A data picture of Australia’s Arts and Entertainment Sector 2010

Creative Industries Faculty, Queensland University of Technology
Contents

Australian and world markets

Music composition, distribution and publishing

Broadcasting

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AUSTRALIAN & WORLD MARKETS
Australia’s entertainment & media market spending:
2009: US$21.8 billion
2014: US$27.9 billion (projected)

Compound annual growth rate of Australia’s entertainment & media market spending:
2006-2009: 4.7%
2010-2014: 5.1% (projected)

Output and valued added of selected cultural industries, 2005/06*:
AUD$45.9 billion

Comparison to production in other industries*:
Electricity supply, 2005/06: $29 billion
Banking, 2005/06: $35.4 billion
Scientific research, technical & computer services, 2001/02: $43.6 billion
Education, 2001/02: $44 billion
Residential building, 2001/02: $31.7 billion
Health services, 2001/02: $43.9 billion

Value added component of cultural industries (returned received by factors of production i.e. labour & capital)*:
2005/06: AUD$12.2 billion
Fast facts (2)

Trade in cultural goods, 2009/10*:
- Exports: $539.8 million
- Imports: $2.4 billion
- Trade deficit: $1.9 billion

Top 5 countries receiving Australian cultural goods, 2009/10*:
- New Zealand, US, UK, Singapore & Hong Kong

Top 5 countries sending cultural goods to Australia, 2009/10*:
- China, UK, USA, Malaysia & Japan

Trade in cultural services (royalties)
- 2009/10*:
  - Earnings: $163 million
  - Payments: $1.3 billion

Employment in cultural industries*:
- 2001: 274,884
- 2006: 296,183

Household expenditure on culture, 2003/04*:
- Average household: $36.40 a week
- Total: $14.7 billion a year

*ABS, 2010
Australia’s Entertainment & Media (E&M) market share:
- Asia Pacific market: 6.3% (2009) / 5.9% (2014)
- World market: 1.6% (2009) / 1.7% (2014)

Australia’s E&M market share ranking, 2009#:
- Asia Pacific market: 4
- World market: 12

E&M spending per capita, 2009#:
- Australia: US$969
- Average (top 12 countries): US$822

E&M spending compound annual growth rates, 2006-09#:
- Australia: 4.7%
- Asia Pacific: 6.2%
- World: 3.1%

Projected E&M spending compound growth rates, 2010-14#:
- Australia: 5.1%
- Asia Pacific: 6.4%
- World: 5.0%

Entertainment & Media market spending per capita, Top 12 markets, 2009, US$ #

Entertainment & Media market spending compound annual growth rates, percent (%)#
MUSIC COMPOSITION, DISTRIBUTION & PUBLISHING
**Fast facts**

**Physical wholesale sales of sound recordings & music videos**:  
- 2005: $520.3 million  
- 2009: $366.9 million

**Digital wholesale sales, 2009**:  
- 2005: $7.9 million  
- 2009: $79.2 million

**Employment, August 2006**: 3,334  
(music publishing, reproduction of recorded media, and music & other sound activities)

**Number of businesses, June 2007**: 8,349  
(recorded media manufacturing & publishing, recorded music retailing, music & theatre production, and sound recording studios)

**Music royalties, 2007-08**:  
- Payments to Australia: $72 million  
- Payments to overseas: $227 million

**Average household expenditure on music, 2003/04**:  
- $1.65 a week / $655 a year

**Australia’s physical & digital recorded music market spending**:  
- 2009: US$468 million  
- 2014: US$605 million

**Australia’s digital recorded music market spending**:  
- 2009: US$83 million  
- 2014: US$281 million

**Australia’s recorded music market spending, 2005-2014, $US millions**

*ABS, 2007; ^ABS, 2010; #PricewaterhouseCoopers, 2010; ^ARIA, 2010*
Australia’s recording industry world rankings, 2009:
- Market size: 7
- Physical sales: 6
- Digital sales: 8
- Performance rights: 13

Australia’s recorded music sales per capita, 2009: US$17

Compound annual growth rates, recorded music market, 2006-09:
- Australia: -4.1%
- Asia Pacific: 1.4%
- World: -6.5%

Projected compound annual growth rates, recorded music market, 2010-14:
- Australia: 5.3%
- Asia Pacific: 4.3%
- World: 1.1%

Projected compound annual growth rates, digital recorded music market, 2010-14:
- Australia: 27.6%
- Asia Pacific: 18.3%
- World: 16%

Projected compound annual growth rate, physical recorded music market, 2010-14:
- Australia: -3.4%
- Asia Pacific: -10.1%
- World: -9.8%

Recorded music sales per capita, Top 10 markets, 2009, US$:
- USA: $15
- Japan: $32
- UK: $25
- Germany: $19
- France: $14
- Canada: $12
- Australia: $17
- Netherlands: $16
- Italy: $4
- Spain: $5

Recorded music market spending compound annual growth rates, percent:
- World: -14%
- North America: 2%
- Europe, Middle East & Africa: 2%
- Asia Pacific: 5%
- Latin America: 5%
- Australia: 7%

*IFPI, 2010; #PricewaterhouseCoopers, 2010
BROADCASTING
Fast facts (1)

- Income from broadcasting, 2008/09*: $9 billion
- Costs of productions made primarily for TV, 2006/07#: $1.37 billion
- First release commercial TV broadcast hours, 2006/07#: 55,546 hours
- Employment in TV & radio broadcasting, August 2006*: 20,800
- People involved in broadcasting (paid & unpaid), April 2007*: 162,900
- Number of broadcasting licences, 2006/07^: 3,414
- Household expenditure on broadcasting, electronic media & film, 2003/04*: Average household: $7.87 a week, Total: $3.2 billion a year
- TV royalties, 2008/09*:
  - Payments to Australia: $88 million
  - Payments to overseas: $837 million
- Number of hours spent per person 15 years & older, per day TV viewing & with other audio/visual media*: 2 hours, 20 minutes

Time spent on recreation & leisure activities per person per day (4 hours, 13 minutes total), 2006*

- Talking (including phone) or writing/reading own correspondence, 30 minutes
- Other free time, 19 minutes
- Attendance at recreational courses, 1 minute
- Associated travel, 5 minutes
- Other, 5 minutes
- Sport and outdoor activity, 19 minutes
- Games, hobbies, arts, crafts, 10 minutes
- Reading, 23 minutes

TV and other audio/visual media
- 2 hours, 20 minutes (2006)
- 1 hour, 53 minutes (1992)

#ABS, 2008a; •ABS, 2008b; *ABS, 2010; ^ACMA, 2009
Fast facts (2)

- Radio market spending, 2009#: US$730 million
- Number of commercial, national and community radio stations, 2008*: 1,995
- % of Australians 15 years & over indicating they regularly listen to the radio (at least once a week)^: 91.1%
- All metropolitan stations broadcasting in digital from May 2009*
- Number of Australians listening to commercial radio each week*: 16 million
- Number of Australians listening to community radio each week+: 4.4 million
- Average number of radio sets in every household in five capital cities+: 4.2 sets

Radio market spending, 2005-2014, US$ millions#

^ACMA, 2009; #PricewaterhouseCoopers, 2010; *Commercial Radio Australia, 2010; †Nielsen Australia, 2010; ‡McNair Ingenuity Research, 2010
**World markets**

- **Compound annual growth rates, TV subscriptions market spending, 2006-2009##:**
  - Australia: 18%
  - Asia Pacific: 10.9%
  - World: 7%

- **Projected compound annual growth rates, TV subscriptions market spending, 2010-14##:**
  - Australia: 9.1%
  - Asia Pacific: 10%
  - World: 6.8%

- **Compound annual growth rates, radio market spending, 2006-09##:**
  - Australia: 1.2%
  - Asia Pacific: 2.5%
  - World: -1.2%

- **Projected compound annual growth rates, radio market spending, 2010-14##:**
  - Australia: 1.1%
  - Asia Pacific: 4.4%
  - World: 3.5%

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**Projected growth in radio market spending, percent (%), 2010-04##**

- World: 4.3%
- North America: 6.8%
- Europe, Middle East & Africa: 2.8%
- Asia Pacific: 1.9%
- Australia: 8.0%

**Projected growth in TV subscriptions market spending, percent (%), 2010-04##**

- World: 5.8%
- North America: 4.1%
- Europe, Middle East & Africa: 8.4%
- Asia Pacific: 5.4%
- Australia: 11.3%
NEW MEDIA
% of internet users using the internet for entertainment, 2008/09^:
  2008: 41%
  2009: 46%

Internet publishing and broadcasting income, 2008/09*: AUD$792 million

Broadband household penetration#:  
  2009: 72%
  2014: 89.7%

Number of mobile internet subscribers#:  
  2009: 280,000
  2014: 3.5 million

Average number of hours spent online at home per person during a quarter^:
  June quarter 2008: 47 hours
  June quarter 2009: 57 hours

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**Fast facts (1)**

*ABS, 2010; ^ACMA, 2009; *Australia Council for the Arts, 2010; #PricewaterhouseCoopers, 2010*
Fast facts (2)

% of Australians 15 years & over who used the internet to research, view or create any kind of music, writing or artistic performance: **31%**

% of people 14 years & over who access social networking sites to read or comment on online newspaper blogs, June 2009: **38%**

% of mobile phone users who in April 2009:
- Played games: **27%**
- Streamed/download music: **23%**
- Streamed/downloaded videos: **16%**
- Used mobile TV: **11%**

<table>
<thead>
<tr>
<th>Consuming and creating art online</th>
<th>% of internet users</th>
</tr>
</thead>
<tbody>
<tr>
<td>Researched or found more about an artist or art event</td>
<td>35%</td>
</tr>
<tr>
<td>Watched or listened to music online</td>
<td>30%</td>
</tr>
<tr>
<td>First heard about an artist or art event</td>
<td>26%</td>
</tr>
<tr>
<td>Downloaded music online</td>
<td>22%</td>
</tr>
<tr>
<td>Watched/downloaded performances and/or art works by professional artists, excluding music</td>
<td>14%</td>
</tr>
<tr>
<td>Watched/downloaded performances by non-professional artists, excluding music</td>
<td>11%</td>
</tr>
<tr>
<td>Posted own work of visual art/film/video online</td>
<td>6%</td>
</tr>
<tr>
<td>Participated in an online community or social network concerned with art in some way</td>
<td>5%</td>
</tr>
<tr>
<td>Learned to create music, graphics or stories online</td>
<td>5%</td>
</tr>
<tr>
<td>Wrote own blog</td>
<td>5%</td>
</tr>
<tr>
<td>Posted own stories/poetry/articles online</td>
<td>3%</td>
</tr>
<tr>
<td>Worked with others through the internet to create visual art/film/video</td>
<td>3%</td>
</tr>
<tr>
<td>Worked with others through the internet to create a story article or poem</td>
<td>2%</td>
</tr>
<tr>
<td>Posted own music online</td>
<td>2%</td>
</tr>
<tr>
<td>Posted own book/music/theatre reviews online</td>
<td>2%</td>
</tr>
<tr>
<td>Worked with others through the internet to create music</td>
<td>2%</td>
</tr>
</tbody>
</table>

^ACMA, 2009; •Australia Council for the Arts, 2010
World ranking of broadband subscribers per 100 inhabitants, 2007:
- Australia (16), Korea (1), Iceland (2), Netherlands (3), Denmark (4), Sweden (5)

Australia's accessibility of digital content, 2008-09 weighted average:
- Accessibility score: 5.63 out of 7 (1=not accessible at all; 7=widely accessible)
- World ranking: 29

Projected compound annual growth rates, no. of mobile internet subscribers, 2010-14:
- Australia: 56.3%
- Asia Pacific: 20.4%

Projected compound annual growth rates, global internet spending market: wired & mobile, 2010-14:
- Australia: 5.2%
- Asia Pacific: 6.2%
- World: 9%

Accessibility of digital content, 2008-2009 weighted average, by country ranking:

<table>
<thead>
<tr>
<th>Country</th>
<th>Accessibility Score</th>
</tr>
</thead>
<tbody>
<tr>
<td>Estonia</td>
<td>7</td>
</tr>
<tr>
<td>Switzerland</td>
<td>6</td>
</tr>
<tr>
<td>Iceland</td>
<td>5</td>
</tr>
<tr>
<td>Sweden</td>
<td>4</td>
</tr>
<tr>
<td>Austria</td>
<td>5</td>
</tr>
<tr>
<td>Finland</td>
<td>6</td>
</tr>
<tr>
<td>United States</td>
<td>7</td>
</tr>
<tr>
<td>South Korea</td>
<td>8</td>
</tr>
<tr>
<td>Denmark</td>
<td>9</td>
</tr>
<tr>
<td>Norway</td>
<td>10</td>
</tr>
<tr>
<td>Australia</td>
<td>29</td>
</tr>
</tbody>
</table>

Accessibility of digital content (e.g., text and audiovisual content, software products) via multiple platforms (e.g., fixed-line Internet, wireless Internet, mobile network, satellite, etc.)

Projected compound annual growth rates of number of mobile internet subscribers, 2010-2014, percent (%):
- North America: 35%
- Europe, Middle East & Africa: 23%
- Asia Pacific: 17%
- Australia: 56.3%

Projected compound annual growth rates of global internet access spending market: wired and mobile, 2010-2014, percent (%):
- World: 9%
- North America: 12%
- Europe, Middle East & Africa: 11%
- Asia Pacific: 9.5%
- Australia: 5.2%

*OECD, 2009; *World Economic Forum, 2010; #PricewaterhouseCoopers, 2010
PERFORMING ARTS
### Fast facts

<table>
<thead>
<tr>
<th>Category</th>
<th>Details</th>
</tr>
</thead>
<tbody>
<tr>
<td>Total industry revenue of live entertainment industry, 2008#</td>
<td>$1.88 billion</td>
</tr>
<tr>
<td>Box office income, 2008#</td>
<td>$1.1 billion</td>
</tr>
<tr>
<td>Attendance at performing arts venues &amp; events, 2005/06*</td>
<td>15.2 million</td>
</tr>
<tr>
<td>Employment in performing arts industries, August 2006*</td>
<td>21,476</td>
</tr>
<tr>
<td>People in performing arts roles (paid &amp; unpaid) before an audience, 12 months ending April 2007*</td>
<td>277,600</td>
</tr>
<tr>
<td>Household expenditure on performing arts, 2003/04*</td>
<td>Average household: $1.59 per week</td>
</tr>
<tr>
<td></td>
<td>Total: $644 million per year</td>
</tr>
<tr>
<td>Performing arts operation organisations, 2005/06*</td>
<td>726</td>
</tr>
<tr>
<td>% of creative &amp; performing arts businesses that made a profit, 2007/08*</td>
<td>72%</td>
</tr>
<tr>
<td>% of Australians 15 years &amp; over who receptively participated in the arts in last 12 months ending November 2009*</td>
<td>92%</td>
</tr>
<tr>
<td>% of Australians 15 years &amp; over who like/really like the arts, November 2009*</td>
<td>79%</td>
</tr>
</tbody>
</table>

#### Attitudes towards the arts, November 2009*

- **Like/really like the arts, 79%**
- **Neither like nor dislike the arts, 18%**
- **Do not like/really do not like the arts, 3%**

#### Number of students in Creative Arts disciplines, 2007^:

- **81,279**

Compared to enrolment in other fields:

- **Natural & physical sciences**: 67,416
- **Engineering**: 68,225
- **Information Technology**: 47,388
- **Education**: 95,594

**Note**: International comparative data for the performing arts industries as a whole is limited. Therefore, there is no slide on World Markets.

*ABS, 2010; #Live Performance Australia, 2010; •Australia Council for the Arts, 2010; ^AMPAG, 2010*
Data sources


Photo sources

http://www.flickr.com/photos/johnkarakatsanis/4545531616/sizes/m/in/photostream/

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