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# ARTS AND CULTURE IN AUSTRALIA: A STATISTICAL OVERVIEW AUSTRALIA

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## ABOUT THIS PUBLICATION

This publication brings together a range of data from both ABS and non-ABS sources about cultural activities and the cultural industries. It presents cultural data on both a topic basis (e.g. participation in cultural activities, employment in cultural industries) and a sector basis (e.g. libraries and archives, performing arts).

Content in this publication is based on the *Australian Culture and Leisure Classifications, 2001* (cat.no.4902.0). These classifications were developed by the ABS in order to promote a more unified body of statistical information about culture and leisure.

In this publication, the cultural sector is defined as those industries in the 'Heritage' and 'Arts' Divisions of the Industry Classification of the Australian Culture and Leisure Classifications (ACLC). This excludes the 'Sports and physical recreation' Division of the ACLC as well as recreational industries such as gambling and hospitality.

Most of the information presented in this publication was collected by the ABS, but data collected by other organisations have also been used so that a more complete picture of the cultural industries can be provided. Care must be taken in comparing data from different sources presented in this publication due to differences in survey methodology, definitions and reference periods.

While this publication provides substantial detail, intentionally, it is an overview of the cultural sector, and the information is not exhaustive. More comprehensive data are available from the ABS on many of the aspects of the cultural sector highlighted in this publication.

## ACKNOWLEDGMENT

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ABS publications draw extensively on information provided freely by individuals, businesses, governments and other organisations. Their continued cooperation is very much appreciated. Without it, the wide range of statistics published by the ABS would not be available. Information received by the ABS is treated in strict confidence as required by the *Census and Statistics Act 1905*.

## ROUNDING

Where figures have been rounded, discrepancies may occur between the sum of component items and the published total.

## MORE INFORMATION ON ABS CULTURE AND RECREATION STATISTICS

Information about ABS activities in the field of culture and recreation statistics is available from the Culture and Recreation Statistics theme page on the ABS web site. This theme page also contains information about the role of the National Centre for Culture and Recreation Statistics within the ABS. To access the theme page, select Themes from the menu on the ABS web site Home Page.

Susan Linacre  
Acting Australian Statistician

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**PREFACE** .....

This publication brings together a range of data from both ABS and non-ABS sources about cultural activities and the cultural industries. It presents cultural data on both a topic basis (e.g. participation in cultural activities, employment in cultural industries) and a sector basis (e.g. libraries and archives, performing arts).

This issue of the publication differs from previous editions as its content is based on the *Australian Culture and Leisure Classifications, 2001* (cat. no. 4902.0). These classifications were developed by the ABS in order to promote a more unified body of statistical information about culture and leisure. Adoption of these classifications in statistical collections facilitates comparability between different data collections and, as such, aids decision making by government and the cultural industries themselves.

In this publication, the cultural sector is defined as those industries in the 'Heritage' and 'Arts' Divisions of the Industry Classification of the Australian Culture and Leisure Classifications (ACLC). This excludes the 'Sports and physical recreation' Division of the ACLC as well as recreational industries such as gambling and hospitality.

Most of the information presented in this publication was collected by the ABS, but data collected by other organisations have also been used so that a more complete picture of the cultural industries can be provided. Care must be taken in comparing data from different sources presented in this publication due to differences in survey methodology, definitions and reference periods.

While this publication provides substantial detail, intentionally, it is an overview of the cultural sector, and the information is not exhaustive. More comprehensive data are available from the ABS on many of the aspects of the cultural sector highlighted in this publication.

Susan Linacre  
Acting Australian Statistician

## ABBREVIATIONS .....

'000	thousand
\$m	million dollars
ABN	Australian Business Number
ABS	Australian Bureau of Statistics
ACLC	Australian Culture and Leisure Classifications
ACT	Australian Capital Territory
AFC	Australian Film Commission
ANA	Australian National Accounts
ANZSIC	Australian and New Zealand Standard Industrial Classification
Aust.	Australia
BTR	Bureau of Tourism Research
CMC	Cultural Ministers Council
CMC SWG	Cultural Ministers Council Statistics Working Group
DCITA	Australian Government Department of Communication, Information Technology and the Arts
DEST	Australian Government Department of Education, Science and Training
GDP	gross domestic product
GSS	General Social Survey
GST	goods and services tax
n.e.c.	not elsewhere classified
n.f.d.	not further defined
no.	number
NCCRS	National Centre for Culture and Recreation Statistics
NSW	New South Wales
NT	Northern Territory
PSM	Population Survey Monitor
Qld	Queensland
SA	South Australia
SIS	Service Industry Survey
Tas.	Tasmania
TAFE	Technical and Further Education
Vic.	Victoria
WA	Western Australia

# CHAPTER 1

## PARTICIPATION AND ATTENDANCE .....

### INTRODUCTION

Australians' involvement in heritage and the arts can take many forms. Active involvement can include such creative pursuits as painting, acting or playing a musical instrument, while more passive involvement can cover the enjoyment one gains through experiencing the creative or artistic works of others such as when reading a book, seeing a movie, or visiting a museum or art gallery.

This chapter provides information on Australians' cultural pursuits – the time they spend on particular leisure activities, the cultural venues and events they like to attend and some of the creative hobbies in which they are involved. The focus of this chapter is on less formal involvement in heritage and the arts.

Information on people who are paid or do voluntary work for cultural organisations or produce cultural works for public display are the subject of Chapter 5 of this publication.

### TIME SPENT ON CULTURAL ACTIVITIES

How people spend their time was the subject of an ABS survey conducted in 1997. People aged 15 years and over were asked to record what they did during a two-day period. Information was recorded on eating, sleeping, paid work, housework etc. – all of which are considered essential activities.

The time left in the day after these essential activities have been done is considered free time, and it is under the broad heading of free time that most culture and recreation activities appear.

Many free time activities can be undertaken simultaneously with another activity (e.g. watching TV while eating a meal, or listening to the radio while doing housework). The information presented below shows the time spent by participants on each activity, regardless of whether it was the main activity being undertaken at the time or whether it was a secondary activity being undertaken simultaneously.

It is perhaps not too surprising that watching TV was found to be the activity which took up most people's leisure time. Approximately 87% of Australians watched TV for an average of just over 3 hours (182 minutes) per day. This means that in 1997, Australians aged 15 years and over spent a total of 37 million hours watching TV each day.

It should be noted that many people were also involved in other activities such as eating and drinking and housework at the same time that they were watching TV.

Other activities on which Australians spent a large amount of time included listening to the radio and reading.

TIME SPENT ON  
CULTURAL ACTIVITIES  
*continued*

**1.1** AVERAGE TIME SPENT BY PARTICIPANTS ON SELECTED CULTURE AND LEISURE ACTIVITIES (a)(b)—1997

Activity	Average time spent by participants	Participation rate	Total time spent by all Australians	Average percentage of day spent on activity by all Australians
	minutes per day	%	millions of person hours per day	%
Visiting entertainment and cultural venues	120	4.6	1.4	0.4
Attendance at sports events	150	1.3	0.5	0.1
Religious activities and ritual ceremonies	92	5.5	1.2	0.4
Sport and outdoor activity	103	27.1	6.6	1.9
Games, hobbies, arts and crafts	105	19.6	4.8	1.4
Reading	76	48.0	8.6	2.5
Watching TV	182	86.7	36.9	11.0
Watching videos	111	6.5	1.7	0.5
Listening to radio	135	55.0	17.4	5.2
Listening to CDs, records and tapes	91	5.6	1.2	0.4
Attendance at recreational courses	123	0.8	0.2	0.1

(a) Includes only those who have taken part in the activity.

(b) Includes cultural activities which were undertaken as a secondary activity.

Source: ABS, Time Use Survey, 1997, data available on request.

The Time Use Survey found that visiting entertainment and cultural venues attracted about 5% of the population who spent on average about two hours when they attended.

Activities included movies, concerts, theatres and the library. More details from this survey about the time spent visiting each type of venue can be obtained from the ABS publication *Time Use on Culture/Leisure Activities, 1997* (cat. no. 4173.0).

ATTENDANCE AT  
SELECTED CULTURAL  
VENUES AND EVENTS

In 1991, the ABS conducted its first survey on attendance patterns of Australians at cultural venues and events. The survey has been repeated several times since then, most recently in 2002.

That survey found the most popular venue to be the cinema for people aged 18 years and over. Some 70% of adult Australians attended the Cinema in the 12 months before their survey interview.

Other popular venues included Local, state and national libraries (an attendance rate of 42%), Botanic gardens (42%) and Zoological parks and aquariums (40%).

Of the performing arts activities, Popular music concerts had the highest attendance rate, with 26% of Australians aged 18 years or more attending at least one concert in the 12-month period.

ATTENDANCE AT  
SELECTED CULTURAL  
VENUES AND EVENTS*continued***1.2** PERSONS ATTENDING SELECTED CULTURAL VENUES AND  
EVENTS (a)—2002

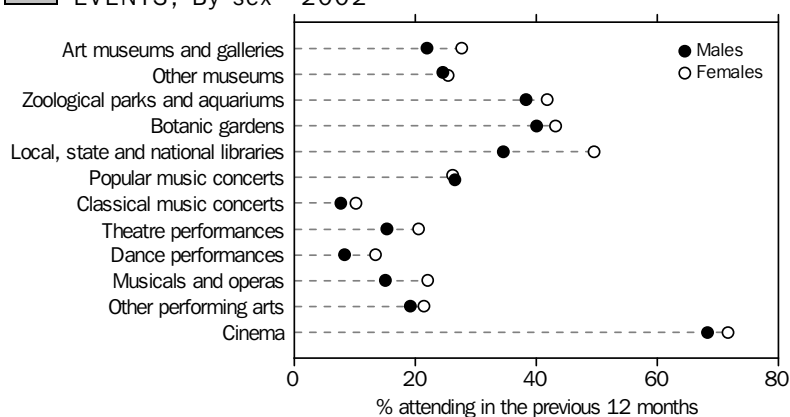
<i>Venue or activity</i>	<i>Number of people attending</i> '000	<i>Attendance rate(b)</i> %
Art museums and galleries	3 606.6	24.9
Other museums	3 623.2	25.0
Zoological parks and aquariums	5 808.3	40.0
Botanic gardens	6 034.2	41.6
Local, state and national libraries	6 110.2	42.1
Popular music concerts	3 833.6	26.4
Classical music concerts	1 298.9	9.0
Theatre performances	2 607.1	18.0
Dance performances	1 581.0	10.9
Musicals and operas	2 705.8	18.7
Other performing arts	2 955.7	20.4
Cinema	10 137.7	69.9

(a) In the 12 months before interview.

(b) Number attending as a percentage of the population aged 18 years and over.

Source: ABS, *Attendance at Selected Cultural Venues and Events*, 2002 (cat. no. 4114.0).*Characteristics of  
attendees*

For almost all venues and events, attendance rates for females were higher than for males. The differences were most apparent for Local, state and national libraries (50% of females compared with 35% of males) and Musicals and operas (22% compared with 15%).

**1.3** PERSONS ATTENDING SELECTED CULTURAL VENUES AND  
EVENTS, By sex—2002Source: ABS, *Attendance at Selected Cultural Venues and Events*, 2002 (cat. no. 4114.0).

*Characteristics of  
attendees continued*

Attendance patterns at the cultural venues and events varied considerably for the different age groups.

People aged 18–24 years were those most likely to attend Popular music concerts and the Cinema, while people aged 25–34 years were those most likely to visit Zoological parks and aquariums and Botanic gardens. By comparison, people aged 55–64 years were those most likely to attend Classical music concerts and Musicals and operas.

People aged 65 years and over generally recorded lower attendance rates for all cultural venues and events than younger age groups.

**1.4** ATTENDANCE RATES (a), By age—2002

	AGE GROUP (YEARS)						Total
	18-24	25-34	35-44	45-54	55-64	65 and over	
	ATTENDANCE RATE (%)						
Art museums and galleries	23.8	23.9	25.8	27.8	28.0	19.7	24.9
Other museums	22.3	27.0	29.1	25.3	25.7	18.3	25.0
Zoological parks and aquariums	43.2	51.9	49.1	36.7	32.8	20.1	40.0
Botanic gardens	42.6	45.5	43.4	41.4	42.2	33.1	41.6
Local, state and national libraries	47.2	42.0	47.4	41.9	36.9	35.7	42.1
Popular music concerts	43.8	33.2	25.9	24.9	20.3	10.4	26.4
Classical music concerts	6.3	6.6	8.1	10.9	13.2	9.7	9.0
Theatre	19.8	17.7	19.4	19.9	17.6	13.0	18.0
Dance performances	10.5	10.3	14.0	12.1	10.7	6.9	10.9
Musicals and operas	16.0	17.9	17.1	21.6	23.2	16.6	18.7
Other performing arts	23.3	24.0	20.9	20.6	19.5	12.9	20.4
Cinema	92.1	81.0	76.7	69.9	56.7	38.6	69.9
	NUMBER ('000)						
Total population	1 904.9	2 907.2	2 932.8	2 644.6	1 884.1	2 229.7	14 503.3

(a) Number attending in the 12 months before interview as a percentage of the population in the relevant age group.

Source: ABS, *Attendance at Selected Cultural Venues and Events, 2002* (cat. no. 4114.0).

*Frequency of attendance*

Some venues and events were more likely to attract repeat visitors than others. About two-thirds (66%) of library attendees reported visiting at least five times during the 12 month period before being interviewed. Similarly, Cinemas were popular with over half (56%) the patrons having attended at least five times in 12 months.

The venues or events where the majority of people attending had been only once in the 12 month period were Museums other than art museums, Musicals and operas, and Other performing arts.

Frequency of attendance  
continued

**1.5** FREQUENCY OF ATTENDANCE AT CULTURAL VENUES AND EVENTS—2002

	FREQUENCY OF ATTENDANCE(a)				
	Once only	2-4 times	5 times or more	Total	
	%	%	%	%	'000
Art museums and galleries	39.8	43.5	16.7	100.0	3 606.6
Other museums	52.6	37.2	10.2	100.0	3 623.2
Zoological parks and aquariums	47.2	43.5	9.3	100.0	5 808.3
Botanic gardens	37.0	44.8	18.1	100.0	6 034.2
Local, state and national libraries	6.5	27.3	66.3	100.0	6 110.2
Popular music concerts	36.1	43.3	20.6	100.0	3 833.6
Classical music concerts	41.8	41.7	16.5	100.0	1 298.9
Theatre	47.8	41.1	11.1	100.0	2 607.1
Dance performances	49.4	36.3	14.3	100.0	1 581.0
Musicals and operas	54.2	40.8	4.9	100.0	2 705.8
Other performing arts	58.3	33.3	8.4	100.0	2 955.7
Cinema	9.9	34.2	55.9	100.0	10 137.7

(a) In the 12 months before interview.

Source: ABS, *Attendance at Selected Cultural Venues and Events, 2002* (cat. no. 4114.0).

Table 1.6 shows attendance rates recorded in 2002, compared with attendance rates from previous ABS surveys conducted in 1991, 1995 and 1999. Generally, attendance rates in 2002 were slightly higher than in the earlier years. While it is important to note that some changes in survey collection methods have occurred across some of the years, these changes are likely to have had minimal impact on the results.

**1.6** ATTENDANCE AT SELECTED CULTURAL VENUES AND EVENTS(a)—1991, 1995, 1999 and 2002

	1991	1995	1999	2002
ATTENDANCE RATE (%)				
Art museums and galleries	23.9	22.1	20.9	24.9
Other museums	30.0	27.4	19.6	25.0
Zoological parks and aquariums	na	35.0	33.8	40.0
Botanic gardens	na	38.4	36.4	41.6
Local, state and national libraries	na	37.4	36.8	42.1
Popular music concerts	28.6	26.4	24.7	26.4
Classical music concerts	8.2	7.8	9.0	9.0
Theatre	17.8	16.0	16.0	18.0
Dance performances	11.2	9.9	8.8	10.9
Musicals and operas	20.1	19.3	16.3	18.7
Other performing arts	na	18.5	17.8	20.4
Cinema	na	60.4	65.6	69.9

na not available

(a) In the 12 months before interview.

Source: ABS, *Attendance at Selected Cultural Venues and Events, 2002* (cat. no. 4114.0).

## READING

A survey conducted by ACNielsen for the government book promotion, *Books Alive*, in June 2001, found that 78% of people aged 18 years and over in Australia read for pleasure every day or on most days of the week. About 11% read occasionally during the month, 7% only read every few months while 4% never read. People more likely to read frequently were: females; older people; and those with post-school qualifications.

### 1.7 PERSONS AGED 18 YEARS AND OVER WHO READ FOR PLEASURE, By selected characteristics—June 2001

Characteristics	Percentage who read every day or most days of the week %
Sex	
Males	75
Females	82
Age group (years)	
18–29	63
30–44	79
45–64	83
65 and over	86
Educational attainment	
University or higher	87
Trade or diploma	80
Year 12	73
Some secondary	75
<b>Total</b>	<b>78</b>

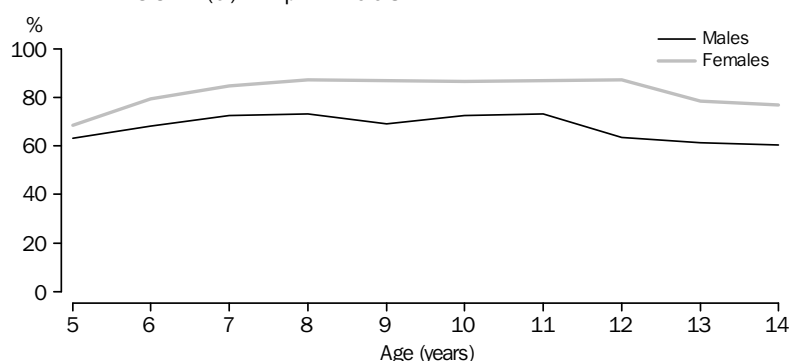
Source: Australia Council, *A National Survey of Reading, Buying and Borrowing Books for Pleasure*, conducted for *Books Alive* by ACNielsen.

The survey also found that the most popular reading material was newspapers, with 91% of people having read a newspaper for pleasure in the week before interview. This compares with 72% of people who had read books for pleasure and 63% who had read magazines in the same period.

A household survey conducted by the ABS on the activities of 5–14 year olds in 2003 showed that girls were more likely to read for pleasure than boys at any age. Overall, 82% of girls read for pleasure during the two-week reference period compared with 68% of boys.

Girls also read for longer than boys – the average time spent by girls who read for pleasure during the two-week period was 8.6 hours, compared with 7.1 hours for boys.



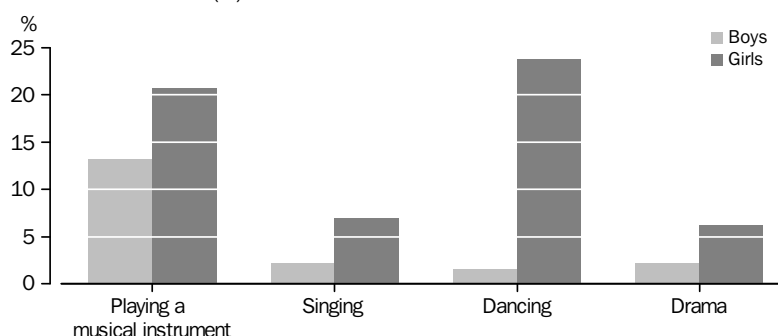
READING *continued***1.8** CHILDREN AGED 5–14 YEARS WHO READ FOR PLEASURE(a)—April 2003

(a) Outside of school hours during the past two school weeks prior to interview.

Source: ABS, *Children's Participation in Cultural and Leisure Activities, Australia, April 2003* (cat. no. 4901.0).CHILDREN'S  
INVOLVEMENT IN  
CULTURAL ACTIVITIES

Many children take part in cultural activities during school hours often as part of compulsory lessons. Some children also choose to undertake cultural activities in their own time. An ABS survey showed that over one-quarter (29%) of children aged 5–14 years were involved in at least one of four selected organised cultural activities (playing a musical instrument, singing, dancing or drama) outside of school hours in the 12 months to April 2003. Over twice as many girls as boys (43% compared with 17%) participated in at least one of these activities.

Playing a musical instrument was the most popular of the selected cultural activities (445,500 children), followed by dancing (329,300), singing (122,500) and drama (112,600). Participation rates for all four activities peaked at 11 years of age.

**1.9** CHILDREN'S PARTICIPATION IN ORGANISED CULTURAL ACTIVITIES (a)—2003

(a) Children aged 5 to 14 years who participated outside of school hours during the 12 months prior to interview in April 2003.

Source: ABS, *Children's Participation in Cultural and Leisure Activities, Australia, April 2003* (cat. no. 4901.0).

## HOBBY ACTIVITIES

Very little data exists on the types of hobbies in which people take part. The ABS collected some data on a limited set of cultural hobbies (art and craft, writing and music) in its 2001 *Survey of Work in Selected Culture and Leisure Activities*.

For the survey a hobby was defined as an activity that was undertaken only for oneself or for the family, that is, the output was not for general consumption. For example, a mother knitting a jumper for her child would include the activity as a hobby. If she knitted the jumper to sell, her activity would be considered a work involvement (work involvements are reported in Chapter 5).

The survey showed that there were 2.4 million people aged 15 years and over in Australia who were not involved in producing art and craft for the public but created items for their own or family use in the 12 months before interview. This was 16% of the population aged 15 years and over.

The survey also showed that there were 321,200 people involved in writing as a hobby only and 103,900 involved in music as a hobby only.

## CHAPTER 2

## TOURISM

### MOTIVATION FOR TRAVEL

All tourism is spurred by an underlying factor such as the desire to visit friends and relatives or to experience the character and culture of a destination. In the second half of 1996, the Bureau of Tourism Research (BTR) investigated the characteristics and motivations of international visitors to Australia aged 15 years and over. The survey found that 60% of all overseas visitors saw at least one cultural attraction while in Australia. Over one-quarter who visited cultural attractions (28% of males and 29% of females) reported the desire to experience something Australian as a motivating factor.

#### **2.1** OVERSEAS VISITORS WHO SAW CULTURAL ATTRACTIONS, Motivations, By sex—1996(a)

	Males	Females
AS PERCENTAGE OF ALL VISITORS WHO SAW CULTURAL ATTRACTIONS (%)		
Artist or professional in industry	5	4
Specifically wanted to visit	24	26
Not interested but with friend/relative	5	7
Part of package tour	26	24
Break from normal schedule	7	5
Make new friends/industry contact	1	—
An educational experience	12	12
Experience something Australian	28	29
Interested and wanted to spend time with friends/relatives	8	11
Experience something new	13	14
Something to do	10	5
Image of the activity or attraction	5	4
Rest and relaxation	6	6
Something to tell my friends/relatives about	5	6
Authentic experience	12	7
Other experience	9	8
Not stated	—	1
NUMBER OF VISITORS WHO SAW CULTURAL ATTRACTIONS ('000)		
Total	546.4	656.8

— nil or rounded to zero (including null cells)

(a) During the period July to December 1996.

Source: Foo L.M. and Rossetto A, BTR Occasional Paper Number 27, *Cultural Tourism in Australia - Characteristics and Motivations*.

INTERNATIONAL  
CULTURAL TOURISM

The most commonly seen cultural attractions by overseas visitors in 2002 were National and state parks (visited by 42% of the 4.5 million people who travelled to Australia in 2002), Wildlife parks, zoos and aquariums (41%) and Markets (43%). Historic and heritage buildings and monuments were seen by 28% of overseas visitors, Museums and art galleries by 26%, Theatre, concerts or other performing arts by 12% and Aboriginal art and craft and cultural displays by 9% of visitors.

**2.2** CULTURAL ATTRACTIONS VISITED BY OVERSEAS VISITORS—2002

<i>Cultural attraction</i>	<i>Per cent of all overseas visitors</i>
	<i>%</i>
National or state parks	42
Bushwalking or rainforest walks	21
Botanical gardens or other public gardens	36
Theatre, concerts or other performing arts	12
Museums or art galleries	26
Festivals/fairs or cultural events	7
Aboriginal art/craft and cultural displays	9
Historic/heritage buildings or monuments	28
Wildlife parks/zoos/aquariums	41
Markets (e.g. street, arts & crafts)	43
Tourist trains	8

Source: BTR, *International Visitors to Australia, Annual Results of the International Visitor Survey, 1999–2002*.

*Purchase of arts and  
crafts*

Between July and December 1997, BTR conducted a survey which collected information on the purchase of arts and crafts by the 2.0 million international visitors to Australia aged 15 years and over.

The survey found that over 90% of those visiting in the six-month period had been shopping while in Australia, and of these, 41% had spent some money on art and handcraft. Arts were purchased by 7% of shoppers and handcrafts by 39% (5% purchased both).

Expenditure on art in the six-month period totalled \$10.1m, while total expenditure on handcraft equalled \$137.4m. Handcrafted clothing (\$63.6m) and leather goods (\$38.5m) were the main items purchased. Over half the expenditure on art and handcraft was for Aboriginal items (\$77.7m out of \$147.5m).

*Purchase of arts and  
crafts continued*

**2.3** PURCHASES OF ARTS AND CRAFTS BY INTERNATIONAL VISITORS—July to December 1997

	Percentage of total visitors who purchased item (a)	Average expenditure by all visitors (a)	Total expenditure
	%	\$	\$m
<b>Arts</b>			
Paintings, drawings or prints	6.0	4.5	8.6
Sculpture	1.3	0.8	1.5
<i>Total</i>	(b) 7.1	5.3	10.1
<b>Handcrafts</b>			
Wood or furniture	7.8	6.1	11.5
Ceramics or pottery	5.2	2.4	4.5
Glass	4.1	1.5	2.8
Handcrafted clothing	19.3	33.5	63.6
Other textiles	2.0	1.6	3.1
Metal	2.6	2.1	3.9
Leather	11.8	20.3	38.5
Other handcrafts	7.3	5.0	9.5
<i>Total</i>	(b) 38.9	72.4	137.4
<b>Total art and handcrafts</b>	(b) <b>41.0</b>	<b>77.7</b>	<b>147.5</b>

(a) Who had some expenditure on shopping while in Australia. This was estimated to be 1,898,000 persons.

(b) Components do not add to the total as some visitors purchased more than one type of item.

Source: BTR, *Cultural Tourism in Australia: Visual Art & Craft Shopping by International Visitors, 1997*, prepared for DCITA.

**DOMESTIC CULTURAL  
TOURISM**

The majority of Australians spent some time away from home in 2002, with most going on a holiday or to visit friends and relatives. Data from BTR show that in 2002, there was a total of 75.3 million trips taken by persons aged 15 years and over that were of at least one night's duration. This is an average of almost five trips per person in the year.

As might be expected, tourists going on holidays were those most likely to undertake cultural activities while away from home. Of the 32.0 million holiday or leisure trips, 20% included a visit to a national park, bushwalking or a rainforest walk, 6% included a museum or art gallery visit and 5% included a visit to history or heritage buildings, sites or monuments.

During 2002, there were also 142.1 million day trips taken within Australia by persons aged 15 years and over. A day trip is defined as being a round trip distance of at least 50 kilometres, with the traveller being away from home for at least four hours although not overnight. Routine travel such as commuting between work and home is excluded.

The most common cultural activities undertaken on day trips were visiting national parks, going bushwalking and taking rainforest walks (undertaken on 6% of day trips overall and on 9% of day trips where the purpose was for holiday or leisure).

## 2.4 CULTURAL ACTIVITIES OF DOMESTIC VISITORS—2002

	PURPOSE OF VISIT					
	Holiday or leisure	Visiting friends and relatives	Business	Other	Total	
PERCENTAGE OF OVERNIGHT VISITORS (%)						
Visited national parks, went bushwalking, or took rainforest walks	20	7	2	6	12	
Visited botanical or other public gardens	2	2	1	1	2	
Attended theatre, concerts or other performing arts	3	2	1	*1	2	
Visited museums or art galleries	6	3	2	1	4	
Attended festivals, fairs or cultural events	3	1	1	*1	2	
Visited history or heritage buildings, sites or monuments	5	2	1	2	3	
Visited wildlife parks or zoos	3	2	1	*1	2	
NUMBER ('000)						
Total number of overnight trips	31 978	26 089	14 880	4 115	75 339	
PERCENTAGE OF DAY VISITORS (%)						
Visited national parks, went bushwalking, or took rainforest walks	9	2	*1	2	6	
Visited botanical or other public gardens	2	1	—	*1	1	
Attended theatre, concerts or other performing arts	2	—	—	*1	1	
Visited museums or art galleries	2	1	1	1	2	
Attended festivals, fairs or cultural events	2	—	1	*1	1	
Visited history or heritage buildings, sites or monuments	2	1	—	*1	1	
Visited wildlife parks or zoos	2	—	—	*1	1	
NUMBER ('000)						
Total number of same day trips	74 582	42 372	11 577	13 603	142 133	
* estimate has a relative standard error of 25% to 50% and should be used with caution						
— nil or rounded to zero (including null cells)						
Source: BTR, <i>Travel by Australians, 2002: Annual Results of the National Visitor Survey.</i>						

INTRODUCTION

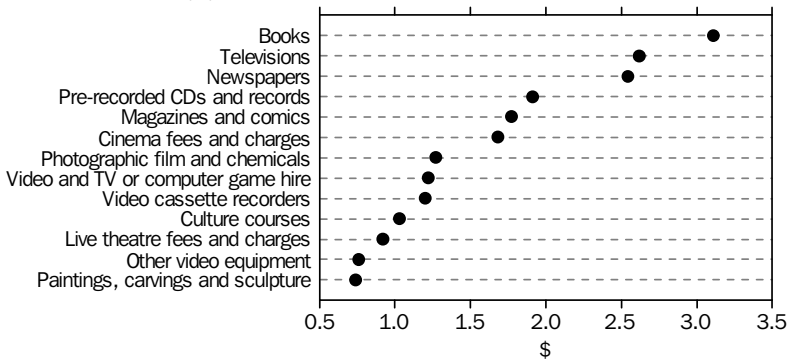
According to the most recent ABS Household Expenditure Survey (1998–99) there were an estimated 7.1 million households in Australia, each spending an average of \$27.19 per week on culture – equivalent to a total annual expenditure of \$10,097.9m by all households. The ABS Household Expenditure Survey collected detailed information at the household rather than personal level because some expenditures (e.g. video cassette recorders) benefit the whole family and cannot be meaningfully attributed to an individual within a household.

Many factors influence household spending on culture, including:

- the size of the household – more people generally equates to higher expenditures
- the location of the household – e.g. some cultural performances may only be staged in larger cities
- the income of the household – expenditure on most goods and services is related to the household's income
- the composition of the household – cultural interests vary according to the age and sex of individuals in a household which in turn influences where their cultural dollars are spent.

EXPENDITURE ON  
CULTURE

**3.1** AVERAGE WEEKLY HOUSEHOLD EXPENDITURE ON CULTURE (a) —1998–99



(a) Selected cultural items.  
Source: CMC SWG, *Household Expenditure on Culture*, prepared for CMC SWG by the NCCRS of the ABS.

In 1998–99, Australian households spent 3.8% of their total expenditure on cultural goods and services. Households spent the largest amounts on Video equipment (\$1,960.9m), Books (\$1,155.0m) and Newspapers (\$943.3m).

EXPENDITURE ON  
CULTURE *continued***3.2** EXPENDITURE ON CULTURE BY AUSTRALIAN  
HOUSEHOLDS—1998-99

	Average household expenditure	Total household expenditure
	\$/week	\$m/year
Literature		
Books	3.10	1 155.0
Newspapers	2.50	943.3
Magazines and comics	1.80	657.4
Other printed material	*0.14	*52.0
<i>Total</i>	7.60	2 804.0
Music		
Pre-recorded compact discs and records (audio)	1.90	709.3
Audio-cassettes and tapes	0.20	59.4
<i>Total</i>	2.10	765.1
Performing arts		
Live theatre fees and charges	0.90	341.7
Music concert fees and charges	0.60	208.0
<i>Total</i>	1.50	549.6
Visual arts and crafts		
Studio and other professional photography	0.40	130.0
Paintings, carvings and sculptures	0.70	274.8
Art and craft materials	0.50	167.1
<i>Total</i>	1.50	571.9
Broadcasting, electronic media and film		
Hire of video cassettes and TV or computer games	1.20	453.1
Pre-recorded video cassettes and video discs	0.50	189.4
Cinema fees and charges	1.70	623.9
Pay TV fees	0.70	267.4
<i>Total</i>	4.10	1 533.8
Other arts		
Musical instruments and accessories	*0.25	*92.8
Culture courses	1.00	382.5
Cultural fees and charges n.e.c.	0.10	26.0
<i>Total</i>	1.40	501.4
Heritage		
Art gallery and museum fees and charges	0.10	26.0
National park and zoo fees and charges	0.10	37.1
<i>Total</i>	0.20	63.1
Other culture		
Audio equipment	1.10	401.2
Video equipment	5.30	1 960.9
Other audio visual equipment and parts	0.10	52.0
Hire of televisions and video recorders	0.10	40.8
Blank video cassettes and video discs	0.20	78.0
Repair and maintenance of audiovisual equipment	0.40	144.8
Audiovisual equipment and personal computer repairs insurance	—	11.1
Photographic equipment, films and chemicals (including developing)	1.70	612.8
<i>Total</i>	8.90	3 305.3
<b>Total expenditure on culture</b>	<b>27.20</b>	<b>10 097.9</b>

\* estimate has a relative standard error of 25% to 50% and should be used with caution

— nil or rounded to zero (including null cells)

Source: CMC SWG, *Household Expenditure on Culture*, prepared for CMC SWG by the NCCRS of the ABS.



## CHANGES IN SPENDING PATTERNS

Between 1988–89 and 1998–99, total household expenditure on culture (after adjusting for inflation) increased by 13%, with some notable shifts in expenditure patterns over that time.

Large increases in spending over this 10-year period were for Broadcasting, electronic media and film (up by 60%), Visual arts and crafts (up 58%) and Music (up 54%). Conversely, households chose to spend less on Other arts (down by 26%), Literature (down 23%) and Heritage (down 19%).

### 3.3 HOUSEHOLD EXPENDITURE ON CULTURE AT CONSTANT PRICES (a)—1988–89 and 1998–99

	1988–89	1998–99	Percentage change
	\$/week	\$/week	%
Literature	9.8	7.6	–22.6
Music	1.3	2.1	53.7
Performing arts(b)	1.5	1.5	–0.7
Visual arts and crafts(c)	0.7	1.1	58.0
Broadcasting, electronic media and film(d)	2.6	4.1	60.1
Other arts(e)	1.8	1.4	–26.2
Heritage	0.2	0.2	–19.0
Other culture(f)(g)	5.8	8.9	53.4
<b>Total(c)(e)</b>	<b>23.7</b>	<b>26.7</b>	<b>12.9</b>

(a) In 1998–99 prices (1988–89 expenditures have been adjusted to 1998–99 prices).

(b) Comprises live theatre fees and charges and music concert fees and charges.

(c) Excludes art and craft materials which were allocated to a category that was not predominantly cultural prior to 1998–99.

(d) Excludes hire of TV games for 1998–99 survey.

(e) For 1998–99, includes cultural fees and charges n.e.c. which were included in other cultural categories in 1988–89.

(f) Includes hire of TV games for 1998–99.

(g) For 1998–99, includes other audiovisual equipment and parts which were included in other cultural categories in 1988–89.

Source: CMC SWG, *Household Expenditure on Culture*, prepared for CMC SWG by the NCCRS of the ABS.

## CHAPTER 4

## FUNDING BY GOVERNMENT AND BUSINESS .....

### INTRODUCTION

Each year, governments provide financial assistance to both cultural organisations and individuals (e.g. musicians) in the form of direct funding, subsidies and grants.

### GOVERNMENT FUNDING

In 2002–03, government funding for cultural activities totalled \$4,933.1m, with state and territory governments providing almost half (45% or \$2,238.1m), the Australian Government contributing 34% (\$1,670.5m), and local government making up the balance of 21% (\$1,024.5m).

Funding for capital expenditure accounted for 12% of cultural funding by all levels of government, while recurrent expenditure accounted for the remaining 88%.

Apart from direct funding, the Australian Government also provides assistance through tax concessions such as the Cultural Gifts Program, which offers tax deductions to encourage the donation of items of cultural significance to public art galleries, museums and libraries.

According to the Department of Communications, Information Technology and the Arts (DCITA) Annual Report for 2002–03, 746 donations were made to the program in that year with a total value of \$44.0m.

This compares with \$27.5m in 2001–02 and \$18.2m in 2000–01, with the significant increases over this period due in part to various changes in taxation provisions that were introduced in May 2000, and which made cultural philanthropy a more attractive proposition.

## GOVERNMENT FUNDING

*continued***4.1** CULTURAL FUNDING BY LEVEL OF GOVERNMENT—2002–03

	<i>Value of funding</i>	<i>Percentage of total</i>
	\$m	%
Australian Government		
Heritage		
Art museums and galleries	52.0	1.1
Other museums	204.6	4.1
Nature parks and reserves	83.7	1.7
Zoological parks, aquariums and botanic gardens	7.9	0.2
Libraries and archives	112.8	2.3
<i>Total</i>	<i>461.1</i>	<i>9.3</i>
Arts		
Literature and print media	25.4	0.5
Performing arts	99.9	2.0
Performing arts venues	0.5	—
Visual arts and crafts	13.2	0.3
Broadcasting and film	979.6	19.9
Community cultural centres and activities	13.4	0.3
Administration of culture	37.8	0.8
Other arts n.e.c.	39.5	0.8
<i>Total</i>	<i>1 209.4</i>	<i>24.5</i>
<i>Total</i>	<i>1 670.5</i>	<i>33.9</i>
State and territory governments		
Heritage		
Art museums and galleries	144.2	2.9
Other museums	286.3	5.8
Nature parks and reserves	987.8	20.0
Zoological parks, aquaria and botanic gardens	114.6	2.3
Libraries and archives	358.4	7.3
<i>Total</i>	<i>1 891.3</i>	<i>38.3</i>
Arts		
Literature and print media	4.3	0.1
Performing arts	72.6	1.5
Performing arts venues	91.3	1.9
Visual arts and crafts	13.3	0.3
Broadcasting and film	86.0	1.7
Community cultural centres and activities	15.4	0.3
Administration of culture	24.3	0.5
Other arts n.e.c.	39.7	0.8
<i>Total</i>	<i>346.9</i>	<i>7.0</i>
<i>Total</i>	<i>2 238.1</i>	<i>45.4</i>
Local government	1 024.5	20.8
<b>Total funding by all levels of government</b>	<b>4 933.1</b>	<b>100.0</b>

— nil or rounded to zero (including null cells)

Source: ABS, *Cultural Funding by Government, 2002–03* (cat. no. 4183.0).

## GOVERNMENT FUNDING

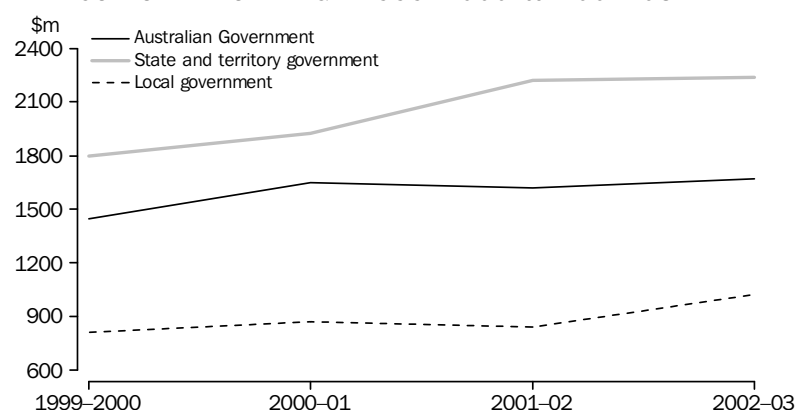
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In 2002–03, the majority of Australian Government cultural funding supported Arts activities (\$1,209.4m or 72% of total Australian Government funding). Broadcasting and film was the main beneficiary receiving over half of the total funding provided (\$979.6m or 59%).

In contrast, state and territory governments directed the majority of their funding to Heritage activities (\$1,891.3m or 85%) in 2002–03. Nature parks and reserves received \$987.8m representing 44% of the total state and territory government funding for cultural activities.

While detailed figures for local government are not available for 2002–03, data for 2000–01 show that 53% of its cultural funding was provided to Libraries and archives and 15% to Public halls and civic centres.

All three tiers of government increased their funding of cultural activities over the period 1999–2000 to 2002–03, with local governments leading (up by 26%), closely followed by state and territory governments (24%), and the Australian Government (15%).

**4.2** CULTURAL FUNDING—1999–2000 to 2002–03

Source: ABS, *Cultural Funding by Government, 2001–02 and 2002–03* (cat. no. 4183.0).

EXPENDITURE ON  
CULTURE BY BUSINESS

Businesses can fund cultural activities in several ways, with assistance usually taking the form of cash sponsorships, in-kind support (e.g. products, materials, advertising, services) or donations.

For sponsorships (and/or in-kind support), businesses often receive advertising or promotional benefits. Donations on the other hand, are usually made unconditionally, with the recipient determining the purpose for which the donation is used. While the donor is not repaid with any benefit or service, businesses and individuals can receive taxation benefits for donations of cash or property to organisations such as those listed on the Register of Cultural Organisations. In 2002–03 there were 891 organisations listed on the Register, and total donations amounted to more than \$23m.

The ABS Business Generosity Survey, 2000–01, reported that businesses gave a total of \$1,446.6m to a range of organisations and individuals, of which \$69.6m (5%) was provided for arts and cultural activities.

**4.3** BUSINESS GIVING, By type of contribution—2000–01

	Arts and culture	Other activities	Total	Arts and culture as percentage of total
	\$m	\$m	\$m	%
Donations	22.8	562.8	585.7	3.9
Business to community projects(a)	6.3	176.0	182.3	3.5
Sponsorship	40.4	638.2	678.7	6.0
<b>Total giving</b>	<b>69.6</b>	<b>1 377.1</b>	<b>1 446.6</b>	<b>4.8</b>

(a) Co-operative arrangements such as the transfer of money in exchange for strategic business benefits such as improved staff expertise, wider networking, etc.

Source: ABS, *Generosity of Australian Businesses, 2000–01* (cat. no. 8157.0).

Monetary contributions were the most common form of support from businesses. Over three-fifths (63%) of the value of support to arts and cultural activities took this form.

**4.4** BUSINESS GIVING TO ARTS AND CULTURE, By type of contribution—2000–01

	Money	Goods(a)	Services(a)	Total giving
	\$m	\$m	\$m	\$m
Donations	13.9	np	np	22.8
Business to community projects(b)	3.3	np	np	6.3
Sponsorship	26.9	7.3	6.2	40.4
<b>Total giving</b>	<b>44.1</b>	<b>13.6</b>	<b>11.9</b>	<b>69.6</b>

np not available for publication but included in totals where applicable, unless otherwise indicated

(a) At market value.

(b) Co-operative arrangements such as the transfer of money in exchange for strategic business benefits such as improved staff expertise, wider networking, etc.

Source: ABS, *Survey of Generosity of Australian Businesses, 2000–01*, data available on request.

## SOURCES OF SUPPORT FOR ARTS AND CULTURAL ORGANISATIONS

In 1999–2000, the ABS collected financial details for selected cultural industries, through a series of surveys of businesses and organisations.

Public libraries were the most reliant on government funding (92% of their total income), with Botanic gardens running a close second (80%). At the other end of the scale, those organisations involved in Music and theatre production relied least on public funds, with only 23% of their total income sourced from government.

Music and theatre production was the area where sponsorship was greatest, receiving \$25.0m in financial and in-kind support in 1999–2000, whilst Performing arts festivals (\$20.9m) and Museums (\$19.7m) also benefited from substantial sponsorship.

Museums received the largest amount (\$33.8m or almost 70% of their income) of donations and bequests made to arts and cultural organisations in the financial year, and the largest amount of private funds overall (\$53.5m).

### 4.5 SUPPORT FOR ARTS AND CULTURAL ORGANISATIONS (a)—1999–2000

#### FUNDRAISING INCOME

	<i>Sponsorship</i>	<i>Donations, bequests, etc.</i>	<i>Total</i>	<i>Government funding</i>	<i>Total funding</i>	<i>Total income</i>
VALUE (\$ m)						
Museums	19.7	33.8	53.5	487.2	540.7	716.4
Public libraries	np	np	(b) 10.8	646.6	657.4	705.0
Botanic gardens	2.2	2.4	4.6	73.4	78.0	91.8
Music and theatre production	25.0	8.9	33.9	116.7	150.6	505.4
Performing arts venues	7.0	3.0	10.0	93.5	103.5	315.9
Performing arts festivals	20.9	1.2	22.1	27.1	49.2	102.7

#### AS PERCENTAGE OF TOTAL INCOME (%)

Museums	2.7	4.7	7.5	68.0	75.5	100.0
Public libraries	np	np	(b) 1.5	91.7	93.2	100.0
Botanic gardens	2.4	2.6	5.0	80.0	85.0	100.0
Music and theatre production	4.9	1.8	6.7	23.1	29.8	100.0
Performing arts venues	2.2	0.9	3.2	29.6	32.8	100.0
Performing arts festivals	20.4	1.2	21.5	26.4	47.9	100.0

np not available for publication but included in totals where applicable, unless otherwise indicated

(b) Includes some other income such as interest.

Source: ABS, *Service Industry Surveys, 1999–2000* (cat. nos.

(a) Excludes funds provided as loans or advances.

8560.0, 8561.0, 8563.0 and 8697.0).

## INTRODUCTION

There are several data collections undertaken by the ABS which measure aspects of employment. Each has a different purpose, with different definitions and different collection methodologies. Data from several of these data sources are presented in this chapter which, taken together, provide a good picture of employment and voluntary work in the cultural sector in Australia. The chapter focuses mainly on the people who have paid work in cultural industries and occupations. Information is also presented on unpaid involvement which includes voluntary work. Different aspects of the cultural sector are selected from the data sources described below.

The Census of Population and Housing collected information on a person's main job, the one in which they usually worked the most hours, in the week before the Census. A range of demographic information including sex, age, birthplace, income, hours worked and state or territory of usual residence as well as details on occupation and industry are available from the Census. While this chapter gives some data from the Census on cultural employment, it is by no means exhaustive and substantially more can be found in the ABS publication *Employment in Culture, Australia, 2001* (cat. no. 6273.0).

The Survey of Work in Selected Culture and Leisure Activities (or 'Work' survey) was conducted in 1993, 1997 and 2001 as part of the Monthly Population Survey. Unlike the Census, the surveys covered all cultural work including second jobs and both paid and unpaid involvement. The surveys asked people aged 15 years and over about their involvement in cultural activity over a 12-month period. Data for 2001 appear in *Work in Selected Culture and Leisure Activities, Australia, April 2001* (cat. no. 6281.0).

The 2000 Voluntary Work Survey collected information about volunteering for all kinds of organisations, including those relating to arts and culture. The demographic details of volunteers, their reasons for volunteering, the frequency and duration of their involvement were all collected and are the subject of a report commissioned by the Cultural Ministers Council Statistics Working Group entitled *Australia's Cultural Volunteers, 2000*.

While the Census, the 'Work' Survey and the Voluntary Work Survey obtained their data from the general population, the 1999–2000 Service Industries Surveys collected information from employing cultural organisations. These organisations were able to provide information on the number of people they employed and the number of volunteers whose services they used. However, it should be emphasised that many smaller businesses operated by self-employed people with no employees and those organisations which rely on volunteers, were excluded, as the focus was on employing businesses.

## INTRODUCTION

*continued*

The May 2002 Survey of Employee Earnings and Hours provides information on the composition and distribution of the earnings and hours of wage and salary earners. Data from this survey have been published in *Employee Earnings and Hours, Australia, May 2002* (cat. no. 6306.0).

Each data source provides a different perspective on employment or voluntary work in the cultural sector. Which source to use is dependent on what one is trying to measure. For example, if seeking a regional breakdown (below state or territory level) or a fine level of detail on the occupation of a person working in a cultural industry, the census is the most appropriate data source although it suffers from only referring to a person's main job. If information on the total number of people involved in culture is required and detailed data on the characteristics of those involved is not important, then the 'Work' Survey data would be the most useful. If trying to compare the number of people who volunteer to work in heritage and arts organisations, with those offering their services elsewhere, the Voluntary Work Survey should be used.

The Service Industry Surveys are the most appropriate source if details of the number of people working in selected industries are required. Unlike the census, these surveys include people working in the industries in second jobs or in an unpaid capacity. However, the Service Industry Surveys only collect information from employing organisations, therefore those organisations which rely solely on the services of volunteers are excluded.

CENSUS OF POPULATION  
AND HOUSING

The 2001 Census of Population and Housing found that there were approximately 275,000 people whose main job in the week prior to Census Night was in a cultural industry. This was about 11% more than the number employed by the cultural industries in 1996.

In 2001, almost a quarter (67,362 people) of those employed in the cultural industries were involved in design. The Design industry was dominated by the Architectural services industry (26,723 people) and the Advertising services industry (25,794 people). The Newspaper, book and stationery retailing industry (38,016 people) and the Newspaper printing or publishing industry (25,737 people) were also major employers.

While industries as a whole reported a 9% increase in employment from 1996 to 2001, cultural industries increased by 11%. The size of the change over that period differed for the individual industries. For example, the largest increase in employment was 100% for the number working in the Motion picture exhibition industry. This was followed by a 57% increase in the number of people in the Other periodical publishing industry. Decreases in employment of over 30% were reported for the Film and video distribution industry, the Film, radio and TV services undefined industry and the Photographic studios industry.

Compared with people employed in all industries, those employed in cultural industries were more likely to:

- be female (50% in cultural industries, compared with 45% in all industries)
- work between 1 and 34 hours each week (33% compared with 28% in all industries)
- have a weekly income below \$300 a week (20% compared with 18% in all industries).



CENSUS OF POPULATION  
AND HOUSING *continued***5.1** PERSONS EMPLOYED IN CULTURAL INDUSTRIES (a)—August  
1996 and 2001

	1996 Census	2001 Census	Percentage change
<i>Industry</i>	no.	no.	%
Newspaper printing or publishing	26 422	25 737	-2.6
Other periodical publishing	5 563	8 716	56.7
Book and other publishing(b)	9 525	11 322	18.9
Film and video production	7 760	7 702	-0.7
Film and video distribution	1 709	1 057	-38.2
Motion picture exhibition	5 048	10 079	99.7
Radio services	6 473	5 879	-9.2
Television services	14 552	17 388	19.5
Film, radio and TV services undefined(c)	1 876	1 262	-32.7
Music and theatre productions	8 043	10 812	34.4
Creative arts	7 277	9 345	28.4
Other services to the arts(d)	7 293	5 643	-22.6
Libraries	13 735	11 451	-16.6
Museums	5 256	5 422	3.2
Libraries, museums and the arts, undefined(e)	1 277	977	-23.5
Parks and gardens(f)	7 568	10 322	36.4
Photographic studios	7 167	4 868	-32.1
Design(g)	56 188	67 362	19.9
Other cultural industries			
Recorded media manufacturing and publishing	1 528	2 148	40.6
Book and magazine wholesaling	4 839	3 734	-22.8
Newspaper, book and stationery retailing	34 594	38 016	9.9
Recorded music retailing	3 892	4 829	24.1
Video hire outlets	9 747	10 813	10.9
<b>Total cultural industries(h)</b>	<b>247 332</b>	<b>274 884</b>	<b>11.1</b>

(a) In their main job in the week before Census Night.

(b) Includes publishing undefined.

(c) Comprises Motion picture, radio and TV services undefined, Film and video services undefined and Radio and TV services undefined.

(d) Comprises Sound recording studios, Performing arts venues, Services to the arts n.e.c and Services to the arts undefined.

(e) Includes Arts undefined.

(f) Comprises Zoological and botanic gardens, Recreational parks and gardens and Parks and gardens undefined.

(g) Comprises Architectural services, Commercial art and display services and Advertising services.

(h) Excludes persons employed by religious organisations.

Source: ABS, *Employment in Culture, Australia, 2001* (cat. no. 6273.0).

About two-fifths (42%) of the people employed in the cultural industries had a cultural occupation (i.e. their work was culturally-orientated such as a writer or painter or curator), with the remaining having non-cultural occupations such as receptionists, sales assistants, clerks, cleaners and security guards. The list of cultural occupations shown in this chapter is based on the Occupation Classification of the *Australian Culture and Leisure Classifications (ACLC)* (cat. no. 4902.0). Occupations were selected because they are intrinsically creative (e.g. Sculptors), represent a cultural activity (e.g. Actors), or have a role in enabling others to participate in a cultural activity (e.g. Librarians).

## 5.2 PERSONS EMPLOYED IN CULTURAL INDUSTRIES, By whether working in cultural occupations(a)—August 2001

Industry	Cultural occupations(b)	Other occupation(c)	Total	Percentage of occupations which are cultural
	no.	no.	no.	%
Newspaper printing or publishing	12 375	13 362	25 737	48.1
Other periodical publishing	3 919	4 797	8 716	45.0
Book and other publishing(d)	4 072	7 250	11 322	36.0
Film and video production	5 105	2 597	7 702	66.3
Film and video distribution	178	879	1 057	16.8
Motion picture exhibition	4 319	5 760	10 079	42.9
Radio services	3 155	2 724	5 879	53.7
Television services	8 995	8 393	17 388	51.7
Film, radio and TV services undefined(e)	562	700	1 262	44.5
Music and theatre productions	8 288	2 524	10 812	76.7
Creative arts	7 947	1 398	9 345	85.0
Other services to the arts(f)	1 915	3 728	5 643	33.9
Libraries	9 092	2 359	11 451	79.4
Museums	1 846	3 576	5 422	34.0
Libraries, museums and the arts, undefined(g)	503	474	977	51.5
Parks and gardens(h)	1 631	8 691	10 322	15.8
Photographic studios	3 670	1 198	4 868	75.4
Design(i)	35 577	31 785	67 362	52.8
Other cultural industries(j)	1 496	58 044	59 540	2.5
<b>Total cultural industries(k)</b>	<b>114 645</b>	<b>160 239</b>	<b>274 884</b>	<b>41.7</b>

(a) In their main job in the week before Census Night.

(b) Excludes 14,239 Ministers of religion who are included in the category 'Other occupations'.

(c) Includes not stated and inadequately described.

(d) Includes publishing undefined.

(e) Comprises Motion picture, radio and TV services undefined, Film and video services undefined and Radio and TV services undefined.

(f) Comprises Sound recording studios, Performing arts venues, Services to the arts n.e.c and Services to the arts undefined.

(g) Includes Arts undefined.

(h) Comprises Zoological and botanic gardens, Recreational parks and gardens and Parks and gardens undefined.

(i) Comprises Architectural services, Commercial art and display services and Advertising services.

(j) Comprises Recorded media manufacturing and publishing, Book and magazine wholesaling, Newspaper, book and stationery retailing, Recorded music retailing and Video hire outlets.

(k) Excludes persons employed by religious organisations.

Source: ABS, *Employment in Culture, Australia, 2001* (cat. no. 6273.0).

### CENSUS OF POPULATION AND HOUSING *continued*

The 2001 Census of Population and Housing found that there were 245,617 people whose main job in the week prior to Census Night was in a cultural occupation. This was approximately 14% more than the number employed in cultural occupations in 1996. Some of the more common cultural occupations included Graphic designers, Architects and Landscape architects, Librarians and Printing tradespersons.

Overall, more males (55%) than females (45%) worked in cultural occupations. In particular, males dominated the Camera operator, Sound technician and Printing tradesperson occupations. Conversely, females greatly outnumbered males in occupations such as Make-up artists, Library technicians and Dance teachers.

The median weekly income for all persons working in cultural occupations was \$611, compared with \$587 for all employed persons, according to the 2001 Census. About two-thirds (68%) of Ticket collectors or ushers and one-half (50%) of Potters and ceramic artists received an income of less than \$300 per week. In contrast, a high percentage of

CENSUS OF POPULATION  
AND HOUSING *continued*

Environment, parks and landcare managers (84%) and Television journalists (80%) received an income of at least \$700 per week.

**5.3** EMPLOYED PERSONS BY OCCUPATION(a)—August 2001

<i>Occupation</i>	<i>Persons employed</i>  no.
Museum related workers	2 327
Heritage related workers	3 935
Library and archive related workers	25 638
Print journalists and related workers	10 155
Publishing and printing related workers	41 889
Authors	3 289
Film/TV/radio/stage directors and producers	10 780
Advertising and related workers	4 256
Film, radio and TV technicians and operators	8 352
Cinema workers	5 319
Musicians, actors and related professionals	26 812
Other performing arts workers	2 660
Photographers	7 381
Visual arts and crafts professionals	16 321
Designers and related workers	37 709
Architects and related workers	24 939
Broadcasting related workers	5 872
Other cultural occupations	7 983
<i>Total cultural occupations(b)</i>	<i>245 617</i>
Other occupations(c)	8 052 936
<b>Total all employed persons</b>	<b>8 298 553</b>

- (a) In their main job in the week before Census Night.  
 (b) Excludes 14,239 Ministers of religion who are included in the category 'Other occupations'.  
 (c) Includes Not stated and Inadequately described.  
 Note: These occupations have been grouped. For more detail, see *Employment in Culture, Australia, 2001* (cat. no. 6273.0).  
 Source: ABS, *Employment in Culture, Australia, 2001* (cat. no. 6273.0).

WORK IN CULTURE AND  
LEISURE ACTIVITIES  
SURVEY

As the Census did not fully represent employment in the cultural sector because of the large numbers involved through a second job or through unpaid work, the ABS conducted a survey to collect more information on all the ways in which people could be involved.

In 2001, the latest 'Work Survey' found that there were about 2.5 million people (17% of the population aged 15 years and over) in Australia who had worked in a culture or leisure activity in the 12 months before interview. Of these, some 794,800 (5% of the population aged 15 years and over) stated that their involvement was part of a job they held in the week before interview.

It should be noted that this involvement could have been a relatively minor part of the job the person held (e.g. taking photographs for inclusion in their organisation's newsletter). Involvement was defined to exclude those activities undertaken only for the person's own or family use – these were classed as hobbies.

WORK IN CULTURE AND  
LEISURE ACTIVITIES  
SURVEY *continued*

**5.4** PERSONS WORKING IN CULTURE AND LEISURE  
ACTIVITIES(a)—12 months ending April 2001

	Males	Females	Persons
NUMBER ('000)			
Involvement part of main job held last week	386.8	378.9	765.7
Involvement part of second job held last week	17.9	11.2	29.1
<i>Involvement part of a job held last week</i>	<i>404.7</i>	<i>390.1</i>	<i>794.8</i>
Involvement not part of any job held last week	754.9	961.8	1 716.6
<b>Total involved</b>	<b>1 159.6</b>	<b>1 351.9</b>	<b>2 511.5</b>
PARTICIPATION RATE (%)			
Involvement part of main job held last week	5.2	5.0	5.1
Involvement part of second job held last week	0.2	0.1	0.2
<i>Involvement part of a job held last week</i>	<i>5.5</i>	<i>5.1</i>	<i>5.3</i>
Involvement not part of any job held last week	10.2	12.7	11.5
<b>Total involved</b>	<b>15.7</b>	<b>17.8</b>	<b>16.8</b>

(a) Excludes people whose only involvement was in a hobby capacity.

Source: ABS, Survey of Work in Selected Culture and Leisure Activities, April 2001, data available on request.

There were 1.7 million people who worked in culture and leisure activities in the 12 months before interview who stated that the activity was not related to a job held last week. Some of these people would have undertaken the activity as part of a job held earlier in the 12-month period. However, most would have undertaken these activities on a voluntary basis.

The most common types of cultural activities which formed part of the person's job were Writing (247,800 people), Design (192,800 people), Interactive content creation, such as designing web sites and computer games (103,600 people) and Computer art (86,600 people).

WORK IN CULTURE AND  
LEISURE ACTIVITIES  
SURVEY *continued*

**5.5** PERSONS INVOLVED(a), By type of activity and whether part of  
job—12 months ending April 2001

Activity	Involvement part of job(s) held last week '000	Involvement not part of job(s) held last week '000	Total '000
Heritage organisations	*8.1	45.6	53.7
Public art galleries	*7.8	33.0	40.8
Museums	*8.1	40.1	48.2
National parks and reserves	14.3	62.6	76.9
Zoos and aquariums	*6.2	*7.9	14.1
Botanic gardens	*4.1	19.7	23.8
Libraries and archives	25.9	50.1	76.0
Writing	247.8	289.0	536.9
Publishing	81.1	71.0	152.0
Music - live performer	23.4	211.0	234.4
Music - no involvement as live performer	14.4	33.1	47.5
Performer arts - performer	18.1	240.1	258.3
Performing arts - no involvement as performer	17.6	88.8	106.3
Drawing	42.2	82.3	124.5
Painting	32.7	121.3	154.1
Sculpture	*4.8	36.3	41.0
Photography	40.1	111.5	151.6
Print-making	17.1	20.1	37.1
Computer art	86.6	115.3	201.9
Other visual art activities	*9.7	27.1	36.8
Pottery and ceramics	*8.4	48.5	56.9
Textiles	16.5	77.9	94.4
Jewellery	*6.9	18.1	25.0
Furniture-making and wood crafts	21.3	102.6	123.9
Glass crafts	*6.8	14.2	21.0
Other craft activities	16.1	111.2	127.3
Design	192.8	157.1	349.8
Radio	28.8	61.9	90.7
Television	37.7	45.9	83.6
Film production	18.7	25.7	44.4
Cinema and video distribution	13.7	*6.4	20.1
Interactive content creation	103.6	130.1	233.8
Fete organising	40.0	277.6	317.5
Teaching	57.2	107.2	164.4
Festival organising	48.7	145.2	193.9
Art and craft show organising	27.0	95.4	122.5
Government arts organisations and agencies	11.6	16.6	28.3

\* estimate has a relative standard error of 25% to 50% and should be used with caution

(a) Excludes people whose only involvement was in a hobby capacity.

Source: ABS, Survey of Work in Selected Culture and Leisure Activities, April 2001, data available on request.

VOLUNTARY WORK  
SURVEY

Some cultural industries rely heavily on the activities of volunteers to assist their paid workforce. The 2000 Voluntary Work Survey defined a volunteer as someone who willingly gave unpaid help, in the form of time, services or skills, through a club, organisation or association. It found that about 32% of people in Australia aged 18 years and over undertook some sort of voluntary work in the 12 months before interview in 2000. Some 280,200 people (2% of the population) undertook voluntary work for heritage and arts organisations.

VOLUNTARY WORK  
SURVEY *continued***5.6** PERSONS UNDERTAKING VOLUNTARY WORK FOR HERITAGE AND ARTS ORGANISATIONS—2000

	Number of volunteers	Per cent of the population
	'000	%
Males	117.1	1.7
Females	163.1	2.3
<b>Persons</b>	<b>280.2</b>	<b>2.0</b>

Source: CMC SWG, *Australia's Cultural Volunteers, 2000*, prepared for CMC SWG by the NCCRS of the ABS.

Some of the people undertaking voluntary work provided assistance to more than one heritage and arts organisation. Consequently, the total number of involvements in heritage and arts organisations (306,400) exceeded the total number of volunteers (280,200). Performing arts organisations were the most likely to attract volunteers (102,600 involvements).

The most common type of involvement in heritage and the arts was with organisations involved in the Performing arts (102,600 involvements), which accounted for approximately one-third (34%) of the 306,400 involvements. There were 46,800 involvements in Other arts (e.g. with art festivals, art schools and art councils).

**5.7** VOLUNTEER INVOLVEMENTS, By cultural organisation assisted—2000

	Number of volunteers	Percentage
Type of organisation (a)	'000	%
Performing arts	102.6	33.5
Museums, antiques and collectibles	*33.4	*10.9
Environmental heritage	*26.7	*8.7
Broadcasting, electronic media and film	*25.9	*8.5
Other arts	46.8	15.3
Other groups in the Heritage and Arts Divisions	71.0	23.2
<b>Total involvements (b)</b>	<b>306.4</b>	<b>100.0</b>

\* estimate has a relative standard error of 25% to 50% and should be used with caution

(a) Grouped according to the Industry Classification of the Australian Culture and Leisure Classifications.

(b) As volunteers can work for a number of organisations, the number of involvements exceeds the number of volunteers.

Source: CMC SWG, *Australia's Cultural Volunteers, 2000*, prepared for CMC SWG by the NCCRS of the ABS

SERVICE INDUSTRY  
SURVEYS

The 1999–2000 Service Industry Surveys collected information from employers in selected cultural industries. Data was provided on all of the people working in the selected industries (both paid and unpaid) during the last pay period in June 2000. However, as stated earlier, only employing organisations were covered.

SERVICE INDUSTRY  
SURVEYS *continued*

While a few of the selected industries have been surveyed since 1999–2000, namely the Television, film and video production, Music and theatre production and Performing arts festivals industries, they have not been included in this chapter to allow comparisons to be made across industries. However, the latest data have been included under the appropriate chapters in Part B of this report, which give a profile for the individual industries.

Of the industries surveyed, the largest employers were Film and video production (15,195 people) and Public libraries (11,840 people). Video hire and Motion picture exhibition industries also employed large numbers of people, although they predominantly worked part-time or as casuals.

**5.8** PERSONS EMPLOYED IN SELECTED CULTURAL INDUSTRIES—June 2000

	Full-time	Part-time and casual	Total
	no.	no.	no.
Film and video production	7 234	7 875	(a) 15 195
Film and video distribution	1 059	366	1 426
Motion picture exhibition	1 196	8 026	(a) 9 282
Television services(b)			
Commercial free-to-air	6 392	1 415	7 807
Pay television	2 379	482	2 861
Music and theatre productions	2 904	4 012	(a) 7 060
Performing arts venues	1 451	3 698	5 149
Other services to the arts			
Festivals	189	184	374
Other	1 726	2 043	(a) 3 846
Libraries(c)			
Public libraries	5 915	5 925	11 840
Archives	na	na	756
Art and other museums	4 014	2 775	(a) 6 956
Video hire	2 026	8 267	(a) 11 034
Commercial art galleries	389	586	1 409
Botanic gardens	971	279	1 250

na not available

(a) Includes working proprietors and partners.

(b) Excludes public television broadcasters and community broadcasters.

(c) Excludes special libraries and libraries located in educational institutions.

Source: ABS, Service Industries Surveys, various publications, 1999–2000  
(cat. nos. 8559.0, 8560.0, 8561.0, 8562.0, 8563.0, 8651.0,  
8654.0, 8679.0, 8697.0).

Many cultural industries are run as commercial operations and are exclusively staffed by paid employees. A few industries, however, rely heavily on the assistance of volunteers. The Service Industries Surveys found that 29,963 volunteers helped in the running of museums during June 2000 which was over four times the number of people with paid employment in the industry at that time. Similarly, 5,150 people undertook voluntary work for Libraries during June 2000, or about two volunteers for every five people employed.

SERVICE INDUSTRY  
SURVEYS *continued*

Some 3,034 people worked as volunteers in Music and theatre productions in June 2000, again giving a ratio of about two volunteers for every five persons employed. The 2,142 paid staff working on 152 performing arts festivals (of 2 days or more duration) during 1999–2000 received assistance from 17,718 volunteers.

**5.9** VOLUNTEERS IN SELECTED CULTURAL INDUSTRIES—JUNE 2000

	<i>Number</i>
Music and theatre productions	3 034
Festivals	17 718
Public libraries	(a) 5 150
Art and other museums	29 963

(a) Excludes special libraries and libraries located in educational institutions.

Source: ABS, Service Industries Surveys, various publications, 1999–2000 (cat. nos. 8560.0, 8561.0, 8697.0).

EMPLOYEE EARNINGS  
AND HOURS

The earnings of wage and salary earners by occupation is available from an ABS survey conducted in May 2002. However, the information is not available at the detailed occupation level shown in the Census of Population and Housing. This survey showed that Artists and related professionals who worked as full-time employees (excluding those who were self-employed) worked an average of 38 hours per week and had weekly earnings of \$929. Printing tradespersons worked an average of 41 hours per week and had weekly earnings of \$814. By comparison, all wage and salary earners worked an average of 40 hours per week with earnings totalling \$845.

**5.10** FULL-TIME ADULT NON-MANAGERIAL EMPLOYEES (a), Earnings and hours—May 2002

	<i>Males</i>		<i>Females</i>		<i>Persons</i>	
	\$	Hours	\$	Hours	\$	Hours
Artists and related professionals	972	39	880	38	929	38
Printing tradespersons	850	41	646	40	814	41
All occupations	901	40	760	38	845	40

(a) Average weekly total earnings and hours paid for.

Source: ABS, *Employee Earnings and Hours, Australia, May 2002* (cat. no. 6306.0).



## CHAPTER 6

## OUTPUT OF CULTURAL INDUSTRIES .....

### AUSTRALIAN NATIONAL ACCOUNTS

A measure of the significance of an industry to the Australian economy is the value of its outputs compared with those of other industries and to the economy as a whole. The Australian National Accounts (ANA) provides a summary of the economic activity of the nation allowing such comparisons to be made. The ANA includes expenditure in Australia by businesses, governments and people from overseas.

Data from the ANA are available on both an industry basis (the value of output of firms in the industry) and a product basis (the value of commodities typically produced by the industry). The difference between the industry and product data arises because some firms produce products which are typically not made by firms in their industry.

The industries in the ANA are defined using the 1993 *Australian and New Zealand Standard Industrial Classification (ANZSIC)* (cat. no. 1292.0). The Classification combines industries into economically significant classes which are then the basis for statistical output.

For Australia, a significant class is one which has \$200m turnover in Australia or employs 3,500 – based on 1989–90 information. Unfortunately, many individual cultural industries do not reach these limits and are therefore grouped with similar cultural industries. For example, those working as painters, writers and playwrights are all grouped together, with several other similar activities, under a class entitled 'Creative arts'. Data are available for the combined group but not for the individual creative activities.

A small number of cultural goods and services have been excluded from the calculation of cultural output because they cannot be separately identified from non-cultural products.

The latest product data available are for the year 1998–99. These data show that the Australian production of cultural goods and services totalled \$31,828.0m.

The value of the output of the cultural industries was approximately the same as that of the Residential building industry (\$31,713.0m), the Scientific research, technical and computer services industry (\$31,552.2m), the Education industry (\$33,179.0m) and the Accommodation, cafes and restaurants industry (\$35,191.0m).

In 1998–99, the value of production of Printing and services to printing totalled \$5,639.9m, which was 18% of the total value of cultural goods and services produced in that year. Newspapers (printing or publishing) and Radio and TV station services each accounted for 14% of the total value of output of cultural goods and services. Advertising services was the only other cultural product which accounted for more than 10%.

AUSTRALIAN NATIONAL  
ACCOUNTS *continued***6.1** PRODUCTION OF CULTURAL GOODS AND SERVICES (a) (b)—1998-99

<i>Product item (c)</i>	<i>Australian production</i>	<i>Percentage of total cultural goods and services produced</i>
	\$m	\$m
Publishing, recorded media and publishing		
Newspapers, printing or publishing	4 437.7	13.9
Magazines and bound periodicals publishing	1 284.6	4.0
Books, sheet music, maps, etc. publishing	1 529.9	4.8
Pre-recorded audio, video tapes, computer tapes or disks, compact disks and records, manufactured or published	1 106.0	3.5
<i>Total (d) (e)</i>	8 397.7	26.4
Motion picture, radio and television services		
Motion picture production	422.5	1.3
Film hiring services	227.0	0.7
Motion picture theatre services	576.1	1.8
Radio and TV station services	4 399.6	13.8
Pay TV services	746.0	2.3
<i>Total (f)</i>	6 374.2	20.0
Libraries, museums and the arts		
Library, museum and art gallery services	844.0	2.7
Zoological and botanical gardens operation	291.0	0.9
Recreational parks and gardens operation	475.0	1.5
Music and theatre production operation	421.0	1.3
Creative arts services	530.0	1.7
Sound recording studios operation	66.0	0.2
Performing arts venue operation	656.0	2.1
Other services to the arts (g)	272.0	0.9
<i>Total (f) (h)</i>	3 825.0	12.0
Other cultural products		
Printing and services to printing	5 639.9	17.7
Television receiving sets production	129.3	0.4
Musical instruments (incl. parts and accessories) production	10.0	—
Architectural services	1 384.0	4.3
Advertising services	3 779.0	11.9
Commercial art and display services	1 101.0	3.5
Video hire	891.0	2.8
Photography services n.e.c.	296.9	0.9
<i>Total</i>	13 231.1	41.6
<b>Total</b>	<b>31 828.0</b>	<b>100.0</b>

— nil or rounded to zero (including null cells)

(a) At basic values - the net price received by the producer (after deducting any indirect taxes).

(b) Excludes products produced by: the Recorded media manufacturing and publishing industry; the Book and magazine wholesaling industry; the Newspaper, book and stationery retailing industry; and the Recorded music retailing industry (details for these industries are not available separately).

(c) The product items are defined to be consistent with ANZSIC, which has been used by the ABS to code industry since 1993.

(d) Includes other income.

(e) Includes increase in inventories.

(f) Includes general government consumption of fixed capital.

(g) Includes casting agency operation; news reporting services (excluding own account); and services to the arts n.e.c..

(h) Includes royalties income and licence fees (excluding licence fees paid to the government).

Source: ABS, *Australian National Accounts: Input-Output Tables (Product Details)*, 1998-99 (cat. no. 5215.0.55.001).

AUSTRALIAN NATIONAL  
ACCOUNTS *continued*

The data in table 6.1 show the value of cultural goods and services produced in Australia. This is a gross measure which includes the value of output produced by other industries that are used by the cultural industries in producing their output.

For instance, the category Radio and TV station services includes the purchase of the rights to broadcast sport events which are the output of another industry (i.e. the Sport, recreation and gambling services industry).

The value of an industry's output after deducting the value of goods and services used in producing them is termed 'value added'. This is equivalent to the return received by the factors of production (labour and capital).

This is a net measure of the size of the industry's output, and allows the production of different industries to be added together without the risk of double counting.

Value added data are only available on an industry basis, which is not as detailed as the product basis. Therefore, value added data are not available for all of the cultural products displayed in table 6.1, which shows only the value of production and the value added for those cultural industries which can be identified separately in the industry classification.

The value of the goods and services produced by the cultural industries for which value added data were available was \$17,773m in 1998–99. The value added component of these cultural industries was \$10,117m, which indicates that 57% of the value of goods and services produced by the cultural industries was paid to factors of production (labour and capital). The remaining amount (\$7,656m or 43%) was paid to other industries for their output which was used in producing the cultural goods and services.

These selected cultural industries account for 1.9% of Australia's Gross Domestic Product (GDP), in terms of value added. Since these industries produce about 56% of the output of all cultural industries (those industries included in table 6.1), it seems likely that cultural industries as a whole account for approximately 3.3% of Australia's GDP in 1998–99. GDP is equivalent to gross national expenditure plus exports of goods and services minus imports of goods and services.

AUSTRALIAN NATIONAL  
ACCOUNTS *continued***6.2** OUTPUT AND VALUE ADDED, Selected Cultural  
Industries(a)—1998-99

	Australian production(b)	Value added
<i>Industry</i>	\$m	\$m
Motion picture, radio and television services	5 501	3 643
Libraries, museums and the arts	3 825	2 156
Publishing, recorded media, etc.	8 447	4 318
<i>Total for selected cultural industries(a)</i>	<i>17 773</i>	<i>10 117</i>
<b>Total for all industries</b>	<b>1 100 720</b>	<b>542 831</b>

(a) Those for which value added data are available.

(b) These figures differ slightly from those that could be obtained by summing the relevant categories in the previous table. This table shows the value of output produced by firms belonging to this industry, whereas the previous table shows the value of products typically produced by this industry, regardless of whether they were produced by firms in this industry (the difference arises because some firms have non-core activities which belong to a different industry to their core activities).

Source: ABS, *Australian National Accounts: Input-Output Tables, 1998-99* (cat. no. 5209.0.55.001).SERVICE INDUSTRIES  
SURVEYS

ANA data are useful for making broad comparisons across industries to enable a picture to be drawn of the economic importance of the cultural sector. However, the ANA does not have detailed information on the operations of each of the cultural industries. Such information is available from a series of 1999–2000 Service Industries Surveys (SIS).

Most of these surveys included only employing businesses (unlike data for the ANA) and therefore do not reflect the activities of the whole industry. However, even though there are numerous businesses in Australia without employees, their overall contribution to economic activity is relatively small.

A 1995–96 study revealed that non-employing businesses in the cultural and recreational services industry division accounted for approximately three-quarters of all businesses but only 6% of operating income (Source: ABS, *Information Paper: The Expanded Use of Business Income Tax Data in ABS Economic Statistics*, cat. no. 5672.0).

Thus, the exclusion of businesses without employees does not affect the usefulness of the data collected by the Service Industries Surveys.

In 1999–2000, businesses mainly engaged in Television services had an operating income of \$4,181.9m. Other cultural industries included in the Service Industries Surveys where income exceeded \$1,000m were Film and video production and Film and video distribution and Motion picture exhibition.

SERVICE INDUSTRIES  
SURVEYS *continued***6.3** SELECTED CULTURAL INDUSTRIES(a), Income and Value  
Added—1999-2000

<i>Industry</i>	<i>Operating income</i>	<i>Value added</i>
	\$m	\$m
Film and video production	1 473.8	606.8
Film and video distribution	1 141.8	281.1
Motion picture exhibition(b)	678.9	347.7
Television services	4 181.9	na
Video hire industry	595.2	281.9
Libraries and archives	792.2	na
Museums	716.4	na
Botanic gardens	91.8	na
Music and theatre productions	505.4	206.9
Performing arts venues	315.9	86.0
Commercial art galleries	131.8	na
Other services to the arts		
Performing arts festivals	102.7	14.1
Other services to the arts	709.8	50.5

na not available

(a) Excludes some parts of the cultural industries such as publishing and recorded media and the creative arts. Also excludes the income of non-employed businesses.

(b) Includes non-operating income.

Source: ABS, *Service Industries Surveys* (various publications), Australia, 1999-2000 (cat. nos. 8559.0, 8560.0, 8561.0, 8562.0, 8563.0, 8651.0, 8654.0, 8679.0, 8697.0).

When making comparisons between the different sources of data it is important to take into consideration differences in the scope and methodology of the surveys. Each data source provides information on different aspects of cultural production and what information is required will determine what data source to use.

ANA data should be used if making broad comparisons across industries or when trying to value the cultural sector as a whole to the economy. On the other hand, SIS data are more appropriate for examining a particular industry in detail.

As the chapters in Part B of this report do not make comparisons across industries, SIS will be the primary data source.

# CHAPTER 7

## CULTURAL TRADE

### INTRODUCTION

Australian culture has evolved over many years and continues to be influenced by the diverse backgrounds of people who have migrated to Australia.

Overseas trade in goods and services also has an undeniable impact on Australian culture that extends well beyond its economic significance, as the imports of items such as films, music and books influence the way Australians think and act.

The range of cultural goods and services included in the following tables is based on the culture and recreation product classification of the Australian Culture and Leisure Classifications (ACLC).

More detailed information about the ACLC and what items have been included is available in the CMC SWG publication *Australia's Trade in Culture 2000–01*, Appendix 1 (see the *List of references* for this publication for more detail).

### TRADE IN CULTURAL GOODS

Australia continues to import more cultural goods and services than it exports overseas. In 2002–03, Australia earned \$918m through the provision of cultural goods and cultural and recreational services to the rest of the world, less than a quarter of the value of goods and services it received from overseas (\$4,328m).

#### 7.1 TRADE IN CULTURAL GOODS AND SERVICES—2002–03

	Cultural goods	Cultural and recreational services	Total
VALUE (\$ m)			
Exports/credits	576	342	918
Imports/debits	3 342	986	4 328
PER CENT (%)			
Exports/credits	62.7	37.3	100.0
Imports/debits	77.2	22.8	100.0

Source: ABS, *International Trade, Australia - Information Consultancy Ad Hoc Service* (cat. no. 5466.0).

Exports of cultural goods in 2002–03 totalled \$576m, or 0.5% of all goods exported out of Australia, while cultural imports totalled \$3,341m, or 2.5% of all goods imported into Australia.

TRADE IN CULTURAL  
GOODS *continued***7.2** TRADE IN CULTURAL GOODS—2002–03

	Cultural goods	All goods	Cultural goods as a percentage of all goods
	\$m	\$m	%
Exports	576.2	115 454.5	0.5
Imports	3 341.8	133 129.8	2.5

Source: ABS, *International Trade, Australia - Information Consultancy Ad Hoc Service* (cat. no. 5466.0).

## COMMODITIES TRADED

The largest individual cultural commodity exported in 2002–03 was Printed books (\$97m). This was followed by Paintings, drawings and pastels executed entirely by hand (\$72m), and Brochures, leaflets and similar printed matter and children's drawing and colouring books (\$65m).

The largest individual cultural commodity imported in 2002–03 was Television receivers (\$754m), with the second largest being Radio broadcast receivers, including radio-cassette players and CD-tuners for installation in motor vehicles (\$607m). Imports of Printed books in 2002–03 totalled \$434m.

**7.3** TRADE IN CULTURAL GOODS, By Product Group—2002–03

	Exports	Imports	Excess of imports over exports
	\$m	\$m	\$m
<i>ACLC Product Group</i>			
Heritage services	18.8	46.3	27.5
Books, magazines, newspapers and other printed matter	244.6	936.8	692.1
Audio and video media	100.2	326.6	226.4
Radio and television receivers and apparatus for sound or video recording or reproduction	101.9	1 789.7	1 687.7
Exposed photographic and cinematographic media, and artistic works	100.2	115.5	15.3
Musical instruments and other performing arts equipment	10.4	127.0	116.5
<b>Total</b>	<b>576.2</b>	<b>3 341.8</b>	<b>2 765.6</b>

Source: ABS, *International Trade, Australia - Information Consultancy Ad Hoc Service* (cat. no. 5466.0)

CULTURAL TRADE BY  
COUNTRY

About two-fifths (41%) of Australia's cultural exports went to New Zealand (\$234m), with significant quantities also going to the United States of America (\$96m) and the United Kingdom (\$81m).

**7.4** EXPORTS OF CULTURAL GOODS, By Country and Product Group—2002–03

## ACLC PRODUCT GROUP(a)

	<i>Heritage services</i>	<i>Books, magazines, etc.</i>	<i>Audio and video media</i>	<i>Radios, TVs, etc.</i>	<i>Exposed film and artistic works</i>	<i>Musical instruments etc.</i>	<i>Total</i>
	\$m	\$m	\$m	\$m	\$m	\$m	\$m
Canada	0.1	3.5	1.3	0.3	1.6	0.1	6.8
China	—	0.4	0.2	4.6	0.4	0.1	5.7
Fiji	—	3.6	0.2	1.2	0.1	0.1	5.2
Germany	0.3	0.5	1.7	2.1	2.5	0.5	7.7
Hong Kong	0.8	3.7	11.0	5.3	2.9	0.1	23.7
Japan	0.2	1.8	1.0	2.3	4.3	0.2	9.9
Korea, Republic of	—	1.3	0.8	2.5	1.5	—	6.1
Malaysia	—	2.1	0.1	10.0	0.4	—	12.6
Netherlands	0.1	0.5	3.7	0.2	0.6	0.1	5.2
New Zealand	0.3	157.1	31.0	32.9	8.4	4.6	234.3
Papua New Guinea	—	4.5	0.1	0.5	0.1	—	5.2
Singapore	0.2	10.8	1.9	4.8	1.7	0.1	19.4
South Africa	—	5.0	0.2	3.6	0.5	0.1	9.4
Taiwan	1.0	0.8	0.5	5.0	1.1	0.1	8.5
Thailand	—	2.3	0.2	2.4	0.1	—	5.2
United Kingdom	8.7	12.7	8.5	2.2	47.9	0.6	80.5
United States of America	6.3	26.1	32.0	9.5	19.6	2.2	95.6
Other countries	0.7	8.0	5.8	12.7	6.5	1.5	35.3
<b>Total</b>	<b>18.8</b>	<b>244.6</b>	<b>100.2</b>	<b>101.9</b>	<b>100.2</b>	<b>10.4</b>	<b>576.2</b>

— nil or rounded to zero (including null cells)

Source: ABS, *International Trade, Australia - Information*

(a) The descriptions of the ACLC product groups shown have been abbreviated for space reasons. See table 7.3 for full descriptions.

Consultancy Ad Hoc Service (cat. no. 5466.0).

CULTURAL TRADE BY  
COUNTRY *continued*

Australia imported over \$500m of cultural goods from China in 2002–03, with the bulk of this (82%) comprising Radio and television receivers and audio and video equipment such as CD players. Imports from the United Kingdom totalled \$479m while imports from the United States totalled \$455m—for both of these countries, Books, magazines, newspapers and other printed matter accounted for the majority of imports.



## 7.5 IMPORTS OF CULTURAL GOODS, BY COUNTRY AND PRODUCT GROUP—2002–03

### ACLC PRODUCT GROUP(a)

	Heritage services	Books, magazines, etc.	Audio and video media	Radios, TVs, etc.	Exposed film and artistic works	Musical instruments etc.	Total
	\$m	\$m	\$m	\$m	\$m	\$m	\$m
Austria	—	0.9	100.6	10.5	0.2	0.8	113.0
Belgium-Luxembourg	1.2	1.7	0.9	16.1	0.3	—	20.1
Canada	0.3	5.7	1.8	3.5	0.5	1.2	13.0
China	3.0	56.8	2.3	(b) 443.9	8.8	24.1	(b) 539.0
Denmark	0.1	2.5	0.4	16.1	—	0.2	19.4
France	7.1	6.2	3.3	10.5	4.0	2.8	33.9
Germany	0.6	14.8	19.6	30.2	2.7	6.4	74.3
Hong Kong	2.0	58.7	6.0	30.8	0.5	0.2	98.2
India	0.3	1.6	0.3	2.4	0.9	0.7	6.1
Indonesia	—	3.0	0.7	122.8	1.9	10.3	138.6
Ireland	—	5.3	8.6	0.1	—	0.1	14.1
Italy	0.2	9.0	0.6	4.2	3.7	3.3	21.0
Japan	1.5	8.7	7.9	145.7	2.8	31.6	198.3
Korea, Republic of	—	5.2	0.3	228.7	1.3	5.2	240.7
Malaysia	—	8.8	1.0	(b) 312.4	0.1	3.1	(b) 325.4
Mexico	—	0.6	—	15.2	0.1	0.8	16.7
Netherlands	0.5	3.5	5.5	0.7	1.8	0.7	12.7
New Zealand	0.6	18.7	6.9	1.2	2.8	0.2	30.3
Philippines	0.1	0.6	—	32.7	0.3	—	33.7
Singapore	0.2	64.3	42.1	(b) 50.9	0.1	—	(b) 157.7
South Africa	0.1	1.3	—	24.6	0.6	—	26.6
Spain	—	3.2	0.3	20.4	0.7	0.5	25.1
Sweden	0.2	2.0	0.4	2.3	0.1	0.1	5.1
Switzerland	0.8	1.8	1.5	0.2	1.0	0.4	5.6
Taiwan	—	2.8	12.2	18.8	1.0	8.4	43.3
Thailand	0.1	3.8	3.7	(b) 63.5	0.7	0.7	(b) 72.6
Turkey	0.1	0.1	—	15.0	—	0.1	15.4
United Kingdom	23.3	346.4	50.4	26.5	29.4	2.5	478.6
United States of America	2.0	288.7	45.2	56.0	41.4	21.2	454.5
Other countries	1.9	10.1	4.1	11.4	7.3	1.7	36.5
<b>Total</b>	<b>46.3</b>	<b>936.8</b>	<b>326.6</b>	<b>(c) 1 789.7</b>	<b>115.5</b>	<b>127.0</b>	<b>(c) (b) 3 341.8</b>

— nil or rounded to zero (including null cells)

(a) The descriptions of the ACLC groups shown have been abbreviated for space reasons - see Table 7.3 for full descriptions.

(b) Excludes imports of certain size television receivers (these data are confidential).

(c) Includes imports of \$72.1m of television receivers from China, Germany, Malaysia and Singapore which are individually confidential.

Source: ABS, *International Trade, Australia - Information Consultancy Ad Hoc Service* (cat. no. 5466.0).

### CULTURAL TRADE BY COUNTRY *continued*

Exports of cultural goods have generally increased since 1996–97, with the value of exports in 2002–03 being 95% higher than in 1996–97. The product group showing the largest increase over this time was Audio and video media (which includes both recorded and unrecorded CDs, video tapes and audio cassettes) which increased almost five-fold, from \$21m in 1996–97 to more than \$100m in 2002–03.

**7.6** EXPORTS OF CULTURAL GOODS, By Product Group—1996–97 to 2002–03

	1996–97	1997–98	1998–99	1999–00	2000–01	2001–02	2002–03
<i>ACLC Product Group</i>	\$m	\$m	\$m	\$m	\$m	\$m	\$m
Heritage services	12.0	17.5	41.5	36.7	33.4	32.6	18.8
Books, magazines, newspapers and other printed matter	157.4	162.3	172.5	165.9	172.5	214.7	244.6
Audio and video media	20.7	22.0	36.5	44.4	67.1	85.2	100.2
Radio and television receivers and apparatus for sound or video recording or reproduction	55.7	73.6	62.5	65.8	100.4	107.2	101.9
Exposed photographic and cinematographic media, and artistic works	44.9	49.5	65.6	63.6	97.0	95.2	100.2
Musical instruments and other performing arts equipment	4.9	5.3	5.3	8.3	7.7	8.7	10.4
<b>Total</b>	<b>295.6</b>	<b>330.2</b>	<b>383.8</b>	<b>384.6</b>	<b>478.1</b>	<b>543.6</b>	<b>576.2</b>

Source: ABS, *International Trade, Australia - Information Consultancy Ad Hoc Service* (cat. no. 5466.0).

CULTURAL TRADE BY  
COUNTRY *continued*

Imports of cultural goods increased by 42% between 1996–97 and 2002–03. However, the growth varied by commodity – Audio and video media increased almost four-fold over this period while the value of commodities in the product group Heritage services actually declined over this period.

**7.7** IMPORTS OF CULTURAL GOODS, By Product Group—1996–97 to 2002–03

	1996–97	1997–98	1998–99	1999–00	2000–01	2001–02	2002–03
<i>ACLC Product Group</i>	\$m	\$m	\$m	\$m	\$m	\$m	\$m
Heritage services	67.2	73.8	73.5	95.1	46.5	44.1	46.3
Books, magazines, newspapers and other printed matter	790.8	889.2	920.0	916.4	925.6	942.0	936.8
Audio and video media	83.4	196.3	241.7	217.9	210.4	220.9	326.6
Radio and television receivers and apparatus for sound or video recording or reproduction	1 234.0	1 236.1	1 312.3	1 402.0	1 718.1	1 720.0	1 789.7
Exposed photographic and cinematographic media, and artistic works	97.4	113.7	120.8	145.0	126.6	91.4	115.5
Musical instruments and other performing arts equipment	84.5	95.3	91.4	107.7	103.5	123.6	127.0
<b>Total</b>	<b>2 357.2</b>	<b>2 604.4</b>	<b>2 759.8</b>	<b>2 884.0</b>	<b>3 130.7</b>	<b>3 142.0</b>	<b>3 341.8</b>

Source: ABS, *International Trade, Australia - Information Consultancy Ad Hoc Service* (cat. no. 5466.0).

## TRADE IN SERVICES

The previous section provided information on trade in cultural goods (i.e. movable goods that cross Australia's customs frontier). While this is a major part of Australia's cultural trade with other countries, trade in services also contributes to Australia's trade in culture and recreation.

The term 'credits' is used to refer to services rendered by Australians to the rest of the world and the term 'debits' to describe services provided by the rest of the world to Australians.

Most of Australia's trade in services relates to international transport, travel, education and business services. Trade in cultural services (including music royalties) is relatively small in value and therefore parts of it have been combined with recreational services and health and medical services in the collection and output of data. Trade in this broader category (referred to as cultural and recreational services in the remainder of this chapter)—rather than just cultural services—is discussed here.

## TRADE IN SERVICES

*continued*

Australia earned \$342m from cultural and recreational services in 2002–03, approximately 1% of its total earnings from services in that year. This figure has remained relatively constant over recent years, with the exception of 2000–01 when the inclusion of television rights to the Sydney 2000 Olympic and Paralympic Games boosted it to about 4%.

Australia paid \$986m to other countries for the cultural and recreational services in 2002–03, with Audiovisual and related services accounting for 69% of that total, and music royalties a further 21%. This represented approximately 3% of all Australia's payments for services in that year.

**7.8** TRADE IN CULTURAL AND RECREATIONAL SERVICES—1996–97 to 2002–03

	1996–97	1997–98	1998–99	1999–00	2000–01	2001–02	2002–03
	\$m	\$m	\$m	\$m	\$m	\$m	\$m
Service credits (earnings)							
Audiovisual and related services	146	125	145	175	(a) 1 226	80	152
Music royalties	40	42	46	57	70	54	65
Other cultural and recreational services(b)	46	61	83	78	95	137	125
<i>Total services provided</i>	232	228	274	310	1 391	271	342
Service debits (payments)							
Audiovisual and related services	467	598	638	683	634	727	680
Music royalties	203	167	171	209	229	229	207
Other cultural and recreational services(b)	54	63	64	64	81	77	99
<i>Total services received</i>	724	828	873	956	944	1 033	986

(a) Includes \$1,133m associated with the broadcast rights for the Sydney 2000 Olympic and Paralympic Games.

(b) Includes health and medical services.

Source: ABS, *Balance of Payments and International Investment Position, Australia*, (various issues), (cat. no. 5302.0) and data available on request.

For Audiovisual and related services, Australia's largest earnings came from the sale of television programs. In 2002–03, television program sales amounted to \$64m.

Television programs also accounted for the bulk of the \$680m of payments Australia made for Audiovisual and related services, amounting to \$448m in 2002–03. Of the payments for television programs, \$291m (65%) was paid to the United States of America and \$57m (13%) to the United Kingdom.

Payments for the right to use videotapes totalled \$148m, with \$115m (78%) of this being paid to the United States of America.

**7.9** AUDIOVISUAL AND RELATED SERVICES, By Type—1996–97 to 2002–03

	1996–97	1997–98	1998–99	1999–00	2000–01	2001–02	2002–03
	\$m	\$m	\$m	\$m	\$m	\$m	\$m
<b>Credits (earnings)</b>							
Theatrical films	19	15	21	21	9	np	16
Television programs - Sydney Olympic Games	—	—	—	—	1 133	—	-
Television programs - other	117	98	111	108	64	59	64
Video tapes	np	np	np	np	6	1	6
<i>Total credits(a)</i>	<i>146</i>	<i>125</i>	<i>145</i>	<i>175</i>	<i>1 226</i>	<i>80</i>	<i>152</i>
<b>Debits (payments)</b>							
Theatrical films	87	130	92	136	80	84	74
Television programs	260	342	412	421	429	498	448
Video tapes	np	np	127	118	104	138	148
<i>Total debits(a)</i>	<i>467</i>	<i>598</i>	<i>638</i>	<i>683</i>	<i>634</i>	<i>727</i>	<i>680</i>

— nil or rounded to zero (including null cells)

np not available for publication but included in totals where applicable, unless otherwise indicated

(a) Includes Multimedia and Other (not separately identified).

Source: ABS, Balance of Payments and International Investment Position, data available on request.

## CHAPTER 8

## MUSEUMS .....

### INTRODUCTION

Museums are generally engaged in the acquisition, conservation and exhibition of culturally significant objects. The Australian Culture and Leisure Classifications (ACLC) groups museums into two categories: Art museums (i.e. public art galleries); and Other museums – the latter a more diverse group which encompasses natural science, applied science, history and transport museums and Indigenous keeping places amongst others.

This chapter draws together information from the ABS' attendance and industry surveys and from its Census of Population and Housing to provide some details of the demand for museum services and the operations of museums which try to satisfy these demands. Supplementary data has been obtained from the Australian Heritage Council.

### ATTENDANCE

According to the 2002 ABS Survey of Attendance at Selected Cultural Venues and Events a total of 5.1 million people aged 18 years and over (35% of the population) visited art museums or public art galleries or other museums in the 12 months before being interviewed. Females recorded higher attendance rates than males for both types of institution.

ATTENDANCE *continued***8.1** ATTENDANCE AT MUSEUMS, By selected characteristics, 12 months before interview—2002

	NUMBER			ATTENDANCE RATE		
	Art museums & galleries	Other museums	Total(a)	Art museums & galleries	Other museums	Total(a)
	'000	'000	'000	%	%	%
Sex						
Males	1 578.8	1 764.0	2 382.1	22.0	24.6	33.2
Females	2 027.8	1 859.2	2 751.1	27.7	25.4	37.5
Age group (years)						
18–24	453.5	425.3	626.1	23.8	22.3	32.9
25–34	694.1	785.8	1 040.1	23.9	27.0	35.8
35–44	756.1	852.5	1 158.7	25.8	29.1	39.5
45–54	735.1	668.1	972.0	27.8	25.3	36.8
55–64	528.0	484.4	699.2	28.0	25.7	37.1
65 years and over	439.7	407.0	637.0	19.7	18.3	28.6
State or Territory						
New South Wales	1 224.5	1 200.5	1 729.2	25.0	24.5	35.3
Victoria	837.8	894.7	1 257.7	22.9	24.4	34.3
Queensland	618.0	562.0	831.4	22.9	20.8	30.8
South Australia	273.4	310.4	410.2	24.1	27.4	36.2
Western Australia	413.8	367.2	564.0	29.0	25.8	39.6
Tasmania	94.1	111.0	133.5	27.3	32.2	38.7
Northern Territory	33.1	45.4	50.9	31.4	43.1	48.2
Australian Capital Territory	111.8	132.0	156.4	48.4	57.1	67.7
<b>Total</b>	<b>3 606.6</b>	<b>3 623.2</b>	<b>5 133.2</b>	<b>24.9</b>	<b>25.0</b>	<b>35.4</b>

(a) The total is less than the sum of the components as some people visited both types of museums.

Source: ABS, Survey of Attendance at Selected Cultural Venues and Events, 2002, data available on request.

Most people (64%) who attended Art museums and galleries had been there only once or twice in the 12 months before interview, as had about three-quarters (76%) of those who visited Other museums.

**8.2** FREQUENCY OF ATTENDANCE AT MUSEUMS, 12 months before interview—2002

	Art museums & galleries	Other museums	Art museums & galleries	Other museums
	'000	'000	%	%
Once	1 435.6	1 907.4	39.8	52.6
Twice	885.9	850.5	24.6	23.5
3 times	424.2	323.9	11.8	8.9
4 times	259.9	173.4	7.2	4.8
5 times	169.7	108.7	4.7	3.0
6–10 times	260.1	161.8	7.2	4.5
11–20 times	107.7	56.1	3.0	1.5
21 times or more	63.6	*41.6	1.8	*1.1
<b>Total</b>	<b>3 606.7</b>	<b>3 623.4</b>	<b>100.0</b>	<b>100.0</b>

\* estimate has a relative standard error of 25% to 50% and should be used with caution

Source: ABS, *Attendance at Selected Cultural Venues and Events, Australia, 2002* (cat. no. 4114.0).

ATTENDANCE *continued*

While the 'Attendance Survey' provides information on the type of people who attend a museum and an indication of how often they go, it is unable to give a figure for the total number of admissions.

As the survey only obtained information about Australian residents aged 18 years or over, some groups were excluded from the data collection such as tourists from overseas and younger age groups.

Further, as respondents were asked to indicate their frequency of attendance from a set of ranges, for example, 6–10 times, 10–15 times, 16–20 times etc. it is not possible to accurately calculate the exact number of visits.

However, an estimate of the number of admissions can be obtained from a survey of museums conducted in 1999–2000.

The survey found that there were 27.5 million admissions during the year, of which about three-fifths (60%) were free of charge. Art museums and galleries accounted for almost one-quarter (24%) of all admissions.

### 8.3 MUSEUM ADMISSIONS—During the year ended 30 June 2000

	Art museums and galleries	OTHER MUSEUMS .....		
		Historic properties	Museums n.e.c.	Total
	'000	'000	'000	'000
Paid	1 414.6	2 936.6	6 614.6	10 965.7
Free	5 113.1	*4 323.4	7 128.6	16 566.1
<b>Total</b>	<b>6 527.6</b>	<b>*7 260.0</b>	<b>13 744.2</b>	<b>27 531.8</b>

\* estimate has a relative standard error of 25% to 50% and should be used with caution

Source: ABS, *Museums, Australia, 1999–2000* (cat. no. 8560.0).

## ORGANISATIONS

The 1999–2000 ABS Survey of Museums defined a museum establishment as an enclosed area, which stores artefacts, artworks and museum objects and which is open to the general public. In June 2000, there were 2,049 museum establishments operating in Australia. Of these, 12% were Art museums and galleries, and the remaining 88% were classified as Other museums. Historic properties which were being conserved for their historic, scientific, aesthetic, social or architectural value were considered to be part of this Other museums category.

## ORGANISATIONS

*continued***8.4** NUMBER OF MUSEUM ESTABLISHMENTS—June 2000

	<i>Number</i>	<i>%</i>
Art museums and galleries	249	12.2
Other museums		
Historic properties	411	20.1
Museums n.e.c.	1 389	67.8
<i>Total</i>	1 800	87.8
<b>Total</b>	<b>2 049</b>	<b>100.0</b>

Source: ABS, *Museums, Australia, 1999–2000* (cat. no. 8560.0).

MUSEUM ARTEFACTS,  
ARTWORKS AND OBJECTS

According to the 1999–2000 Survey of Museums, museums held a total of 62 million artefacts, artworks and museum objects. Of these, about 2% were held by Art museums and galleries, 4% by Historic properties and 94% by Museums not elsewhere classified. The 78 largest museums (those which had employment of 100 or more persons) held 59% of these 62 million objects. Approximately 16% of the objects were on display, although this varied by the size of the museum, with the 78 largest museums having only 2% on display.

## FINANCIAL DATA

The 1999–2000 ABS Survey of Museums found that the total income in the 1999–2000 financial year for the 2,049 museums establishments in Australia was \$716.4m. About two-thirds (68%) of this income was provided by government, with the bulk of the balance made up by fundraising (\$53.5m), admissions (\$52.4m) and sales of goods (\$51.7m).

Wages and salaries accounted for \$211.4m of museum expenses in 1999–2000, which was about one-third (33%) of total outgoings. During the year, museums also spent \$24.9m on exhibition and display development costs, \$17.4m on advertising, marketing and promotional expenses and \$9.2m on purchases of artefacts, artworks and museum objects.

**8.5** MUSEUM ESTABLISHMENTS, Income and Expenses—1999–2000

	<i>Art museums &amp; galleries</i>	<i>OTHER MUSEUMS</i> .....		
		<i>Historic properties</i>	<i>Museums n.e.c.</i>	<i>Total</i>
	\$m	\$m	\$m	\$m
<b>Income</b>				
Government funding	124.0	35.5	327.7	487.2
Admissions income	7.6	10.1	34.7	52.4
Other income	65.7	18.8	92.3	176.8
<i>Total</i>	197.2	64.4	454.8	716.4
<b>Expenses</b>				
Wages and salaries	57.4	23.8	130.2	211.4
Other expenses	107.0	33.6	290.4	431.1
<i>Total</i>	164.4	57.4	420.7	642.5

Source: ABS, *Museums, Australia, 1999–2000* (cat. no. 8560.0).



## FINANCIAL DATA

*continued*

A more recent data collection which focuses solely on government funding for cultural activities, found that the Australian Government provided \$52.0m to art museums and a further \$204.6m to Other museums in 2002–03. State and territory governments also contributed a total of \$430.5m to Art and Other museums.

While local governments also provide considerable cultural funding, there was no data available on the specific amounts committed to museums.

It should be noted that the government funding collection adopted a broader definition of Art and Other museums, therefore its data is not directly comparable to that obtained from the Survey of Museums.

### 8.6 CULTURAL FUNDING BY GOVERNMENT, Museums—2002–03

	Australian Government	State and territory government	Total
	\$m	\$m	\$m
Art museums	52.0	144.2	196.2
Other museums	204.6	286.3	490.9
<b>Total</b>	<b>256.6</b>	<b>430.5</b>	<b>687.1</b>

Source: ABS, *Cultural Funding by Government, Australia*, 2002–03 (cat. no. 4183.0).

## EMPLOYMENT

This section covers employment in the museums sector using information drawn from three sources – the 1999–2000 ABS Survey of Museums, the April 2001 ABS Survey of Work in Selected Culture and Leisure Activities, and the 2001 Census of Population and Housing. When making comparisons between these sources, it is important to take into consideration the different scope and reference periods of each. Further information on how the data sources differ can be found in Chapter 5.

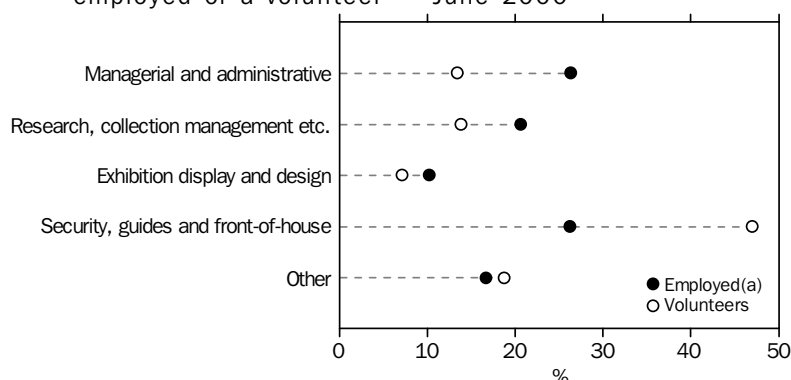
*Survey of Museums*

According to the 1999–2000 Survey of Museums, there were 6,956 people employed in museums at the end of June 2000. Of these, 1,741 (25%) worked for Art museums and galleries, 1,010 (15%) worked for Historic properties and 4,205 (60%) worked for Museums not elsewhere classified. There were also 484 people working in museums who were paid by a related organisation rather than by the museum itself.

This survey also found that 29,963 people worked as volunteers for museums during the month of June 2000. Almost half the volunteers (47%) were involved as guides or worked in security or front-of-house activities. They were less likely to be involved in managerial, administrative, research, collection management and conservation activities.

## Survey of Museums

continued

**8.7** MAIN TYPE OF WORK UNDERTAKEN IN MUSEUMS, By whether employed or a volunteer — June 2000

(a) Includes people paid by related organisations.

Source: ABS, *Museums, Australia, 1999–2000* (cat. no. 8560.0).

## Census of Population and Housing

The 2001 Census of Population and Housing presented a different perspective, with its focus on 5,419 people who nominated working in a museum as their main job (i.e. where they worked the most hours) in the week before Census Night in August 2001. Of these, 34% were employed in cultural occupations such as museum and gallery attendants, curators, conservators or technicians. The 66% of museum employees not in cultural occupations included specialist managers, project and program administrators, security officers, general clerks, tour guides and education officers.

The Census identified an additional 969 people working in a museum-related occupation, but not in a museum (e.g. a conservator working in a library). There were 302 Museum and gallery attendants, 317 Museum and gallery curators, 252 Conservators, and 98 Museum and gallery technicians working in other industries. Almost 60% of persons working in these selected museum-related positions were female.

**8.8** PERSONS EMPLOYED IN MUSEUMS INDUSTRY(a), By occupation—August 2001

	Number	%
<b>Cultural occupations</b>		
Museum and gallery attendants	562	10.4
Museum and gallery curators	528	9.7
Conservators	152	2.8
Museum and art gallery technicians	121	2.2
Historians	33	0.6
Other cultural occupations	447	8.2
<b>Total cultural occupations</b>	<b>1 843</b>	<b>34.0</b>
<b>Other occupations</b>		
Tour guides	139	2.6
Education officers	110	2.0
Other (includes not stated)	3 327	61.4
<b>Total other occupations</b>	<b>3 576</b>	<b>66.0</b>
<b>Total all occupations</b>	<b>5 419</b>	<b>100.0</b>

(a) In their main job in the week before Census Night.

Source: ABS, *Census of Population and Housing, 2001*, data available on request.

*Work Survey*

The April 2001 ABS Survey of Work in Selected Culture and Leisure Activities provided yet another perspective, examining 'work involvement' in Museums over a longer period. It included persons who had undertaken paid work in a museum as part of their main job, as well as those whose cultural work involvement was part of a second job or undertaken in a voluntary capacity (i.e. unpaid).

The survey showed that there were 40,800 people aged 15 years and over with a work involvement in Art museums and galleries and 48,200 in Other museums. About one-quarter (25%) of these people received some payment for their involvement.

The reference period for this survey was the 12 months prior to interview, making it more likely to capture those persons working in a cultural occupation on an irregular basis than either the one-week reference period used in the census, or the 'end-of-June 2000 snapshot' provided by the Museums Survey.

## HISTORIC AND INDIGENOUS PLACES

Australia's cultural heritage is not confined to museums and the objects they hold. A considerable number of places of cultural or heritage value are recorded on the Register of the National Estate. The National Estate is defined as 'those places, being components of the natural environment of Australia, or the cultural environment of Australia, that have aesthetic, historic, scientific or social significance or other special value for future generations as well as for the present community'.

### 8.9 REGISTER OF THE NATIONAL ESTATE(a), Number of places—30 June 2003

Type	NSW	Vic.	Qld	SA	WA	Tas.	NT	ACT(b)	Aust.(c)
Historic places	3 143	2 465	740	1 209	971	1 211	157	199	10 137
Natural environment places	521	386	329	391	373	271	73	30	2 399
Indigenous places	222	111	157	153	75	77	107	30	932
<b>Total numbers of places listed</b>	<b>3 886</b>	<b>2 962</b>	<b>1 226</b>	<b>1 753</b>	<b>1 419</b>	<b>1 559</b>	<b>337</b>	<b>259</b>	<b>13 468</b>

(a) Includes both registered and interim listed places.

(b) Includes Jervis Bay.

(c) Includes external territories.

Source: Australian Heritage Commission, *Annual Report, 2002–03* (online).

The Register of the National Estate had a total of 10,137 historic places recorded on 30 June 2003, which included 2,624 residential buildings, 933 religious places and 500 hotels, motels and inns. The number of historic places on the Register had increased by 11% (1,007) in the six years to June 2003.

### 8.10 HISTORIC ENVIRONMENT PLACES ON THE REGISTER OF THE NATIONAL ESTATE(a)—30 June 2003

Type	NSW	Vic.	Qld	SA	WA	Tas.	NT	ACT(b)	Aust.(c)
Residential buildings	783	847	136	267	202	357	18	10	2 624
Religion	272	209	80	148	64	141	4	13	933
Farming and grazing	235	252	28	51	71	206	10	34	891
Retail and wholesale	186	106	54	72	122	77	3	4	625
Hotels, motels and inns	165	80	33	67	65	79	3	8	500
Law and enforcement	215	85	26	53	37	30	10	5	461
Education	142	76	25	57	44	38	1	15	398
Urban area	164	44	13	38	24	25	4	12	328
Government and administration	84	61	21	26	23	29	3	13	263
Recreation and entertainment	68	79	22	37	25	15	1	10	258
Parks, gardens and trees	87	58	12	29	24	15	9	17	251
Other	742	568	290	364	270	199	91	58	2 605
<b>Total</b>	<b>3 143</b>	<b>2 465</b>	<b>740</b>	<b>1 209</b>	<b>971</b>	<b>1 211</b>	<b>157</b>	<b>199</b>	<b>10 137</b>

(a) Includes both registered and interim listed places.

Source: Australian Heritage Commission, *Annual Report, 2002–03* (online).

(b) Includes Jervis Bay.

(c) Includes external territories.

### HISTORIC AND INDIGENOUS PLACES *continued*

At 30 June 2003, there were 932 Indigenous places recorded on the Register of the National Estate, which included 213 Aboriginal art sites, 108 Aboriginal site complexes and 101 Aboriginal occupation sites. The number of Indigenous places on the Register increased by 44 (5%) in the six years to June 2003.

### 8.11 ABORIGINAL AND TORRES STRAIT ISLANDER PLACES ON THE REGISTER OF THE NATIONAL ESTATE(a)(b)—30 June 2003

Type	NSW	Vic.	Qld	SA	WA	Tas.	NT	ACT(c)	Aust.(d)
Aboriginal art site	70	17	34	42	25	5	18	2	213
Places of significance to Aboriginal people	25	6	14	23	9	2	51	3	133
Aboriginal site complex	18	4	17	17	16	13	23	—	108
Aboriginal occupation site	17	8	10	24	9	27	4	2	101
Aboriginal shell midden	15	17	16	5	—	17	—	—	70
Aboriginal modified trees	23	8	9	2	2	—	1	19	64
Aboriginal stone arrangements	9	4	26	8	3	3	—	1	54
Aboriginal historic or contact site	15	10	2	8	5	1	8	—	49
Aboriginal quarries	3	7	7	9	3	5	—	1	35
Aboriginal burials/cemeteries/graves	10	13	2	1	2	3	1	—	32
Other	17	17	20	14	1	1	1	2	73
<b>Total numbers of places listed</b>	<b>222</b>	<b>111</b>	<b>157</b>	<b>153</b>	<b>75</b>	<b>77</b>	<b>107</b>	<b>30</b>	<b>932</b>

— nil or rounded to zero (including null cells)

(c) Includes Jervis Bay.

(a) Includes both registered and interim listed places.

(d) Includes external territories.

(b) Most of the places listed on the Register encompass a number of Aboriginal sites.

Source: Australian Heritage Commission, *Annual Report, 2002–03* (online).

There were also 2,399 natural environment places on the Register of the National Estate at 30 June 2003, which are discussed in greater detail in Chapter 9 of this publication.

More comprehensive statistics on the types of places on the Register of the National Estate can be found in the annual reports of the Australian Heritage Council, and on their web site <<http://www.ahc.gov.au>>.

## CHAPTER 9

## ENVIRONMENTAL HERITAGE .....

### INTRODUCTION

This chapter brings together available data on environmental heritage, which, for the purpose of this publication covers nature parks and reserves, zoological parks and aquariums, and botanic gardens. While recent data is available on people's attendance and work involvement in areas of environmental heritage, little exists on the economic activity of the organisations which operate and maintain nature, zoological and botanic parks and reserves.

Apart from details on government funding of these activities, which is collected annually by the ABS, the most recent data on the activity of botanic gardens organisations comes from a survey conducted in 1999–2000. However, it is necessary to go back to 1996–97 for details on organisations responsible for nature parks and reserves and zoological parks and aquariums.

Some data from the 1999–2000 botanic gardens survey is presented here, while data from the 1996–97 surveys of nature parks and reserves, and zoological parks and aquariums is available through the ABS web site.

### ATTENDANCE

#### *Nature parks and reserves*

Nature parks and reserves includes Australia's national parks and other protected areas of land or sea especially dedicated to the protection of biodiversity and other natural and cultural resources.

Australia has over 1,500 World Heritage Areas, and national and state parks and reserves which are managed by the Australian Government and each of the state governments. The area covered extends beyond Australia's coastline to include marine protected areas up to three nautical miles out to sea as well as national parks on the Cocos (Keeling), Christmas and Norfolk Islands.

More than 7.6 million or 54% of Australians aged 18 years and over visited a World Heritage area, national or state park in the twelve months prior to March 2001, according to a survey conducted by the ABS.

A similar survey conducted in 1998 also reported a 54% attendance rate, while a survey in 1992 reported 63% of Australians visiting these areas. Residents of the Australian Capital Territory recorded the highest attendance rate (64%) and South Australians the lowest (50%).

*Nature parks and reserves*  
*continued*

**9.1** ATTENDANCE AT NATURE PARKS(a), By state and territory—2001(b)

	Number	Attendance rate
	'000	%
New South Wales	2 548.1	52.8
Victoria	1 806.8	50.3
Queensland	1 488.4	56.5
South Australia	557.4	49.6
Western Australia	828.3	59.6
Tasmania	196.0	57.1
Northern Territory	63.7	58.7
Australian Capital Territory	145.5	63.8
<b>Australia</b>	<b>7 634.2</b>	<b>53.6</b>

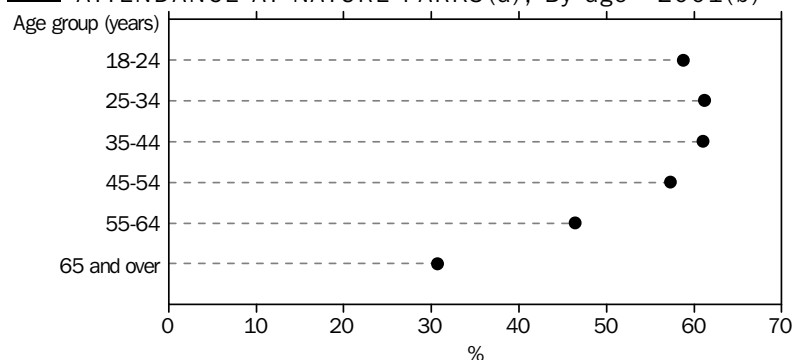
(a) Includes world heritage parks and state parks.

(b) Twelve months before interview in 2001.

Source: ABS, *Environmental Issues: People's Views and Practices, March 2001* (cat. no. 4602.0).

The survey found that Australians aged 25-44 years, and households with children were the most likely to visit a nature park.

**9.2** ATTENDANCE AT NATURE PARKS(a), By age—2001(b)



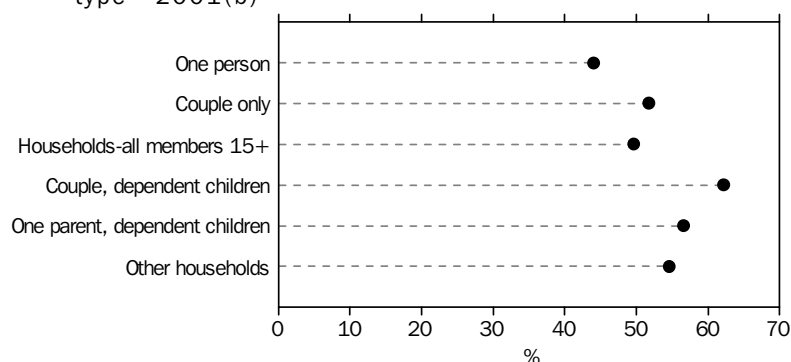
(a) Includes world heritage parks and state parks.

(b) Twelve months before interview in 2001.

Source: ABS, *Environmental Issues: People's Views and Practices, March 2001* (cat. no. 4602.0).

## Nature parks and reserves

continued

**9.3** ATTENDANCE AT NATURE PARKS(a), By household type—2001(b)

(a) Includes world heritage parks and state parks.

(b) Twelve months before interview in 2001.

Source: ABS, *Environmental Issues: People's Views and Practices*, March 2001 (cat. no. 4602.0).Zoological parks and  
Botanic gardens

Zoological parks and aquariums are primarily engaged in the breeding, preservation, study and display of native and/or exotic fauna in captivity, and are accessible to the general public. Similarly, botanic gardens have been established to collect, study, exchange and display plants for research and for the education and enjoyment of the public.

In 2002, the ABS conducted a survey to determine attendance at Zoological parks and Botanic gardens. More than 6 million Australians aged 18 years and over visited a Botanic garden, and in excess of 5.8 million visited a Zoological park in the twelve months prior to being interviewed between March and July 2002.

Residents of the Australian Capital Territory had the highest attendance rates for Zoological parks (50%) while Northern Territorians recorded the highest attendance rates for Botanic gardens (49%). Tasmanians recorded the lowest attendance rates for both Zoological parks (30%) and Botanic gardens (35%).

*Zoological parks and  
Botanic gardens  
continued*

**9.4** ATTENDANCE AT ZOOLOGICAL PARKS AND BOTANIC GARDENS,  
By state and territory—2002(a)

	ZOOLOGICAL PARKS (b)		BOTANIC GARDENS	
	Number	Attendance rate	Number	Attendance rate
	'000	%	'000	%
New South Wales	1 862.4	38.0	1 832.8	37.4
Victoria	1 593.9	43.5	1 695.0	46.3
Queensland	982.9	36.4	1 195.4	44.2
South Australia	441.0	38.9	413.3	36.5
Western Australia	661.6	46.4	619.7	43.5
Tasmania	102.2	29.6	120.4	34.9
Northern Territory	49.3	46.7	51.5	48.8
Australian Capital Territory	115.0	49.8	106.1	45.9
<b>Australia</b>	<b>5 808.3</b>	<b>40.0</b>	<b>6 034.2</b>	<b>41.6</b>

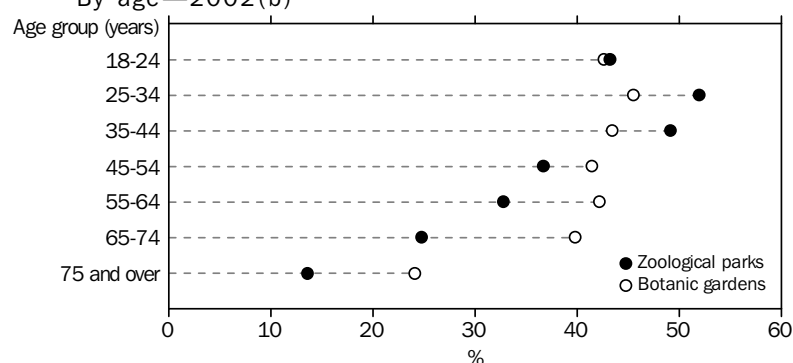
(a) Twelve months before interview in 2002.

(b) Includes other wildlife parks, aquariums and marine parks.

Source: ABS, *Attendance at Selected Cultural Venues and Events, 2002* (cat. no. 4114.0).

For both Zoological parks and Botanic gardens and Nature parks and reserves, those aged 25–44 years were more likely to attend than any other age group. The presence of children was also an important factor for attendance at Zoological parks, although it seemed to have little bearing on rates of attendance at Botanic gardens.

**9.5** ATTENDANCE AT ZOOLOGICAL PARKS AND BOTANIC GARDENS (a),  
By age—2002(b)



(a) Includes other wildlife parks, aquariums and marine parks.

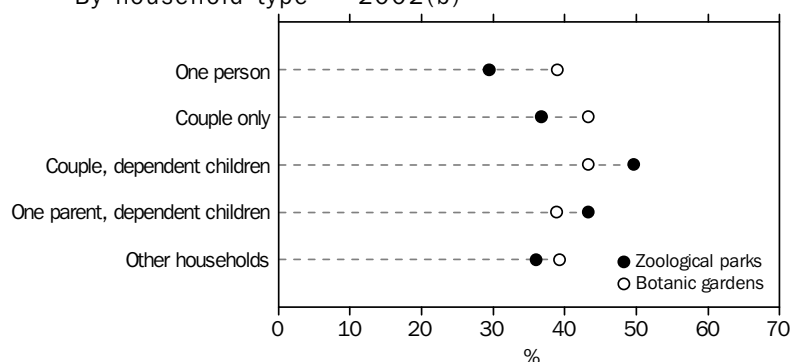
(b) Twelve months before interview in 2002.

Source: ABS, *Attendance at Selected Cultural Venues and Events, 2002* (cat. no. 4114.0).



*Zoological parks and  
Botanic gardens  
continued*

**9.6** ATTENDANCE AT ZOOLOGICAL PARKS AND BOTANIC GARDENS (a),  
By household type — 2002(b)



(a) Includes other wildlife parks, aquariums and marine parks.

(b) Twelve months before interview in 2002.

Source: ABS, *Attendance at Selected Cultural Venues and Events, 2002* (cat. no. 4114.0).

## FINANCIAL DATA

In 2002–03, the ABS found that state and territory governments contributed \$1,102.4m and the Australian Government \$91.6m for environmental heritage. The vast majority of funding (approximately 90%) was for nature parks and reserves.

While some funding occurs at the local government level, details are not available for 2002–03.

**9.7** CULTURAL FUNDING BY GOVERNMENT, Environmental  
Heritage—2002–03

	Australian Government	State and territory governments	Total
	\$m	\$m	\$m
Nature parks and reserves	83.7	987.8	1 071.5
Zoological parks, aquaria	—	48.2	48.2
Botanic gardens	7.9	66.4	74.3
<b>Total</b>	<b>91.6</b>	<b>1 102.4</b>	<b>1 194.0</b>

— nil or rounded to zero (including null cells)

Source: ABS, *Cultural Funding by Government, Australia, 2002–03* (cat. no. 4183.0).

The 1999–2000 Survey of Botanic Gardens found that there were 72 employing organisations operating botanic gardens at the end of June 2000. These organisations had a total income of \$91.8m, almost four-fifths of which was provided by the government (\$73.4m). The majority of their expenses were for the wages and salaries of staff (\$44.0m).

## FINANCIAL DATA

*continued***9.8** INCOME AND EXPENSES OF BOTANIC GARDENS—1999–2000

	Value	Percentage contribution
	\$m	%
<b>Income</b>		
Government funding	73.4	80.0
Fund-raising income	4.6	5.0
Admissions income	1.2	1.3
Sales of goods	2.9	3.2
Other	9.7	10.6
<b>Total income</b>	<b>91.8</b>	<b>100.0</b>
<b>Expenses</b>		
Labour costs		
Wages and salaries	44.0	54.0
Other	5.5	6.7
<b>Total</b>	<b>49.5</b>	<b>60.7</b>
Other expenses		
Electricity, gas and water charges	3.4	4.2
Repair and maintenance	5.2	6.4
Purchases of goods for resale	1.5	1.8
Other	21.9	26.9
<b>Total</b>	<b>32.0</b>	<b>39.3</b>
<b>Total expenses</b>	<b>81.5</b>	<b>100.0</b>

Source: ABS, *Botanic Gardens, Australia, 1999–2000* (cat. no. 8563.0).

## EMPLOYMENT

*Census of Population and Housing*

Data from the 2001 Census of Population and Housing, which provides details on people's main job, does not separately identify those working in organisations responsible for nature parks and reserves from those working in other recreational parks and gardens. However, some specific occupations are more likely to be related to nature parks and reserves than to recreational parks and gardens. The broad Recreational parks and gardens industry employed 7,958 people, of which 1,074 were Park rangers, 220 were Environment, parks and land care managers and 205 were Tour guides.

**9.9** PERSONS EMPLOYED IN RECREATIONAL PARKS AND GARDENS INDUSTRY(a), By occupation—August 2001

Occupation	Number	%
Park rangers	1 074	13.5
General gardeners	466	5.9
Garden labourers	376	4.7
Environment, parks and land care managers	220	2.8
Tour guides	205	2.6
Urban and regional planners	96	1.2
Zoologists	55	0.7
Other (includes not stated)	5 466	68.7
<b>Total all occupations</b>	<b>7 958</b>	<b>100.0</b>

(a) In their main job in the week before Census Night.

Source: ABS, 2001 Census of Population and Housing, data available on request.

*Census of Population and  
Housing continued*

It is not possible to separate those working in zoological gardens from those working in botanic gardens using Census data. However, in the combined industries Animal attendants (410 people) and General gardeners (183 people) were the most common occupations.

**9.10** PERSONS EMPLOYED IN ZOOS AND BOTANIC GARDENS  
INDUSTRY(a), By occupation—August 2001

<i>Occupation</i>	<i>Number</i>	<i>%</i>
Animal attendants	410	19.4
General gardeners	183	8.6
Tour guides	44	2.1
Botanists	38	1.8
Zoologists	34	1.6
Park rangers	17	0.8
Environment, parks and land care managers	15	0.7
Other (includes not stated)	1 377	65.0
<b>Total all occupations</b>	<b>2 118</b>	<b>100.0</b>

(a) In their main job in the week before Census Night.

Source: ABS, 2001 Census of Population and Housing, data available on request

*Work Survey*

More information on employment can be obtained from the 2001 Survey of Work in Selected Culture and Leisure Activities which collected data on all involvement rather than just the paid employment in main job which is obtained from the Census. The survey found that 76,900 people had some involvement in the operations of national parks and reserves although only 20% received some form of payment. A large number of people also reported volunteering their time to work in botanic gardens. Of the estimated 23,800 people working in botanic gardens, 35% were paid for their involvement.

**9.11** PERSONS WITH A WORK INVOLVEMENT IN NATIONAL PARKS,  
ZOOS AND BOTANIC GARDENS(a), By whether paid or  
unpaid—2001

	<i>Some paid involvement</i>	<i>Unpaid involvement only</i>	<i>Total</i>	<i>Percentage with some involvement</i>
	'000	'000	'000	%
National parks and reserves	15.3	61.6	76.9	19.9
Zoological parks and aquariums	*6.9	*7.2	14.1	*49.0
Botanic gardens	*8.4	15.4	23.8	*35.5

\* estimate has a relative standard error of 25% to 50% and should be used with caution

(a) In the 12 months before interview in April 2001.

Source: ABS, Survey of Work in Selected Culture and Leisure Activities, 2001, data available on request.

**NATURAL ENVIRONMENT  
PLACES**

The Register of the National Estate which is administered by the Australian Heritage Council provides a list of Australia's natural environment places with heritage significance. The Register listed 2,399 natural environment places at the end of June 2003. Many of these were national parks and reserves, but other common places included wetlands, endangered species habitats and geological monuments.

**9.12** NATURAL ENVIRONMENT PLACES ON THE REGISTER OF THE NATIONAL ESTATE (a)—30 June 2003

	NSW	Vic.	Qld	SA	WA	Tas.	NT	ACT(b)	Aust.(c)
Vegetation communities	125	139	66	78	72	42	15	3	542
Flora species sites and habitat	88	35	26	54	76	32	20	10	342
Fauna habitats	58	33	32	67	46	35	10	2	296
Geological sites and areas	69	36	22	67	19	37	1	8	259
Wetlands and rivers	41	25	21	39	59	25	14	1	225
Coastal environments	38	16	32	23	16	11	2	1	142
Landform sites and areas	18	11	40	3	14	17	6	2	111
Island environments	21	4	17	21	17	20	2	1	104
Temperate environments	9	50	—	11	15	17	—	2	104
Palaeontological sites	16	7	9	7	9	15	1	—	64
Other	38	30	64	21	30	20	2	—	210
<b>Total</b>	<b>521</b>	<b>386</b>	<b>329</b>	<b>391</b>	<b>373</b>	<b>271</b>	<b>73</b>	<b>30</b>	<b>2 399</b>

— nil or rounded to zero (including null cells)

(c) Includes external territories.

(a) Includes both registered and interim listed places.

Source: Australian Heritage Commission, *Annual Report, 2002–03* (online).

(b) Includes Jervis Bay.

NATURAL ENVIRONMENT  
PLACES *continued*

More comprehensive statistics on the types of places on the Register of the National Estate can be found in the annual reports of the Australian Heritage Commission, and on their web site <<http://www.ahc.gov.au>>.

## CHAPTER 10

## LIBRARIES AND ARCHIVES .....

### INTRODUCTION

Libraries have traditionally been known as places which acquire, organise, conserve and lend material such as books, magazines, CDs, DVDs, manuscripts, musical scores, maps or prints.

A major part of their role has also been as a conduit to a wide variety of information, a role which is ever expanding as digital technology revolutionises the operations of libraries.

Increasingly, libraries provide Internet access allowing users to draw information from resources around the world. Many also operate web sites which enable those with their own Internet access to use the facilities of the library without the need to physically visit.

This chapter provides a statistical overview of aspects of Australia's public libraries. The data is drawn primarily from three ABS data sources: a survey of public libraries covering the period 1999–2000; a 2002 household survey which collected attendance figures for a range of cultural venues and events; and the 2001 Census of Population and Housing.

Unfortunately, while these data sources provide comprehensive statistics on public libraries, only limited school, college and university library data are available while business library information is non-existent.

Like libraries, archives have a role in permanently preserving unique records which have been selected because of their administrative, financial, legal or other information value.

The services provided by archives include the description and preservation of archival material as well as the provision of research and reference facilities. Some information on archives is also included in this chapter where available.

### ATTENDANCE

#### *Attendance Survey*

According to the Survey of Attendance at Selected Culture and Leisure Venues and Events, some 6.1 million people (42% of the population aged 18 years and over) visited a national, state or local library in the 12 months before interview in 2002.

While the attendance rates for males and females at state and national libraries were similar (both approximately 8%), local libraries were more likely to attract females (with an attendance rate of 48%) than males (32%).

Attendance Survey  
continued

**10.1** ATTENDANCE AT PUBLIC LIBRARIES, By Sex—2002

	Males	Females	Persons
NUMBER ('000)			
Local libraries	2 305.6	3 510.1	5 815.8
National and state libraries	547.0	600.4	1 147.5
Total who attended(a)	2 477.4	3 632.8	6 110.2
ATTENDANCE RATE (%)			
Local libraries	32.1	47.9	40.1
National and state libraries	7.6	8.2	7.9
Total who attended(a)	34.5	49.6	42.1

(a) Components do not add to the total as some persons attended both types of libraries.

Source: ABS, Survey of Attendance at Selected Cultural Venues and Events, 2002, data available on request.

The attendance rate at national and state libraries was highest for people aged 18–24 years (15%), with the next highest rate being 9% for 25–34 year olds. For local libraries, the highest attendance rate was for the age group 35–44 years (46%), followed by the 18–24 years age group (43%).

**10.2** ATTENDANCE AT PUBLIC LIBRARIES, By Age—2002

	AGE GROUP (YEARS)						
	18-24	25-34	35-44	45-54	55-64	65 and over	Total
NUMBER ('000)							
Local libraries	822.1	1 138.3	1 342.6	1 067.2	665.3	780.2	5 815.8
National and state libraries	278.3	255.5	216.4	181.9	117.4	98.0	1 147.5
Total who attended(a)	899.3	1 221.8	1 389.9	1 107.8	694.5	797.1	6 110.2
ATTENDANCE RATE (%)							
Local libraries	43.2	39.2	45.8	40.4	35.3	35.0	40.1
National and state libraries	14.6	8.8	7.4	6.9	6.2	4.4	7.9
Total who attended(a)	47.2	42.0	47.4	41.9	36.9	35.7	42.1

(a) Components do not add to the total as some persons attended both types of libraries.

Source: ABS, Survey of Attendance at Selected Cultural Venues and Events, 2002, data available on request.

Unlike several of the other cultural institutions, public libraries regularly attract repeat visitors. Only 7% of those who visited a library did so on one occasion. About two-fifths (40%) of those who had visited public libraries had been more than 10 times during a 12-month reference period, with over half of those going more than 20 times.

*Attendance Survey*  
*continued*

Those in the older age groups were more likely to make multiple return visits. Almost one-third of those aged 65 years and over who visited public libraries went 26 times or more during the 12-month period.

### 10.3 FREQUENCY OF ATTENDANCE AT PUBLIC LIBRARIES—2002

#### NUMBER OF VISITS IN LAST 12 MONTHS

	Once	Twice	3 times	4 times	5 times	6-10 times	11-15 times	16-20 times	21-25 times	26 times or more	Total
NUMBER ('000)											
Sex											
Males	189.6	302.5	265.5	210.5	192.4	377.2	267.6	158.6	111.2	402.3	2 477.4
Females	204.8	320.4	308.6	259.2	311.0	696.0	405.6	251.4	162.8	713.1	3 632.8
Age group (years)											
18-24	64.9	103.5	121.0	80.2	99.9	136.6	49.0	62.0	19.2	162.9	899.3
25-34	110.7	141.0	130.0	107.8	117.9	221.7	107.1	96.9	34.0	154.7	1 221.8
35-44	94.0	152.2	130.4	100.5	115.6	239.1	163.2	98.0	64.1	232.7	1 389.9
45-54	65.3	108.8	87.0	70.8	86.4	252.9	138.8	58.6	60.6	178.6	1 107.8
55-64	37.2	59.7	52.8	56.4	55.0	125.4	92.0	45.5	35.8	134.7	694.5
65 & over	22.3	57.7	52.9	53.9	28.6	97.5	123.1	49.0	60.2	251.8	797.1
<b>Total</b>	<b>394.5</b>	<b>622.9</b>	<b>574.1</b>	<b>469.6</b>	<b>503.4</b>	<b>1 073.2</b>	<b>673.2</b>	<b>410.0</b>	<b>274.0</b>	<b>1 115.4</b>	<b>6 110.2</b>

#### PER CENT (%)

Sex											
Males	7.7	12.2	10.7	8.5	7.8	15.2	10.8	6.4	4.5	16.2	100.0
Females	5.6	8.8	8.5	7.1	8.6	19.2	11.2	6.9	4.5	19.6	100.0
Age group (years)											
18-24	7.2	11.5	13.5	8.9	11.1	15.2	5.4	6.9	2.1	18.1	100.0
25-34	9.1	11.5	10.6	8.8	9.7	18.1	8.8	7.9	2.8	12.7	100.0
35-44	6.8	11.0	9.4	7.2	8.3	17.2	11.7	7.1	4.6	16.7	100.0
45-54	5.9	9.8	7.9	6.4	7.8	22.8	12.5	5.3	5.5	16.1	100.0
55-64	5.4	8.6	7.6	8.1	7.9	18.1	13.2	6.6	5.2	19.4	100.0
65 & over	2.8	7.2	6.6	6.8	3.6	12.2	15.4	6.1	7.6	31.6	100.0
<b>Total</b>	<b>6.5</b>	<b>10.2</b>	<b>9.4</b>	<b>7.7</b>	<b>8.2</b>	<b>17.6</b>	<b>11.0</b>	<b>6.7</b>	<b>4.5</b>	<b>18.3</b>	<b>100.0</b>

Source: ABS, Survey of Attendance at Selected Cultural Venues and Events, 2002, data available on request.

*Census of Public Libraries*

While the Attendance Survey cannot give a figure for the total number of visits to public libraries, this figure can be obtained from a census of these institutions conducted by the ABS which found that in 1999–2000 there were 99.4 million visits, the vast majority (94%) of which were to local libraries.

The institutions covered by the 1999–2000 Census of Public Libraries comprise local government libraries, national and state libraries and archival service organisations in Australia. Libraries with restricted access, such as those operated by educational institutions (universities and schools), and libraries operated by businesses and organisations for internal reference purposes, were excluded from the collection.

The Census of Public Libraries also reported that national and state archives attracted 94,200 visits to their search rooms and recorded a total of 218,400 archival enquiries during 1999–2000. National and state libraries, which undertook archival services as a secondary activity, recorded 342,700 visits to archival search rooms and 56,700 archival enquiries during this period.

*Census of Public Libraries*  
*continued*

**10.4** NATIONAL AND STATE ARCHIVES (a), Visits and enquiries—1996–97 and 1999–2000

	1996–97	1999–2000
	'000	'000
Visits to search rooms	93.1	94.2
Recorded archival enquiries(b)	211.5	218.4

(a) Excludes national and state library archives.

(b) In addition, in 1999–2000, there were 39,300 recorded archival enquiries at the eight national and state libraries.

Source: ABS, *Public Libraries, Australia, 1999–2000* (cat. no. 8561.0).

## ORGANISATIONS

At the end of June 2000, there were 505 local government libraries and eight national and state libraries operating in Australia. The local government libraries operated from 1,510 locations, while the national and state libraries had a total of 26 locations.

At the end of June 2000, there were also eight national and state archives operating in Australia. State specific data on archives are not available for this collection due to confidentiality requirements nor are data on the archives operated by universities, local governments, commercial organisations and collecting institutions (e.g. state libraries).

**10.5** LOCAL GOVERNMENT LIBRARIES, Number of locations—June 2000

	NSW	Vic.	Qld	SA	WA	Tas.	NT	ACT	Aust.
Branches	387	260	291	156	216	48	27	8	1 393
Mobile services	40	34	19	17	6	—	—	1	117
<b>Total</b>	<b>427</b>	<b>294</b>	<b>310</b>	<b>173</b>	<b>222</b>	<b>48</b>	<b>27</b>	<b>9</b>	<b>1 510</b>

— nil or rounded to zero (including null cells)

Source: ABS, *Public Libraries, Australia, 1999–2000* (cat. no. 8561.0).

## HOLDINGS AND LOANS

In June 2000, public libraries in Australia held a total of 54.3 million books and other library materials such as video and audio tapes and discs. About 36.4 million items were available as lending stock, of which 32.9 million were books. Lending stock is drawn solely from local libraries, which in 1999–2000 reported 162.0 million loans, 133.1 million of which were books. There were 10.7 million registered borrowers in that year.



## HOLDINGS AND LOANS

*continued***10.6** PUBLIC LIBRARY HOLDINGS—June 2000

	<i>Local libraries</i>	<i>National and state libraries</i>	<i>All public libraries</i>
	'000	'000	'000
Lending stock	36 416.4	. .	36 416.4
Non-lending stock	2 963.9	14 925.0	17 888.9
<b>Total</b>	<b>39 380.3</b>	<b>14 925.0</b>	<b>54 305.3</b>

. . not applicable

Source: ABS, *Public Libraries, Australia, 1999–2000* (cat. no. 8561.0).

The national and state archives which record their holdings in metres of shelf space reported having 959,700 metres of holdings at the end of June 2000, an increase of 33% since June 1997.

## TECHNOLOGY

Increasingly, libraries are introducing new technologies to ensure the public have access to information. At the end of June 2000, public libraries operated 14,135 computers – 5,674 available for use by the general public. A number of these workstations had multiple uses. Libraries used 3,296 of these computers to provide an on-line public access catalogue, while 3,005 provided access to the Internet.

**10.7** TECHNOLOGY FACILITIES IN PUBLIC LIBRARIES—June 2000

	<i>Local libraries</i>	<i>National and state libraries</i>	<i>All public libraries</i>
NUMBER			
Personal computers			
For public use	5 220	454	5 674
For staff use only	6 290	2 171	8 461
<b>Total</b>	<b>11 510</b>	<b>2 625</b>	<b>14 135</b>
On-line public access catalogue workstations	2 967	329	3 296
Internet workstations	2 832	173	3 005
CD-Rom workstations	1 882	241	2 123
Other personal computer workstations	1 498	32	1 530
Photocopiers	1 338	100	1 438

Source: ABS, *Public Libraries, Australia, 1999–2000* (cat. no. 8561.0).

## FINANCIAL DATA

Public libraries are particularly reliant on government funding for their operation, with 92% of their total income of \$705.0m in 1999–2000 coming from this source. The total expenses of public libraries in 1999–2000 were \$688.5m, of which \$367.4m (53%) were labour costs. Other major expenses were purchases of library materials, and repairs and maintenance. The eight national and state archives were also highly dependent on government funding with \$78.2m of their total \$87.2m coming from this source.

## FINANCIAL DATA

*continued***10.8** INCOME AND EXPENSES OF PUBLIC LIBRARIES—1999–2000

	Local libraries	National and state libraries	All public libraries
	\$m	\$m	\$m
Income			
Government funding			
Federal and state/territory	117.0	190.9	307.9
Local	338.7	—	338.7
Total	455.7	190.9	646.6
Income from services to clients	17.1	11.4	28.5
Other income	5.3	24.7	30.0
<b>Total income</b>	<b>478.0</b>	<b>227.0</b>	<b>705.0</b>
Expenses			
Labour costs	270.2	97.2	367.4
Telecommunication services	9.1	2.5	11.6
Repair and maintenance expenses	22.0	5.7	27.7
Purchase of library materials(a)	36.6	10.7	47.3
Other	118.5	116.0	234.5
<b>Total expenses</b>	<b>456.4</b>	<b>232.1</b>	<b>688.5</b>

— nil or rounded to zero (including null cells)

(a) In addition to these purchases, public libraries also had \$75.6m of capital expenditure on library materials (these purchases are treated as an asset and depreciated over a number of years).

Source: ABS, *Public Libraries, Australia, 1999–2000* (cat. no. 8561.0).

An annual ABS collection of data on government funding of cultural activities provides more up to date information on the main source of income for libraries and archives. Data from the collection showed that the Australian Government increased funding for public libraries from \$39.3m in 2000–01 to \$49.1m in 2002–03, an increase of 25%.

State and territory government funding increased by 16% over the same period, from \$273.2m to \$317.9m. Australian Government funding for archives also increased, from \$43.8m in 2000–01 to \$63.7m in 2002–03. This represents an increase of 45%. By comparison, state and territory government funding for archives decreased by 4% over the same period, from \$42.4m to \$40.6m.

Substantial funding of libraries and archives also occurs at the local government level, but this data was not available for 2002–03. However, as an indicator of their contribution to these facilities, local governments provided funding of over \$450m in 2000–01.

## EMPLOYMENT

*Census of Population and Housing*

In 2001, the Census of Population and Housing recorded 11,461 people whose main job was working in the libraries industry – the ABS definition of this industry includes people working for archives organisations but excludes people working for libraries located in educational institutions (e.g. school libraries) and specialist libraries (e.g. those located in government departments and within business organisations). The most common occupations were Library assistants (3,093 people), Librarians (2,974 people) and Library technicians (2,592 people).

**10.9** PERSONS EMPLOYED IN THE LIBRARIES INDUSTRY(a), By occupation—August 2001

	Number	%
Cultural occupations		
Library assistants	3 093	27.0
Librarians	2 974	26.0
Library technicians	2 592	22.6
Archivists	207	1.8
Other cultural occupations	215	1.9
<i>Total cultural occupations</i>	<i>9 081</i>	<i>79.3</i>
Other occupations	2 367	20.7
<b>Total all occupations</b>	<b>11 448</b>	<b>100.0</b>

(a) In their main job in the week before Census Night.  
 Source: ABS, *Employment in Culture, Australia, 2001*  
 (cat. no. 6273.0).

The extent to which library activity is carried out in other industries can be gauged from Table 10.10. While the libraries industry employed 2,974 librarians, post-school education (university and technical education) employed 2,499 librarians, school education employed 627 librarians, while government administration employed 1,467 librarians.

**10.10** PERSONS WITH LIBRARY-RELATED OCCUPATIONS(a), By industry—August 2001

Industry	Librarians	Library technicians	Library assistants	Archivists	Total
Libraries	2 974	2 592	3 093	207	8 866
Post-school education	2 499	1 219	1 664	49	5 431
School education	627	1 454	2 242	75	4 398
Government administration	1 467	334	532	131	2 464
Health and community services	404	117	96	21	638
Legal and accounting services	352	73	82	22	529
Motion picture, radio and television services	123	19	48	29	219
Scientific research	160	29	20	7	216
Other industries	1 708	311	632	259	2 910
<b>Total all industries</b>	<b>10 314</b>	<b>6 148</b>	<b>8 409</b>	<b>800</b>	<b>25 671</b>

(a) In their main job in the week before Census Night. Source: ABS, 2001 Census of Population and Housing, data available on request.

*Census of Population and Housing continued*

The 2001 Census of Population and Housing also counted 800 people whose main job in the week before the Census was as an archivist. This included not only those employed in the national and state archives, but also those working for government organisations, educational institutions, commercial organisations, etc.

*Work Survey*

The ABS 2001 Survey of Work in Selected Culture and Leisure Activities provides another perspective on employment in libraries and archives.

While not being able to provide information on the occupation of people working in a library or archive, or the industries in which librarians or archivists might work, it does give a better indication of the total number of people working in library or archive organisations by providing information on those working in both a paid and unpaid capacity and those who are involved as part of a second job.

The survey found that there were 76,000 people aged 15 years and over who had some work involvement in a library or archive in the 12 months to April 2001, of whom 31,200 (41%) received some payment.

*Census of Public Libraries*

The 1999–2000 ABS Census of Public Libraries found that at the end of June 2000, there were 9,592 staff employed in local government libraries and 2,248 employed in national and state libraries.

Some 44% of those employed in local government libraries were permanent full-time workers while 74% of those employed in national and state libraries were permanent full-time workers.

This census also found that at the end of June 2000, there were 756 persons employed by the eight national and state archives in Australia.

### **10.11** NUMBER OF EMPLOYEES IN PUBLIC LIBRARIES—June 2000

<i>Occupation</i>	<i>Males</i>	<i>Females</i>	<i>Persons</i>
LOCAL GOVERNMENT LIBRARIES			
Librarians	359	2 063	2 422
Other employees	926	6 244	7 170
<b>Total</b>	<b>1 285</b>	<b>8 307</b>	<b>9 592</b>
NATIONAL AND STATE LIBRARIES			
Librarians	167	546	713
Other employees	546	989	1 535
<b>Total</b>	<b>713</b>	<b>1 535</b>	<b>2 248</b>

Source: ABS, *Public Libraries, Australia, 1999–2000*  
(cat. no. 8561.0).

The 1999–2000 ABS Census of Public Libraries showed that the number of volunteers working for local government libraries in June 2000 totalled 4,493 people. Data are not available on the number of volunteers working in national and state libraries and archives.

**INTRODUCTION**

Literature is the product of the creative minds of authors, whether this be writing books or articles for publication in newspapers and magazines.

The Australian Culture and Leisure Classifications define the literature and print media industry as those businesses and organisations whose main activity is creative writing and/or the printing, publishing and selling of literature products.

It includes the following activities in this category:

- Primary literature creation (writing material for publication or performance)
- Newspaper publishing and printing
- Periodical publishing
- Book publishing
- Other printing (e.g. sheet music)
- Literature wholesaling and retailing.

With the exception of Book publishing and Book retailing, there are only limited data available on this industry.

**ORGANISATIONS**

The 2002–03 ABS Book Publishers Survey identified 236 businesses that were predominantly involved in publishing books. There were also ten businesses that generated an annual income in excess of \$2m from book publishing, although their main business activities were in other fields.

At the other end of the distribution chain, the 2002–03 ABS Book Retailers Survey identified a total of 1,415 businesses in Australia involved in book retailing. This included 522 bookshops, 875 newsagents and 18 other large retailers (i.e. supermarkets, department stores, etc.) which employed more than 200 staff.

**PRODUCTS**

In 2002–03, book publishers sold 114.4 million books with a total value of \$1,369.4m to book retailers and directly to the general public. Some \$877.0m (77.2 million books) of these were sales of new Australian titles. Approximately 15% (by value) of all books published were sold overseas, predominantly to the United States and New Zealand.

Educational books accounted for 40% of sales, with general non-fiction accounting for 34%, general fiction 17% and specialised children's books 9%.

PRODUCTS *continued***11.1** DOMESTIC AND EXPORT SALES OF BOOKS, By Category—2002–03

	<i>Domestic sales</i>	<i>Export sales(a)</i>	<i>Total</i>
	\$m	\$m	\$m
Printed books			
Education			
Primary	132.5	53.8	186.3
Secondary	101.1	6.0	107.2
Tertiary	132.9	10.5	143.4
Professional and reference	93.4	*17.5	110.9
<i>Total education</i>	459.9	87.8	547.8
General			
Hardback			
Nonfiction	133.4	*25.9	159.3
Fiction	81.3	4.6	85.9
Children's	43.0	5.6	48.6
<i>Total hardback</i>	257.7	36.1	293.8
Trade paperback(b)			
Nonfiction	153.7	*67.5	221.2
Fiction	68.3	1.6	69.8
Children's	21.8	*4.0	25.8
<i>Total trade paperback</i>	243.8	*73.0	316.8
Mass-market paperback(c)			
Nonfiction	77.5	3.3	80.7
Fiction	77.4	4.5	81.9
Children's	36.5	4.7	41.2
<i>Total mass-market paperback</i>	191.4	12.5	203.8
<i>Total general</i>	692.9	121.6	814.5
<i>Total printed books</i>	1 152.8	209.4	1 362.3
Electronic books			
Education	np	np	2.7
General	np	np	4.4
<i>Total electronic</i>	7.0	0.1	7.1
<b>Total books</b>	<b>1 159.8</b>	<b>209.5</b>	<b>1 369.4</b>

\* estimate has a relative standard error of 25% to 50% and should be used with caution

np not available for publication but included in totals where applicable, unless otherwise indicated

(a) Includes re-export sales of \$7.4m and excludes sales of rights of \$4.6m.

(b) An alternative format to hardback with the same dimensions, but with a soft cover.

(c) The conventional form of paperback book.

Source: ABS, *Book Publishers, 2002–03* (cat. no. 1363.0).

Book publishers reported selling \$329.7m worth of books to final consumers in 2002–03. By comparison, the 2002–03 Book Retailers Survey reported 76 million new books valued at \$1,274.9m were sold via retail outlets. Approximately 58% of these were sold by bookshops, 27% by department stores, 9% by newsagents and 6% by supermarkets and other large retailers. The figures suggest that many readers are by-passing book retailers with approximately 20% of the income from sales to final consumers being earned by book publishers, often selling by subscription or straight to public and private organisations and schools.

## FINANCIAL DATA

The Book Publishers Survey was conducted for both the 2001–02 and 2002–03 reference years. The value of the operating profit before tax increased by 76% over this period, from \$50.2m in 2001–02 to \$88.4m in 2002–03. This led to an increase in the profit margin from 3.3% to 5.6%.

**11.2** BOOK PUBLISHERS(a), Income and expense items—2001–02 and 2002–03

	2001–02	2002–03
	\$m	\$m
Income		
Sales of books		
Australian titles	853.8	877.0
Imported titles	503.0	492.4
Total	1 356.8	1 369.4
Sales of other goods	59.6	73.9
Other sources of income	126.3	135.3
Total income	1 542.7	1 578.6
Expenses		
Wages and salaries	249.6	248.6
Royalties and fees paid	93.5	102.3
Other expenses	1 117.3	1 136.8
Total expenses	1 460.4	1 487.7
Operating profit before tax	50.2	88.4

(a) Includes businesses not predominantly involved in book publishing but with \$2m or more of book publishing income.

Source: ABS, *Book Publishers*, 2002–03 (cat. no. 1363.0).

Comparative financial data for the period 2000–01 to 2002–03 is available from the Book Retailers Survey. Bookshops recorded fairly stable performance in terms of sales over this period, although the operating profit before tax fluctuated, with the profit margin declining from 3.6% in 2001–02 to 2.0% in 2002–03.

## FINANCIAL DATA

*continued***11.3** BOOKSHOPS (a), Summary of Operations—2000–01 to 2002–03

	2000–01	2001–02	2002–03
	\$m	\$m	\$m
Income			
Retail sale of new books(b)	933.6	957.4	947.3
Other retail sales	66.5	104.6	98.5
Other income	24.7	33.4	27.6
<b>Total income</b>	<b>1 024.8</b>	<b>1 095.4</b>	<b>1 073.5</b>
Expenses			
Purchase of new books	602.1	604.6	590.1
Wages and salaries	140.8	149.0	145.8
Other	274.6	322.8	321.5
<b>Total expenses</b>	<b>1 017.5</b>	<b>1 076.4</b>	<b>1 057.4</b>
Operating profit before tax	22.8	39.0	21.3

(a) Includes only those businesses which are classified according to the ANZSIC as Newspaper, book and stationary retailing and for which the value of new book sales comprises at least 50% of all retail sales.

(b) Includes electronic and audio books.

Source: ABS, *Book Retailers, Australia, 2002–03* (cat. no. 1371.0).

The ABS Cultural Funding by Government collection reported that the Australian, state and territory governments contributed a total of almost \$30m towards Literature and print media in 2002–03, an increase of more than 16% over the previous year.

**11.4** CULTURAL FUNDING BY GOVERNMENT, Literature and print media—2000–01 to 2002–03

	2000–01	2001–02	2002–03
	\$m	\$m	\$m
Australian government	22.8	21.9	25.4
State and territory government	4.3	3.6	4.3
<b>Total</b>	<b>27.1</b>	<b>25.5</b>	<b>29.7</b>

Source: ABS, *Cultural Funding by Government, Australia, 2002–03* (cat. no. 4183.0).

## EMPLOYMENT

*Census of Population and Housing*

The 2001 Census of Population and Housing collected employment data relating to the job in which a person worked the most hours during the week before the Census.

A total of 43,388 people were employed in the printing and/or publishing of newspapers, periodicals and books. A further 41,742 people were employed in the wholesaling and/or retailing of books, newspapers, magazines and stationery.

Almost 45% of those working in the printing/publishing sector of the industry were employed in a 'cultural' occupation, compared with only 2% of those employed in the wholesaling and retailing sector. The most common 'cultural' occupations recorded were Print journalists (4,817 people employed), Printing tradespersons (4,630) and Editors (2,586). Of the 'other' occupations recorded for this industry, Sales assistants (15,136) and Shop managers (9,724) were the most common.



### 11.5 PERSONS EMPLOYED IN LITERATURE AND PRINT MEDIA INDUSTRIES(a), By occupation—August 2001

	<i>Newspaper printing or publishing</i>	<i>Other periodical publishing</i>	<i>Book and other publishing</i>	<i>Book and magazine wholesaling</i>	<i>Newspaper, book and stationary retailing</i>
<b>Cultural occupations</b>					
Advertising specialists	154	114	14	5	11
Authors	43	59	262	16	31
Book editors	3	24	459	8	8
Classified advertising clerks	441	11	5	—	20
Copywriters	27	13	14	—	—
Desktop publishing operators	95	60	101	6	14
Editors	1 439	932	182	7	26
Graphic designers	782	474	282	12	81
Illustrators	46	8	65	3	3
Librarians	83	11	21	11	20
Media producers	82	226	32	—	9
Photographers	628	46	12	3	16
Print journalists	4 080	659	15	9	54
Printing hands	920	213	331	24	27
Printing tradespersons	2 874	693	930	26	107
Proof readers	83	26	34	3	6
Technical writers	5	19	56	3	3
Other cultural occupations	589	326	318	47	231
<i>Total cultural occupations</i>	<i>12 374</i>	<i>3 914</i>	<i>3 133</i>	<i>183</i>	<i>667</i>
<b>Other occupations</b>					
General clerks	584	149	206	118	388
General managers	689	768	922	120	312
Leaflet and newspaper deliverers	1 291	20	5	101	963
Sales assistants (other personal and household goods)	107	24	61	130	14 814
Sales and marketing managers	743	516	337	108	486
Sales representatives (business services)	1 619	291	124	15	285
Sales representatives (personal and household goods)	54	58	255	467	988
Shop managers	60	9	15	85	9 555
Storepersons	51	35	161	584	645
Other (includes not stated)	8 175	2 933	3 705	1 822	8 906
<i>Total other occupations</i>	<i>13 373</i>	<i>4 803</i>	<i>5 791</i>	<i>3 550</i>	<i>37 342</i>
<b>Total all occupations</b>	<b>25 747</b>	<b>8 717</b>	<b>8 924</b>	<b>3 733</b>	<b>38 009</b>

— nil or rounded to zero (including null cells)

(a) In their main job in the week before Census Night.

Source: ABS, Census of Population and Housing, 2001, data available on request.

*Book Publishers Survey*

More recently, the 2002–03 ABS Book Publishers Survey reported that there were 5,340 people employed by the 246 businesses involved in book publishing, which was virtually the same as the previous year.

### 11.6 BOOK PUBLISHERS (a), Employment—2001–02 and 2002–03

	2001–02	2002–03
	no.	no.
Males	1 861	1 783
Females	3 502	3 556
<b>Persons</b>	<b>5 364</b>	<b>5 340</b>

(a) Includes the 10 businesses not predominantly involved in book publishing but with \$2m or more of book publishing income.

Source: ABS, *Book Publishers, Australia, 2002–03* (cat. no. 1363.0).

*Book Retailers Survey*

The 2002–03 ABS Book Retailers Survey showed that there were 7,336 people employed in the 522 businesses predominantly involved in book retailing. The largest increase in employment in this sector occurred between 2000–01 and 2001–02 (8%), with numbers increasing by 4% between 2001–02 and 2002–03.

### 11.7 BOOKSHOPS (a), Employment—2000–01 to 2002–03

	2000–01	2001–02	2002–03
	no.	no.	no.
Males	2 222	2 398	2 383
Females	4 342	4 685	4 953
<b>Persons</b>	<b>6 564</b>	<b>7 083</b>	<b>7 336</b>

(a) Includes only those businesses which are classified according to the ANZSIC as Newspaper, book and stationary retailing and for which the value of new book sales comprises at least 50% of all retail sales.

Source: ABS, *Book Retailers, Australia, 2002–03* (cat. no. 1371.0).

*Work Survey*

Additional information on people's involvement in Literature and print media was also collected in the ABS 2001 Survey of Work in Selected Culture and Leisure Activities.

According to this survey, some 536,900 people contributed their writing skills in the 12 months before interview, with 40% of these receiving some payment for their contributions.

A further 152,000 people had a work involvement in publishing in the 12 months before interview, with just over one-half (52%) receiving some payment for their efforts.

CHAPTER **12**

PERFORMING ARTS .....

INTRODUCTION

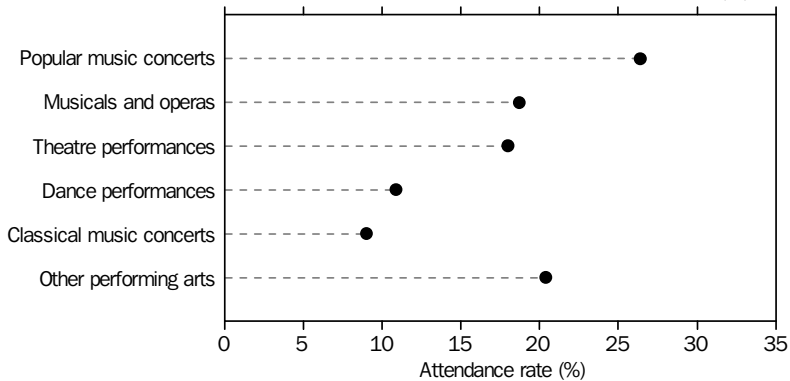
This chapter provides information on music, theatre, dance, opera and a variety of other activities which come under the broad heading of the performing arts. Attendance data from a 2002 ABS survey and detailed employment data from both the Census of Population and Housing and an ABS survey on work in selected culture and leisure activities are the main sources of information about involvement with the performing arts. This is complemented by data from a 2002–03 survey of businesses operating in Australia which gives information on the income, expenditure and employment of selected music and theatre production and performing arts festival organisations.

ATTENDANCE

According to the ABS Survey of Attendance at Selected Cultural Venues and Events, over one-half (53%) of the population aged 18 years and over attended at least one type of performing arts performance in the 12 month period prior to interview in April 2002. Over a quarter (26%) of the population had attended Popular music concerts, while about one-fifth had seen Musicals and operas (19%) and Theatre performances (18%).

**12.1**

ATTENDANCE RATES FOR THE PERFORMING ARTS (a)—2002



(a) In the 12 months before interview.  
Source: ABS, *Attendance at Selected Cultural Venues and Events, 2002* (cat. no. 4114.0).

The attendance rates for females exceeded those of males for all events except popular music concerts. For most events, attendance was correlated with age. The best example of this is Popular music concerts, where attendance peaked with the youngest age group (44% for 18–24 years olds), dropping progressively with each older age group, to 10% for those aged 65 years and over.

## 12.2 ATTENDANCE AT PERFORMING ARTS VENUES AND EVENTS(a), By selected characteristics—2002

	<i>Classical music concerts</i>	<i>Popular music concerts</i>	<i>Theatre performances</i>	<i>Dance performances</i>	<i>Musicals and operas</i>	<i>Other performing arts</i>
NUMBER ('000)						
Males	552.3	1 910.6	1 100.1	600.8	1 084.7	1 380.7
Females	746.6	1 922.9	1 506.9	980.1	1 621.1	1 575.1
18–24 years	119.5	834.0	376.5	199.6	304.7	444.2
25–34 years	190.7	966.4	515.0	298.2	520.4	698.5
35–44 years	237.1	760.9	567.7	409.3	502.3	613.4
45–54 years	287.0	658.1	527.4	319.2	571.5	544.7
55–64 years	248.6	382.6	330.7	201.2	437.6	367.8
65 years and over	216.0	231.6	289.8	153.4	369.4	287.2
Six state capital cities	976.9	2 519.4	1 758.0	1 021.0	1 879.6	1 998.6
Rest of Australia	321.9	1 314.1	849.1	560.0	826.2	957.1
NSW	487.6	1 322.8	858.3	539.4	935.3	955.5
Vic.	319.8	994.2	705.6	364.8	772.9	759.6
Qld	177.5	621.6	433.2	294.1	466.7	516.2
SA	103.1	284.0	181.6	114.8	181.0	277.6
WA	138.3	421.7	293.0	177.3	229.1	322.7
Tas.	31.2	87.1	60.1	33.9	54.1	63.1
NT	10.1	26.3	16.4	15.6	19.4	18.8
ACT	31.3	76.0	58.9	40.9	47.1	42.2
<b>Total</b>	<b>1 298.9</b>	<b>3 833.6</b>	<b>2 607.1</b>	<b>1 581.0</b>	<b>2 705.8</b>	<b>2 955.7</b>
ATTENDANCE RATE (%)						
Males	7.7	26.6	15.3	8.4	15.1	19.2
Females	10.2	26.2	20.6	13.4	22.1	21.5
18–24 years	6.3	43.8	19.8	10.5	16.0	23.3
25–34 years	6.6	33.2	17.7	10.3	17.9	24.0
35–44 years	8.1	25.9	19.4	14.0	17.1	20.9
45–54 years	10.9	24.9	19.9	12.1	21.6	20.6
55–64 years	13.2	20.3	17.6	10.7	23.2	19.5
65 years and over	9.7	10.4	13.0	6.9	16.6	12.9
Six state capital cities	10.6	27.3	19.0	11.1	20.4	21.7
Rest of Australia	6.1	24.9	16.1	10.6	15.7	18.1
NSW	10.0	27.0	17.5	11.0	19.1	19.5
Vic.	8.7	27.1	19.3	10.0	21.1	20.7
Qld	6.6	23.0	16.0	10.9	17.3	19.1
SA	9.1	25.0	16.0	10.1	16.0	24.5
WA	9.7	29.6	20.6	12.4	16.1	22.6
Tas.	9.0	25.2	17.4	9.8	15.7	18.3
NT	9.5	24.9	15.6	14.8	18.4	17.8
ACT	13.5	32.9	25.5	17.7	20.4	18.3
<b>Total</b>	<b>9.0</b>	<b>26.4</b>	<b>18.0</b>	<b>10.9</b>	<b>18.7</b>	<b>20.4</b>

(a) In the 12 months before interview.

Source: ABS, *Attendance at Selected Cultural Venues and Events*, 2002 (cat. no. 4114.0).

ATTENDANCE *continued*

Popular music and classical music concerts were the events most likely to attract multiple visits, with around 60% of people attending more than once over a 12 month period. This fell to about 40% for those who attended more than twice and around 25% for those who attended more than three times.

**12.3** FREQUENCY OF ATTENDANCE AT PERFORMING ARTS VENUES AND EVENTS (a)—2002

	<i>Classical music concerts</i>	<i>Popular music concerts</i>	<i>Theatre performances</i>	<i>Dance performances</i>	<i>Musicals and operas</i>	<i>Other performing arts</i>
NUMBER ('000)						
Once	543.2	1 385.2	1 246.8	781.2	1 467.3	1 723.7
Twice	276.5	857.5	692.1	319.2	708.7	584.8
3 times	165.4	530.5	247.3	159.5	280.9	291.2
4 times	99.5	270.9	131.5	95.1	115.1	107.1
5 times	69.5	218.5	94.3	67.4	55.0	66.5
6–10 times	92.3	309.0	131.6	87.6	52.4	107.1
11 times or more	52.5	262.1	63.5	71.1	*26.4	75.4
<b>Total</b>	<b>1 298.9</b>	<b>3 833.6</b>	<b>2 607.1</b>	<b>1 581.0</b>	<b>2 705.8</b>	<b>2 955.7</b>
ATTENDANCE RATE (%)						
Once	41.8	36.1	47.8	49.4	54.2	58.3
Twice	21.3	22.4	26.5	20.2	26.2	19.8
3 times	12.7	13.8	9.5	10.1	10.4	9.9
4 times	7.7	7.1	5.0	6.0	4.3	3.6
5 times	5.4	5.7	3.6	4.3	2.0	2.2
6–10 times	7.1	8.1	5.0	5.5	1.9	3.6
11 times or more	4.0	6.8	2.4	4.5	*1.0	2.6
<b>Total</b>	<b>100.0</b>	<b>100.0</b>	<b>100.0</b>	<b>100.0</b>	<b>100.0</b>	<b>100.0</b>

\* estimate has a relative standard error of 25% to 50% and should be used with caution

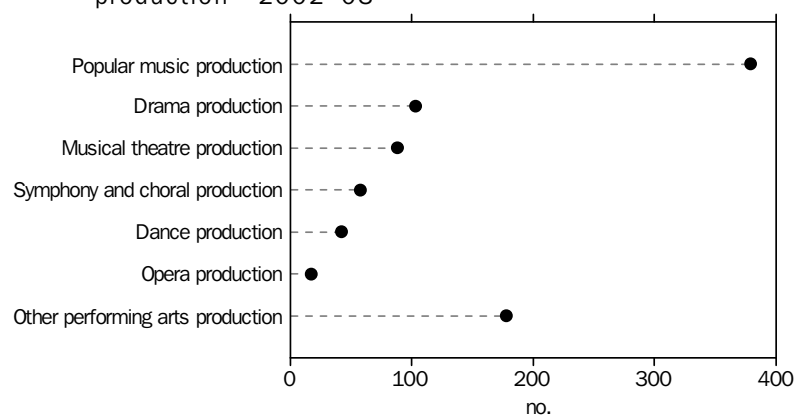
(a) In the 12 months before interview.

Source: ABS, *Attendance at Selected Cultural Venues and Events, Australia, 2002* (cat. no. 4114.0).

## ORGANISATIONS

The 2002–03 ABS Survey of the Performing Arts found that at the end of June 2003, there were 865 organisations in the music and theatre production industry in Australia. Of these, 379 were mainly engaged in Popular music production, 103 in Drama production, 88 in Music theatre production, 58 in Symphony and choral production, 42 in Dance production, 17 in Opera production and 178 in Other performing arts production such as puppetry, circuses, etc.

## ORGANISATIONS

*continued***12.4** MUSIC AND THEATRE PRODUCTION ORGANISATIONS, By type of production—2002–03Source: ABS, *Performing Arts, Australia, 2002–03* (cat. no. 8697.0).

Not for profit organisations represented 24% of the Music and theatre production industry. Such organisations put on an estimated 15,384 performances for payment and attracted 4.6 million paying patrons. By comparison, the 657 commercial organisations reported staging 37,857 paid performances with 9.6 million paying customers.

**12.5** MUSIC AND THEATRE PRODUCTION ORGANISATIONS, Performances and Attendances—2002–03

	Paid performances	Paid attendances(a)
	no.	'000
Popular music performance	15 917	4 048
Symphony and choral performance	3 861	1 577
Drama production	12 536	2 554
Dance production	1 501	747
Musical theatre production	4 813	3 182
Opera production	1 013	471
Other production	13 601	1 651
<b>Total</b>	<b>53 241</b>	<b>14 230</b>

(a) Includes overseas attendances.

Source: ABS, *Performing Arts, Australia, 2002–03* (cat. no. 8697.0).

The ABS also conducted a survey to collect data on the activities of organisations which were involved with performing arts festivals in 2002–03. The survey only included those festivals which lasted more than two consecutive days and which were either multifaceted or had a primary focus in one of the genres of the performing arts, such as music or drama. The survey found that there were 176 performing arts festivals during 2002–03, 91 of which were music festivals, 75 were multifaceted, while the remaining ten were drama, dance or comedy festivals.

## FINANCIAL DATA

Figures from the ABS Survey of Performing Arts indicate that just over half the income received by Music and theatre production organisations in 2002–03 came from box office takings (53%). Governments were responsible for providing a further 22% of income while 7% was obtained through fundraising.

### 12.6 MUSIC AND THEATRE PRODUCTION ORGANISATIONS, Income received—2002–03

	<i>For profit</i>	<i>Not for profit</i>	<i>Total</i>
Organisations at end June (no.)	657	208	865
Income from box office (\$m)	216.0	115.6	331.6
Government funding (\$m)	2.2	132.2	134.4
Other income (\$m)	79.8	76.2	156.0
<b>Total income (\$m)</b>	<b>298.1</b>	<b>324.0</b>	<b>622.1</b>

Source: ABS, *Performing Arts, Australia, 2002–03* (cat. no. 8697.0).

Governments provided funding of \$132.2m to 150 'not-for-profit' music and theatre production organisations in 2002–03. A further \$2.2m in government funding was distributed amongst 53 of the 657 profit making organisations in the industry. Organisations most reliant on government funding were those involved in Symphony and choral performances (50% of total income) and Opera production (38%). By contrast, organisations involved in Popular music performances received 1% of their income from governments.

### 12.7 MUSIC AND THEATRE PRODUCTION ORGANISATIONS, Income by Type—2002–03

	<i>Income from box office</i>	<i>Government funding</i>	<i>Fundraising</i>	<i>Other income</i>	<i>Total</i>
	\$m	\$m	\$m	\$m	\$m
Popular music performance	67.0	0.6	5.0	38.3	110.9
Symphony and choral performance	31.2	52.6	13.3	8.2	105.4
Drama production	41.0	26.8	9.1	14.4	91.4
Dance production	19.9	17.6	7.0	7.5	52.0
Musical theatre production	124.6	1.8	*1.2	15.8	143.4
Opera production	np	29.0	8.2	np	75.6
Other production	np	6.0	1.7	np	43.3
<b>Total</b>	<b>331.6</b>	<b>134.4</b>	<b>45.5</b>	<b>110.6</b>	<b>622.1</b>

\* estimate has a relative standard error of 25% to 50% and should be used with caution

np not available for publication but included in totals where applicable, unless otherwise indicated

Source: ABS, *Performing Arts, Australia, 2002–03* (cat. no. 8697.0).

Music and theatre production organisations incurred expenses of \$575.6m in 2002–03. Over a third (37%) of these were labour costs, primarily wages and salaries, with another 8% being contract payments to performers and artists. Of the \$20.5m paid in royalties, almost three-fifths (\$12.0m) was paid to overseas organisations and individuals.

## FINANCIAL DATA

*continued***12.8** MUSIC AND THEATRE PRODUCTION ORGANISATIONS,  
Expenses—2002–03

	<i>For profit</i>	<i>Not for profit</i>	<i>Total</i>
Organisations at end June (no.)	657	208	865
Expenses			
Labour costs (\$m)	59.8	154.1	213.9
Contract payments to performers/artists (\$m)	15.8	31.6	47.3
Royalties (\$m)	15.0	5.5	20.5
Venue Hire (\$m)	22.6	18.3	40.9
Advertising (\$m)	22.9	14.5	37.4
Travelling, accommodation and entertainment expenses (\$m)	16.6	17.9	34.5
Other (\$m)	101.3	79.7	181.1
<i>Total expenses (\$m)</i>	<i>254.0</i>	<i>321.6</i>	<i>575.6</i>

Source: ABS, *Performing Arts, Australia, 2002–03* (cat. no. 8697.0).

Respondents to the ABS Survey of Performing Arts Festivals reported income of \$88.5m in 2002–03 derived largely from three sources – ticket sales (\$27.2m), government funding (\$27.0m) and fund raising (\$24.3m). This compares with their expenditure for the year of \$82.8m, including \$16.6m for contract payments to performers, artists and artistic support and \$12.8m for labour costs.

During 1999–2000, the 125 businesses in the performing arts venues industry generated income of \$315.9m. The two main sources of income for these businesses were government funding (\$93.5m) and rent, leasing and hiring income (\$83.6m).

Australian Government funding for Performing arts in 2002–03 totalled \$99.9m, with a further \$0.5m for Performing arts venues. By comparison, state and territory government funding of Performing arts was \$72.6m, although their contribution toward Performing arts venues was \$91.3m. While local governments also provide funding for the performing arts, data are not available on their level of contribution.

**12.9** CULTURAL FUNDING BY GOVERNMENT, Performing arts—2002–03

	<i>Australian Government</i>	<i>State and territory governments</i>
	<i>\$m</i>	<i>\$m</i>
Performing arts		
Music	57.1	20.8
Drama	13.0	20.7
Dance	9.0	11.7
Music theatre and opera	14.2	13.2
Other performing arts	6.5	6.2
<i>Total</i>	<i>99.9</i>	<i>72.6</i>
Performing arts venues	0.5	91.3

Source: ABS, *Cultural Funding by Government, Australia, 2002–03* (cat. no. 4183.0).



## EMPLOYMENT

*Survey of Performing Arts  
Industries*

Putting together a production requires more than performers. Technicians, producers, directors, stage managers, those involved in marketing and sales, ticket collectors and a variety of others all contribute. According to the 2002–03 ABS Survey of Performing Arts Industries, there were 7,842 people employed in the music and theatre production industry in June 2003 (this survey only includes people working for organisations with employees).

Of these, 60% were performing artists, 17% were in managerial or administrative roles and 10% were providing artistic support (e.g. choreographers, composers and music directors). While the industry employed roughly equal numbers of males and females (52% and 48% respectively), the majority of performing artists employed were male (58%) while the majority of managerial and administrative staff were female (65%). The survey also found that there were 2,548 people working as volunteers in the industry during the month of June 2003.

Organisations involved in running performing arts festivals of more than 2 days duration during 2002–03, reported employing a total of 1,272 people. While the festival was on, they received assistance from 15,728 volunteers working an average of 25 hours each.

*Census of Population and  
Housing*

The performing arts surveys do not give information on the occupations in which people work, and it is necessary to analyse data from the Census of Population and Housing for such detail. According to the Census, there were 10,797 people whose main job was in music and theatre production in August 2001. Almost two-fifths of these (4,255) were Instrumental musicians – easily the largest occupation category in the industry.

There were also 847 people who indicated that they worked as Singers, 301 as Actors and 190 as Dancers and choreographers in the Music and theatre production industry. However, this does not represent all the singers, actors, dancers and choreographers in Australia, with many people reporting having these occupations whilst being employed in other industries.

For example, there were a total of 2,009 people in various Australian industries who described their main job as "actor" in August 2001, with the largest concentrations in the Creative arts (277 people) and the Television services industries (263 people).

The same is also true of many performing arts occupations, with opportunities for employment existing in many different industries. In a statistical overview publication it is not possible to map in which industries all performing arts workers are employed, however, such detail is available in another ABS publication entitled *Employment in Culture, Australia, 2001* (cat. no. 6273.0).

*Census of Population and  
Housing continued*

**12.10** PERSONS EMPLOYED IN MUSIC AND THEATRE PRODUCTIONS  
INDUSTRY(a), By occupation—August 2001

	<i>Number</i>	<i>%</i>
Cultural occupations		
Instrumental musicians	4 255	39.4
Singers	847	7.8
Actors	301	2.8
Music teachers (private)	274	2.5
Media producers	247	2.3
Dancers and choreographers	190	1.8
Composers	170	1.6
Radio presenters	168	1.6
Sound technicians	158	1.5
Directors (film, television, radio and stage)	105	1.0
Stage managers	96	0.9
Light technicians	82	0.8
Ticket collectors and ushers	76	0.7
Theatre and cinema managers	74	0.7
Artistic directors	63	0.6
Music directors	61	0.6
Other cultural occupations	1 108	10.3
<i>Total cultural occupations</i>	<i>8 275</i>	<i>76.6</i>
Other occupations		
Project and program administrators	147	1.4
Sales and marketing managers	137	1.3
Public relations officers	120	1.1
Other (includes not stated)	2 118	19.6
<i>Total other occupations</i>	<i>2 522</i>	<i>23.4</i>
<b>Total all occupations</b>	<b>10 797</b>	<b>100.0</b>

(a) In their main job in the week before Census Night.

Source: ABS, Census of Population and Housing, 2001, data available on request.

*Work Survey*

According to the 2001 Survey of Work in Selected Culture and Leisure Activities, there were 234,400 people who had performed music in front of an audience in the 12 months before interview. Almost 28% of these people received payment for at least one of their performances. The same survey found that there were 258,300 people who performed as actors, dancers or in other performing roles before an audience. Approximately 10% of these were paid for at least one of their performances.

Work Survey continued

**12.11** PERSONS INVOLVED IN MUSIC AND THE PERFORMING ARTS,  
By payment status —August 2001

	<i>Some paid involvement</i>	<i>Unpaid involvement only</i>	<i>Total</i>
NUMBER ('000)			
<b>Music</b>			
As a live performer	64.6	169.8	234.4
No involvement as a live performer	18.9	28.6	47.5
<i>Total</i>	83.5	198.4	281.9
<b>Performing arts</b>			
As a performer	29.1	229.1	258.3
No involvement as a performer	16.6	89.7	106.3
<i>Total</i>	45.7	318.8	364.6
PER CENT (%)			
<b>Music</b>			
As a live performer	27.6	72.4	100.0
No involvement as a live performer	39.7	60.3	100.0
<i>Total</i>	29.6	70.4	100.0
<b>Performing arts</b>			
As a performer	11.3	88.7	100.0
No involvement as a performer	15.6	84.4	100.0
<i>Total</i>	12.5	87.5	100.0

Source: ABS, Survey of Work in Selected Culture and Leisure Activities, 2001, data  
available on request.

# CHAPTER 13

## MUSIC COMPOSITION, DISTRIBUTION AND PUBLISHING .....

### INTRODUCTION

This chapter examines the industries that create music and make it available to consumers. Information on live musical performances is included in Chapter 12 Performing Arts.

### RETAIL SALES

The 1998–99 Retail Industry Survey showed that retail sales of pre-recorded audio CDs totalled \$838.9m in that year. Businesses predominantly involved in retailing recorded music accounted for almost 66% of sales, while Department stores accounted for a further 21%. Retail sales of other pre-recorded audio media amounted to \$118.8m.

#### **13.1** RETAIL SALES OF PRE-RECORDED AUDIO MEDIA (a)—1998–99 .....

	Income	Percentage share
<i>Industry</i>	\$m	%
Pre-recorded audio CDs		
Recorded music retailing	552.0	65.8
Department stores	173.7	20.7
Domestic appliance retailing	81.7	9.7
Other retailers	31.5	3.8
<i>Total</i>	838.9	100.0
Other pre-recorded audio media		
Recorded music retailing	18.0	15.2
Retailing n.e.c.	**13.7	**11.5
Other retailers	87.1	73.3
<i>Total</i>	118.8	100.0

\*\* estimate has a relative standard error greater than 50% and is considered too unreliable for general use

(a) Excludes sales by retail businesses with no employees.

Source: ABS, *Retail Industry, Commodity Sales, 1998–99* (cat. no. 8624.0).

The ABS Retail Industry Survey also estimated that sales of musical instruments totalled \$268.2m in 1998–99, although caution must be exercised with this figure as it has a high relative standard error.

### ORGANISATIONS

The only comprehensive study of music activity by the ABS was undertaken in the mid 1990s. The 1995–96 ABS Business of Music Survey found that there were:

- 73 music publishing businesses
- 153 record companies and distributors
- 23 manufacturers of recorded music
- 113 businesses which collectively managed a total of 248 musical entities
- 292 sound recording businesses.

## ORGANISATIONS

*continued*

The survey did not collect information on music retailers. However, the 1998–99 Retail Industry Survey found that there were 358 businesses involved in Recorded music retailing in June 1999, and these operated a total of 661 stores.

## FINANCIAL DATA

The Business of Music Survey showed that record companies and distributors had an income of \$792.4m in 1995–96, of which 92% was earned through sales of goods and services. Their expenses totalled \$751.5m, with the largest components being payments made to manufacturers for physically producing the recorded music product (\$216.9m), payments for royalties (\$215.9m) and for the category Other expenses (\$214.0m).

The survey also showed that the income of music publishers during the same period totalled \$119.9m, with almost four-fifths (78%) of this being receipts for royalties. Music publishers' expenses totalled \$112.1m, with royalties being the largest expense item (\$75.6m or 67%).

Manufacturers of recorded music in Australia had income of \$95.0m in 1995–96, of which 99% was earned through sales of goods and services. Their expenses totalled \$82.2m, with the largest components being labour (24%) and manufacturing costs (37%).

### 13.2 INCOME AND EXPENSES OF MUSIC BUSINESSES—1995–96

	Record companies and distributors	Music publishers	Manufacturers of recorded music
	\$m	\$m	\$m
<b>Income</b>			
Sales of goods and services	725.5	22.5	94.5
Publishing and sound recording royalties	41.8	93.8	—
Other income	25.1	3.6	0.5
<i>Total income</i>	<i>792.4</i>	<i>119.9</i>	<i>95.0</i>
<b>Expenses</b>			
Labour costs	93.0	11.0	19.6
Manufacturing costs and purchases	216.9	10.1	30.6
Publishing and sound recording royalties	215.9	75.6	—
Net advances expensed or provided for	11.8	1.3	—
Other expenses	214.0	14.2	31.9
<i>Total expenses</i>	<i>751.5</i>	<i>112.1</i>	<i>82.2</i>

— nil or rounded to zero (including null cells)

Source: ABS, *Business of Music*, 1995–96 (cat. no. 4143.0).

The ABS Retail Industry Survey showed that the income of recorded music retailing businesses was \$636.1m in 1998–99, while their expenses totalled \$610.1m. Some \$432.4m (71%) of these expenses were for purchases, while labour costs accounted for \$74.3m (12%) and rent, leasing and hiring costs amounted to \$48.8m (8%).

## EMPLOYMENT

*Census of Population and  
Housing*

The 2001 Census of Population and Housing found that there were 2,178 people employed in the Recorded media manufacturing and publishing industry. They were employed in a wide variety of occupations in the industry, the majority (87%) of which were non-cultural.

*Census of Population and  
Housing continued*

Census employment figures relate only to the main job a person was doing in the week before Census Night. This means that people involved in the industry as part of a second job are excluded. A better indicator of the number of people employed in the industry is data from the ABS Manufacturing Industry Survey which found 3,381 people working in the Recorded media manufacturing and publishing industry in June 2001.

**13.3** PERSONS EMPLOYED IN RECORDED MEDIA MANUFACTURING  
AND PUBLISHING INDUSTRY(a), By occupation—August 2001

	<i>Number</i>	<i>%</i>
Cultural occupations		
Printing tradespersons	67	3.1
Graphic designers	46	2.1
Sound technicians	45	2.1
Media producers	17	0.8
Other cultural occupations	111	5.1
<i>Total cultural occupations</i>	286	13.1
Other occupations		
Software designers	103	4.7
Sales and marketing managers	85	3.9
Applications and analyst programmers	80	3.7
Handpackers	77	3.5
Computing support technicians	73	3.4
Other (includes not stated)	1 474	67.7
<i>Total other occupations</i>	1 892	86.9
<b>Total all occupations</b>	<b>2 178</b>	<b>100.0</b>

(a) In their main job in the week before Census Night.

Source: ABS, Census of Population and Housing, 2001, data  
available on request

The Census also identified some 4,802 people employed in the Recorded music retailing industry, with the vast majority (97%) working in non-cultural occupations (mainly as Shop assistants and Shop managers).

*Census of Population and  
Housing continued*

**13.4** PERSONS EMPLOYED IN RECORDED MUSIC RETAILING  
INDUSTRY(a), By occupation—August 2001

	<i>Number</i>	<i>%</i>
Cultural occupations		
Music teachers (private)	26	0.5
Sound technicians	24	0.5
Instrumental musicians	23	0.5
Graphic designers	14	0.3
Other cultural occupations	74	1.5
<i>Total cultural occupations</i>	<i>161</i>	<i>3.4</i>
Other occupations		
Sales assistants, n.e.c.	2 162	45.0
Shop managers	985	20.5
Sales assistants (other personal and household goods)	161	3.4
Sales and marketing managers	147	3.1
Other (includes not stated)	1 186	24.7
<i>Total other occupations</i>	<i>4 641</i>	<i>96.6</i>
<b>Total all occupations</b>	<b>4 802</b>	<b>100.0</b>

(a) In their main job in the week before Census Night.

Source: ABS, Census of Population and Housing, 2001, data available on request

There were 332 people who stated that their main job in the week before the census was as a composer (this category includes song writers). Of these, 170 worked for music and theatre production businesses and 51 worked for themselves.

## INTRODUCTION

Arts and crafts take many forms but are generally accepted to include such items as paintings, drawings, cartoons, prints, photographs, digital works of art, art installations, sculpture, ceramics, pottery, jewellery, woven or printed textile art, carvings, furniture, glass, metal and leather craft. While many of these items can be mass produced, for the purpose of this publication the focus is on one-off or limited series visual arts and crafts produced in either traditional or contemporary styles.

## BUYING ART AND CRAFT

Data on most aspects of visual arts and crafts is fairly scarce. Surveys conducted in the late 1990s by the ABS provide some of the only information on the amount of money spent by households on these items. These surveys also provide some limited information on the characteristics of art and craft purchasers.

The Household Expenditure Survey found that 176,200 Australian households purchased paintings, carvings and sculptures during a three month period in 1998–99. Their expenditure on these items totalled \$68.7m (the equivalent of \$274.8m in a year). While households also spent on other types of arts and crafts, it is not possible to isolate this spending from expenditure on other items.

Another survey in 1997, the Art and Craft Purchases Survey, which asked respondents whether and what type of art and craft purchases they had made in a three month period, found that a total of 0.9 million art items and 3.9 million craft items had been bought. The most common art items purchased were Paintings (372,100 purchased), while Pottery and ceramics (992,700), Garments and clothing (565,600) and Jewellery (525,400) were the most common craft items.



## BUYING ART AND CRAFT

*continued***14.1** NUMBER OF ART AND CRAFT ITEMS PURCHASED, Three months before interview—1997

	WHETHER MADE IN AUSTRALIA		Total(a) '000	Percentage made in Australia(b) %
	Yes	No		
	'000	'000		
<b>Art items</b>				
Paintings	334.3	30.4	372.1	91.7
Sculptures	113.6	76.0	191.8	59.9
Drawings/Works on paper	88.3	*18.5	107.4	82.7
Original photographs	106.5	*13.6	120.6	88.6
Original, limited edition prints	81.2	25.7	110.0	76.0
<i>Total art items</i>	<i>724.0</i>	<i>164.2</i>	<i>902.0</i>	<i>81.5</i>
<b>Craft items</b>				
Pottery/ceramics	885.5	81.2	992.7	91.6
Garments/clothing	435.1	108.9	565.6	80.0
Woven/printed textiles	61.3	76.0	140.8	44.6
Glass	264.5	93.2	377.3	73.9
Jewellery	383.9	116.3	525.4	76.7
Furniture crafts	193.7	36.8	242.5	84.0
Wood crafts	353.0	80.0	445.9	81.5
Metal crafts	47.2	*18.6	67.0	71.8
Leather crafts	300.0	121.5	435.3	71.2
Other crafts	115.5	*11.8	134.0	90.7
<i>Total craft items</i>	<i>3 039.8</i>	<i>744.4</i>	<i>3 926.5</i>	<i>80.3</i>

\* estimate has a relative standard error of 25% to 50% and should be used with caution

(a) Includes items where it is not known where they are made.

(b) Excludes items where it is not known where they are made.

Source: DCITA, *Cultural Trends in Australia No. 7: Art and Craft Purchases, 1997*, prepared for DCITA by the NCCRS of the ABS.

The Art and Craft Purchasers Survey found that art items were purchased by a total of 696,500 people aged 18 years and over. Those most likely to purchase were:

- aged 25–34 years
- living in capital cities
- employed full-time.

Over 80% of the art items purchased were made in Australia and had a value of \$137.9m. Of this amount, the majority (\$84.2m) were for Paintings. Australian-made art items were usually purchased direct from the artist (\$41.4m or 30%) or from art and craft dealers (\$34.4m or 25%).

The 1997 survey also found that 2.5 million people aged 18 years and over purchased 3.9 million craft items over a three month period. People most likely to purchase craft items were:

- female
- aged 25–34 years
- living in capital cities
- employed part-time.

## BUYING ART AND CRAFT

*continued*

The value of Australian-made craft items purchased in the three months before interview totalled \$317.5m with Furniture crafts accounting for \$120.5m, Jewellery another \$58.6m and Pottery and ceramics, \$44.4m. The most common places for craft purchases were direct from the craftsperson (\$59.8m or 19%), from specialty craft shops (\$46.7m or 15%) and from markets (\$42.3m or 13%).

## ORGANISATIONS

It is difficult to accurately determine the number of businesses involved in the production and sale of art and craft items. Data sources usually used to count the number of businesses in an industry, such as the Australian Business Register, do not separately identify art and craft producers – they are generally combined with other businesses in the creative arts industry such as self-employed composers, songwriters and writers.

As art and craft producers generally work independently and are often not part of any formal network, developing a list of organisations (including people working for themselves) who are representative of the industry is problematic. Consequently, the ABS has not undertaken surveys of art and craft producers in the past.

Collecting information on the activities of those who sell art and craft items is also difficult. Those involved in the sale of arts and crafts are generally counted with retailers of a range of other items in any business listings. Sales also regularly by-pass formal retail channels with producers selling directly, or selling through markets or fairs. The 1997 Art and Craft Purchases Survey provides some information on the main sales points for art and craft items.

Direct sales from artists and producers accounted for 22% of the value of sales; art and craft dealers, specialty craft shops and markets each had about 12% of sales; department stores, craft fairs, and museum and art gallery shops around 5% each; while the remaining sales were distributed amongst a variety of retailers.

The 1999–2000 ABS Survey of Commercial Art Galleries is one of the few business surveys to be conducted to gather information on those who sell art and craft items. The survey collected information on commercial art galleries and Aboriginal and Torres Strait Islander (ATSI) art centres. For the purpose of this survey, a commercial art gallery was defined as a business whose primary activity was the display and sale of works of art. At the end of June 2000, there were 514 commercial art gallery businesses operating in Australia. Some 31 of these commercial art galleries were ATSI art centres. The 514 commercial art gallery businesses operated from a total of 573 locations in Australia.

## FINANCIAL DATA

The 1999–2000 ABS Survey of Commercial Art Galleries found that commercial art gallery businesses in Australia sold works of art valued at \$217.5m in the 12 months to June 2000. Businesses predominantly selling crafts were excluded from the survey. Sales of art by Indigenous artists were valued at \$35.6m while items by overseas artists were sold for a further \$14.0m. From these sales and other activities, commercial art galleries derived an income of \$131.8m.

## FINANCIAL DATA

*continued*

## COMMERCIAL ART GALLERIES, Sources of Income—1999–2000

**14.2**

	Value	Percentage contribution
	\$m	%
Income from the sale of artworks		
By Aboriginal and Torres Strait Islander artists	27.4	20.8
By other artists	79.1	60.0
By overseas artists	*9.6	*7.3
<i>Total</i>	<i>116.1</i>	<i>88.1</i>
Income from the sale of craftworks		
By Aboriginal and Torres Strait Islander artists	1.1	0.9
By other artists	1.4	1.1
<i>Total</i>	<i>2.6</i>	<i>2.0</i>
Other income	13.1	9.9
<b>Total</b>	<b>131.8</b>	<b>100.0</b>

\* estimate has a relative standard error of 25% to 50% and should be used with caution

Source: ABS, Commercial Art Galleries, Australia, 1999–2000, data available on request.

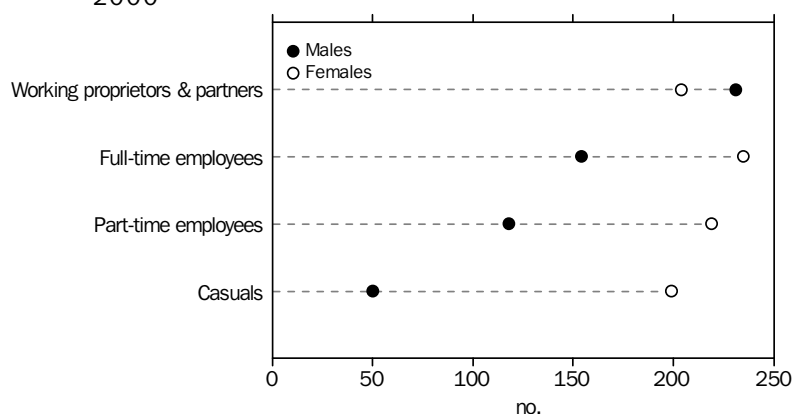
## EMPLOYMENT

*Commercial art galleries*

The Survey of Commercial Art Galleries found that there were 1,409 people employed by commercial art gallery businesses at the end of June 2000. Of these, 39% were males and 61% were females. While males had slightly higher numbers than females in the category Working proprietors and partners, they were outnumbered in each of the other categories, with the greatest difference being for casual employees (50 males and 199 females).

**14.3**

## PERSONS EMPLOYED IN COMMERCIAL ART GALLERIES—June 2000



Source: ABS, Commercial Art Galleries, 1999–2000 (cat. no. 8651.0).

*Visual artists and craft workers*

Two data sources; the 2001 Census of Population and Housing and the 2001 Work in Selected Culture and Leisure Activities Survey, provide some information on the number of people involved in the creation of visual arts and crafts.

### *Census of Population and Housing*

The 2001 Census of Population and Housing does not separately identify a visual arts and crafts industry, treating it as a subset of the broader Creative arts industry. The Creative arts industry comprises those who are self employed and includes writers, composers and a variety of occupations which rely on creative expression. Selecting specific occupations gives an indication of the number of people undertaking visual art and craft activity as their main job in the week before the Census.

Some of the more common visual arts and crafts occupations in the Creative arts industry in 2001 were Visual arts painters (1,735 people) and Designers and illustrators (566 people). The data indicates that other industries also employed creative artists.

Table 5.3 provides details of the total number of people working in visual art and craft occupations in all industries.

### **14.4** SELECTED CULTURAL OCCUPATIONS IN THE CREATIVE ARTS INDUSTRY (a)—August 2001

<i>Selected cultural occupations</i>	<i>Number of persons</i>
Painters (visual arts)	1 735
Designers and illustrators	566
Visual arts and crafts professionals, n.e.c. or n.f.d.	503
Sculptors	371
Potters and ceramic artists	113
<b>Total selected cultural occupations</b>	<b>3 288</b>

(a) In their main job in the week before Census Night.

Source: ABS, *Employment in Culture, Australia, 2001* (cat. no. 6273.0).

### *Work Survey*

The Census only collects information on a person's main job during a one week period in August 2001. However, the 2001 Survey of Work in Selected Culture and Leisure Activities shows that less than a third of artists and craftworkers received payment for their creations in the 12 months before interview.

Many would therefore be unlikely to indicate art and craftwork as their main job in the Census, more likely nominating the activity that provides the largest income. The Work survey is perhaps a better indicator of the Australian level of involvement in visual art and craft, as it includes both paid and unpaid involvement and involvement over a 12 month period.

It should be noted that hobby activity is excluded - that is, only those people involved in the production of works which are available for sale or public display are covered.

During the 12 months prior to interview in April 2001, an estimated 503,200 people aged 15 years and over were involved in visual arts, while 396,400 were involved in craft. Female involvement was higher for virtually all types of art and craft work, the exception being furniture-making and wood craft.

People most likely to be paid for their creative work were those involved in the production of jewellery, although the number undertaking this activity was relatively small.

Work Survey continued

**14.5** PERSONS INVOLVED, By type of activity and payment status—2001

Category	Some paid involvement	Unpaid involvement only	Total	Percentage with some paid involvement
	'000	'000	'000	%
<b>Visual art activities</b>				
Computer art	75.6	126.2	201.9	37.5
Painting	51.6	102.4	154.1	33.5
Photography	46.6	105.0	151.6	30.7
Drawing	46.3	78.3	124.5	37.2
Sculpture	16.2	24.8	41.0	39.6
Print-making	19.2	17.9	37.1	51.7
Other visual art	14.3	22.5	36.8	38.9
<i>Total visual art activities(a)</i>	<i>175.8</i>	<i>327.3</i>	<i>503.2</i>	<i>34.9</i>
<b>Craft activities</b>				
Furniture-making and wood crafts	34.0	89.9	123.9	27.4
Textiles	23.5	71.0	94.4	24.8
Pottery and ceramics	*11.6	45.3	56.9	*20.4
Jewellery	13.5	*11.5	25.0	54.0
Glass crafts	*5.8	15.2	21.0	*27.5
Other craft activities	17.4	109.9	127.3	13.7
<i>Total craft activities(a)</i>	<i>94.5</i>	<i>301.9</i>	<i>396.4</i>	<i>23.8</i>

\* estimate has a relative standard error of 25% to 50% and should be used with caution

(a) Components do not add to the totals as some persons were involved in more than one activity.

Source: ABS, *Work in Selected Culture and Leisure Activities, Australia, April 2001* (cat. no. 6281.0).

**INTRODUCTION**

The Australian Culture and Leisure Classifications (ACLC) define the design industry as those businesses and organisations whose main activity is the creative, artistic and aesthetic design of objects, environments and services. The classifications focus on several distinct areas of design:

- Architecture – includes the design of buildings, town planning and landscape architecture
- Advertising – includes the planning, creation and production of advertising campaigns
- Graphic design – includes the design of visual or graphic material such as packaging designs, corporate logos and sign writing.
- Other design – includes exhibition and display design, fashion and interior design.

Note that the design of industrial products is not considered cultural as a large part of the designwork is the development of the mechanics of the product. That is, artistic or aesthetic design is secondary to its functional design. Therefore industrial design is not included in this chapter.

**ORGANISATIONS**

Some information on businesses involved in the design sector is available from the Australian Business Register. The table below shows the number of businesses in these industries that were actively registered for GST purposes in June 2001. There were 14,754 businesses on the Register classified as being predominantly involved in Architectural services, with a further 11,221 involved in Commercial art and display services, and 11,084 involved in Advertising services. It is not possible to separately identify other design industries on the Register.

## ORGANISATIONS

*continued***15.1** AUSTRALIAN BUSINESS REGISTER COUNTS(a), Selected design industries—June 2001

	Architectural services	Advertising services	Commercial art and display services
	no.	no.	no.
New South Wales	5 109	4 338	4 283
Victoria	4 020	2 775	3 155
Queensland	2 381	2 112	1 710
South Australia	730	610	720
Western Australia	1 916	903	905
Tasmania	218	132	160
Northern Territory	109	54	86
Australian Capital Territory	242	139	187
<b>Australia(b)</b>	<b>14 754</b>	<b>11 084</b>	<b>11 221</b>

(a) All businesses registered and active for GST and operating in only one state or territory (i.e. it excludes entities with locations in more than one state or territory).

(b) Includes businesses for which state/territory was not recorded.

Source: ABS, Australian Business Register Counts, data available on request.

## FINANCIAL DATA

The majority (72%) of the discernible design businesses on the Australian Business Register in June 2001 had an annual turnover of less than \$100,000. There were 324 businesses in the Architectural services industry with a turnover of \$1m or more, compared with 742 businesses in the Advertising services industry and 290 businesses in the Commercial art and display services industry (note multi-state businesses are excluded from these data).

**15.2** AUSTRALIAN BUSINESS REGISTER COUNTS FOR SELECTED DESIGN INDUSTRIES(a), By turnover size—June 2001

	Architectural services	Advertising services	Commercial art and display services
Annual turnover	no.	no.	no.
\$0 - \$49,999	4 762	4 440	5 224
\$50,000 - \$99,999	6 136	2 919	3 120
\$100,000 - \$1,000,000	3 532	2 983	2 587
\$1,000,001 - \$19,999,999	np	705	np
\$20 million and over	np	37	np
<b>Total(b)</b>	<b>14 754</b>	<b>11 084</b>	<b>11 221</b>

np not available for publication but included in totals where applicable, unless otherwise indicated

(a) All businesses registered and active for GST and operating in only one state or territory (i.e. it excludes entities with locations in more than one state or territory).

(b) Includes businesses where annual turnover was not known.

Source: ABS, Australian Business Register Counts, data available on request.

## EMPLOYMENT

*Census of Population and Housing*

Data on the people involved in design can be obtained from several sources. Chapter 5 provides some information on the relative advantages of each of these sources.

There were 26,737 people whose main job in August 2001 was in the Architectural services industry. The Census of Population and Housing found that over half of those in the industry worked as either Architects and landscape architects (10,787 people) or Architectural associates (4,143 people).

Advertising services employed large numbers of people in non-cultural occupations – particularly in sales. Graphic designers, generally considered to be one of the main creative activities in the industry, were less than 8% of employees.

A third of those employed in the Commercial arts and display services industry were Graphic designers (5,493 people) or Signwriters (3,395 people). The remaining employees were distributed amongst a large number of both cultural and non-cultural occupations.

**15.3** PERSONS EMPLOYED IN SELECTED DESIGN INDUSTRIES (a), By Occupation—August 2001

	Number	%
<b>Architectural services</b>		
Architects and landscape architects	10 787	40.3
Architectural associates	4 143	15.5
Building and engineering associate professionals, n.f.d.	1 590	5.9
Urban and regional planners	850	3.2
Civil engineers and engineering associates	715	2.7
Interior designers	696	2.6
Other occupations	7 956	29.8
<i>Total occupations</i>	<i>26 737</i>	<i>100.0</i>
<b>Advertising services</b>		
Sales representatives (Business services)	2 472	9.6
Sales and marketing managers	2 381	9.2
Advertising specialists	2 213	8.6
Graphic designers	1 928	7.5
Media producers	1 063	4.1
Leaflet and newspaper deliverers	1 031	4.0
Other occupations	14 725	57.0
<i>Total occupations</i>	<i>25 813</i>	<i>100.0</i>
<b>Commercial Art and display services</b>		
Graphic designers	5 493	37.0
Signwriters	3 395	22.9
Printing tradespersons	293	2.0
Media producers	248	1.7
Designers and illustrators, n.f.d.	218	1.5
Advertising specialists	171	1.2
Other occupations	5 012	33.8
<i>Total occupations</i>	<i>14 830</i>	<i>100.0</i>

(a) In their main job in the week before Census Night.

Source: ABS, Census of Population and Housing, 2001, data available on request.

*Work Survey*

The 2001 Survey of Work in Selected Culture and Leisure Activities, which collected data on any involvement with design, found that there were 349,800 people who had worked in design activities in the 12 months to April 2001. Of these, about three-fifths (60%) received some payment for their involvement.



*Work Survey continued*

The most common design activities undertaken were Graphic design (131,500 people) and Advertising (109,400 people). Fashion design was the only activity where the number of females involved exceeded the number of males.

**15.4** PERSONS INVOLVED IN DESIGN, By selected characteristics—12 months ending April 2001

	Males	Females	Persons
	'000	'000	'000
Involvement part of a job held last week	110.2	82.5	192.8
Involvement not part of any job held last week	87.6	69.5	157.1
Annual income from design activity(a)			
No payment	74.8	64.3	139.1
Less than \$5,000	32.3	28.1	60.4
\$5,000 to \$19,999	28.3	18.4	46.7
\$20,000 to 39,999	21.5	17.0	38.4
\$40,000 or more	20.8	*6.5	27.3
Type of design activity undertaken(b)			
Graphic design	85.1	46.4	131.5
Fashion design	*6.0	26.8	32.8
Architecture	33.2	15.3	48.5
Advertising	57.2	52.3	109.4
Other design activities	53.2	38.6	91.9
<b>Total persons</b>	<b>197.8</b>	<b>152.0</b>	<b>349.8</b>

\* estimate has a relative standard error of 25% to 50% and should be used with caution

(a) Excludes people who received payment-in-kind only and people who did not state the amount of payment they received.

(b) Components do not add to the total number of people undertaking design activities as some people undertook more than one type of design activity.

Source: ABS, Survey of Work in Selected Culture and Leisure Activities, April 2001, data available on request.

## INTRODUCTION

The film and video sector comprises several industries, some of which focus on the creation of new products (e.g. the film production industry) while others are more service-orientated (e.g. the film and video distribution, motion picture exhibition and video hire industries).

The Australian Culture and Leisure Classifications (ACLC) define film and video production as businesses and organisations whose main activity is the production of films, video tapes, or other media containing moving images for theatre or television projection. The industry includes production of feature films, documentaries and drama series, as well as videos for advertising and corporate training. It also includes businesses providing post-production services such as casting, film editing and titling.

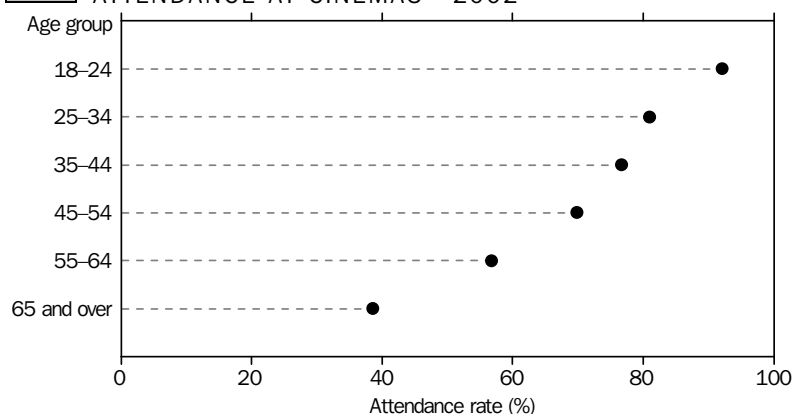
Film and video distribution is defined as businesses or organisations mainly engaged in leasing or wholesaling motion pictures on film, video tape and DVD to organisations for exhibition or sale. Motion picture exhibition is defined as businesses and organisations whose main activity is the screening of motion pictures on film or video tape.

Data for this chapter have largely been sourced from ABS surveys. The Australian Film Commission also provides substantial detail on many different aspects of the film, television and video industries through their publication *Get the Picture* which is available on their website at <<http://www.afc.gov.au>>.

## ATTENDANCE

The 2002 Survey of Attendance at Selected Cultural Venues and Events showed that 10.1 million people (70% of the population aged 18 years and over) attended cinemas in the 12 months before interview in 2002. The attendance rate decreased successively with age from 92% for 18–24 year olds to 39% for people aged 65 years and over.

**16.1** ATTENDANCE AT CINEMAS—2002



Source: ABS, *Attendance at Selected Cultural Venues and Events, 2002* (cat. no. 4114.0).

ATTENDANCE *continued*

The frequency of attendance was also greater for people aged 18–24 years than for other age groups. Approximately 66% of 18–24 year olds visited a cinema more than 5 times in the 12-month period compared with about 40% for most other age groups.

**16.2** PERSONS ATTENDING CINEMAS (a), By Age and Frequency of Attendance—2002

	AGE GROUP (YEARS)						Total
	18-24	25-34	35-44	45-54	55-64	65 and over	
NUMBER ('000)							
1-5 times	600.0	1 272.9	1 382.3	1 070.8	586.7	523.3	5 436.0
6-10 times	470.0	509.9	504.3	449.1	248.2	175.5	2 357.1
11-20 times	375.9	381.4	276.2	210.8	152.7	96.1	1 493.1
21 times or more	308.6	191.6	86.5	118.7	80.1	66.0	851.5
Total	1 754.5	2 355.8	2 249.3	1 849.4	1 067.8	861.0	10 137.7
PROPORTION (%)							
1-5 times	34.1	53.9	61.5	57.9	54.9	60.8	53.6
6-10 times	26.8	21.6	22.4	24.3	23.2	20.4	23.3
11-20 times	21.4	16.2	12.3	11.4	14.3	11.2	14.7
21 times or more	17.6	8.1	3.8	6.4	7.5	7.7	8.4
Total	100.0	100.0	100.0	100.0	100.0	100.0	100.0

(a) In the 12 months before interview.

Source: ABS, Survey of Attendance at Selected Cultural Venues and Events, 2002, data available on request.

## ORGANISATIONS

The Survey of Film and Video Production and Distribution collected information on businesses mainly engaged in the production and distribution of motion pictures on film or video tape for theatre or television projection. According to this survey, there were 1,975 businesses engaged in Film and video production and 58 businesses involved in Film and video distribution in June 2000.

The Survey of Television, Film and Video Production found that in June 2003 the number of businesses operating in the Film and video production industry had increased by 199 to 2,174 organisations.

The Census of the Motion Picture Exhibition Industry found 173 businesses operating a total of 326 cinema sites and 17 drive-in sites in June 2000. While the number of motion picture exhibition businesses in Australia declined from 188 to 173 since the last census was conducted in June 1997, the number of cinema screens increased from 1,050 to 1,513 (up by 44%). This growth was primarily due to the introduction of 'megaplex' sites (i.e. cinema sites with 14 or more screens). By comparison, during the same period, the number of drive-in theatre sites and screens fell from 28 to 17 and 36 to 27 respectively.

The Survey of the Video Hire Industry collected information on businesses mainly engaged in hiring pre-recorded video cassettes for personal use, and identified 1,166 video hire businesses operating a total of 1,615 outlets as at June 2000.

ORGANISATIONS  
*continued*

**16.3** NUMBER OF BUSINESSES IN THE FILM AND VIDEO INDUSTRIES

<i>Australia</i>	
2002–03	
Film and video production	2 174
1999–2000	
Film and video production	1 975
Film and video distribution	58
Motion picture exhibition	173
Video hire outlets	1 166

Source: ABS, *Television, Film and Video Production, 2002–03* (cat. no. 8679.0); ABS *Service Industry Surveys, 1999–2000* (various - cat. nos. 8562.0, 8654.0, 8679.0).

Data from the Australian Film Commission show that in 2003, 9% of the films screened in Australian cinemas were of Australian origin. By comparison, 66% of the films screened originated in the United States of America, 9% in the United Kingdom and 4% in France.

FINANCIAL DATA

The 2002–03 ABS Cultural Funding by Government collection reported that the Australian Government provided total funding of \$91.3 million for Film and video, while state and territory governments contributed \$84.7m.

## FINANCIAL DATA

*continued***16.4** AUSTRALIAN FEATURE FILMS, Sources of Finance

	Contribution	Proportion of total budget	No. of films invested in
	\$m	%	no.
Australian government sources(a)			
2000–01	43.5	54	13
2001–02	28.9	22	16
2002–03	18.8	39	8
2003–04	31.6	24	11
Australian private investors(b)			
2000–01	8.4	10	9
2001–02	28.9	22	16
2002–03	21.3	44	10
2003–04	10.1	8	6
Australian film/TV industry(c)			
2000–01	6.4	8	9
2001–02	16.6	13	17
2002–03	4.0	8	6
2003–04	7.1	5	9
Foreign sources			
2000–01	22.0	27	10
2001–02	56.5	43	9
2002–03	4.5	9	5
2003–04	85.2	64	5

- (a) Australian state and federal agencies and funding bodies, the Australian Broadcasting Commission and Special Broadcasting Service.
- (b) Private investment sources including Film Licensed Investment Companies (FLICs).
- (c) Mainly Australian free-to-air broadcasters and pay TV channels, as well as Australian-based TV production and distribution companies.

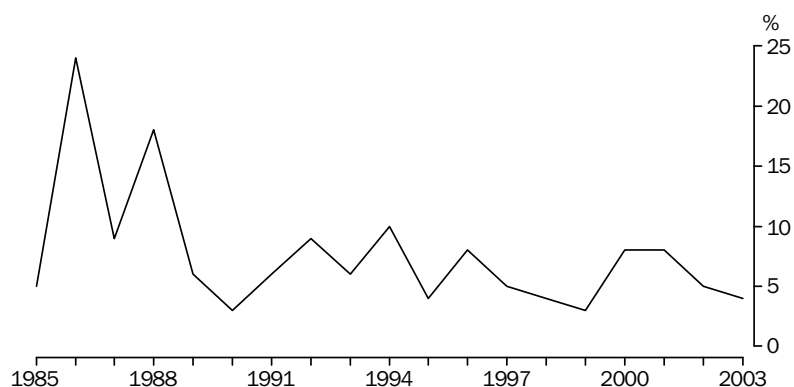
Source: Australian Film Commission, *National Survey of Feature Film and TV Drama Production, 2003–04*.

Data from the National Survey of Feature Film and TV Drama Production, conducted by the Australian Film Commission, show that government sources accounted for 24% of total funding for Australian features in 2003–04. The majority of these funds came via the Film Finance Corporation, which invested \$29.7m in Australian features and co-productions, while state agencies contributed a further \$3.8m.

Overseas investors were the most significant source of funds in 2003–04, contributing \$85.2m (or 64% of total funding) to five titles, with the animated feature *Happy Feet* accounting for the bulk of their investment.

Australian films accounted for only four per cent of the total box office receipts of Australian cinemas. As the graph shows, this percentage has fluctuated over time, depending on the success of Australian movies released in each of the years.

## FINANCIAL DATA

*continued***16.5** AUSTRALIAN FILMS' SHARE OF THE AUSTRALIAN BOX OFFICE

Source: Australian Film Commission, *Get the Picture Online* (compiled from data provided by the Motion Picture Distributors Association of Australia).

While the income derived from the production of commercials increased by 23% between 1999–2000 and 2002–03, the income from all other types of film and video production decreased. This meant overall production income was 8% lower in 2002–03 than in 1999–2000. However, increases in income from other sources, particularly postproduction and other production services meant the total income for film and video production businesses was greater in 2002–03.

# 16.6 INCOME AND EXPENSES OF BUSINESSES IN THE FILM AND VIDEO PRODUCTION INDUSTRY—1999–2000 and 2002–03

	1999–2000		2002–03	
	Value	Percentage contribution	Value	Percentage contribution
	\$m	%	\$m	%
Income				
Income from the production of:				
Feature films	74.0	5.0	59.2	3.7
Television programs	472.2	32.0	393.6	24.7
Commercials	186.2	12.6	228.4	14.3
Corporate, training and marketing videos	72.0	4.9	70.6	4.4
Other	45.5	3.1	26.8	1.7
Total	849.9	57.7	(a) 778.6	48.8
Income from the provision of production services to other businesses	233.1	15.8	350.9	22.0
Income from the provision of post-production/film laboratory services to other businesses	262.6	17.8	360.5	22.6
Other income	128.2	8.7	106.5	6.7
Total income	1 473.8	100.0	1 596.6	100.0
Expenses				
Labour costs				
Wages and salaries	373.5	26.7	402.4	26.7
Other	53.1	3.8	63.9	4.2
Total	426.6	30.5	466.3	31.0
Payments to other businesses for production services	250.8	17.9	215.8	14.3
Payments to other businesses for post-production/film laboratory services	88.3	6.3	89.5	5.9
Rent, leasing and hiring expenses	65.5	4.7	85.4	5.7
Travelling, accommodation and entertainment expenses	34.8	2.5	38.5	2.6
Purchases of film stock and video tape stock	50.6	3.6	62.4	4.1
Other purchases	45.8	3.3	63.1	4.2
Amortisation of productions	61.1	4.4	*38.7	2.6
Other	374.4	26.8	445.1	29.6
Total expenses	1 397.9	100.0	1 504.8	100.0

\* estimate has a relative standard error of 25% to 50% and should be used with caution

(a) Of the \$778.6m received from the production of films and programs etc., \$88.9m were commissioned (i.e. the business did not retain the rights to the production).

Source: ABS, *Television, Film and Video Production, 2002–03* (cat. no. 8679.0) and *Film and Video Production and Distribution, 1999–2000* (cat. no. 8679.0).

## Film and video production industry

The television industry also has a role in the production of film and video. While predominantly involved in broadcasting (the subject of chapter 17) the television industry also spends substantial amounts on productions made specifically for television. In 2002–03, the Survey of Television, Film and Video Production found that \$1,140.7m was spent on television productions, 71% by television broadcasters.

*Film and video production  
industry continued*

**16.7** PRODUCTION COSTS OF PROGRAMS MADE SPECIFICALLY FOR TELEVISION—2002–03

	Television businesses(a)	Other businesses(b)	Total
	\$m	\$m	\$m
Drama	np	np	159.5
Situation and sketch comedy	5.9	*9.8	15.8
Documentaries	5.5	30.7	36.2
Quiz, panel and game shows	np	np	17.2
News and current affairs	344.3	6.7	351.0
Sport	285.2	*19.9	305.1
Light entertainment and variety	88.6	45.0	133.6
Other(c)	np	np	*122.3
<b>Total</b>	<b>812.4</b>	<b>328.4</b>	<b>1 140.7</b>

\* estimate has a relative standard error of 25% to 50% and should be used with caution

np not available for publication but included in totals where applicable, unless otherwise indicated

(a) Includes commercial free-to-air, subscription and public broadcasters.

(b) Includes businesses whose primary activity was film and video production or subscription television channel provision with in-house production.

(c) Includes children's programs.

Source: ABS, *Television, Film and Video Production, 2002–03* (cat. no. 8679.0).

The 2002–03 Survey of Television, Film and Video Production found that there were 5,774 films and/or videos created which were not specifically made for television, at a total production cost of \$142.4m. While the majority of these (88%) were Corporate, marketing and training media, more than 50% of total production costs were devoted to the production of 66 feature films.

**16.8** PRODUCTIONS MADE OTHER THAN FOR TELEVISION—2002–03

	Productions	Total cost of production	Average cost per production
Type of production	no.	\$m	\$'000
Feature films	66	73.5	1 113.8
Short films	*74	2.4	*32.8
Documentaries	*37	*1.7	*46.5
Corporate, marketing and training media	5 057	33.9	6.7
Educational media	*185	*3.8	*20.7
Music media	*156	*2.5	*15.8
Other	199	24.5	*123.1
<b>Total</b>	<b>5 774</b>	<b>142.4</b>	<b>24.7</b>

\* estimate has a relative standard error of 25% to 50% and should be used with caution

Source: ABS, *Television, Film and Video Production, 2002–03* (cat. no. 8679.0).

*Film and video distribution  
industry*

The main sources of revenue for film and video distribution businesses in 1999–2000 were the renting and leasing of films to motion picture exhibitors (\$289.4m) and television businesses (\$172.5m); and the sale of pre-recorded video tapes and DVDs to retail outlets (\$157.0m). Copyright fees and licences for film and video distribution accounted for about one-quarter (23%) of total expenses.



## 16.9 INCOME AND EXPENSES OF BUSINESSES IN THE FILM AND VIDEO DISTRIBUTION INDUSTRY—1999–2000

	Value	Percentage contribution
	\$m	%
<b>Income</b>		
Sales of pre-recorded video tapes and DVDs to:		
Video hire stores	100.4	8.8
Retail outlets	157.0	13.8
Direct marketing and other businesses	2.9	0.3
<i>Total</i>	260.3	22.8
Income from the rental/lease of pre-recorded video tapes, DVDs and films to:		
Motion picture exhibitors	289.4	25.3
Television businesses	172.5	15.1
Video hire stores	94.9	8.3
Other businesses	24.0	2.1
<i>Total</i>	580.8	50.9
Other income		
Income from the provision of channels to pay TV stations	169.2	14.8
Other	131.5	11.5
<i>Total</i>	300.7	26.3
<b>Total income</b>	<b>1 141.8</b>	<b>100.0</b>
<b>Expenses</b>		
Labour costs		
Wages and salaries	66.8	6.4
Other	12.4	1.2
<i>Total</i>	79.2	7.6
Selected expenses		
Payments to other businesses for dubbing, duplication and film print costs	77.7	7.5
Program rights/licence fees used	124.4	12.0
Copyright fees/licences for film and video distribution	235.6	22.7
Advertising expenses	127.1	12.2
Other operating expenses	236.0	22.7
<i>Total</i>	800.8	77.1
Other costs	158.2	15.2
<b>Total expenses</b>	<b>1 038.4</b>	<b>100.0</b>

Source: ABS, *Film and Video Production and Distribution, 1999–2000* (cat. no. 8679.0).

### *Motion picture exhibition industry*

According to the Census of Motion Picture Exhibition Industry, there were 79.4 million paid admissions to cinemas in 1999–2000 which generated gross box office receipts of \$678.9m (or 65% of the total income of motion picture exhibitors). Sales of food and beverages contributed a further 17% to business income, while their major expenses were Film hire and Wages and salaries (29% and 14% of total expenses respectively).

*Motion picture exhibition  
industry continued*

**16.10** INCOME AND EXPENSES OF BUSINESSES IN THE MOTION  
PICTURE EXHIBITION INDUSTRY—1999–2000

	Value	Percentage contribution
	\$m	%
Income		
Gross box office receipts	678.9	64.9
Sales of food and beverages	175.9	16.8
Screen advertising income	32.5	3.1
Other income	158.8	15.2
<b>Total income</b>	<b>1 046.1</b>	<b>100.0</b>
Expenses		
Wages and salaries	129.9	13.9
Other Labour costs	18.6	2.0
Rent, leasing and hiring expenses		
Film hire	268.2	28.7
Other	118.8	12.7
<b>Total</b>	<b>387.0</b>	<b>41.4</b>
Advertising, marketing and promotion expenses	43.3	4.6
Other operating expenses	196.3	21.0
Purchases of goods for resale	49.1	5.3
Other	110.2	11.8
<b>Total expenses</b>	<b>934.3</b>	<b>100.0</b>

Source: ABS, *Motion Picture Exhibition, 1999–2000* (cat. no. 8654.0).

*Video hire*

In 1999–2000, video hire outlets earned about three-quarters (76%) of their income through rental of videos and DVDs. Wages and salaries accounted for about one-fifth (21%) of total expenses, with the other main expense items being purchases of videos and related goods (18%) and rent, leasing and hiring expenses (17%).

**16.11** INCOME AND EXPENSES OF BUSINESSES IN THE VIDEO HIRE  
OUTLET INDUSTRY—1999–2000

	Value	Percentage contribution
	\$m	%
Income		
Income from the rental of videos and DVDs	449.7	75.6
Income from the rental of video games	38.3	6.4
Income from the sale of videos and video related goods	36.3	6.1
Income from sales of food and beverages	40.0	6.7
Other	30.9	5.2
<b>Total income</b>	<b>595.2</b>	<b>100.0</b>
Expenses		
Labour costs	128.9	23.1
Rent, leasing and hiring expenses	93.5	16.7
Other selected expenses	87.7	15.7
Purchases		
Videos and related goods	99.9	17.9
Food and beverages	27.9	5.0
Other costs	120.8	21.6
<b>Total expenses</b>	<b>558.7</b>	<b>100.0</b>

Source: ABS, *Video Hire Industry, 1999–2000* (cat. no. 8562.0).

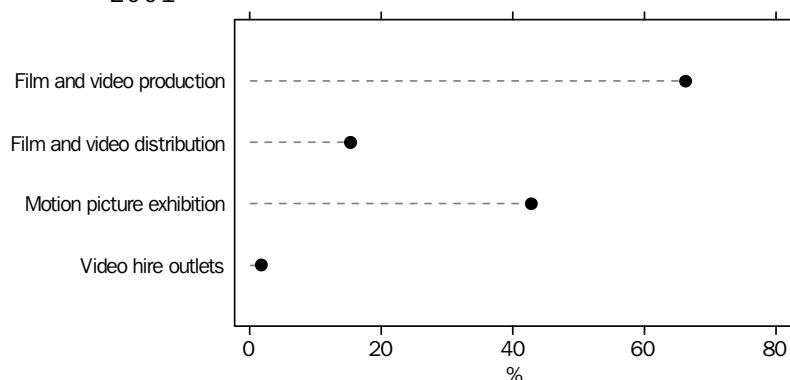
## EMPLOYMENT

*Census of Population and  
Housing*

The 2001 Census of Population and Housing collected employment data relating to the job in which a person worked the most hours during the week before the Census.

According to the Census, almost 30,000 people were employed in Film and Video industries in August 2001. There were 10,804 people working in video hire outlets, 10,070 people working in cinemas and drive-ins, 7,693 people producing films and videos and another 1,059 distributing them.

**16.12** PERCENTAGE OF PERSONS EMPLOYED IN CULTURAL OCCUPATIONS (a), By Film and Video Industries—August 2001



(a) In their main job in the week before Census Night.

Source: ABS, *Employment in Culture, 2001* (cat. no. 6273.0).

*Census of Population and  
Housing continued*

**16.13** PERSONS EMPLOYED IN FILM AND VIDEO INDUSTRIES(a), By  
occupation—August 2001

	Number	%
Film and video production		
Managers and administrators		
Media producers	1 107	14.4
Other managers and administrators	548	7.1
Professionals and associated professionals		
Directors (film, television, radio and stage)	589	7.7
Film and video editors	477	6.2
Film, television, radio and stage directors n.e.c.	473	6.1
Graphic designers	224	2.9
Illustrators	200	2.6
Directors of photography	127	1.7
Actors	98	1.3
Authors	86	1.1
Other professionals and associate professionals	1 203	15.6
Tradespersons and related workers		
Production assistants (film, television and radio)	254	3.3
Performing arts support worker n.e.c.	209	2.7
Camera operators (film, television and video)	325	4.2
Sound technicians	148	1.9
Other tradespersons and related workers	408	5.3
Other (includes not stated)	1 217	15.8
<i>Total Film and Video Production occupations</i>	<i>7 693</i>	<i>100.0</i>
Film and video distribution		
Managers and administrators	189	17.8
Professionals and associated professionals	320	30.2
Tradespersons and related workers	54	5.1
Sales assistants	124	11.7
Other (includes not stated)	372	35.1
<i>Total Film and Video Distribution occupations</i>	<i>1 059</i>	<i>100.0</i>
Motion picture exhibition		
Managers and administrators		
Sales and marketing managers	111	1.1
General managers	94	0.9
Media producers and artist directors	72	0.7
Other managers and administrators	280	2.8
Professionals and associated professionals		
Theatre and cinema managers	839	8.3
Directors (film, television, radio and stage)	96	1.0
Other professionals and associate professionals	1 278	12.7
Tradespersons and related workers		
Motion picture projectionists	846	8.4
Other tradespersons and related workers	369	3.7
Ticket collectors and ushers	1 624	16.1
Sales assistants	1 105	11.0
Ticket sellers	907	9.0
Other (includes not stated)	2 451	24.3
<i>Total Motion Picture Exhibition occupations</i>	<i>10 070</i>	<i>100.0</i>
Video hire		
Sales assistants	6 369	60.0
Shop managers	2 358	22.2
Professionals and associated professionals	416	3.9
Managers and administrators	260	2.5
Other (includes not stated)	1 401	11.4
<i>Total Video Hire occupations</i>	<i>10 610</i>	<i>100.0</i>
<b>Total Film and Video Industries</b>	<b>29 432</b>	<b>. .</b>

. . not applicable

(a) In their main job in the week before Census Night.

Source: ABS, Census of Population and Housing, 2001, data available on request.

*Work Survey*

Additional data on employment in Film and Video Industries were collected through the 2001 Survey of Work in Selected Culture and Leisure Activities, which reported that 61,300 people had a work involvement in either film production or cinema and video distribution in the 12 months to April 2001. Unlike the Census of Population and Housing, the 'Work survey' collects more than just 'main job' activity. See Chapter 5 for more details on the differences between the data collections.

Just over half of those involved in cinema and video distribution (57%) were paid for their labours, as were slightly less than half (46%) of those involved in film production.

**16.14** PERSONS INVOLVED IN FILM AND VIDEO(a), By payment status—12 months ending April 2001

Activity	Some paid involvement	Unpaid involvement only	Total
NUMBER ('000)			
Film production	20.4	24.0	44.4
Cinema and video distribution	*11.4	*8.7	20.1
<b>Total(b)</b>	<b>29.4</b>	<b>31.9</b>	<b>61.3</b>
PER CENT (%)			
Film production	46.0	54.0	100.0
Cinema and video distribution	*56.6	*43.4	100.0
<b>Total</b>	<b>47.9</b>	<b>52.1</b>	<b>100.0</b>

\* estimate has a relative standard error of 25% to 50% and should be used with caution

(a) Excludes people whose only involvement was in a hobby capacity.

(b) The total is less than the sum of the components, as some people were involved in both activities.

Source: ABS, Survey of Work in Selected Culture and Leisure Activities, April 2001, data available on request.

*Service Industry Surveys*

A third perspective on employment in this sector can be obtained from the results of the 2002–03 ABS Television, Film and Video Production Survey and the 1999–2000 ABS Service Industry Surveys. According to these surveys, the number of employees in film and video production businesses increased by an annual average of 2.6%, from 15,195 in June 2000 to 16,427 in June 2003.

When making comparisons between the various sources of employment data for this sector it is important to take into consideration the differing scope and reference periods of the respective surveys.

**INTRODUCTION**

This chapter focuses on the activities of radio and television organisations in Australia. It firstly provides information on the amount of time adults and children spend listening to the radio and watching television. It then gives details on some key economic indicators of radio and television broadcasters such as income earned, expenses and employment.

**AUDIENCE**

Invariably, when a survey is conducted on how people spend their time, television viewing and, to a lesser extent, listening to the radio feature prominently. The most recent ABS Time Use Survey, conducted in 1997, showed that the most common recreation and leisure activity for people aged 15 years and over was watching television.

Viewers spent over three hours a day (182 minutes), on average, watching television with males spending about 10 minutes more than females. By comparison, radio listeners spent an average of 135 minutes a day tuned in to the radio. As with television, males listened for longer periods on average than females (141 minutes compared with 130 minutes respectively).

A survey of children's involvement in culture and leisure activities conducted in 2003 by the ABS found that in a two week period almost all (98%) children in Australia aged 5–14 years watched TV or videos outside of school hours and did so for an average of 22 hours a fortnight.

**ORGANISATIONS**

In Australia, free-to air television and radio broadcasting is provided by commercial organisations, a number of community groups and the Australian Government. Subscriber or Pay TV is also an option for most Australians.

The ABS has conducted several surveys relating to various aspects of broadcasting over the years. The most recent is the 2002–03 Census of Television Services, which surveyed all 27 commercial free-to-air and six subscription television broadcasting businesses operating in Australia in 2002–03.

Businesses owned and controlled by the public and mainly engaged in community broadcasting were excluded.

The most recent ABS Survey of Radio broadcasters, conducted in 1996–97, found that there were 103 commercial radio broadcasters and two public broadcasters (those operating on a not-for-profit basis and receiving the majority of their income from government funding) in Australia in June 1997.

In addition, there were 121 community radio broadcasters (non-government, non-profit, organisations operating for the local community, special interest groups, etc.) and 37 other private broadcasters.

## FINANCIAL DATA

Commercial free-to-air television services received income of \$3,810.6m in 2002–03, according to the Census of Television Services. Almost three-quarters (\$2,817.8m) of this income was from the sale of airtime. Commercial free-to-air broadcasters reported an operating profit before tax of \$658.9m or an operating profit margin of 17.7% in 2002–03.

Subscription television broadcasters, with a total income of \$1,348.2m, earned over four-fifths (\$1,158.7m) from subscriptions and membership fees. This income was still not enough for these businesses to record a profit in 2002–03. The operating deficit before tax was \$451.5m which meant an operating profit margin of –33.6%.

### 17.1 INCOME AND EXPENSES OF TELEVISION BROADCASTERS—2002–03

	Commercial free-to-air	Subscription
	\$m	\$m
Income		
Gross income from the sale of airtime	2 817.8	na
Subscription and membership fees	. .	1 158.7
Other	992.8	189.5
<i>Total income</i>	<i>3 810.6</i>	<i>1 348.2</i>
Expenses		
Labour costs	587.4	168.0
Program rights used/payments to channel providers	494.8	784.5
Depreciation and amortisation	387.2	278.6
Other	1 684.5	606.2
<i>Total expenses</i>	<i>3 154.0</i>	<i>1 837.3</i>

. . not applicable

na not available

Source: ABS, *Television, Film and Video Production, 2002–03* (cat. no. 8679.0).

The 2002–03 Census of Television Services did not collect data from public broadcasters, however financial data on the activities of the Australian Broadcasting Commission (ABC) and the Special Broadcasting Service (SBS) can be obtained from their Annual Reports.

Whilst Radio and television broadcasting costs are not detailed separately, the ABC 2002–03 Annual Report recorded that for all its ordinary activities, revenue totalled \$956.6m and expenses \$899.6m. The SBS 2002–03 Annual Report showed that revenue from its consolidated ordinary activities totalled \$174.2m and its expenses \$159.9m.

The 1996–97 Census of Radio and Television Services found that Commercial radio broadcasters received income of \$584.8m in 1996–97, while Community radio broadcasters received \$23.8m. More up to date information for commercial radio stations is available from the Australian Broadcasting Authority which reported that the 251 commercial radio licensees generated revenue of \$774m, and had a profit of \$106m in 2002–03.

In 2002–03 the Australian Government provided \$1,670.5m for cultural activity, 53% (\$887.7m) of which was for Radio and television Services – primarily the ABC and SBS. In the same year, state and territory governments around Australia provided \$0.6m towards Radio and television services.

## EMPLOYMENT

*Service Industry Surveys*

The 2002–03 Census of Television Services found that businesses involved in Commercial free-to-air television services in Australia employed a total of 6,577 people in June 2003. A further 2,517 people were employed by Subscription television broadcasters.

Public broadcasters also employed a large number of people in radio and television. The ABC's and SBS's Annual Reports for 2002–03 indicated that in June 2003 the networks employed 5,011 people and 872 people respectively.

*Census of Population and Housing*

Neither the Census of Television Services nor the ABC and SBS Annual Reports provide detailed breakdowns of the type of occupations in which people are involved in the Radio and Television industries. The 2001 Census of Population and Housing is the most detailed source of occupation information, although the data it collects relates only to a person's main job, the job in which they usually worked the most hours. In August 2001, there were 17,386 people whose main job was in the Television services industry and 5,862 people in the Radio services industry. This includes people working in Community radio and television.

Over half the people employed in the Television services industry worked in cultural occupations as defined by the Australian Culture and Leisure Classifications (see Table 17.2). Common non-cultural occupations in this industry included Inquiry clerks (709 people), Electronic engineers (378 people) and Sales and marketing managers (373 people).

**17.2** PERSONS EMPLOYED IN TELEVISION SERVICES INDUSTRY(a),  
By occupation—August 2001

	Number	Per cent
Cultural occupations		
Media producer	1 989	11.4
Television journalist	858	4.9
Camera operator (Film, television or video)	779	4.5
Film and video editor	714	4.1
Director (Film, television, radio or stage)	562	3.2
Production assistant (Film, television or radio)	449	2.6
Sound technician	370	2.1
Actor	263	1.5
Television presenter	257	1.5
Other cultural occupations	2 756	15.9
<i>Total cultural occupations</i>	<i>8 997</i>	<i>51.7</i>
Other occupations	8 389	48.3
<b>Total all occupations</b>	<b>17 386</b>	<b>100.0</b>

(a) In their main job in the week before Census Night.

Source: ABS, 2001 Census of Population and Housing, data available on request.

Like the Television services industry, the majority of people working in the Radio services industry in their main job worked in a cultural occupation (see Table 17.3). Common non-cultural occupations in the industry included Sales representatives (495 people), General managers (299 people), Sales and marketing managers (185 people) and Public relations officers (111 people).



*Census of Population and  
Housing continued*

### 17.3 PERSONS EMPLOYED IN RADIO SERVICES INDUSTRY(a), By occupation—August 2001

	Number	Per cent
Cultural occupations		
Radio presenters	924	15.8
Program directors (Radio or Television)	747	12.7
Radio journalists	483	8.2
Advertising specialist	132	2.3
Sound technicians	117	2.0
Media producers	101	1.7
Other cultural occupations	647	11.0
<i>Total cultural occupations</i>	<i>3 151</i>	<i>53.8</i>
Other occupations	2 711	46.2
<b>Total all occupations</b>	<b>5 862</b>	<b>100.0</b>

(a) In their main job in the week before Census Night.

Source: ABS, 2001 Census of Population and Housing, data available on request.

#### Work Survey

As data from the Census of Population and Housing relates only to a person's main job during a one week period in August, it may not capture those people who are involved in a less regular or voluntary capacity. The 2001 Survey of Work in Culture and Leisure Activities provides some indication of total involvement over a 12 month period. The survey found that over 80,000 people were involved in television and over 90,000 were involved in radio over a 12 month period to April 2001. Tens of thousands of people reported involvement without pay in the industries, particularly radio.

### 17.4 PERSONS INVOLVED IN BROADCASTING, By whether paid—12 months ending April 2001

	Some paid involvement	Unpaid involvement only	Total
NUMBER ('000)			
Television	54.0	29.6	83.6
Radio	19.6	71.1	90.7
PER CENT (%)			
Television	64.6	35.4	100.0
Radio	21.6	78.4	100.0

Source: ABS, *Survey of Work in Selected Culture and Leisure Activities, April 2001* (cat. no. 6281.0).

# CHAPTER 18

## ARTS EDUCATION

### INTRODUCTION

Cultural education involves teaching students skills in an art or cultural field. While these skills can be obtained at schools and tertiary institutions, there are a variety of other organisations involved in teaching the arts, such as: TAFE colleges; community learning centres; and adult education centres.

Arts education covers the teaching of skills specific to the fields of literature, television, radio, film, visual arts and crafts, design, music, performing arts and other arts. Skills taught include creative writing; acting; dancing; singing; music composition; music playing; visual design; radio, television and film production, post-production and direction; photography; and sound engineering and recording.

### TRAINING IN THE ARTS

Some 1.1 million people aged 15 years and over in Australia had completed a course or qualification in an arts or culture related field at some time in their lives, according to the 2001 Survey of Work in Selected Culture and Leisure Activities. This included qualifications at universities, specialist tertiary institutions such as the National Institute of Dramatic Art and technical and further education (TAFE) institutes. Crafts (261,900 people), Fine arts (192,700 people) and Music (242,700 people) were the most common courses completed or qualifications obtained.

### 18.1 PERSONS WITH AN ARTS OR CULTURE QUALIFICATION—April 2001

	<i>Males</i>	<i>Females</i>	<i>Persons</i>
<i>Field of qualification</i>	<i>'000</i>	<i>'000</i>	<i>'000</i>
Librarianship	*3.3	12.8	16.2
Heritage	*2.4	*4.1	6.5
Crafts	47.4	214.5	261.9
Drama and dance	32.5	118.5	151.0
Film, radio and television	30.6	20.1	50.7
Fine arts	62.9	129.7	192.7
Design	74.1	70.6	144.8
Music	107.2	135.6	242.7
Literature	21.5	47.7	69.2
Other	69.9	106.0	175.9
<b>Total(a)</b>	<b>385.1</b>	<b>728.0</b>	<b>1 113.1</b>

\* estimate has a relative standard error of 25% to 50% and should be used with caution

(a) Components may not add to totals as some persons may have undertaken study in more than one field.

Source: ABS, *Work in Selected Culture and Leisure Activities, April 2001* (cat. no. 6281.0).

## TRAINING IN THE ARTS

*continued*

Tertiary arts education data are available from the Australian Government Department of Education, Science and Training (DEST). Information is available on student enrolments in tertiary institutions by field of study and level of course. There were 57,896 students studying creative arts at higher educational institutions in Australia in 2003 (this figure excludes TAFE courses) according to DEST data.

**18.2** NUMBER OF STUDENTS UNDERTAKING HIGHER EDUCATION IN THE FIELD OF CREATIVE ARTS (a)—2003

	Number	Per cent
New South Wales	18 255	31.5
Victoria	14 730	25.4
Queensland	12 424	21.5
South Australia	2 938	5.1
Western Australia	6 663	11.5
Tasmania	950	1.6
Northern Territory	257	0.4
Australian Capital Territory	1 563	2.7
<b>Australia(b)</b>	<b>57 896</b>	<b>100.0</b>

(a) Creative arts comprises the following fields of education: Performing arts; Visual arts and crafts; Graphic and design studies; Communication and media studies; and Other creative arts.

(b) Includes students undertaking courses in multi-state institutions.

Source: Department of Education, Science and Training, *Students 2003: Selected Higher Education Statistics*.

Data on vocational education can be obtained from the National Centre for Vocational Education Research. It found that in 2002 vocational training organisations such as TAFE institutes reported 58,500 students enrolled in the creative arts as their major field of study.

## TRAINING IN THE ARTS

*continued***18.3** SUBJECT ENROLMENTS IN VOCATIONAL EDUCATION AND TRAINING COURSES IN THE FIELD OF CREATIVE ARTS (a) (b) — 2002

	Subject enrolments	Students(c)	Per cent of all creative arts students
	'000	'000	%
New South Wales	158.2	16.4	28.0
Victoria	177.1	14.7	25.1
Queensland	64.0	16.6	28.4
South Australia	37.0	1.9	3.2
Western Australia	58.6	5.7	9.7
Tasmania	8.8	0.8	1.4
Northern Territory	8.2	1.2	2.1
Australian Capital Territory	7.7	1.1	1.9
<b>Australia</b>	<b>519.5</b>	<b>58.5</b>	<b>100.0</b>

- (a) Excludes vocational education and training courses which are part of a secondary school program.
- (b) Creative arts comprises the following fields of education: Performing arts; Visual arts and crafts; Graphic and design studies; Communication and media studies; and Other creative arts.
- (c) Whose major field of education was the Creative arts.

Source: National Centre for Vocational Education Research Ltd., *Students and Courses 2002: In detail*.

## EMPLOYMENT

*Work Survey*

According to the 2001 Survey of Work in Selected Culture and Leisure Activities, some 164,400 people were involved in teaching at least one of the creative arts in the 12 months to April 2001. There were far more female teachers, particularly in the area of art and craft.

**18.4** PERSONS WITH A WORK INVOLVEMENT IN TEACHING (a) — 2001

	Males	Females	Persons
	'000	'000	'000
<i>Teaching</i>			
Radio, TV, film and video	*9.8	*7.5	17.3
Music and performing arts	27.6	38.6	66.2
Art and craft	13.8	55.4	69.2
Writing and publishing	13.1	13.2	26.3
Design	12.5	*7.1	19.6
<b>Total(b)</b>	<b>58.8</b>	<b>105.6</b>	<b>164.4</b>

\* estimate has a relative standard error of 25% to 50% and should be used with caution

- (a) In the 12 months before interview in April 2001.
- (b) Components may not add to totals as some persons were involved in more than one activity.

Source: ABS, *Work in Selected Culture and Leisure Activities, April 2001* (cat. no. 6281.0).

*Census of Population and Housing*

The Census of Population and Housing provides some information on the number of people who taught arts activities privately as their main job in August 2001. The Census found that there were 1,366 people employed as art teachers, 8,441 as music teachers, 3,447 as dance teachers and 499 as drama teachers.

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