



# A data picture of Australia's Arts and Entertainment Sector **2010**

Creative Industries Faculty, Queensland University of Technology



**QUT**

# Contents

Australian and world markets

Music composition, distribution and publishing

Broadcasting

New media

Performing arts





# AUSTRALIAN & WORLD MARKETS



# Fast facts (1)

Australia's entertainment & media market spending#

2009: US\$21.8 billion

2014: US\$27.9 billion (projected)

Compound annual growth rate of Australia's entertainment & media market spending#:

2006-2009: 4.7%

2010-14: 5.1% (projected)

Output and valued added of selected cultural industries, 2005/06\*:

**AUD\$45.9 billion**

Comparison to production in other industries\*♦:

**Electricity supply, 2005/06: \$29 billion**

**Banking, 2005/06: \$35.4 billion**

**Scientific research, technical & computer services, 2001/02: \$43.6 billion**

**Education, 2001/02: \$44 billion**

**Residential building, 2001/02: \$31.7 billion**

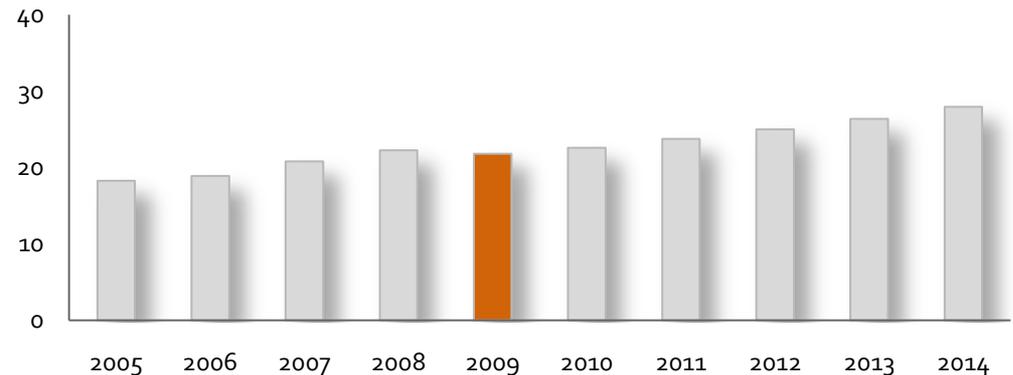
**Health services, 2001/02: \$43.9 billion**

Value added component of cultural industries (returned received by factors of production i.e. labour & capital)\*:

**2005/06: AUD\$12.2 billion**



Australia's entertainment and media market spending, 2005-2014, US\$ billions#



Output and valued added, selected cultural industries, AUD\$ billions♦\*



♦ABS, 2007; \*ABS, 2010; # PricewaterhouseCoopers, 2010



# Fast facts (2)



Trade in cultural goods, 2009/10\*:

**Exports: \$539.8 million**

**Imports: \$2.4 billion**

**Trade deficit: \$1.9 billion**

Top 5 countries receiving Australian cultural goods, 2009/10\*:

**New Zealand, US, UK, Singapore & Hong Kong**

Top 5 countries sending cultural goods to Australia, 2009/10\*:

**China, UK, USA, Malaysia & Japan**

Trade in cultural services (royalties) 2009/10\*:

**Earnings: \$163 million**

**Payments: \$1.3 billion**

Employment in cultural industries\*:

**2001: 274,884**

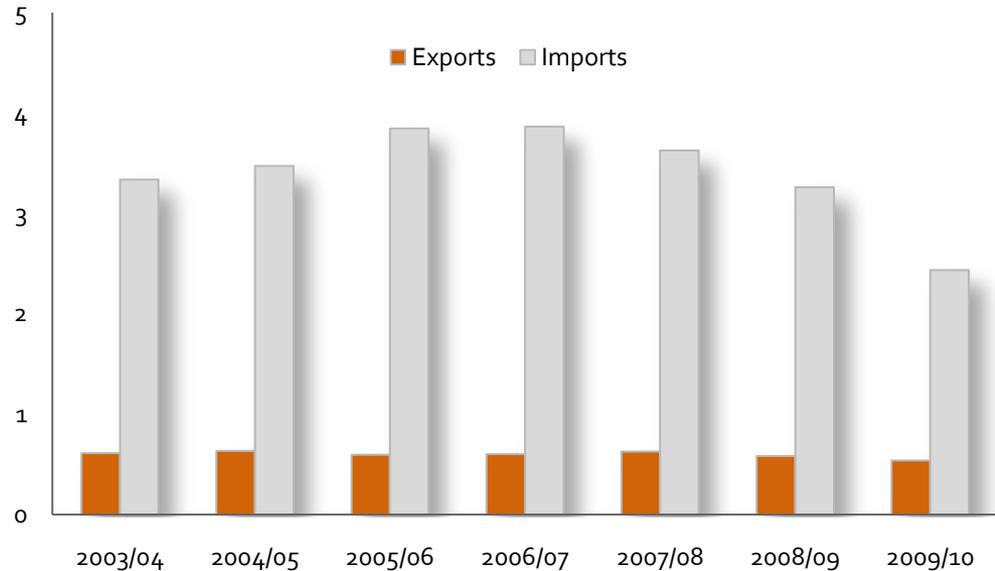
**2006: 296,183**

Household expenditure on culture, 2003/04\*:

**Average household: \$36.40 a week**

**Total: \$14.7 billion a year**

Trade in cultural goods, AUD\$ billions\*



\*ABS, 2010



# World markets

Australia's Entertainment & Media (E&M) market share#:

Asia Pacific market  
6.3% (2009) / 5.9% (2014)

World market:  
1.6% (2009) / 1.7% (2014)

Australia's E&M market share ranking, 2009#:

Asia Pacific market: 4  
World market: 12

E&M spending per capita, 2009#:

Australia: US\$969  
Average (top 12 countries): US\$822

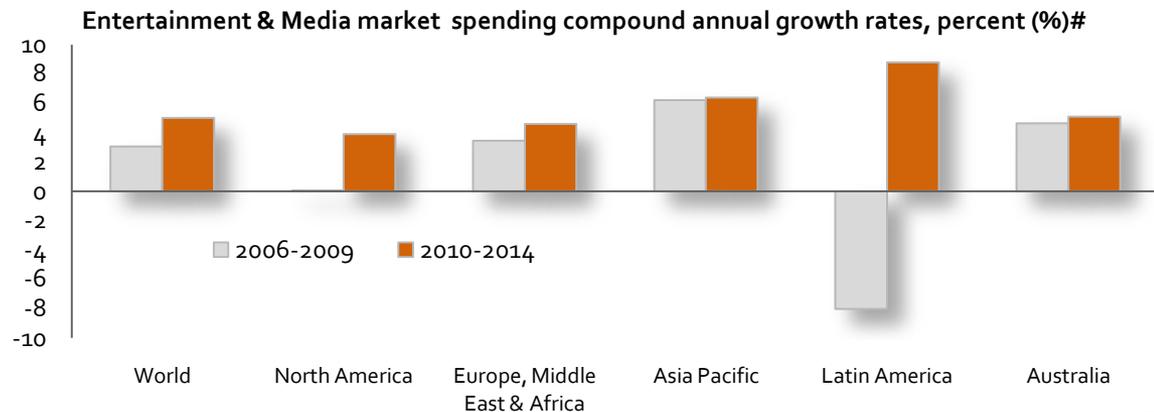
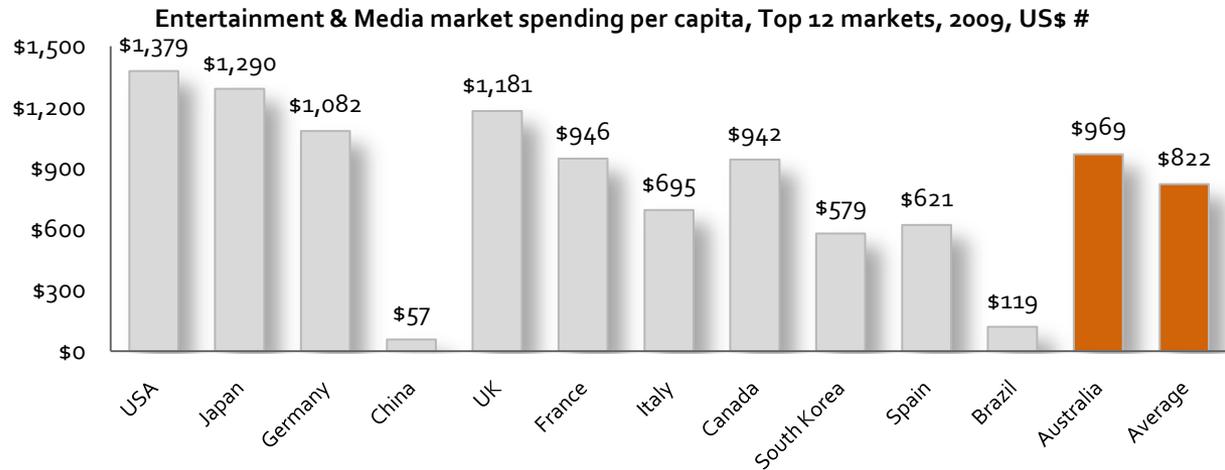
E&M spending compound annual growth rates, 2006-09#:

Australia: 4.7%  
Asia Pacific: 6.2%  
World: 3.1%

Projected E&M spending compound growth rates, 2010-14#:

Australia: 5.1%  
Asia Pacific: 6.4%  
World: 5.0%

Australia's creative industries exports, 2005\*  
Share of world market: 0.27%  
World ranking: 38



\* World Economic Forum, 2010; #PricewaterhouseCoopers, 2010





<http://www.flickr.com/photos/hiss/456788140/sizes/m/>

# MUSIC COMPOSITION, DISTRIBUTION & PUBLISHING



# Fast facts



Physical wholesale sales of sound recordings & music videos<sup>^</sup>:

2005: \$520.3 million  
2009: \$366.9 million

Physical wholesale sales by units<sup>^</sup>:

2005: 58.2 million  
2009: 44.5 million

Digital wholesale sales, 2009<sup>^</sup>:

2005: \$7.9 million  
2009: \$79.2 million

Digital wholesales by units<sup>^</sup>:

2005: 5 million  
2009: 270.5 million

Employment, August 2006\*: **3,334**

(music publishing, reproduction of recorded media, and music & other sound activities)

Australia's physical & digital recorded music market spending#:

2009: US\$468 million  
2014: US\$605 million

Australia's digital recorded music market spending#:

2009: US\$83 million  
2014: US\$281 million

Number of businesses, June 2007\*: **8,349**

(recorded media manufacturing & publishing, recorded music retailing, music & theatre production, and sound recording studios)

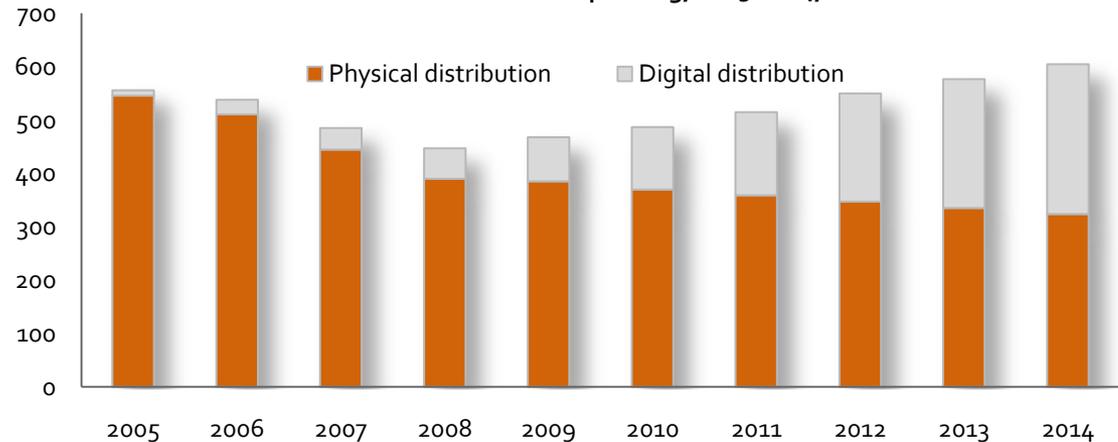
Music royalties, 2007-08\*:

Payments to Australia: \$72 million  
Payments to overseas: \$227 million

Average household expenditure on music, 2003/04\*:

\$1.65 a week / \$655 a year

Australia's recorded music market spending, 2005-2014, \$US millions#



\*ABS, 2007; \*ABS, 2010; #PricewaterhouseCoopers, 2010; ^ARIA, 2010



# World markets



Australia's recording industry world rankings, 2009♦ :

- Market size: 7**
- Physical sales: 6**
- Digital sales: 8**
- Performance rights: 13**

Australia's recorded music sales per capita, 2009#: **US\$17**

Compound annual growth rates, recorded music market, 2006-09#:

- Australia: -4.1%**
- Asia Pacific: 1.4%**
- World: -6.5%**

Projected compound annual growth rates, recorded music market, 2010-14#:

- Australia: 5.3%**
- Asia Pacific: 4.3%**
- World: 1.1%**

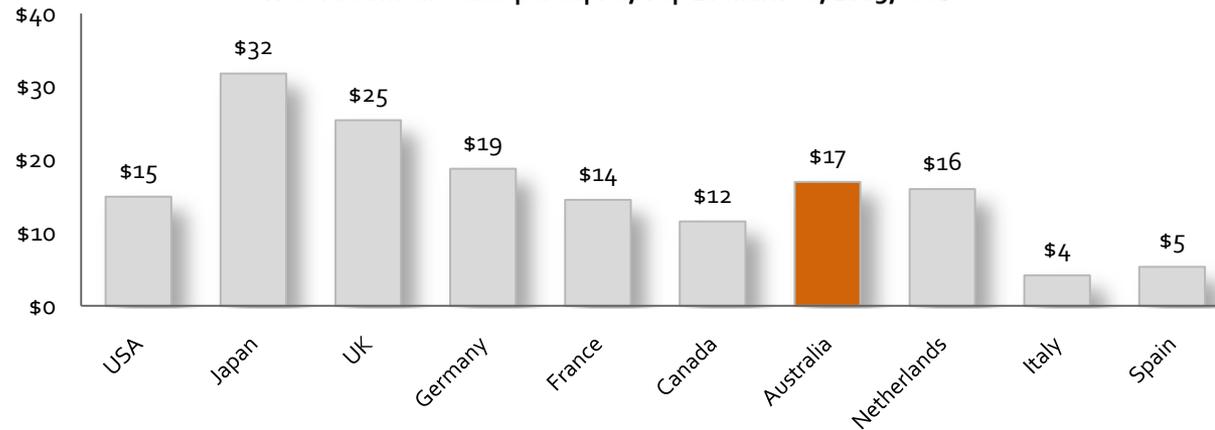
Projected compound annual growth rates, digital recorded music market, 2010-14#:

- Australia: 27.6%**
- Asia Pacific: 18.3%**
- World: 16%**

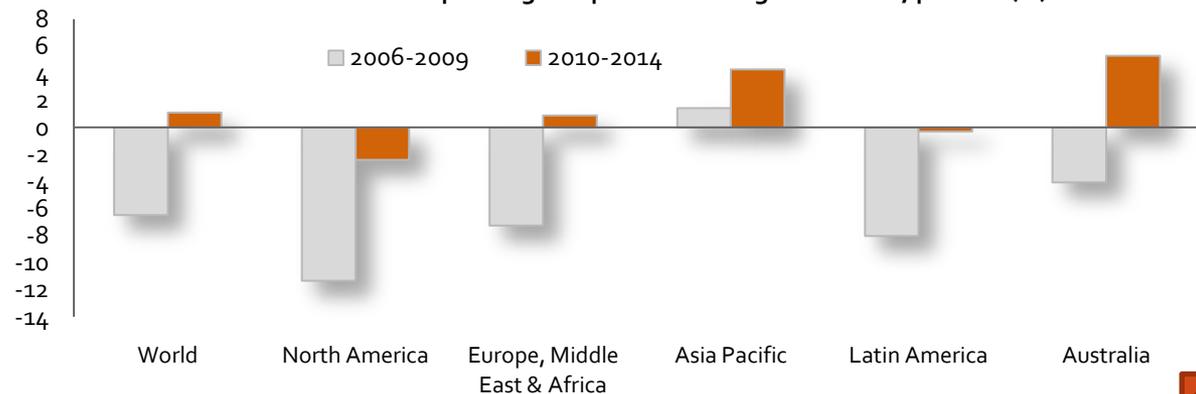
Projected compound annual growth rate, physical recorded music market, 2010-14#:

- Australia: -3.4%**
- Asia Pacific: -10.1%**
- World: -9.8%**

Recorded music sales per capita, Top 10 markets, 2009, US\$♦



Recorded music market spending compound annual growth rates, percent (%)#



♦IFPI, 2010; #PricewaterhouseCoopers, 2010



# BROADCASTING



# Fast facts (1)

Income from broadcasting, 2008/09\*:  
**\$9 billion**

TV royalties, 2008/09\*:  
**Payments to Australia: \$88 million**  
**Payments to overseas: \$837 million**

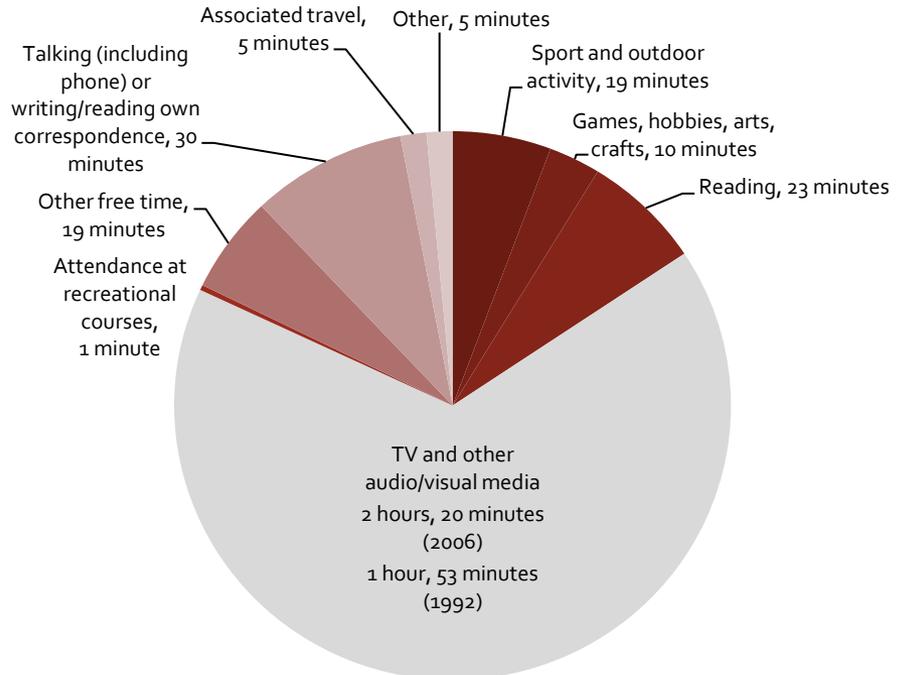
Costs of productions made primarily for TV,  
 2006/07# : **\$1.37 billion**

Number of hours spent per person 15 years  
 & older, per day TV viewing & with other  
 audio/visual media♦: **2 hours, 20 minutes**

First release commercial TV broadcast  
 hours, 2006/07#: **55,546 hours**

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

Employment in TV & radio broadcasting,  
 August 2006\*: **20,800**



People involved in broadcasting (paid &  
 unpaid), April 2007\*: **162,900**

Number of broadcasting licences,  
 2006/07^: **3,414**

Household expenditure on broadcasting,  
 electronic media & film, 2003/04\*:  
**Average household: \$7.87 a week**  
**Total: \$3.2 billion a year**



# Fast facts (2)



Radio market spending, 2009#: **US\$730 million**

Number of commercial, national and community radio stations, 2008♦: **1,995**

% of Australians 15 years & over indicating they regularly listen to the radio (at least once a week)^: **91.1%**

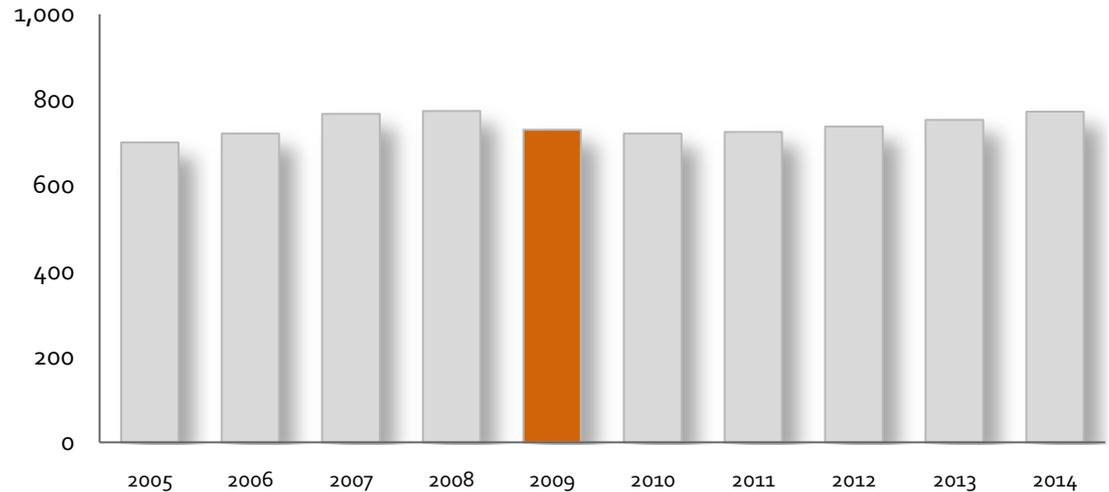
All metropolitan stations broadcasting in digital from May 2009♦

Number of Australians listening to commercial radio each week\*: **16 million**

Number of Australians listening to community radio each week†: **4.4 million**

Average number of radio sets in every household in five capital cities♦: **4.2 sets**

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



^ACMA, 2009; #PricewaterhouseCoopers, 2010; \*Commercial Radio Australia, 2010; ♦ Nielsen Australia, 2010; † McNair Ingenuity Research, 2010



# World markets

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

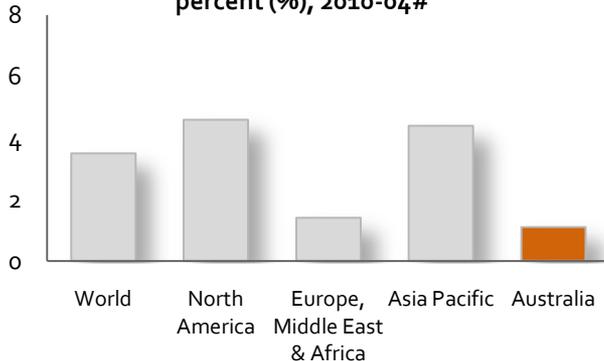
Projected compound annual growth rates,  
TV subscriptions market spending,  
2010-14#:  
**Australia: 9.1%**  
**Asia Pacific: 10%**  
**World: 6.8%**



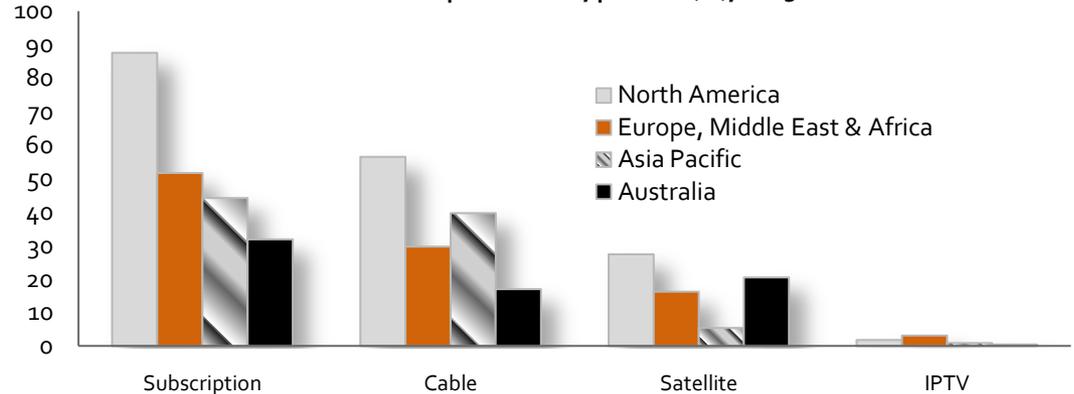
Compound annual growth rates,  
radio market spending, 2006-09#:  
**Australia: 1.2%**  
**Asia Pacific: 2.5%**  
**World: -1.2%**

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

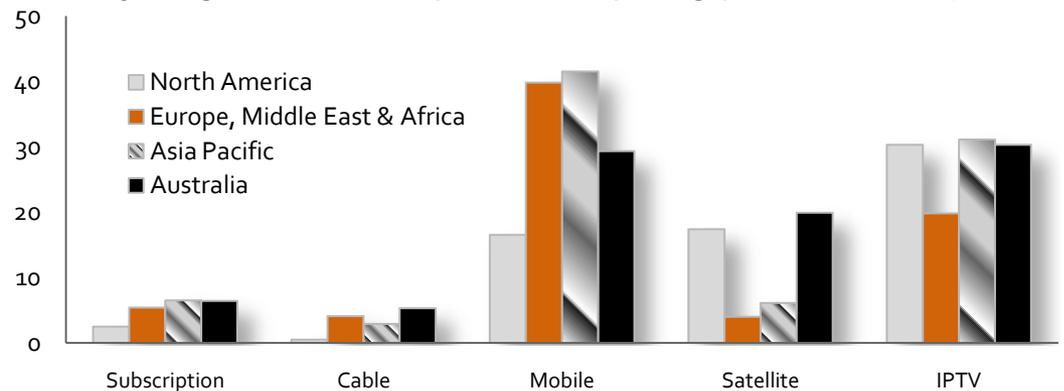
Projected growth in radio market spending,  
percent (%), 2010-04#



TV household penetration, percent (%), 2009#



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



# NEW MEDIA



# Fast facts (1)

% of internet users using the internet for entertainment, 2008/09<sup>^</sup>:

2008: 41%

2009: 46%

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

Broadband household penetration#:

2009: 72%

2014: 89.7%

Number of mobile internet subscribers#:

2009: 280,000

2014: 3.5 million

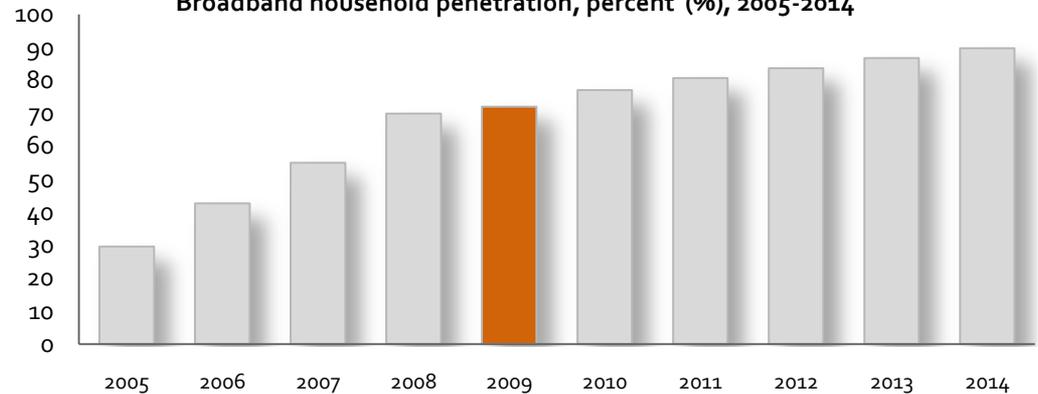
Average number of hours spent online at home per person during a quarter<sup>^</sup>:

June quarter 2008: 47 hours

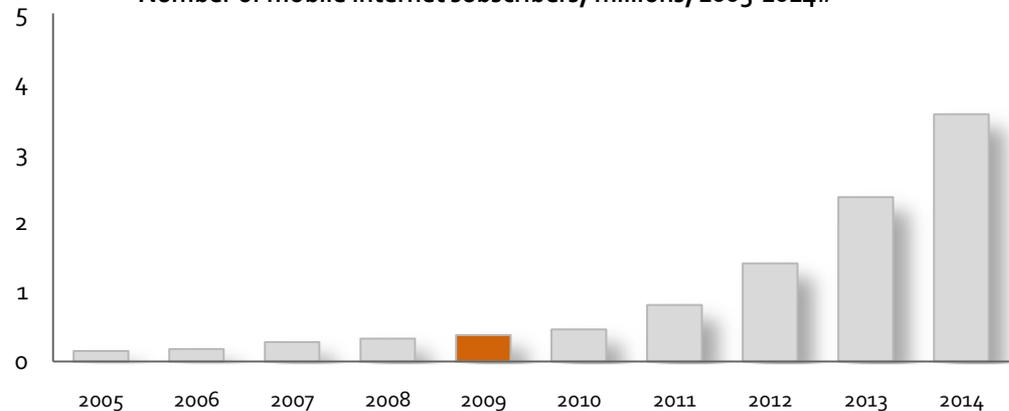
June quarter 2009: 57 hours



Broadband household penetration, percent (%), 2005-2014



Number of mobile internet subscribers, millions, 2005-2014#



\*ABS, 2010; <sup>^</sup>ACMA, 2009; ♦Australia Council for the Arts, 2010; #PricewaterhouseCoopers, 2010

# Fast facts (2)



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

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

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

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



# World markets

World ranking of broadband subscribers per 100 inhabitants, 2007 ♦ :

**Australia (16), Korea (1), Iceland (2), Netherlands (3), Denmark (4), Sweden (5)**

Projected compound annual growth rates, no. of mobile internet subscribers, 2010-14#:

**Australia: 56.3%**  
**Asia Pacific: 20.4%**

Australia's accessibility of digital content, 2008-09 weighted average\*

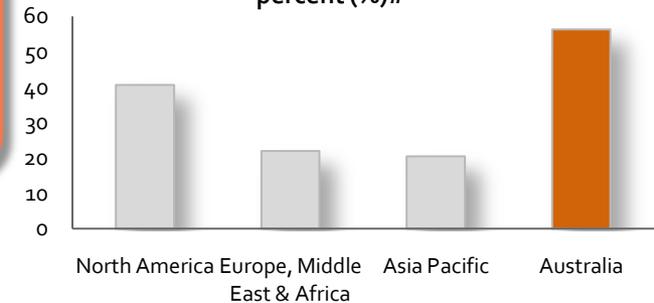
**Accessibility score: 5.63 out of 7**  
**(1=not accessible at all; 7=widely accessible)**  
**World ranking: 29**

Projected compound annual growth rates, global internet spending market: wired & mobile, 2010-14#:

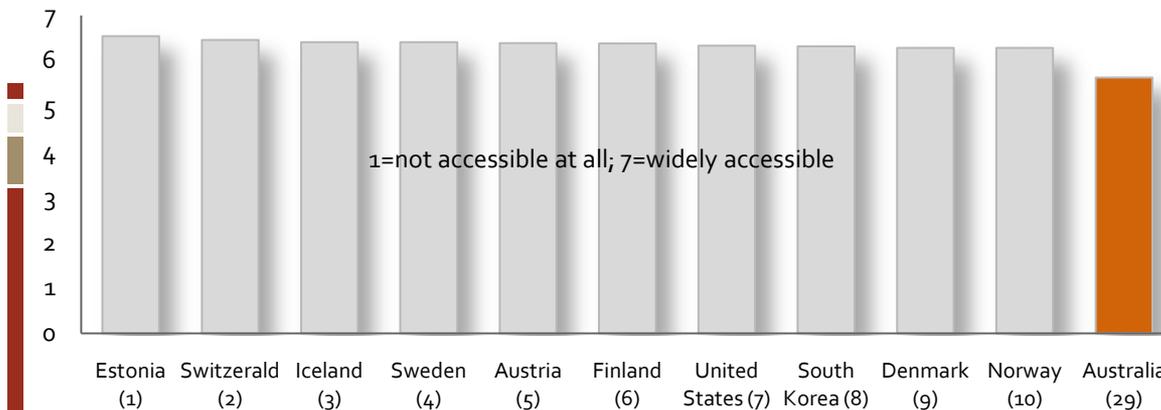
**Australia: 5.2%**  
**Asia Pacific: 6.2%**  
**World: 9%**



Projected compound annual growth rates of number of mobile internet subscribers, 2010-2014, percent (%)#

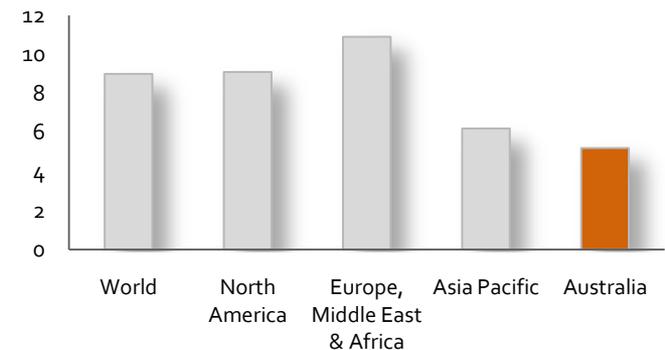


Accessibility of digital content, 2008-2009 weighted average, by country ranking\*



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

Projected compound annual growth rates of global internet access spending market: wired and mobile, 2010-2014, percent (%)#



♦OECD, 2009; \*World Economic Forum, 2010; #PricewaterhouseCoopers, 2010

# PERFORMING ARTS



# Fast facts

Total industry revenue of live entertainment industry, 2008#: **\$1.88 billion**

Box office income, 2008#: **\$1.1 billion**

Attendance at performing arts venues & events, 2005/06\*: **15.2 million**

Employment in performing arts industries, August 2006\*: **21,476**

People in performing arts roles (paid & unpaid) before an audience, 12 months ending April 2007\*: **277,600**

Household expenditure on performing arts, 2003/04\*:  
Average household: **\$1.59 per week**  
Total: **\$644 million per year**

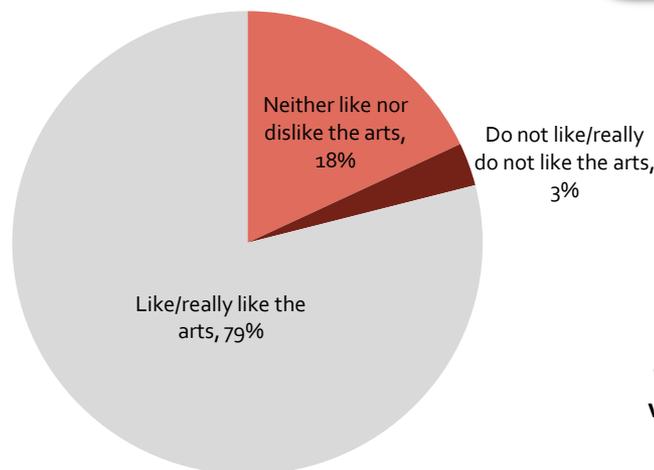
Performing arts operation organisations, 2005/06\*: **726**

% of creative & performing arts businesses that made a profit, 2007/08\*: **72%**

% of Australians 15 years & over who receptively participated in the arts in last 12 months ending November 2009♦: **92%**

% of Australians 15 years & over who like/really like the arts, November 2009♦: **79%**

Attitudes towards the arts, November 2009♦



Number of students in Creative Arts disciplines, 2007^: **81,279**  
Compared to enrolment in other fields:  
**Natural & physical sciences: 67,416**  
**Engineering: 68,225**  
**Information Technology: 47,388**  
**Education: 95,594**

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



# Data sources

Accenture Media and Entertainment (2008). *The future of broadcasting: Sustaining shareholder value and high performance in a changing industry*. <http://www.accenture.com/NR/rdonlyres/A6E79670-092F-4A41-93B9-11B63D7A0FoFo/FutureBroadcastingFinalSingle.pdf>

Australian Bureau of Statistics (2008a). *Television, Film and Video Production and Post-production Services*. Catalogue no. 8679. [http://www.ausstats.abs.gov.au/ausstats/subscriber.nsf/0/04BB9775477424E5CA25748D00130734/\\$File/86790\\_2006-07.pdf](http://www.ausstats.abs.gov.au/ausstats/subscriber.nsf/0/04BB9775477424E5CA25748D00130734/$File/86790_2006-07.pdf)

Australian Bureau of Statistics (2008b). *How Australians Use Their Time, 2006*. Catalogue no. 4153. <http://www.abs.gov.au/AUSSTATS/abs@.nsf/DetailsPage/4153.02006?OpenDocument>

Australian Bureau of Statistics (2007). *Arts and Culture in Australia: A Statistical Overview, 2007 (Reissue)*. Catalogue no. 4172. [http://www.ausstats.abs.gov.au/Ausstats/subscriber.nsf/0/AD10E8CF277236C8CA2572FB001D5B36/\\$File/41720\\_2007%20%28Reissue%29.pdf](http://www.ausstats.abs.gov.au/Ausstats/subscriber.nsf/0/AD10E8CF277236C8CA2572FB001D5B36/$File/41720_2007%20%28Reissue%29.pdf)

Australian Bureau of Statistics (2010). *Arts and Culture in Australia: A Statistical Overview, 2010*. Catalogue no. 4172. [http://www.ausstats.abs.gov.au/ausstats/subscriber.nsf/0/CA71125B3A9457DFCA2577C00013BDCA/\\$File/41720\\_2010.pdf](http://www.ausstats.abs.gov.au/ausstats/subscriber.nsf/0/CA71125B3A9457DFCA2577C00013BDCA/$File/41720_2010.pdf)

Australian Communications and Media Authority (ACMA) (2009), *Communications Report, 2008-2009*. [http://165.191.2.20/webwr/\\_assets/main/lib311252/08-09\\_comms\\_report.pdf](http://165.191.2.20/webwr/_assets/main/lib311252/08-09_comms_report.pdf)

Australian Council for the Arts (2010). *More than bums on seats: Australian participation in the arts*. [http://www.australiacouncil.gov.au/\\_data/assets/pdf\\_file/0004/71257/Full\\_report\\_More\\_than\\_bums\\_on\\_seats\\_Australian\\_participation\\_in\\_the\\_arts.pdf](http://www.australiacouncil.gov.au/_data/assets/pdf_file/0004/71257/Full_report_More_than_bums_on_seats_Australian_participation_in_the_arts.pdf)

Australian Major Performing Arts Group (2010). *The Arts: The Big Picture*. <http://www.weallplayapart.com.au/Resources>

Commercial Radio Australia (2010). [http://www.commercialradio.com.au/index.cfm?page\\_id=1045](http://www.commercialradio.com.au/index.cfm?page_id=1045)

International Federation of the Phonographic Industry (IFPI) (2010). *Recording Industry in Numbers 2010*. [http://www.ifpi.org/content/section\\_resources/rin/rin.html](http://www.ifpi.org/content/section_resources/rin/rin.html)

Live Performance Australia (2010). *Size & scope of the live entertainment industry*. [http://www.liveperformance.com.au/site/\\_content/document/00000149-source.pdf](http://www.liveperformance.com.au/site/_content/document/00000149-source.pdf)

McNair Ingenuity Research (2010). *Community Radio National Listener Survey*.

Nielsen Australia (2010). *Radio Ratings Research*. [http://au.nielsen.com/products/nmr\\_radio.shtml](http://au.nielsen.com/products/nmr_radio.shtml)

OECD (2009). *OECD Communications Outlook 2009*. <http://oberon.sourceoecd.org.ezpo1.library.qut.edu.au/vl=849781/cl=13/nw=1/rpsv/-6681/v2009n11/s1/p1>

PricewaterhouseCoopers (2010). *Global entertainment and media outlook 2010-2014*. <http://www.pwc.com/gx/en/global-entertainment-media-outlook>

World Economic Forum (2010). *The Global Information Technology Report 2009-2010*. [http://www.weforum.org/pdf/GITR10/GITR%202009-2010\\_Full%20Report%20final.pdf](http://www.weforum.org/pdf/GITR10/GITR%202009-2010_Full%20Report%20final.pdf)

# Photo sources



<http://www.flickr.com/photos/johnkarakatsanis/454531616/sizes/m/in/photostream/>



<http://www.flickr.com/photos/abcarchives/4293749285/sizes/m/in/photostream/>



<http://www.flickr.com/photos/hiss/456788140/sizes/m/>



<http://www.flickr.com/photos/infomatique/3355649005/sizes/m/in/photostream>



<http://www.flickr.com/photos/marfis75/3272079115/>

