGORY	DEFINITION	TASMANIAN EXAMPLES
Specialist Creatives	People in creative occupations working within creative industries – the workers most directly associated with arts and cultural practice.	Curators at TMAG; musicians at the Conservatorium; designers at architecture firms; writers at publishers.
Support Workers	People in non-creative occupations (administration, finance, IT, technical) working within creative industries. Essential to organisational function.	Box office staff at theatre venues; accountants at arts organisations; production managers at broadcasters.
Embedded Creatives	People with creative occupations working outside the creative industries. The largest and most invisible category – distributed across education, tourism, government and health.	Musicians teaching in schools; designers employed by hotel groups; writers in government communications; heritage interpreters at tourist sites.

Why embedded creatives matter for tasmania

In 2021, nationally there were more people in creative occupations working outside creative industries (218,297) than within them (190,896). In a small economy where arts workers routinely combine practice with roles in tourism, education and government, this embedded population is likely proportionally even larger in Tasmania. It is entirely invisible to TCI – or BCARR-type industry-only measurement. The Tasmanian sector's unusually high proportion of sole traders (79.2% of 6,683 ABN-registered creative businesses in 2016) compounds this invisibility: sole traders with mixed-portfolio income are systematically undercounted in industry-based employment figures.

C.4 Tasmanian baseline data

C.4.1 Creative Island 2017 (Lehman et al. 2018)

The most rigorous Tasmania-specific employment data derives from the Creative Island Sector Analysis 2017. Using ABS 2016 Census data, it identified 3,489 workers in the TCI-defined creative sector (1.65% of total Tasmanian employment of 211,040), growing 6.8% from 2011 to 2016. On the broader CIP definition, including architectural services, advertising, and computer system design, employment reached 6,200 (2.94%). Both figures are industry-based measures; neither includes embedded creatives.

The dominant industry by employment was Museum Operation (18% of TCI employment, approximately 628 workers), followed by Creative Artists, Musicians, Writers and Performers (14%, ~489), and Newspaper Publishing (12%, ~419). Of particular note: three of the top five CI employers by employment (creative arts, museums, and libraries and archives) earned an average of $42,000 per year nationally – the lowest of the sectors represented.

The report also identified 6,683 ABN-registered creative businesses in Tasmania, of which 79.2% were sole proprietors. The small business and sole-trader character of the sector is a key structural feature: it depresses the Support Worker count relative to mainland states, produces systematically lower average incomes, and means Census headcount employment figures undercount actual creative participation (since sole traders with multiple income streams may record a non-arts primary occupation).

Division R (Arts and Recreation Services) total employment was confirmed at 4,017 in the 2016 Census – a figure that includes sports, recreation and gambling workers outside the CI definition, and excludes CI workers in other ABS divisions (newspaper publishing, broadcasting, arts education).

C.4.2 Cultural and Creative Industries Strategy 2015 (CCIS 2015)

The State of Tasmania's Cultural and Creative Industries Strategy (2015) reported 9,311 persons employed in a cultural and creative occupation and/or a cultural and creative industry in 2011. This figure approximates the Creative Trident by including workers with creative occupations across all industries – not just those in designated creative industry classifications. It provides the most appropriate historical anchor for projecting Trident-based estimates forward and is the only confirmed near-Trident baseline available for Tasmania.

C.4.3 National Creative Trident (McCutcheon and Cunningham 2022)

McCutcheon and Cunningham's analysis of the 2021 Census produced a national Creative Trident count of 409,193 workers: 190,896 Specialist Creatives and Support Workers in creative industries, and 218,297 Embedded Creatives outside them.
Between 2016 and 2021, the national Trident grew by 20.4% cumulatively (approximately 3.8% per annum). This national growth rate, adjusted for Tasmania's population share and documented over-indexing on cultural occupations, provides the basis for forward projections.

C.5 Current estimated sector size

Applying the Creative Trident framework to the Creative Island baseline data and subsequent ABS Census results produces the following estimates. Two methods are used: (a) forward projection from the 2011 CCIS near-Trident anchor at observed Arts and Recreation growth rates; and (b) Tasmania's proportional share of the national Trident, adjusted upward to reflect confirmed over-indexing on cultural occupations in ABS jurisdictional data.

Table 15: Estimated Tasmanian Creative Sector Employment by Trident Category 2011–2022/23.

YEAR	SPECIALIST CREATIVES	SUPPORT WORKERS	EMBEDDED CREATIVES	TRIDENT CENTRAL	RANGE (LOW–HIGH)
2011	~3,500	~2,900	~3,100	~9,500	9,311–10,500 (◂CCIS confirmed anchor)
2013/14	~3,700	~3,100	~3,200	~10,000	9,700–11,200 (**i**)
2016	~4,000	~3,600	~3,400	~11,000	10,500–12,700 (◂ CI report anchor, TCI=3,489; CIP=6,200)
2021	~4,500	~4,600	~4,400	~13,500	12,000–15,500 (**e** nat. Trident @ adj. pop. share)
2022/23 (est.)	~4,750	~4,850	~4,600	~14,200	12,700–16,500 (**e** @ 3.8%)

Legend: ◂ Anchored to confirmed empirical source **e** Estimated / extrapolated **i** Interpolated

Note : 2011 and 2016 anchored to confirmed ABS/CCIS data. 2021 based on national 2021 Census Trident at adjusted population share. 2022/23 extrapolated at 3.8% pa. Sector categories estimated from national proportions adjusted for Tasmania's documented sector mix.

Key finding on sector size

Tasmania's creative sector employs an estimated 13,500–14,200 workers on a central Trident basis (2021–2022/23), rising to over 15,000 on the high estimate. Of these, only 4,100–4,300 are captured by TCI-type industry classification – less than one-third of the probable Trident total. The remaining two-thirds (support workers in creative industries and embedded creatives across the broader economy) represent the sector's invisible economic contribution that current BCARR-based measurement does not capture at the state level.

C.6 ABS Division R: composition and implications for the BCARR attribution factor

C.6.1 The attribution factor problem

The BCARR methodology calculates Tasmania's arts sector GSP contribution by applying a national attribution factor of 0.372 to the combined Arts and Recreation Services (Division R) Total Factor Income reported in ABS 5220.0 Table 7. This factor represents the estimated share of Division R hours worked that are attributable to arts activities, as distinct from sports, recreation and gambling activities. The factor was last updated in 2015-16 using national hours-worked data and has not been recalculated for Tasmania specifically.

The question for this appendix is whether Tasmania's Division R employment composition differs from the national average in ways that would make the 0.372 factor an unreliable proxy. The short answer, supported by three independent lines of evidence, is that it does and that Tasmania's true arts share is materially higher.

Table 16: Employment by Subdivision: National vs Tasmania.

ABS DIVISION R SUBDIVISION	NATIONAL EMPLOYMENT (ABS EAS 2014–15)	NAT. %	TASMANIA CI-DERIVED (2016 CENSUS)	TAS. 2016 %	STRUCTURAL EST. (2021/22)	ASSESSMENT
89 Heritage Activities	7,000	3.1%	~628	~15–16%	~430 (~8%)	5× national share. Structural estimate understated. Museum Operation alone = 18% of CI employment.
90 Creative & Performing Arts	33,000	14.6%	~979	~24%	~1,200 (~22%)	Broadly consistent across all three sources. Confirmed higher than national.
91 Sports & Recreation	127,000	56.2%	~1,790 (residual)	~44–45%	~2,750 (~50%)	Structural estimate overstated by ~5–6pp. Still well below national 56.2%.
92 Gambling Activities	34,000	15.0%	~358 (residual)	~9%	~550 (~10%)	Consistent across sources. ~60% of national proportion.
93 Libraries & Other Info Services	~25,000	11.1%	~262	~6–7%	~550 (~10%)	Structural estimate overstated by ~3–4pp.
TOTAL Division R	~226,000	100%	4,017 (confirmed)	100%	~5,480 (2021/22)	
Arts share (Sub-89+90+93)	~28.8%		~46–47%		~40% (est.)	CI data confirms arts share substantially above national proxy

The most significant finding is in Heritage Activities (Subdivision 89). Museum Operation alone accounts for 18% of all CI employment in Tasmania – approximately 628 workers, or 15–16% of total Division R employment. Nationally, Heritage represents only 3.1% of Division R employment. Tasmania is running at approximately five times the national Heritage share, driven by the concentration of major heritage institutions (TMAG, QVMAG, Port Arthur Historic Site Management Authority, Cascades Female Factory) relative to the state's population.

This finding was not fully anticipated in the structural reasoning developed in Version 1 of this analysis, which estimated Heritage at approximately 8% of Tasmanian Division R employment. The Creative Island data approximately doubles that estimate. The correction strengthens, not weakens, the case for a higher Tasmania-specific attribution factor.

C.6.2 Mapping CI employment to Division R subdivisions

The CI-derived estimates above require mapping the TCI creative industries definition, which spans five ABS divisions, to the specific classes within Division R. The following table makes this mapping explicit.

Table 17: Mapping of TCI Creative Industries Employment to ABS Division R Subdivisions, Using ABS 2016 Census Data.

ANZSIC CLASS	% OF CI (3,489)	EST. WORKERS	DIVISION R SUBDIVISION	ABS DIVISION
Museum Operation (8910)	18%	~628	Sub-89	Division R
Creative Artists, Musicians, Writers and Performers (9002)	14%	~489	Sub-90	Division R
Newspaper Publishing (5411)	12%	~419	n/a	Division J (Information Media) not Division R
Arts Education (8212)	~8%	~279	n/a	Division P (Education & Training) not Division R
Libraries and Archives (9301)	~7%	~244	Sub-93	Division R
Free-To-Air Television Broadcasting (5621)	~6%	~209	n/a	Division J not Division R
Motion Picture Exhibition (5513)	~5%	~175	Sub-90	Division R
Performing Arts Operation (9001)	~5%	~175	Sub-90	Division R
Radio Broadcasting (5610)	~4%	~140	n/a	Division J not Division R
Performing Arts Venue Operation (9003)	~2%	~70	Sub-90	Division R
Remaining CI classes (book publishing, photographic services, jewellery manufacturing, etc.)	~19%	~661	Various	Predominantly Divisions J, C and M not Division R
Total CI employment	100%	3,489		
Division R workers within CI definition (Sub-89+90+93)		~1,869		47% of total Division R (4,017)
Division R workers outside CI definition (Sub-91 Sport + Sub-92 Gambling, residual)		~2,148	Sub-91+92	53% of total Division R

Note : from Lehman et al. (2018). Residual figures (Sub-91 and Sub-92) are total Division R (4,017) minus identified CI workers in Division R (~1,869).

C.6.3 Attribution factor: Scenarios and GSP implications

The following table presents the GSP implications of four attribution factor scenarios, applied to the 2024–25 ABS 5220.0 Table 7 Total Factor Income figure of $448m for Division R. The GSP conversion factor of 1.058 (Tasmanian GSP/TFI ratio, 2024–25) is applied in all scenarios.

Table 18: Attribution Factor Scenarios And Corresponding 2024–25 Arts Gsp Estimates.

SCENARIO	ATTRIBUTION FACTOR	ARTS GSP 2024–25	NOTES
Current BCARR (national factor, applied to Tasmania)	0.372	$176.3M	Current Budget Papers figure. Based on 2015–16 national hours-worked data.
Structural reasoning lower bound	0.40	$189.6M	+$13.3m / +7.5% above current figure.
Structural reasoning upper bound	0.45	$213.3M	+$37.0m / +21.0% above current figure.
CI-derived 2016 Census estimate (Lehman et al. 2018)	~0.47	$222.8M	+$46.5m / +26.4% above current figure. Most empirically grounded estimate available short of a Census TableBuilder query. Direction of finding is robust across all sources.

The CI-derived scenario (~0.47) implies a direct arts GSP contribution of $222.8m in 2024–25 – $46.5m (26%) above the current Budget Papers figure of $176.3m. This difference arises entirely within the existing BCARR methodology framework, without any change to scope or data source. It simply applies the correct Tasmania-specific attribution factor in place of the national proxy.

The Creative Island report itself (Lehman et al. 2018, p.28) independently identified this measurement problem, noting that using Arts and Recreation as a proxy for arts employment 'includes employment that is not counted in the CI sector, as can be seen by the difference between arts and recreation employment (4,017) and CI employment (3,489)', and that it is therefore 'impossible to say if either arts or recreation is bringing down or pulling up productivity' in the division. This is an independent 2017 scholarly articulation of the same limitation the Inkhorn methodology addresses, predating this report by seven years.

C.7 Data limitations and caveats

- **Data reconstruction:** The CI-derived subdivision estimates in Tables D.4 and D.5 are reconstructed from an employment percentage bar chart in Lehman et al. (2018), not directly reported subdivision totals. Smaller CI classes are approximated from chart reading and subject to rounding error.
- **Definitional mismatch:** The TCI creative industries definition and ABS Division R are not coextensive. CI spans five ABS divisions (R, J, P, M, C) and excludes Sports & Recreation and Gambling. Division R includes Sports & Recreation and Gambling which are outside CI. The mapping between the two requires assumptions about ANZSIC class placement.

- **Portfolio employment undercounting:** The ABS Census records only primary occupation. In Tasmania, where arts workers routinely hold multiple part-time roles across creative practice, teaching and tourism, this structurally undercounts creative participation – particularly in music, performing arts and visual arts.
- **Hours vs headcount:** The BCARR attribution factor is based on hours worked, not headcount employment. If part-time or casual employment is more prevalent in Sports & Recreation or Gambling than in Heritage and Creative & Performing Arts, the hours-based factor will differ from the headcount-based ratio estimated here.
- **Timeframe:** The CI-derived 2016 data and the structural 2021/22 estimates relate to different points in time. Division R employment grew from 4,017 (2016) to approximately 5,480 (2021/22), consistent with overall Tasmanian workforce growth. Sub-division proportions are assumed broadly stable, which may not hold across all subdivisions.
- **Residual uncertainty:** Sports & Recreation and Gambling in the CI-derived column are residual figures. Any estimation error in the CI Division R total flows through to these two subdivisions.
- **Post-2021 extrapolation:** No Census Trident data exists for 2022/23. Extrapolated Trident figures assume continuation of observed 2016–2021 growth trends and are subject to disruption from COVID recovery dynamics and structural change.

C.8 Recommended data actions

The following data extractions would convert the estimates in this appendix into a verified, replicable baseline:

- **Action 1:** Commission an ABS Census 2021 TableBuilder query for employment by ANZSIC subdivision (3-digit), restricted to Tasmania, for all five Division R subdivisions. This would enable direct calculation of a Tasmania-specific attribution factor to replace the 0.372 national proxy, at minimal cost.
- **Action 2:** Commission a bespoke ANZSCO × ANZSIC cross-tabulation for Tasmania from the ABS 2021 Census. This would produce a Tasmania-specific Creative Trident, collapsing the current Specialist/Support/Embedded uncertainty range from ±30% to ±10–15%, and providing Creative Tasmania with a defensible, replicable workforce baseline.
- **Action 3:** Confirm with the Office for the Arts whether the Revive strategy review of the 0.372 factor will produce a state-specific figure or a revised national figure applied uniformly. If the latter, a Tasmania-specific calculation by Creative Tasmania may be required.
- **Action 4:** Update the 2016 Creative Island CI employment data to the 2021 Census baseline. This requires applying the TCI industry definitions used in Lehman et al. (2018) to ABS Census 2021 data for Tasmania, ideally by Creative Tasmania or a research partner.

INKHORN PROJECTS

MEASURING THE ECONOMIC CONTRIBUTION OF ARTS AND CULTURE TO THE TASMANIAN ECONOMY – A NEW METHODOLOGY 2026