

# **SPORT AND RECREATION: A STATISTICAL OVERVIEW**

**AUSTRALIA**

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- For further information about these and related statistics, contact Colin Speechley on Adelaide (08) 8237 7363 or the National Information and Referral Service on 1300 135 070.

## NOTES

### ACKNOWLEDGMENTS

This Australian Bureau of Statistics (ABS) publication was produced by the National Centre for Culture and Recreation Statistics (NCCRS) and made possible with funding assistance from the Sport and Recreation Ministers Council (SRMC) and the Standing Committee on Recreation and Sport (SCORS).

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 SPORT AND RECREATION STATISTICS

Information about ABS activities in the field of sport and recreation statistics is available from the Culture and Recreation theme page on the ABS web site. This theme page also contains information about the role of the NCCRS within the ABS. To access the theme page, select Themes from the menu on the home page.

Details of ABS publications containing information relating to sport and recreation are presented in the List of References at the end of this publication.

### ABBREVIATIONS AND SYMBOLS

ABS	Australian Bureau of Statistics
ACLC	Australian Culture and Leisure Classifications
ANZSIC	Australian and New Zealand Standard Industrial Classification
ANZSPC	Australian and New Zealand Standard Product Classification
CPI	Consumer Price Index
ECS	Engineering Construction Survey
excl.	excluding
GSS	General Social Survey
HEC	Household Expenditure Classification
incl.	including
km	kilometre
NCCRS	National Centre for Culture and Recreation Statistics
n.e.c.	not elsewhere classified
n.f.d.	not further defined
NHS	National Health Survey
no.	number
PSM	Population Survey Monitor
SCORS	Standing Committee on Recreation and Sport
SRMC	Sport and Recreation Ministers Council
\$m	million dollars
'000	thousand

## P R E F A C E . . . . .

This publication presents a statistical overview of sport and recreation in Australia, using the latest data available from a diverse range of ABS collections. The dominant focus is on sports and physical recreation, with data also being presented for selected other leisure areas, including gambling, hospitality and amusements.

Wherever possible, the information contained in this publication has been presented in accordance with the Australian Culture and Leisure Classifications. These include separate classifications for industry, products and occupation. For details refer to *Australian Culture and Leisure Classifications, 2001* (cat. no. 4902.0).

This is the second statistical overview of sport and recreation. The format of the previous overview, published in 1997, differed in that it did not separate sports and physical recreation from other leisure areas. In addition, the current edition contains information obtained from a greater number of data sources than have been available in the past.

Only a selection of the available data about sport and recreation has been included in this publication. For information about other relevant data, contact the NCCRS in the Adelaide Office of the ABS.

Dennis Trewin  
Australian Statistician

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## INTRODUCTION .....

Sport and the wide range of other activities that people undertake in their leisure time are important features of the Australian lifestyle.

The sport and recreation sector involves more than just the people who attend or participate in activities. It includes organisations providing sports services, manufacturers and distributors of sports equipment, professional sports people, and other people who are involved in paid employment or voluntary work. Government and business also play an important role through the provision of facilities and support through grants and sponsorship.

This publication presents information covering not only sports and physical recreation, but also related other leisure activities such as gambling and those provided by hospitality clubs and amusement parks and centres. It presents an overview of the sector with information about how many people play sports; the most popular sports played; the numbers of people attending sporting events; how much people spend on sport and recreation; the economic activity of businesses, clubs and associations involved in providing sport and recreation goods and services; the people who work in sport and recreation occupations or industries; and the levels of support provided by volunteers, sponsorship and government funding.

The decisions about which data to include in this publication were guided by the Australian Culture and Leisure Classifications (ACLIC). This contains classifications for culture and leisure industries, products and occupations and has helped guide the separation of data concerning Sports and physical recreation (Part A) from that relating to Other leisure (Part B).

ABS data relating to industry, products and occupation are compiled using ABS standard classifications. The Australian and New Zealand Standard Industrial Classification (ANZSIC) is used in ABS collections relating to industry, and the Australian and New Zealand Standard Product Classification (ANZSPC) is the basis for classifications used in the collection of product-related data. Some sports industry data have recently been output in accordance with the ACLIC and, when presenting information about products, the ACLIC has been used as a guide to decide which are sports and physical recreation and which are other leisure. Inclusions of data in, and exclusions of data from, tables in this publication have been explained in the body of the text where appropriate.

The Australian Standard Classification of Occupations is used for collection of ABS occupation data. This classification is completely aligned with the ACLIC and thus occupation data is presented in accordance with the ACLIC occupation classification.

ABS data relating to participation in sport and physical activity, time spent on sport and outdoor activities, and sport attendance are obtained from a variety of data collections. Each collection may define sports and physical recreation activities in different ways because there is no standard classification for these activities. Nevertheless, the principles underlying the ACLC have provided a guide for the development of some of the collections, and for the data included in this publication. Where there are inconsistencies or differences between the data collections, these have been highlighted in the text.

## MAIN FEATURES .....

### SPORTS AND PHYSICAL RECREATION

#### Participation

- There were 9.1 million persons aged 18 years and over (62.4% of the adult population) who participated in physical activities for recreation, exercise or sport at some time during the 12 months prior to interview in 2002. Slightly more than half of these persons (4.6 million) participated in organised sports and physical recreation.
- The most popular physical recreation activity for both males and females was walking for exercise. However, the participation rate was much higher for females (32.9%) than it was for males (17.5%).
- There were 1.6 million children aged 5–14 years (59.4% of the population) who participated in organised sport outside of school hours during the 12 months ending April 2000.
- The most popular organised sport for boys was soccer (outdoor) which had 265,000 participants (19.6% of the population), whereas for girls it was netball with 239,400 participants (18.2% of the population).

#### Time spent

- Australians aged 15 years and over spent an average of 27 minutes (8.5%) of their free time each day on sport and outdoor activities in 1997. For males the average time spent on sport and outdoor activities was 33 minutes, while for females it was 20 minutes.
- On average, 27.1% of Australians aged 15 years and over actually participated in sport or outdoor activities each day in 1997. Those who participated spent an average of 1 hour and 43 minutes (20.4%) of their free time each day.

#### Attendance at sports events

- There were 7.0 million persons aged 18 years and over (48.2% of the adult population) who attended at least one sports event during the 12 months prior to interview in 2002. A greater percentage of males (56.0%) attended at least one sports event than did females (40.7%).
- Australian Rules football and horse racing were the sports most attended by both males and females. Australian Rules was attended by 21.0% of males and 13.4% of females, while for horse racing the corresponding percentages were 14.8% and 11.0%.

### Expenditure by households

- Australian households spent an average of \$11.03 per week on selected sports and physical recreation products during 1998–99. The largest single component of this figure was \$2.07 spent on sports facility hire charges.
- The total expenditure by Australians on participation in organised sports and physical activities was \$2,762.6m at an average per participant of \$693 in 1996–97. Clothing and equipment accounted for 29.5% of the total expenditure.
- The average expenditure per participant on individual sports and physical activities in 1996–97 ranged from \$129 for carpet bowls to \$1,787 for motor sports.

### Employment and voluntary work

- There were 83,008 persons whose main job was in a sports and physical recreation occupation at the time of the 2001 census. This was 21.6% higher than the corresponding figure from the 1996 census.
- On average, persons in sports and physical recreation occupations were more likely to be working part-time and more likely to have a lower income than persons in the general working population.
- At the end of June 2001 there were 87,448 persons working for organisations in the sports industries (excluding government agencies and manufacturing and sales organisations). Of these persons, 56.9% were working for not-for-profit organisations.
- There were 1.1 million persons aged 18 years and over (8.2% of the adult population) who undertook voluntary work for sports and physical recreation organisations during the 12 months prior to interview in 2000. This was a greater number than for any other type of organisation. A greater percentage of males (10.0%) undertook voluntary work for sports and physical recreation organisations than did females (6.5%).

### Facilities

- Building work worth \$418.8m was approved for sports and physical recreation buildings during 2000–01. Of this total, 42.6% was for the construction of new buildings.
- Engineering construction work worth \$410.9m was done for recreation projects (excluding landscaping) during 2001–02. This followed work worth \$373.0m in 2000–01 and \$477.1m in 1999–2000.
- There were 327 Indigenous communities with a population of 50 or more in 2001. Of these, 33.0% had no sporting facilities at all.

### Funding by government and business

The three levels of government provided a total of \$2,124.2m in funding for sports and physical recreation in 2000–01. The majority of this (60.8%) went to fund Venues, grounds and facilities.

The business sector provided funding of \$628.0m to sports and physical recreation in 2000–01. Over three-quarters of this (76.4%) was provided through sponsorship.

## Industries

- In 2000–01 Sports and physical recreation clubs, teams and sports professionals had the highest total income (\$1,381.8m) of all the sports and physical recreation industries mainly providing services. However, it was also one of the two such industries to record an operating loss/deficit, the other being Other sports and physical recreation venues, grounds and facilities.
- The industry with the largest operating profit/surplus in 2000–01 was Sports and physical recreation administrative organisations with \$45.7m, even though the industry consisted entirely of not-for-profit organisations.
- Sport and camping equipment retailers recorded retail sales of \$1,386.4m in 1998–99, while for Marine equipment retailers the corresponding figure was \$656.3m.

## Products

- The total value of retail sales of selected sports and physical recreation goods in 1998–99 was \$3,799.2m.
- The total value of exports of selected sports and physical recreation goods in 2001–02 was \$463.4m, 21.7% higher than for the previous year and the third successive increase.
- The United States of America and New Zealand were the two biggest export markets for Australian sports and physical recreation goods in 2001–02, between them accounting for 41.0% of the total.
- After several successive increases, the total value of imports of selected sports and physical recreation goods fell 3.2% to be \$1,233.9m in 2001–02.
- China and the United States of America were the two major sources of sports and physical recreation goods imported into Australia in 2001–02, between them accounting for 51.8% of the total.
- Australia's largest trade deficit in selected sports and physical recreation goods in 2001–02 was \$370.5m with China, while its largest surplus was \$30.8m with Greece.
- In 1996–97, the total supply of selected sports and physical recreation products (goods and services) was \$6,634.9m, of which 86.4% came from Australian production and the remainder from imports. Final consumption expenditure by households used up 67.8% of the total supply.

## OTHER LEISURE

## Gambling

- Total net takings from all gambling during 2000–01 amounted to \$13,838.6m, or \$944 per head of adult population. Poker machines contributed \$8,752.4m (63.2%) of total net takings, and 87.9% of this contribution came from poker machines located either in Clubs or in Pubs, taverns and bars.
- In 2000–01, businesses in the gambling industries (i.e. businesses predominantly engaged in providing gambling services) had total income of \$9,543.0m (net of payouts to players) and operating profit of \$1,357.7m. At the end of June there were 32,591 persons employed by these businesses.
- The 2001 Census of Population and Housing found that there were 11,204 persons who identified their main job as working in a gambling occupation. Of these persons, 53.3% were female.
- The 1998–99 Household Expenditure Survey found that 51.3% of all households in Australia had some expenditure on gambling during the two-week enumeration period. For households within capital cities the corresponding percentage was 50.0% whereas, for households in other areas of Australia, it was 53.5%.

## Industries

- The total income of the Amusement industries in 2000–01 was \$424.1m, of which 67.7% was generated by Amusement and theme parks, and the remainder by Amusement arcades, centres and other operations. While the latter managed to break even, the former recorded an operating loss of \$26.7m.
- At the end of June 2001, the amusement industries employed 6,943 persons of whom 56.8% were casual.
- The total income of Hospitality clubs in 2000–01 was \$6,297.1m, of which 31.9% was contributed by those which were associated with sports or physical recreation. These Sports hospitality clubs had a similar share (30.5%) of the total Hospitality club operating surplus of \$374.4m.
- The 23,530 persons employed by Sports hospitality clubs at the end of June 2001 were fairly evenly split between males and females, and between permanent and casual. Female employment was 50.8% of the total and casual employment was 51.1%.
- The total income of Toy and sporting good manufacturers in 2000–01 was \$303.7m and operating profit was \$40.2m. Employment at the end of June was 2,386.
- The total income of Toy and sporting good wholesalers in 1998–99 was \$1,339.1m. Employment at the end of June was 4,173 of which 59.5% were male and 82.8% were full-time.
- The total income of Toy and game retailers in 1998–99 was \$563.5m, while for Trailer and caravan dealers it was \$377.5m. At the end of June, the former had employment of 4,828 persons and the latter 1,105.

## Products

- The total value of retail sales of selected other leisure goods in 1998–99 was \$1,657.1m. Examples of these goods are toys, games, caravans and camping trailers.
- The total value of exports of selected other leisure goods in 2001–02 was \$140.4m, 16.4% lower than for the previous year.
- New Zealand was the biggest export market for Australian other leisure goods in 2001–02, accounting for 36.5% of the total.
- The total value of imports of selected other leisure goods in 2001–02 was \$969.6m, 19.5% higher than for the previous year and the latest in a series of increases.
- China was the major source of other leisure goods imported into Australia in 2001–02, accounting for 51.4% of the total.
- Australia's largest trade deficit in selected other leisure goods in 2001–02 was \$498.1m with China, while its largest surplus was \$42.2m with New Zealand.
- In 1996–97, the total supply of selected other leisure products (goods and services) was \$10,119.8m, of which 90.9% came from Australian production and the remainder from imports. Final consumption expenditure by households used up 83.2% of the total supply.
- Australian households spent an average of \$29.26 per week on selected other leisure products during 1998–99. Of this expenditure, 71.8% went on Food and beverage serving services.
- Building work worth \$347.1m was approved during 2000–01 for other leisure buildings such as casinos and other gambling facilities; amusement parks and arcades; and senior citizen, youth and community centres. Of this total, 33.8% was for the construction of new buildings.

PART **A**

**SPORTS AND PHYSICAL RECREATION .....**

## INTRODUCTION

Sports and physical recreation play a part in the lives of many Australians. The 2002 General Social Survey (GSS) found that, during the 12 months prior to interview, 62.4% of Australians aged 18 years and over participated in physical activities for recreation, exercise or sport. There are many benefits associated with regular participation in sports and physical recreation, including improved health, physical fitness, self-esteem, sense of personal achievement and social interaction.

This Chapter presents summary data on participation in sports and physical recreation within the Australian community. The data have been sourced from a number of ABS surveys and these are discussed briefly below. It is clear from these data that a large number of Australians play sport or undertake other forms of physical recreation or exercise. However, some of these participants undertake these activities infrequently, such as only once or twice during a 12-month period. Therefore, it cannot be assumed that all participants undertake enough regular physical activity to benefit their health. Information about the frequency of participation in sports and physical recreation can be found in the more detailed publications relating to each survey data source.

The GSS collected data during March to July 2002 from persons aged 18 years and over about participation in physical activity for sport, recreation or exercise during the previous 12 months. Sports and physical recreation participation data from the GSS has been published in *Participation in Sport and Physical Activities, Australia, 2002* (cat. no. 4177.0).

Participation data for persons aged 18 years and over was also collected for the years 1996–97 to 1999–2000 using the Population Survey Monitor (PSM). The PSM asked about participation in sports or physical activities during the previous 12 months. Data have been published in editions of *Participation in Sport and Physical Activities, Australia* (cat. no. 4177.0).

The National Health Survey (NHS), conducted in 1989–90, 1995 and 2001, collected information about participation in exercise during the two weeks prior to interview for persons aged 18 years and over. Data from the NHS have been published in *National Health Survey, Summary of Results* (cat. no. 4364.0) and *National Health Survey: Aboriginal and Torres Strait Islander Results, Australia, 2001* (cat. no. 4715.0).

The Survey of Children's Participation in Culture and Leisure Activities was conducted in April 2000, and collected data on participation in organised sport outside school hours for children aged 5–14 years. These data are available in *Children's Participation in Cultural and Leisure Activities, Australia, April 2000* (cat. no. 4901.0).

INTRODUCTION *continued*

The 1998 Survey of Disability, Ageing and Carers obtained information about whether persons aged 5 years and over with a disability had participated in sports and recreation away from home during the previous 12 months. The survey data have been published in *Disability, Ageing and Carers: Summary of Findings, Australia, 1998* (cat. no. 4430.0).

When comparing data from different sources it is important to take into consideration the scope and methodology of the surveys. These issues are discussed in this Chapter wherever such comparisons are made.

## CHARACTERISTICS OF PARTICIPANTS IN SPORTS AND PHYSICAL RECREATION

This section explores participation in sports, physical recreation and/or exercise for adults aged 18 years and over, children aged 5–14 years, and persons aged 5 years and over with a disability.

## Adults aged 18 years and over

During the 12 months prior to interview in 2002, 62.4% of Australians aged 18 years and over participated in physical activities for recreation, exercise or sport. More males participated in sports and physical recreation (4.7 million or 65.0% of males) than females (4.4 million or 59.9% of females). The participation rate was higher for persons aged 18–24 years (72.6%) than for any other age group, and lowest for persons aged 65 years and over (45.6%).

A larger proportion of persons in capital cities participated in sports and physical recreation than did persons living in other areas of Australia (63.4% compared with 60.6%). Participation rates varied among the states and territories, ranging from 59.5% in New South Wales to 76.1% in the Australian Capital Territory.

The participation rates for both full-time and part-time employed persons (69.5% and 67.6% respectively) were higher than that for unemployed persons (61.3%). For persons not in the labour force, the participation rate was particularly low at 49.6%. However, this was largely because a substantial proportion of this group were aged 65 years and over. The May 2002 Labour Force Survey found that 43.4% of persons not in the labour force were aged 65 years and over, compared with only 16.5% of the civilian adult population (i.e. aged 18 years and over).

Adults aged 18 years and over *continued***1.1 ADULT PARTICIPATION IN SPORTS AND PHYSICAL RECREATION(a), Characteristics of participants—2002**

	NUMBER.....			PARTICIPATION RATE....		
	Males	Females	Persons	Males	Females	Persons
	'000	'000	'000	%	%	%
<b>Age group (years)</b>						
18–24	751.6	630.5	1 382.1	77.6	67.4	72.6
25–34	1 098.3	988.2	2 086.5	75.5	68.0	71.8
35–44	994.1	915.8	1 909.9	68.1	62.2	65.1
45–54	771.5	799.7	1 571.2	58.3	60.5	59.4
55–64	533.2	557.4	1 090.7	56.1	59.7	57.9
65 and over	516.0	500.0	1 016.0	50.6	41.3	45.6
<b>State or territory</b>						
New South Wales	1 516.4	1 398.3	2 914.7	62.5	56.6	59.5
Victoria	1 189.7	1 117.7	2 307.4	65.9	60.2	63.0
Queensland	849.8	804.2	1 654.1	63.4	59.0	61.2
South Australia	326.6	327.5	654.1	58.6	56.8	57.7
Western Australia	547.0	520.8	1 067.8	76.9	73.0	74.9
Tasmania	106.3	101.6	207.9	63.3	57.4	60.3
Northern Territory(b)	38.8	35.7	74.5	70.4	70.9	70.6
Australian Capital Territory	90.1	85.8	175.9	78.9	73.4	76.1
<b>Region</b>						
Capital city(c)	3 122.9	2 875.6	5 998.5	67.1	59.9	63.4
Other	1 541.8	1 516.1	3 057.9	61.2	60.1	60.6
<b>Labour force status</b>						
Employed						
Full-time	3 095.5	1 485.0	4 580.5	70.1	68.2	69.5
Part-time	497.8	1 325.4	1 823.2	66.2	68.2	67.6
Unemployed	191.7	156.4	348.0	62.1	60.3	61.3
Not in the labour force	879.7	1 424.9	2 304.6	51.7	48.4	49.6
<b>Total</b>	<b>4 664.7</b>	<b>4 391.6</b>	<b>9 056.3</b>	<b>65.0</b>	<b>59.9</b>	<b>62.4</b>

(a) Relates to persons aged 18 years and over who participated in physical activities for recreation, exercise or sport as players during the 12 months prior to interview.

(b) Refers to mainly urban areas only.

(c) Excludes Canberra and Darwin.

Source: *Participation in Sport and Physical Activities, Australia, 2002* (cat. no. 4177.0).

Table 1.2 shows the number of players who participated in physical recreation that was organised by a club or association (e.g. playing tennis as part of a tennis club competition). The table also shows participation in non-organised physical recreation. Examples of this include swimming at the beach with the family, walking for exercise, and playing tennis socially. Some players participated in physical recreation in both an organised and non-organised capacity. Of the 9.1 million adult participants in sports and physical recreation, a large majority (80.8% or 7.3 million) had undertaken at least some non-organised activity, while about half (50.2% or 4.6 million) had participated in some organised physical recreation.

Adults aged 18 years and over *continued*

In the 12 months prior to interview in 2002, 31.4% of the population aged 18 years and over had participated in some organised physical recreation. More males (34.3%) participated in organised physical recreation, compared with females (28.5%). The most marked difference between males and females related to those who participated in both organised and non-organised physical recreation. While 12.8% of males and 11.2% of females participated only in organised physical recreation, many more males (21.5%) participated in both organised and non-organised physical recreation, compared with females (17.3%).

**1.2 ADULT PARTICIPATION IN SPORTS AND PHYSICAL RECREATION(a), Type of participation—2002**

	Organised only (A)	Non-organised only (B)	Both organised and non-organised (C)	Total organised (A + C)	Total non-organised (B + C)	Total participation (A + B + C)
NUMBER '000)						
Males	919.3	2 203.1	1 542.3	2 461.6	3 745.4	4 664.7
Females	823.0	2 302.8	1 265.8	2 088.8	3 568.6	4 391.6
Persons	1 742.3	4 505.9	2 808.2	4 550.4	7 314.0	9 056.3
PARTICIPATION RATE (%)						
Males	12.8	30.7	21.5	34.3	52.2	65.0
Females	11.2	31.4	17.3	28.5	48.7	59.9
Persons	12.0	31.1	19.4	31.4	50.4	62.4

(a) Relates to persons aged 18 years and over who participated in physical activities for recreation, exercise or sport as players during the 12 months prior to interview.

Source: *Participation in Sport and Physical Activities, Australia, 2002* (cat. no. 4177.0).

## Children aged 5–14 years

During the 12 months ending April 2000, 1.6 million children (59.4%) participated in sport outside of school hours that had been organised by a school, club or association. The sport participation rate for boys exceeded that for girls, both overall (66.1% compared with 52.3%), and in each age category. This is consistent with the situation in the general adult population where a greater percentage of males (34.3%) participated in organised physical recreation than females (28.5%) (table 1.2).

When comparing the participation rates of children and adults, it is important to take into consideration the different scopes of the surveys from which the participation rates are sourced. Adults responding to the GSS had the opportunity to mention activities that were related to exercise or physical recreation, which is a broader scope than just organised sport. As a result, adult sports and physical recreation participation rates from the GSS include activities such as organised dancing and organised yoga, which are physical recreation activities rather than sports. The children's participation survey focused only on organised sports. Hence, other physical recreation activities are not included in the information presented in table 1.3 and participation rates for children cannot be directly compared with those for adults.

Children aged 5–14 years *continued*

A lower proportion of children living in capital cities participated in organised sport outside of school hours than those living elsewhere in Australia (57.3% compared with 62.3%). The sport participation rate for children varied across the states and territories, ranging from 56.1% in Queensland to 65.5% in the Northern Territory.

### 1.3 CHILDREN'S PARTICIPATION IN ORGANISED SPORT(a), Characteristics of participants—2000

	NUMBER.....			PARTICIPATION RATE....		
	Males	Females	Persons	Males	Females	Persons
	'000	'000	'000	%	%	%
<b>Age group (years)</b>						
5–8	317.0	221.7	538.7	58.3	43.3	51.0
9–11	314.9	234.6	549.5	74.2	59.8	67.3
12–14	263.3	216.7	480.0	68.2	56.5	62.4
<b>State or territory</b>						
New South Wales	312.5	220.1	532.6	69.0	51.0	60.2
Victoria	209.6	169.1	378.6	63.6	53.8	58.8
Queensland	167.6	117.2	284.8	64.3	47.4	56.1
South Australia	66.3	56.1	122.5	64.9	57.9	61.5
Western Australia	93.3	72.6	165.8	67.2	55.3	61.4
Tasmania	21.3	19.0	40.3	61.0	57.1	59.1
Northern Territory(b)	9.1	7.3	16.4	69.5	61.2	65.5
Australian Capital Territory	15.5	11.6	27.2	70.2	54.6	62.5
<b>Region</b>						
Capital city(c)	514.8	372.7	887.5	64.9	49.3	57.3
Other	380.4	300.3	680.7	67.8	56.5	62.3
<b>Total</b>	<b>895.2</b>	<b>673.0</b>	<b>1 568.2</b>	<b>66.1</b>	<b>52.3</b>	<b>59.4</b>

(a) Relates to children aged 5–14 years who participated in organised sport outside of school hours during the 12 months ending April 2000.

(b) Comprises predominantly urban areas only.

(c) Excludes Canberra and Darwin.

Source: *Children's Participation in Cultural and Leisure Activities, Australia, April 2000* (cat. no. 4901.0).

## Persons with a disability

There were 1.1 million persons (31.7%) aged 5 years and over with a disability who participated in sports or physical recreation during the 12 months prior to interview in 1998. The majority (643,700 persons or 60.1%) of these participants were male. Disability was defined as any limitation, restriction or impairment, which had lasted, or was likely to last, for at least six months and restricted everyday activities.

Overall, 37.2% of males with a disability participated in sports or physical recreation, compared with 25.9% of females. Persons with a profound core activity restriction (i.e. restriction in activities which comprise communication, mobility and self-care) had the lowest participation rate in sports or physical recreation (17.8%) of all the disability categories. The majority of persons with a profound core activity restriction had a physical condition (70.7% or 380,200 persons) as opposed to a mental or behavioural disorder (29.3% or 157,500 persons).

Persons with a disability *continued*

The proportion of persons aged 5 years and over with a disability who participated in sports or physical recreation during the 12 months prior to interview in 1998 (31.7%) was lower than that identified for the general adult population aged 18 years and over during the 12 months prior to interview in 2002 (62.4%). In addition to being derived from data sources which are four years apart in time, these participation rates are not directly comparable because they relate to populations spanning different age groups and with different age distributions. For example, 33.9% of persons with a disability were aged 65 years and over compared with 12.2% of the general adult population. A higher proportion of older persons in a population may result in a lower sports participation rate, since only 45.6% of persons aged 65 years and over in the general adult population had participated in sports or physical recreation during the 12 months prior to interview in 2002.

**1.4 PARTICIPATION IN SPORTS OR PHYSICAL RECREATION(a), By disability status and sex—1998**

	<i>Profound core activity(b) restriction</i>	<i>Severe core activity(b) restriction</i>	<i>Moderate core activity(b) restriction</i>	<i>Mild core activity(b) restriction</i>	<i>Schooling or employment restriction</i>	<i>All with specific restrictions(c)</i>	<i>All with disability(d)</i>
NUMBER ('000)							
Males	39.8	85.0	93.3	192.8	336.6	514.8	643.7
Females	25.9	57.5	71.7	122.9	210.5	342.1	426.5
Persons	65.7	142.6	165.0	315.6	547.1	856.9	1 070.2
PARTICIPATION RATE (%)							
Males	24.7	31.7	27.8	36.2	37.1	34.6	37.2
Females	12.4	19.5	22.5	24.8	28.0	23.5	25.9
Persons	17.8	25.3	25.2	30.7	32.9	29.1	31.7

- (a) Refers to persons aged 5 years and over, living in households only, who participated in sports or physical recreation away from home during the 12 months prior to interview.
- (b) Core activities comprise communication, mobility and self care.
- (c) Total may be less than the sum of the components as persons may have both a core activity restriction and a schooling or employment restriction.
- (d) Includes those who do not have a specific restriction.

Source: *Disability, Ageing and Carers: Summary of Findings, Australia, 1998* (cat. no. 4430.0) and ABS data available on request.

## SELECTED SPORTS AND PHYSICAL RECREATION ACTIVITIES

A major aim of ABS surveys about sports and physical recreation participation is to find out about the wide range of physical recreation activities that people undertake. This section presents summary information for the top ten sports and physical recreation activities participated in by adults and children. More detailed information about the many other sports and physical recreation activities in which people participate can be found in the survey-specific publications.

### Adults aged 18 years and over

During the 12 months prior to interview in 2002, Walking for exercise attracted the largest number of both male and female participants. However, a much larger percentage of females participated in Walking for exercise than did males (32.9% compared with 17.5%). A larger proportion of females than males participated in Walking for exercise for all age groups except persons aged 65 years and over, where 26.9% of males participated compared with 23.7% of females.

Aerobics/fitness, Swimming, Cycling, Tennis and Running were amongst the top ten activities participated in by both males and females. There were, however, some marked differences in participation rates for some of these activities. More females participated in Aerobics/fitness (13.0% compared with 8.8%) and Swimming (11.8% compared with 9.9%). On the other hand, more males played Tennis (7.6% compared with 6.1%), went Cycling (7.3% compared with 4.2%) and participated in Running (6.1% compared with 3.0%).

Many more females participated in Netball (5.3% of females), Yoga (3.6%), and Dancing (2.8%) than males. Bushwalking was an activity that was amongst the top ten for females, with 3.3% participating. However, a similar proportion of males (3.1%) also participated in bushwalking even though this was not amongst their top ten activities. Many more males participated in Golf (12.4% of males), Fishing (6.1%), Cricket (4.7%) and Soccer (4.4%) than females.

Adults aged 18 years and over *continued***1.5 ADULT PARTICIPATION IN SPORTS AND PHYSICAL RECREATION ACTIVITIES(a)—2002**

	<i>Number</i>	<i>Participation</i>
	'000	%
MALES		
Walking for exercise	1 225.2	17.5
Golf	890.3	12.4
Swimming	708.4	9.9
Aerobics/fitness	632.3	8.8
Tennis	544.5	7.6
Cycling	524.0	7.3
Running	440.9	6.1
Fishing	437.5	6.1
Cricket (outdoor)	340.8	4.7
Soccer (outdoor)	318.9	4.4
FEMALES		
Walking for exercise	2 407.9	32.9
Aerobics/fitness	953.2	13.0
Swimming	867.4	11.8
Tennis	443.4	6.1
Netball	389.4	5.3
Cycling	305.6	4.2
Yoga	266.2	3.6
Bush walking	240.1	3.3
Running	221.9	3.0
Dancing	206.4	2.8

(a) Relates to persons aged 18 years and over who participated in physical activities for recreation, exercise or sport as players during the 12 months prior to interview.

Source: *Participation in Sport and Physical Activities, Australia, 2002* (cat. no. 4177.0).

**Children aged 5–14 years**

During the 12 months ending April 2000, 265,000 or 19.6% of boys aged between 5 and 14 years participated in outdoor soccer outside of school hours. Other organised sports in which many boys participated were Swimming (177,000 or 13.1%), Australian Rules football (170,300 or 12.6%) and outdoor cricket (133,600 or 9.9%).

The organised sport participated in by the largest number of girls was Netball with 234,900 or 18.2%, followed by Swimming with 203,100 or 15.8%.

Although a higher proportion of boys than girls participated in organised sport (66.1% compared with 52.3%), the girls participation rate for some organised sports was significantly higher than that for boys. Examples include Gymnastics (4.3% of girls compared with 0.9% of boys) and Swimming (15.8% of girls compared with 13.1% of boys).

Children aged 5–14 years *continued*

While these data show that more boys participated in organised sports outside school hours, this does not necessarily indicate that boys are more physically active than girls. Other physical recreation activities, which are not classified as organised sports, should also be considered. For example, the 2000 Survey of Children's Participation in Culture and Leisure Activities found that organised dancing, a cultural activity rather than a sport activity, attracted participation by a much higher proportion of girls (19.5%) than boys (1.7%).

Children also participate in non-organised physical recreation activities such as bike riding, skateboarding, backyard ball games, running games and playing at a playground or recreation park. The children's participation survey asked about selected physical recreation activities and found that 63.8% of children aged 5–14 years (71.1% of boys and 56.2% of girls) rode a bike outside of school hours in the previous two weeks, while skateboarding or rollerblading was undertaken by 30.9% of children in the previous two weeks (35.6% of boys and 26.1% of girls).

**1.6 CHILDREN'S PARTICIPATION IN SELECTED ORGANISED SPORTS(a)—2000**

	<i>Number</i>	<i>Participation rate</i>
	'000	%
MALES		
Soccer (outdoor)	265.0	19.6
Swimming	177.0	13.1
Australian Rules football	170.3	12.6
Cricket (outdoor)	133.6	9.9
Tennis	124.8	9.2
Basketball	119.6	8.8
Rugby League	92.5	6.8
Martial arts	72.7	5.4
Athletics and track and field	52.2	3.9
Rugby Union	36.1	2.7
FEMALES		
Netball	234.9	18.2
Swimming	203.1	15.8
Tennis	99.1	7.7
Basketball	80.7	6.3
Gymnastics	55.1	4.3
Athletics and track and field	51.9	4.0
Soccer (outdoor)	37.3	2.9
Hockey	32.5	2.5
Martial arts	31.9	2.5
Horse riding and equestrian activities	25.4	2.0

(a) Relates to children aged 5–14 years who participated in organised sport (to a maximum of three per child) outside of school hours during the 12 months prior to interview.

Source: *Children's Participation in Cultural and Leisure Activities, Australia, April 2000* (cat. no. 4901.0).

## TRENDS IN SPORTS AND PHYSICAL RECREATION PARTICIPATION

A series of participation surveys were undertaken between 1996–97 and 1999–2000 as part of the Population Survey Monitor (PSM). Data from these surveys can be compared across time in two ways: total organised sport participation rates can be compared between 1996–97 and 1999–2000; and total participation rates (which combine organised and non-organised participation in sports and physical recreation) can be compared between 1998–99 and 1999–2000.

Table 1.7 presents data about participation by persons aged 18 years and over as players in organised sport and physical activities from 1996–97 to 1999–2000. During this period, the female organised sport participation rate was lowest in 1996–97 (23.3%) and highest in 1998–99 (26.4%). The male organised sport participation rate increased significantly between 1996–97 and 1998–99, rising from 29.7% to 34.2%.

The gap between organised sport participation rates for males and females increased significantly between 1996–97 and 1999–2000. In 1996–97 the male organised participation rate was 6.4 percentage points higher than that for females, while in 1999–2000 it was 8.7 percentage points higher.

### 1.7 PARTICIPANTS IN ORGANISED SPORT AND PHYSICAL RECREATION(a)—1996–97 to 1999–2000

	Number '000	Participation rate %
MALES		
1996–97	1 917.3	29.7
1997–98	2 063.3	31.4
1998–99	2 285.2	34.2
1999–00	2 267.0	33.3
FEMALES		
1996–97	1 559.6	23.3
1997–98	1 717.5	25.3
1998–99	1 820.8	26.4
1999–00	1 719.6	24.6
PERSONS		
1996–97	3 476.8	26.5
1997–98	3 780.8	28.3
1998–99	4 106.1	30.3
1999–00	3 986.6	28.9

(a) Relates to persons aged 18 years and over who participated in organised sport or physical activity as players during the 12 months prior to interview in the year shown.

Source: *Participation in Sport and Physical Activities, Australia, 1999–2000* (cat. no. 4177.0).

TRENDS IN SPORTS AND PHYSICAL RECREATION PARTICIPATION *continued*

Table 1.8 compares data about participation in sports and physical recreation between 1998–99 and 1999–2000. The number of persons aged 18 years and over participating decreased between 1998–99 and 1999–2000, falling from 8.1 million (59.4%) to 7.5 million (54.7%). In both years, the participation rate for males was higher than that for females.

**1.8 PARTICIPANTS IN SPORT AND PHYSICAL RECREATION(a)—1998–99 and 1999–2000**

	<i>Number</i>	<i>Participation</i>
	'000	%
MALES		
1998–99	4 183.5	62.6
1999–00	3 979.0	58.5
FEMALES		
1998–99	3 878.8	56.3
1999–00	3 562.7	50.9
PERSONS		
1998–99	8 062.3	59.4
1999–00	7 541.7	54.7

(a) Relates to persons aged 18 years and over who participated in sport or physical activity as players during the 12 months prior to interview in the year shown.

Source: *Participation in Sport and Physical Activities, Australia, 1999–2000* (cat. no. 4177.0).

## PARTICIPATION IN EXERCISE

The National Health Survey (NHS) has collected comparable information on participation in exercise (walking, moderate exercise and vigorous exercise) for Australians aged 18 years and over in 1989–90, 1995 and 2001. These data relate to participation in exercise in the two weeks prior to interview. Participation in exercise does not provide an indication of the number of Australians who participated in 'sufficient' levels of exercise to benefit their health. The data relating to participation in exercise include all persons who participated in low, moderate or high levels of exercise. The majority of persons classified as sedentary undertook no exercise. However, this category also includes a small number of persons who had done some exercise but so little as to still be considered sedentary (less than 2% of the population were in this situation).

According to the NHS, between 1989–90 and 2001, the percentage of persons aged 18 years and over participating in exercise increased from 62.5% to 68.5%. Most of this increase was attributable to more people participating in low level exercise. Participation in low level exercise increased from 33.2% to 37.9%. There was little change in the percentage of persons participating in exercise at moderate or high levels.

PARTICIPATION IN EXERCISE *continued*

In 2001, 65.0% of males and 73.6% of females were classified as having a sedentary or low exercise level. Only 8.8% of males and 3.9% of females were classified as having a high level of exercise.

**1.9 EXERCISE LEVEL(a)(b), By sex—1989–90, 1995 and 2001**

	1989–90	1995	2001
<i>Exercise level</i>	%	%	%
MALES			
Sedentary	37.2	35.0	30.9
Low	29.4	31.3	34.1
Moderate	25.0	25.9	26.1
High	8.5	7.9	8.8
<i>Total</i>	<i>100.0</i>	<i>100.0</i>	<i>100.0</i>
FEMALES			
Sedentary	37.5	35.2	32.0
Low	37.0	38.9	41.6
Moderate	21.8	22.0	22.5
High	3.7	3.9	3.9
<i>Total</i>	<i>100.0</i>	<i>100.0</i>	<i>100.0</i>
PERSONS			
Sedentary	37.5	35.2	31.5
Low	33.2	35.1	37.9
Moderate	23.2	23.8	24.2
High	6.1	5.9	6.4
<i>Total</i>	<i>100.0</i>	<i>100.0</i>	<i>100.0</i>

(a) Relates to persons aged 18 years and over during the two weeks prior to interview in the year shown.

(b) This table contains age standardised percentages, which are those which would have prevailed should the actual population have the standard age composition. The standard population used is the population at 30 June 2001 based on the 2001 Census of Population and Housing, adjusted for the scope of the survey. Such standardisation enables comparisons over time or across population groups.

Source: *National Health Survey, Summary of Results, 2001* (cat. no. 4364.0).

## Indigenous adults aged 18 years and over

Information from the National Health Survey relating to exercise for Indigenous Australians is only available for those living in non-remote areas. During the two weeks prior to interview in 2001, 57% of Indigenous adults living in non-remote areas participated in exercise (including low, moderate and high levels of exercise), and this was considerably lower than the 70% of all Australians who participated in exercise. The main difference in participation related to low levels of exercise, where 39% of all Australians had undertaken low levels of exercise, compared with 30% of the Indigenous population in non-remote areas. There was no difference in the proportion who participated in moderate levels of exercise, and the proportions who participated in high levels of exercise were also very similar. However, it is not possible to draw firm conclusions about the results for participation in high levels of exercise due to the unreliability of that estimate for the Indigenous population.

**1.10 EXERCISE LEVEL, By Indigenous status(a)(b)(c)—2001**

	<i>Indigenous</i>	<i>Non-Indigenous</i>
<i>Exercise level</i>	%	%
Sedentary	43	30
Low	30	39
Moderate	24	24
High	*4	6
<b>Total</b>	<b>100</b>	<b>100</b>

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

(a) Relates to persons aged 18 years and over during the two weeks prior to interview.

(b) Age standardisation techniques have been used to remove the effect of the differing age structures in the Indigenous and non-Indigenous populations. The age standardised estimate of prevalence is that which would have prevailed had the Indigenous and non-Indigenous populations had the standard age composition (i.e. the total Australian population at 30 June 2001 based on the 2001 Census of Population and Housing, adjusted for the scope of the survey).

(c) Data relates to persons in non-remote areas. Non-remote areas are those that lie within the 'Major cities of Australia', the 'Inner Regional Australia' and the 'Outer Regional Australia' categories of the *Australian Standard Geographical Classification (ASGC) 2001*, cat. no. 1216.0) Remoteness Structure.

Source: *National Health Survey: Aboriginal and Torres Strait Islander Results, Australia, 2001* (cat. no. 4715.0).

## CHAPTER 2

## TIME SPENT .....

### INTRODUCTION

The Time Use Survey, conducted in 1992 and 1997, collected information on the daily activity patterns of Australians aged 15 years and over. This Chapter examines how people spend their free time using data from the 1997 Time Use Survey. Free time is the time remaining after time devoted to essential activities (such as personal hygiene, paid work, housework etc.) has been deducted from a person's day. Free time spent on Sport and outdoor activity is compared with time spent on other activities. The Time Use Survey defined Sport and outdoor activity as including formal and informal sport, exercise, walking, fishing, hiking and holidays/travel. While most of these are sports and physical recreation activities, the inclusion of holidays and travel does not align with the definitions of sports and physical recreation from data sources presented in Chapter 1. Although many holiday and travel activities include sports or physical recreation (particularly walking for recreation and swimming at the beach), this is not necessarily the case.

Data from the Time Use Survey has been published in *How Australians Use Their Time* (cat. no. 4153.0). Further detail on time spent on culture and leisure activities was released in the brochure *Time Use on Culture/Leisure Activities, 1997* (cat. no. 4173.0). Data are available for 'all persons' and 'participants'. 'All persons' refers to everyone in the Australian population aged 15 years and over, while 'participants' refers to those respondents who reported some time spent on a specific activity.

### TIME SPENT BY ALL PERSONS

The 1997 Time Use Survey found that, on average, Australians aged 15 years and over spent 5 hours 16 minutes (or 21.9%) of each day on free time as the main activity. Males had 24 minutes more free time than females.

Overall, most free time was spent on Recreation and leisure (85.8% or 4 hours 31 minutes per day) leaving 14.2% or 45 minutes for Social and community interaction. Almost half (48.3% or 2 hours 11 minutes) of Recreation and leisure time was spent on Audio/visual media. In comparison, 10% (27 minutes) of Recreation and leisure time was spent on Sport and outdoor activity. Males tended to spend more time on Sport and outdoor activity than females (33 minutes compared with 20 minutes).

TIME SPENT BY ALL PERSONS *continued***2.1 AVERAGE TIME SPENT ON FREE TIME ACTIVITIES, Main activities by sex, All persons(a)—1997**

<i>Purpose of activities</i>	<i>Males</i>	<i>Females</i>	<i>Persons</i>
	minutes per day	minutes per day	minutes per day
Social and community interaction	43	48	45
Socialising	11	11	11
Visiting entertainment and cultural venues	5	6	5
Attendance at sports events	2	1	2
Religious activities/ritual ceremonies	4	5	5
Other	20	24	22
Recreation and leisure	286	257	271
Sport and outdoor activity	33	20	27
Games/hobbies/arts/crafts	17	15	16
Reading	24	26	25
Audio/visual media	145	118	131
Attendance at recreational courses	1	1	1
Talking (incl. phone)	27	44	35
Other	38	32	34
<b>Total free time</b>	<b>329</b>	<b>305</b>	<b>316</b>

(a) Refers to persons aged 15 years and over on a single day.

Source: *Time Use on Culture/Leisure Activities, 1997* (cat. no. 4173.0).

The Time Use Survey collected data about time spent on 'main activities' and time spent on 'all activities'. *Main activities* are those activities reported as the main activity in a particular time period. In contrast, *all activities* include those activities that were undertaken simultaneously with a main activity in a specified period. Respondents could record up to two activities as being undertaken in the same time period (i.e. simultaneously). When time spent on simultaneous activities was also taken into account it was found that Australians spent more time on some activities, such as Audio/visual media and Talking, than they did when only main activities were considered. However, time spent on Sport and outdoor activity increased only by one minute on average. This means that Sport and outdoor activity is only rarely undertaken as other than a main activity.

## TIME SPENT BY PARTICIPANTS

While 99.1% of Australians aged 15 years and over had participated in Recreation and leisure activity in their free time, only 27.1% had participated in Sport and outdoor activity. More males (29.8%) participated in Sport and outdoor activity than females (24.5%).

Table 2.2 shows the average time that participants spent on selected free time activities. The Time Use Survey results relate to the number of persons participating in activities on a single day and are derived from data that take into account all days of the week and all seasons of the year. Other surveys, cited in Chapter 1, ask about participation in sports and physical recreation during a 12-month period, and hence those participation rates tend to be higher.

TIME SPENT BY PARTICIPANTS *continued*

According to the Time Use Survey, participants who spent time on Sport and outdoor activity did so for 1 hour 43 minutes per day on average. This accounted for 20.4% of time spent on Recreation and leisure.

**2.2 AVERAGE TIME SPENT ON FREE TIME ACTIVITIES, All activities by sex, Participants(a)—1997**

<i>Purpose of activities</i>	<i>Males</i>	<i>Females</i>	<i>Persons</i>
	minutes per day	minutes per day	minutes per day
Social and community interaction	98	90	94
Socialising	118	96	106
Visiting entertainment and cultural venues	129	114	120
Attendance at sports events	164	133	150
Religious activities/ritual ceremonies	103	85	92
Recreation and leisure	508	502	505
Sport and outdoor activity	117	87	103
Games/hobbies/arts/crafts	107	103	105
Reading	79	73	76
Audio/visual media	277	265	271
Attendance at recreational courses	150	105	123
Talking (incl. phone)	157	167	162

(a) Refers to persons aged 15 years and over on a single day.

Source: *Time Use on Culture/Leisure Activities, 1997* (cat. no. 4173.0).

In 1997, participants spent an average of 2 hours 27 minutes per day on formal sport—organised sport undertaken with a club or as a competition, or with a commitment to skill development, including practice and training. In comparison, participants spent an average of 2 hours 3 minutes each day on informal sport—sport undertaken for recreation or socialising rather than with the commitment needed for competitive sport.

**2.3 AVERAGE TIME SPENT ON SPORT AND OUTDOOR ACTIVITIES, All activities by sex, Participants(a)—1997**

	<i>Males</i>	<i>Females</i>	<i>Persons</i>
	minutes per day	minutes per day	minutes per day
Sport formal	155	129	147
Sport informal	131	104	123
Exercise	64	55	60
Walking	61	53	57
Hiking	93	66	79
Fishing	249	196	239
Holiday travel, driving for pleasure	151	148	150

(a) Refers to persons aged 15 years and over on a single day.

Source: *Time Use on Culture/Leisure Activities, 1997* (cat. no. 4173.0).

## INTRODUCTION

The staging of sports events generates important economic benefits, as well as contributing to a sense of community identity and culture. A range of ABS data can be used to estimate income and expenditure associated with sports events. For example, Australian households spent \$271.1m on Spectator admission fees to sport in 1998–99 (see Chapter 4). In addition, sports industries earned \$346.5m from Admission charges in 2000–01, although this could include admission for participation as well as attendance (see Chapter 8). The Sydney 2000 Olympic and Paralympic Games organising committees earned \$642m in Admission charges for these major events during 2000–01.

This Chapter provides data on the number and characteristics of persons attending sporting events. The information draws on a number of data sources that are briefly discussed below.

The GSS collected sports attendance data during March to July 2002 from persons aged 18 years and over, and used the same questions as those asked in the Survey of Sports Attendance. Attendance data from the GSS has been published in *Sports Attendance, Australia, 2002* (cat. no. 4174.0).

The Survey of Sports Attendance was run as a supplement to the Monthly Labour Force Survey in 1995 and 1999 and asked persons aged 15 years and over about their attendance at sports events in the previous 12 months. Data from this survey have been published in editions of *Sports Attendance, Australia* (cat. no. 4174.0).

The 1998 Survey of Disability Ageing and Carers obtained information regarding whether persons aged 5 years and over with a disability had attended a sports event away from home in the previous 12 months. Data from this survey have been published in *Disability, Ageing and Carers: Summary of Findings, Australia, 1998* (cat. no. 4430.0).

The Bureau of Tourism Research regularly collects information from overseas visitors and Australian residents aged 15 years and over, including data relating to the purpose of their trip and whether they attended a sports event during their visit. Data from the 2002 surveys are included in this Chapter. Results are published on a quarterly and calendar year basis in the following publications:

*Travel by Australians—Results of the National Visitor Survey*  
*Travel by Australians—Quarterly Results of the National Visitor Survey*  
*International Visitors in Australia—Results of the International Visitor Survey*  
*International Visitors in Australia—Quarterly Results of the International Visitor Survey.*

INTRODUCTION *continued*

The Time Use Survey, conducted in 1992 and 1997, collected detailed information about the daily activity patterns of persons in Australia aged 15 years and over. Data from this survey have been published in editions of *How Australians Use Their Time* (cat no. 4153.0) and *Time use on Culture/Leisure Activities, 1997* (cat. no. 4173.0).

When comparing data from different sources it is important to take into consideration the scope and methodology of the surveys. These issues are noted throughout the Chapter where such comparisons are made.

## CHARACTERISTICS OF PERSONS ATTENDING SPORTS EVENTS

Different surveys provide data relating to attendance at sports events for different populations within the Australian community. Data are presented here for adults aged 18 years and over; persons aged 5 years and over with a disability; and interstate and international visitors aged 15 years and over.

## Adults aged 18 years and over

During the 12 months prior to interview in 2002, 7.0 million or 48.2% of Australians aged 18 years and over attended at least one sports event. More males (4.0 million or 56.0%) attended than females (3.0 million or 40.7%).

The attendance rate at sports events was highest for persons aged 18–24 years and declined across the age groups. Attendance rates varied among the states and territories, ranging from 43.7% in New South Wales to 56.7% in the Northern Territory (in predominantly urban areas only).

The attendance rate at sports events was higher for persons employed full-time (62.2%) than persons employed part-time (51.0%), unemployed persons (42.8%) and persons not in the labour force (27.4%).

Adults aged 18 years and over *continued***3.1 ADULT ATTENDANCE AT SPORTS EVENTS(a), Characteristics of attendants—2002**

	NUMBER.....			ATTENDANCE RATE.....		
	<i>Males</i>	<i>Females</i>	<i>Persons</i>	<i>Males</i>	<i>Females</i>	<i>Persons</i>
	'000	'000	'000	%	%	%
<b>Age group (years)</b>						
18–24	676.9	552.6	1 229.4	69.8	59.1	64.5
25–34	983.7	696.3	1 680.0	67.6	47.9	57.8
35–44	903.0	694.2	1 597.2	61.9	47.1	54.5
45–54	732.5	542.3	1 274.8	55.4	41.0	48.2
55–64	446.3	295.8	742.1	46.9	31.7	39.4
65 and over	274.2	197.7	471.9	26.9	16.3	21.2
<b>State or territory</b>						
New South Wales	1 262.7	875.7	2 138.3	52.1	35.4	43.7
Victoria	1 085.2	805.2	1 890.3	60.1	43.3	51.6
Queensland	700.2	565.0	1 265.3	52.2	41.5	46.8
South Australia	328.9	259.2	588.1	59.0	45.0	51.9
Western Australia	438.3	324.5	762.7	61.6	45.5	53.5
Tasmania	93.5	68.8	162.3	55.7	38.8	47.0
Northern Territory(b)	33.8	26.0	59.8	61.3	51.5	56.7
Australian Capital Territory	73.9	54.7	128.6	64.7	46.8	55.7
<b>Region</b>						
Capital city(c)	2 628.4	1 900.8	4 529.2	56.4	39.6	47.9
Other	1 388.1	1 078.1	2 466.3	55.1	42.7	48.9
<b>Labour force status</b>						
Employed						
Full-time	2 901.0	1 202.8	4 103.8	65.7	55.2	62.2
Part-time	440.5	935.8	1 376.3	58.6	48.1	51.0
Unemployed	142.1	101.0	243.0	46.0	38.9	42.8
Not in the labour force	533.0	739.4	1 272.4	31.3	25.1	27.4
<b>Total</b>	<b>4 016.6</b>	<b>2 978.9</b>	<b>6 995.5</b>	<b>56.0</b>	<b>40.7</b>	<b>48.2</b>

(a) Relates to persons aged 18 years and over during the 12 months prior to interview.

(b) Refers to mainly urban areas only.

(c) Excludes Canberra and Darwin.

Source: *Sports Attendance, Australia, 2002* (cat. no. 4174.0).**Persons with a disability**

During the 12 months prior to interview in 1998, 952,800 or 28.2% of persons aged 5 years and over with a disability attended at least one sports event. Disability was defined as any limitation, restriction or impairment, which had lasted, or was likely to last, for at least six months and restricted everyday activities. As with the general adult population, more males (32.8%) attended a sports event than did females (23.4%). Of the 952,800 persons with a disability who had attended a sports event, 311,500 (32.7%) stated that it was the main activity they had participated in away from home.

Persons with a disability *continued*

The overall sport attendance rate for persons aged 5 years and over with a disability during the 12 months prior to interview in 1998 (28.2%) was lower than that for the general adult population aged 18 years and over during the 12 months prior to interview in 2002 (48.2%). In addition to being derived from data sources which are four years apart in time, these attendance rates are not directly comparable because they relate to populations spanning different age groups and with different age distributions. For example, 33.9% of persons with a disability were aged 65 years and over compared with 12.2% in the general adult population. A higher proportion of older persons in a population may result in a lower sports attendance rate, since only 21.2% of persons aged 65 years and over in the general adult population had attended a sports event in the 12 months prior to interview in 2002.

**3.2 ATTENDANCE AT SPORTS EVENTS(a), By disability status and sex—1998**

	<i>Profound core activity(b) restriction</i>	<i>Severe core activity(b) restriction</i>	<i>Moderate core activity(b) restriction</i>	<i>Mild core activity(b) restriction</i>	<i>Schooling or employment restriction</i>	<i>All with specific restrictions(c)</i>	<i>All with disability(d)</i>
NUMBER ('000)							
Males	35.6	89.9	84.1	172.1	313.3	462.8	568.0
Females	19.1	71.4	69.3	108.5	199.9	321.5	384.8
Persons	54.7	161.2	153.4	280.6	513.2	784.3	952.8
ATTENDANCE RATE (%)							
Males	22.1	33.6	25.1	32.3	34.5	31.1	32.8
Females	9.2	24.2	21.8	21.9	26.6	22.1	23.4
Persons	14.8	28.6	23.5	27.3	30.9	26.7	28.2

(a) Refers to persons aged 5 years and over, living in households only, who attended a sports event as a spectator away from home during the 12 months prior to interview.

(b) Core activities comprise communication, mobility and self care.

(c) Total may be less than the sum of the components as persons may have both a core activity restriction and a schooling or employment restriction.

(d) Includes those who do not have a specific restriction.

Source: *Disability, Ageing and Carers: Summary of Findings, Australia, 1998* (cat. no. 4430.0) and ABS data available on request.

## Australian residents travelling within Australia

During 2002 it was estimated that, among Australians aged 15 years and over, there were 75,339 who went on an overnight trip, and 142,133 who went on a day trip, within Australia. The Bureau of Tourism Research defines overnight travel as a stay away from home of at least one night at a place at least 40 km from home. A day trip is defined as travel for a round trip distance of at least 50 km, and of at least 4 hours duration, which does not incorporate a night away from home.

From the travellers interviewed, it was estimated that 2,696 or 3.6% had attended an organised sports event while on an overnight trip and 3,526 or 2.5% had attended an organised sports event while on a day trip. The Bureau of Tourism Research further estimated that for 1.4% of overnight travellers (1,038 persons), and 2.2% of day travellers (3,058 persons), attending an organised sports event was a purpose of their travel.

## International visitors to Australia

The Bureau of Tourism Research estimated that, in 2002, there were 4.5 million international visitors to Australia aged 15 years and over. Visitors surveyed had stayed in Australia for less than 12 months and were interviewed when departing from major Australian airports (Sydney, Melbourne, Cairns, Perth, Adelaide and Darwin). From the survey interviews, it was estimated that 302,497 or 7.4% had attended an organised sports event while in Australia. It was further estimated that, for 0.9% of international visitors to Australia, attending an organised sports event was a purpose of their travel.

## ATTENDANCE AT SELECTED SPORTS

In 2002, Australian Rules football was the sport most attended by both males (1.5 million or 21.0%) and females (1.0 million or 13.4%) aged 18 years and over. The top ten sports with the highest attendance rates were the same for males and females, albeit in a slightly different order (see table 3.3). Nevertheless, for all sports, the attendance rate for females was consistently lower than that for males.

The second most highly attended sport overall was Horse racing, with 1.1 million males (14.8%), and 802,600 females (11.0%), attending. Motor sports was attended by almost twice as many males (993,300 or 13.8%) than females (480,100 or 6.6%). Rugby League was attended by 951,400 males (13.3%) and 513,200 females (7.0%).

**3.3 ADULT ATTENDANCE AT SELECTED SPORTS(a)—2002**

	<i>Number</i>	<i>Attendance</i>
	'000	%
MALES		
Australian Rules football	1 503.9	21.0
Horse racing	1 062.6	14.8
Motor sports	993.3	13.8
Rugby League	951.4	13.3
Cricket (outdoor)	635.2	8.9
Soccer (outdoor)	519.3	7.2
Rugby Union	469.7	6.5
Harness racing	318.9	4.4
Basketball	226.0	3.1
Tennis	192.5	2.7
FEMALES		
Australian Rules football	982.0	13.4
Horse racing	802.6	11.0
Rugby League	513.2	7.0
Motor sports	480.1	6.6
Soccer (outdoor)	282.6	3.9
Cricket (outdoor)	231.0	3.2
Basketball	208.4	2.8
Rugby Union	203.9	2.8
Tennis	201.0	2.7
Harness racing	189.4	2.6

(a) Relates to persons aged 18 years and over during the 12 months prior to interview.

Source: *Sports Attendance, Australia, 2002* (cat. no. 4174.0).

## TRENDS IN SPORTS ATTENDANCE OVER TIME

Comparable data on sports attendance is available for 1995, 1999 and 2002, for persons aged 18 years and over. The top ten sports for all of these years were as presented in table 3.4, although in a different order each year.

The number of Australians aged 18 years and over attending a sports event (excluding motor sports) increased from 5.6 million in 1995 to 6.5 million in 2002. Over this period, there was a large increase in the number of persons attending Australian Rules football (from 1.7 million to 2.5 million) and Rugby Union (from 329,900 to 673,600). Conversely, there was a decrease in the number of persons attending outdoor cricket matches and competitions between 1995 and 2002 (falling from 1.1 million to 866,200).

## 3.4 ATTENDANCE AT SELECTED SPORTS(a)(b)—1995, 1999 and 2002

	NUMBER.....			ATTENDANCE RATE.....		
	1995 '000	1999 '000	2002 '000	1995 %	1999 %	2002 %
Australian Rules football	1 746.9	2 330.7	2 486.0	13.1	16.5	17.1
Horse racing	1 632.2	1 698.8	1 865.2	12.3	12.8	12.9
Motor sports(c)	406.3	1 416.0	1 473.4	3.1	10.1	10.2
Rugby League	1 315.7	1 371.9	1 464.6	9.9	9.7	10.1
Cricket (outdoor)	1 063.9	870.7	866.2	8.0	6.2	6.0
Soccer (outdoor)	503.4	563.3	801.9	3.8	4.0	5.5
Rugby Union	329.9	417.8	673.6	2.5	3.0	4.6
Harness racing	553.3	508.4	508.3	4.2	3.6	3.5
Basketball	576.0	461.6	434.4	4.3	3.3	3.0
Tennis	401.8	404.3	393.5	3.0	2.9	2.7
<b>Total sports (excl. motor sports)(d)(e)</b>	<b>5 599.3</b>	<b>5 964.1</b>	<b>6 496.2</b>	<b>42.1</b>	<b>43.1</b>	<b>44.8</b>

(a) Data relates to persons aged 18 years and over during the 12 months prior to interview in the year shown.

(b) Data are presented for the ten main sports attended in 2002.

(c) The increase in motor sport attendances needs to be interpreted with caution because a specific question on motor sports attendance was asked in 1999 and 2002.

(d) Includes attendance at all sports, not just those listed above.

(e) A person attending sports events in a given year will only be counted once in the figure for Total sports, regardless of how many different sports they may have attended.

Source: *Sports Attendance, Australia, 2002* (cat. no. 4174.0).

## TIME SPENT AT SPORTS EVENTS

The 1997 Time Use Survey found that, on the day in respect of which the survey was conducted, 1.3% of the Australian population aged 15 years and over attended a sports event. The Time Use Survey looks at the number of persons participating in activities on a single day, and this explains why the rate is very much lower than the participation rates presented earlier in this Chapter for attendance during a 12-month period. However, persons who attended sports events on the survey reference day spent, on average, 2 hours 30 minutes on this activity. On average, males spent more time at sports events than females (2 hours 44 minutes compared with 2 hours 13 minutes).

# CHAPTER 4

## EXPENDITURE BY HOUSEHOLDS .....

### INTRODUCTION

This Chapter presents information about the expenditure by households on sports and physical recreation. Expenditure data have been obtained from two sources: the 1998–99 Household Expenditure Survey and the 1996–97 Population Survey Monitor.

The Household Expenditure Survey collected information about expenditure by households resident in private dwellings and used the Household Expenditure Classification (HEC) to categorise the products purchased. The product categories included in this Chapter as relating to sports and physical recreation are those which most closely align with one or more sports and physical recreation product classes as defined in the ACLC Product Classification.

Because there is not an exact match between categories of the HEC and those of the ACLC Product Classification, there are some instances of individual products which are out of scope of the ACLC being included, and in-scope products being excluded. For example, sports bags, gun oil and powder scales are all classed as sports and physical recreation equipment in the HEC but are out of scope of the ACLC Product Classification. On the other hand, skipping ropes and skateboards are classed as sports and physical recreation equipment in the ACLC Product Classification, but are part of Recreation and education equipment n.e.c. (which relates mainly to other leisure) in the HEC.

During 1996–97, the PSM collected data regarding expenditure on individual organised sports and physical activities by persons aged 15 years and over during the preceding 12 months. Although relating only to organised activities, the data identify areas of sports and physical recreation expenditure, such as clothing and transport, which are not identifiable from the Household Expenditure Survey. The 1996–97 PSM was the last for which expenditure data were collected.

### HOUSEHOLD EXPENDITURE SURVEY 1998–99

The average weekly household expenditure on selected sports and physical recreation products during 1998–99 was \$11.03. This was 1.6% of the average of \$700.10 spent each week on all products (table 4.1).

About half (48.1% or \$5.30 per week) of sports and physical recreation expenditure was for Sports and physical recreation services. A further 39.8% (\$4.39 per week) was spent on Sports, physical recreation and camping equipment, while the remaining 12.1% (\$1.33 per week) went on Sports and recreation vehicles.

The individual categories of sports and physical recreation products for which average weekly expenditure was highest were Sports facility hire charges at \$2.07; Swimming pools at \$1.29; and Boats, their parts and accessories at \$1.21.

HOUSEHOLD EXPENDITURE SURVEY 1998–99 *continued*

Of the total expenditure by Australian households in 1998–99, \$4,096.4m (1.6%) was spent on selected sports and physical recreation goods and services. Of this expenditure, \$1,968.3m was on Sports and physical recreation services; \$1,630.4m on Sports, physical recreation and camping equipment; and \$493.9m on Sports and recreation vehicles.

#### 4.1 EXPENDITURE ON SELECTED SPORTS AND PHYSICAL RECREATION PRODUCTS BY AUSTRALIAN HOUSEHOLDS—1998–99

	Average household expenditure	Total household expenditure	Number of households reporting expenditure(a)
	\$/week	\$m/year	'000
<b>Sports and recreation vehicles</b>			
Bicycles	0.12	44.6	(b)111.5
Boats, their parts and accessories	*1.21	*449.4	(c)96.9
<i>Total</i>	*1.33	*493.9	202.4
<b>Sports, physical recreation and camping equipment</b>			
Camping equipment	*0.33	*122.6	59.1
Fishing equipment	0.42	156.0	251.0
Golf equipment	0.24	89.1	102.1
Sports or physical recreation footwear	1.03	382.5	246.1
Swimming pools	1.29	479.1	(b)50.7
Other sports and physical recreation equipment	1.08	401.1	360.3
<i>Total</i>	4.39	1 630.4	946.7
<b>Sports and physical recreation services</b>			
Hire of sports equipment	*0.12	*44.6	65.0
Health and fitness studio charges	0.55	204.3	202.0
Sporting club subscriptions	0.96	356.5	186.8
Spectator admission fees to sport	0.73	271.1	362.3
Sports facility hire charges	2.07	768.8	1 373.7
Sports lessons	0.87	323.1	268.3
<i>Total</i>	5.30	1 968.3	1 931.2
<b>Total expenditure on selected sports and physical recreation products</b>	<b>11.03</b>	<b>4 096.4</b>	<b>2 556.1</b>
Total expenditure on all products(d)	700.10	260 006.4	7 121.8

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

(a) Households reporting expenditure in the two-week enumeration period unless otherwise noted.

(b) Households reporting expenditure in the 12 months prior to interview.

(c) Households reporting expenditure in the 12 months or two weeks prior to interview for different commodities within this category.

(d) This expenditure is slightly larger than that shown in the equivalent table for other leisure products in Chapter 12. This is because it includes in-ground swimming pools. Expenditure on these is usually excluded from household expenditure on products and instead treated separately as part of capital housing costs.

Source: ABS data available on request, Household Expenditure Survey, 1998–99.

HOUSEHOLD EXPENDITURE SURVEY 1998–99 *continued*

Table 4.2 presents a comparison of both average weekly and total annual expenditures on sports and physical recreation products at constant prices for 1993–94 and 1998–99. To enable this comparison, the expenditure data for 1993–94 have been converted to 1998–99 prices using the Consumer Price Index (CPI).

Overall, the average weekly expenditure remained virtually unchanged. For 1993–94 the estimate was \$8.96, while for 1998–99 it was \$8.91. However, this resulted from falls in some areas of expenditure being balanced by an increase in another. Expenditure on Sports, physical recreation and camping equipment at \$2.28 was 17.4% lower in 1998–99 than the \$2.76 recorded for 1993–94. The fall for Sports and physical recreation services was 6.4% to \$5.30 from \$5.66. The balancing increase came from Sports and recreation vehicles which rose 141.8% to \$1.33 from \$0.55.

Despite average weekly household expenditure on sports and physical recreation products being virtually unchanged from 1993–94 to 1998–99, the total annual expenditure on these products by all households rose 7.0% from \$3,091.1m to \$3,309.0m. This increase came about because of a 7.6% rise in the number of households in Australia (from 6.6m in 1993–94 to 7.1m in 1998–99). By comparison, there was a 13.3% increase in total annual expenditure on all products over this period from \$229,178.8m to \$259,586.7m.

#### 4.2 EXPENDITURE ON SELECTED SPORTS AND PHYSICAL RECREATION PRODUCTS, At constant prices(a)—1993–94 and 1998–99

	AVERAGE HOUSEHOLD EXPENDITURE.....		TOTAL HOUSEHOLD EXPENDITURE.....	
	1993–94 \$/week	1998–99 \$/week	1993–94 \$/m/year	1998–99 \$/m/year
Sports and recreation vehicles	*0.55	*1.33	*188.2	*493.9
Sports, physical recreation and camping equipment(b)(c)	2.76	2.28	951.1	846.8
Sports and physical recreation services	5.66	5.30	1 951.8	1 968.3
<b>Total expenditure on selected sports and physical recreation products(b)(c)</b>	<b>8.96</b>	<b>8.91</b>	<b>3 091.1</b>	<b>3 309.0</b>
Total expenditure on all products(d)	664.28	698.97	229 178.8	259 586.7

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

(a) At 1998–99 prices.

(b) Excludes sports and leisure footwear because it was part of the general footwear expenditure item for 1993–94. However, specialist sports shoes are included.

(c) Excludes swimming pools because in-ground swimming pools were not included in the CPI in 1993–94.

(d) Excludes in-ground swimming pools because they were not included in the CPI in 1993–94. However, above-ground swimming pools are included in this total.

Source: ABS data available on request, Household Expenditure Survey, 1993–94 and 1998–99.

## POPULATION SURVEY MONITOR 1996–97

From data collected as part of the 1996–97 PSM, it was estimated that the total cost of participation in organised sports and physical activities during that year was \$2,762.6m at an average of \$693 per participant (\$13.33 per week). At \$813.9m, Clothing and equipment was the expense category contributing the most (29.5%) to the total cost. The categories Weekly fees, Membership, and Transport each accounted for about another 20% of this total.

The average cost per participant for individual sports ranged from \$129 for carpet bowls to \$1,787 for motor sports. Other relatively inexpensive activities included touch football (\$153), darts (\$158), softball (\$202) and rugby league (\$205). Other more expensive activities were horse riding (\$1,405), water skiing/powerboating (\$1,277), air sports (e.g. parachuting and hang-gliding) (\$1,259) and scuba diving (\$1,253).

POPULATION SURVEY MONITOR 1996–97 *continued*

## 4.3 EXPENDITURE ON SELECTED ORGANISED SPORTS AND PHYSICAL ACTIVITIES—1996–97

	Membership	Transport	Clothing and equipment	Weekly fees	Other	Total expenditure	Average per participant
<i>Sports and physical activities</i>	\$m	\$m	\$m	\$m	\$m	\$m	\$
Aerobics	114.5	41.9	38.8	34.7	7.3	237.1	419
Air sports	10.1	7.0	12.0	11.6	16.6	57.3	1 259
Athletics, track and field	2.0	2.4	5.2	0.7	1.4	11.7	235
Australian Rules football	6.5	16.8	16.1	3.9	5.2	48.5	323
Badminton	1.1	1.4	1.8	4.3	0.9	9.4	229
Baseball	5.9	6.8	5.5	1.8	2.2	22.2	490
Basketball	10.9	22.4	21.4	34.2	6.1	95.0	381
Billiards/snooker/pool	1.8	2.7	1.4	2.7	0.1	8.6	239
Canoeing/kayaking	1.6	4.4	4.8	0.6	0.8	12.2	419
Carpet bowls	0.4	1.5	0.8	2.6	0.2	5.6	129
Cricket (indoor)	2.5	3.1	2.7	17.1	0.9	26.3	281
Cricket (outdoor)	9.8	11.4	21.6	9.3	1.1	53.2	286
Cycling	2.6	7.8	49.0	2.6	3.4	65.4	796
Dancing	3.1	11.6	9.8	23.0	1.1	48.5	554
Darts	0.7	2.1	0.9	2.2	0.1	5.9	158
Fishing	2.7	27.2	49.3	0.6	10.2	90.1	741
Golf	152.8	41.2	120.6	93.7	21.6	429.8	955
Hockey (outdoor)	6.1	3.9	7.7	3.5	1.1	22.3	323
Horse riding	4.9	30.4	36.7	12.2	46.8	131.0	1 405
Ice/snow sports	4.9	14.2	11.8	8.2	8.3	47.4	924
Lawn bowls	16.2	19.3	25.7	34.0	6.4	101.7	374
Martial arts	17.1	10.0	8.5	19.3	6.3	61.1	370
Motor sports	11.1	32.9	60.6	12.0	66.1	182.6	1 787
Netball	13.5	32.9	17.7	38.2	23.4	125.8	386
Rugby League	2.5	2.7	6.1	2.4	1.7	15.3	205
Rugby Union	1.4	4.3	3.6	0.6	2.5	12.5	275
Sailing	12.0	8.2	38.9	3.9	6.1	69.2	940
Scuba diving	3.1	3.0	23.5	2.7	2.2	34.5	1 253
Shooting sports	12.7	20.6	41.2	11.9	7.3	93.6	995
Soccer (outdoor)	8.1	13.5	13.6	6.1	8.6	49.9	325
Softball	2.5	2.1	2.0	0.9	1.0	8.6	202
Squash/racquet ball	8.1	9.0	12.3	23.4	2.1	55.0	481
Surf sports	1.0	5.0	9.6	0.2	0.5	16.1	434
Swimming	11.1	15.8	10.2	21.0	8.4	66.4	259
Tennis	20.0	22.1	32.0	37.5	8.3	120.0	314
Tenpin bowling	2.7	7.9	4.8	50.3	1.2	66.9	416
Touch football	6.4	5.6	4.9	3.3	1.4	21.6	153
Volleyball	3.2	5.8	4.7	10.3	6.1	30.0	320
Walking	1.1	4.6	6.9	1.1	0.9	14.7	355
Waterskiing/powerboating	4.2	3.7	26.8	1.3	5.6	41.6	1 277
Weight-lifting	15.7	5.7	2.7	1.3	1.4	26.8	458
<b>All activities(a)</b>	<b>537.6</b>	<b>526.8</b>	<b>813.9</b>	<b>570.4</b>	<b>313.9</b>	<b>2 762.6</b>	<b>693</b>

(a) Includes activities not listed.

Source: *Participation in Sport and Physical Activities, Australia, 1996–97* (cat. no. 4177.0).

## INTRODUCTION

This Chapter presents information relating to employment and voluntary work in sports and physical recreation. The information has been obtained from several sources as described below.

The Census of Population and Housing is the source of information relating to a person's main job in the week before the census, that is, the one in which they usually worked the most hours. The publication *Employment in Sport and Recreation, Australia, August 2001* (cat. no. 4148.0) presents summary census data about persons employed in selected sports and physical recreation occupations as their main job. It also includes details of their industry of employment, sex, age, birthplace and origin, qualifications, income, hours worked and state or territory of usual residence.

The Survey of Employee Earnings and Hours was most recently conducted in May 2002 and 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).

The 2000–01 Service Industries Survey collected information from employing organisations in the sports industries. Data were published in *Sports Industries, Australia, 2000–01* (cat. no. 8686.0) and include details about the number of persons who were employed by, or worked voluntarily for, sports or physical recreation employing organisations, regardless of whether it was their main job.

The Survey of Involvement in Organised Sport and Physical Activity was conducted in April of each of 1993, 1997 and 2001 as part of the Monthly Population Survey. It obtained information about both paid and unpaid involvement in both playing and non-playing roles, by persons aged 15 years and over, during the 12 months prior to interview. Data for 2001 appear in *Involvement in Organised Sport and Physical Activity, Australia, April 2001* (cat. no. 6285.0).

The 2000 Voluntary Work Survey collected information about volunteering for all kinds of organisations, including those relating to sports and physical recreation. A detailed analysis of volunteers in sports and physical recreation is contained in a report which was prepared for the Standing Committee on Recreation and Sport and entitled *Australia's Sports Volunteers, 2000*. Further information can be found in the general ABS publication *Voluntary Work, Australia, 2000* (cat. no. 4441.0).

Each of the data sources mentioned above provides a different perspective on employment or voluntary work in sports and physical recreation and is examined in more detail in the following sections.

## CENSUS OF POPULATION AND HOUSING

The census offers a unique opportunity to obtain a wide range of data about sports and physical recreation employment. However, the employment figures obtained from the census for work in sports and physical recreation do not include second jobs, unpaid work, or persons usually working in a sports and physical recreation occupation but 'between jobs' during the week before census night. Also, because some types of sports and physical recreation work (e.g. football umpiring) are seasonal in nature, some persons employed in sports and physical recreation occupations will not have been recorded as such during the census period.

## Employment in sports and physical recreation occupations

Of all persons employed in the week prior to the 2001 census, 83,008 (1.0%) had their main job in a sports and physical recreation occupation. For the 1996 census the corresponding figure was 68,289 persons which was 0.9% of total employment. The increase in employment for sports and physical recreation occupations between 1996 and 2001 was 21.6%. In comparison, the increase for all occupations over the same period was 8.7%.

The sports and physical recreation occupations recording the largest numbers of persons employed in 2001 were Fitness instructors (12,364), Greenkeepers (11,928), Veterinarians (5,007), Veterinary nurses (4,858) and Recreation officers (3,842).

The majority of sports and physical recreation occupation groups showed some increase in employment between the 1996 and 2001 censuses, with nineteen of them increasing by more than 20%. The largest increases, in percentage terms, were for Outdoor adventure leaders (560.2% from 83 persons to 548 persons), Sail makers (84.3% from 235 to 433) and Fitness instructors (61.2% from 7,669 to 12,364). Fitness instructors also showed the largest growth in terms of the number of persons employed, with an increase of 4,695 persons during the period.

In comparison, there were seven sports and physical recreation occupation groups that experienced a decline in numbers between 1996 and 2001. In percentage terms, the largest falls occurred for Other sports centre managers (23.9% from 3,677 persons to 2,800 persons), Sports administrators (10.9% from 1,216 to 1,083) and Sports development officers (9.7% from 745 to 673).

In August 2001, there were more males (50,113 or 60.4%) than females (32,895 or 39.6%) employed in sports and physical recreation occupations. In comparison, of all employed persons in August 2001, 54.8% were male and 45.2% were female.

Persons employed in sports and physical recreation occupations showed a younger age profile relative to all employed persons. The 20–24 years age group had the largest number of persons employed in sports and physical recreation occupations (13,478 or 16.2%). There were considerably more younger workers employed in occupations such as Footballers, Sports umpires, Gymnastics coaches and Ticket collectors and ushers. By contrast, over 40% of those employed as Horse or dog racing officials, or as Horse breeders, were aged 50 years or over.

Employment in sports and physical recreation occupations *continued***5.1 EMPLOYMENT IN SPORTS AND PHYSICAL RECREATION OCCUPATIONS, By sex—1996 and 2001 censuses**

Occupation	1996 CENSUS.....			2001 CENSUS.....		
	Males	Females	Persons	Males	Females	Persons
Environment, parks and land care manager	1 889	447	2 336	1 823	509	2 332
Sports administrator	728	488	1 216	652	431	1 083
Horse breeder	653	476	1 129	688	541	1 229
Park ranger	1 438	257	1 695	1 255	351	1 606
Natural and physical science professionals n.e.c.	61	15	76	62	33	95
Veterinarian	2 779	1 467	4 246	2 975	2 032	5 007
Recreation officer	885	1 868	2 753	1 035	2 807	3 842
Sport and recreation managers n.f.d.	15	12	27	90	52	142
Fitness centre manager	486	417	903	626	537	1 163
Other sports centre manager	2 190	1 487	3 677	1 741	1 059	2 800
Sport and recreation managers n.e.c.	172	28	200	251	153	404
Sportspersons, coaches and related support workers n.f.d.	259	127	386	519	278	797
Jockey	705	169	874	813	311	1 124
Golfer	1 011	32	1 043	1 084	38	1 122
Footballer	986	5	991	1 377	8	1 385
Other sportsperson	1 441	450	1 891	1 965	826	2 791
Gymnastics coach	239	1 012	1 251	281	1 151	1 432
Tennis coach	1 044	312	1 356	1 419	358	1 777
Swimming coach	400	532	932	506	381	887
Horseriding coach	91	405	496	107	458	565
Other sports coach	1 727	800	2 527	1 991	887	2 878
Sports development officer	460	285	745	432	241	673
Sports umpire	1 403	558	1 961	1 840	698	2 538
Horse or dog racing official	351	32	383	365	45	410
Other sports official	60	19	79	89	35	124
Gunsmith	137	9	146	146	3	149
Farrier(a)	625	20	645	768	46	814
Animal trainer(b)	2 265	724	2 989	2 251	875	3 126
Greenkeeper(c)	11 609	300	11 909	11 637	291	11 928
Canvas good maker	282	286	568	354	257	611
Sail maker	214	21	235	398	35	433
Apprentice leather goods, canvas goods or sail maker	57	11	68	62	3	65
Boat builder and repairer(d)	2 166	47	2 213	3 153	60	3 213
Veterinary nurse	80	3 159	3 239	121	4 737	4 858
Fitness instructor(e)	2 234	5 435	7 669	3 685	8 679	12 364
Outdoor adventure leader	54	29	83	350	198	548
Ticket collector or usher	1 550	1 275	2 825	1 576	1 624	3 200
Stud hand or stable hand	1 171	1 356	2 527	1 626	1 867	3 493
<b>Total sports and physical recreation occupations</b>	<b>43 917</b>	<b>24 372</b>	<b>68 289</b>	<b>50 113</b>	<b>32 895</b>	<b>83 008</b>
Total employment	4 272 051	3 364 266	7 636 317	4 546 783	3 751 823	8 298 606

(a) Comprises Farrier and Apprentice farrier.

(b) Comprises Animal trainers n.f.d., Horse trainer and Animal trainers n.e.c..

(c) Comprises Greenkeepers n.f.d., Greenkeeper and Apprentice greenkeeper.

(d) Comprises Boat builder and repairer and Apprentice boat builder and repairer.

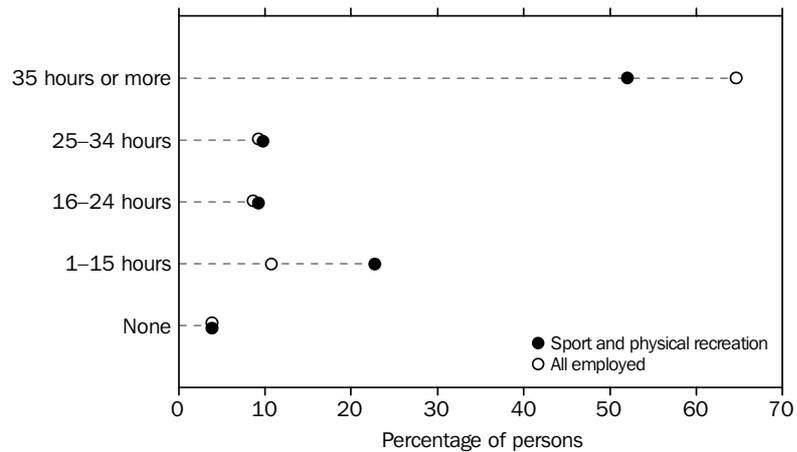
(e) Comprises Fitness instructors and related workers n.f.d. and Fitness instructor.

Source: *Employment in Sport and Recreation, Australia, August 2001* (cat. no. 4148.0).

Earnings and hours worked in sports and physical recreation occupations

The census found that, compared with persons employed in all occupations, persons employed in sports and physical recreation occupations (as their main job) were more likely to be working part-time (i.e. less than 35 hours per week). Almost two-thirds (64.6%) of persons employed in all occupations worked full-time (i.e. 35 hours and over). By comparison, only 52.0% of persons employed in sports and physical recreation occupations worked full-time. Relatively large percentages of persons employed as Sports umpires (88.8%), Gymnastics coaches (84.9%), Ticket collectors or ushers (78.9%) and Fitness instructors (74.8%) worked part-time.

5.2 HOURS WORKED PROFILE OF OCCUPATIONS

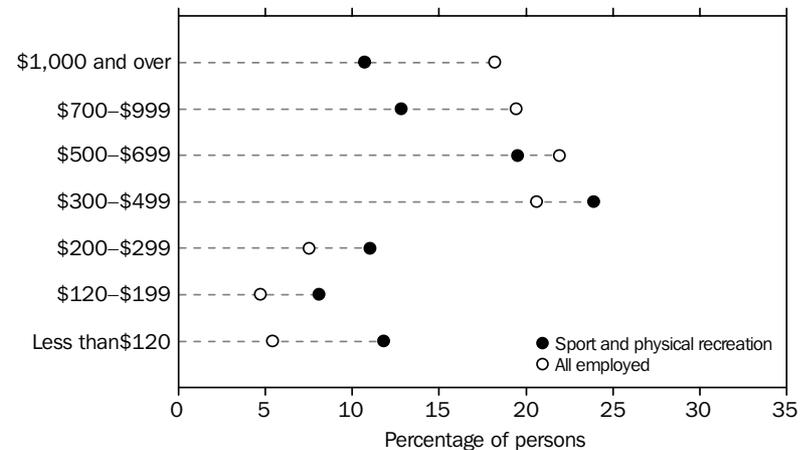


Source: *Employment in Sport and Recreation, Australia, August 2001* (cat. no. 4148.0).

Persons employed in sports and physical recreation occupations as their main job received, on average, a lower income than persons employed in all occupations. The median weekly income for sports and physical recreation occupations was \$453, compared with \$587 for all occupations. This lower income may be related to the higher incidence of part-time employment in sports and physical recreation occupations.

Over two-fifths (43.5%) of all persons employed in sports and physical recreation occupations received a gross weekly income between \$300 and \$700.

5.3 INCOME PROFILE OF OCCUPATIONS



Source: *Employment in Sport and Recreation, Australia, August 2001* (cat. no. 4148.0).

## SURVEY OF EMPLOYEE EARNINGS AND HOURS

The Survey of Employee Earnings and Hours, most recently conducted in May 2002, collects information from a sample of employers about the earnings, hours and selected characteristics of their employees. The scope of the survey is all employing businesses in Australia (public and private sectors) except businesses primarily engaged in Agriculture, forestry and fishing; private households employing staff; and foreign embassies, consulates, etc. Self-employed persons are excluded if they do not employ any wage or salary earners. Further, employees are only considered to be in scope for this survey if they received pay for the reference period. Employees are out of scope if, during the reference period, they were members of the Australian permanent defence forces, or were based outside Australia, or were on workers' compensation and not paid through the payroll.

Sports and physical recreation data from the Survey of Employee Earnings and Hours differ from the census data in that the survey data refer to persons employed in sports and physical recreation industries, whereas the census data refer to persons employed in sports and physical recreation occupations. A person can work in a sports industry but not be employed in a sports occupation. A cleaner employed at a racecourse is an example of a non-sports occupation within a sports industry. Businesses are classified to a sports and physical recreation industry in accordance with Group 931 of ANZSIC. Group 931 Sport is part of Division P Cultural and recreational services. Included in Group 931 are Horse and dog racing, Sports grounds and facilities n.e.c. and Sports and services to sports n.e.c.

From the Survey of Employee Earnings and Hours it was estimated that, in May 2002, 61.7% of employees in sports and physical recreation industries worked part-time. By comparison, 30.7% of employees in all industries worked part-time.

The average weekly total earnings of persons employed in sports and physical recreation industries in May 2002 was \$364.30. This was just over half of the average total earnings for persons employed in all industries (\$697.60). Persons employed in sports and physical recreation industries also earned less (on average) than persons employed in other industries within ANZSIC Division P. The average total earnings for persons employed in all cultural and recreational services industries was \$581.20, which was \$216.90 higher than for persons employed only in sports and physical recreation.

Given the higher incidence of part-time workers in sports and physical recreation industries, the lower average total earnings of persons employed in these industries are as would be expected. However, the average earnings of full-time workers in sports and physical recreation industries were also substantially less per week than the average across all industries (\$690.30, compared with \$878.40). There were only two industries where full-time workers earned less on average than those in sports and physical recreation industries, and those were Accommodation, cafes and restaurants (\$650.60), and Retail trade (\$657.20).

SURVEY OF EMPLOYEE EARNINGS AND HOURS *continued*

Full-time workers in sports and physical recreation industries not only earn less, but have also experienced lower increases in earnings over time. The average weekly total earnings of full-time workers in sports and physical recreation industries increased by 25.5% from \$550.00 in May 1994 to \$690.30 in May 2002, whereas the average weekly total earnings of all full-time workers increased by 37.0% over the same eight-year period from \$641.30 to \$878.40.

**5.4 AVERAGE WEEKLY EARNINGS OF PERSONS EMPLOYED IN SPORTS AND PHYSICAL RECREATION INDUSTRIES**

	MAY 1994.....		MAY 1996.....		MAY 1998.....		MAY 2000.....		MAY 2002.....	
	Average weekly ordinary time earnings	Average weekly total earnings								
	\$	\$	\$	\$	\$	\$	\$	\$	\$	\$
<b>SPORTS AND PHYSICAL RECREATION INDUSTRIES</b>										
<b>Males</b>										
Full-time	578.90	586.20	539.20	555.30	558.70	561.50	656.10	662.40	704.20	707.50
Part-time	91.40	91.40	146.60	147.30	148.50	148.50	169.20	170.50	163.20	166.30
<i>Total</i>	240.30	242.50	292.10	298.50	315.30	316.50	417.10	420.90	444.50	447.70
<b>Females</b>										
Full-time	467.80	470.50	502.20	528.20	478.90	481.90	596.80	610.20	656.30	657.80
Part-time	145.80	149.00	139.40	140.50	112.10	112.10	197.20	197.80	157.40	159.80
<i>Total</i>	201.20	204.30	229.00	236.30	207.80	208.60	346.00	198.80	284.90	287.10
<b>Persons</b>										
Full-time	544.20	550.00	525.60	545.40	533.00	535.90	628.90	638.40	687.60	690.30
Part-time	118.10	119.60	142.90	143.80	131.00	131.00	186.00	186.80	159.60	162.30
<i>Total</i>	222.80	225.40	262.70	269.50	269.50	270.50	378.90	383.50	361.60	364.30
<b>ALL INDUSTRIES</b>										
<b>Persons</b>										
Full-time	604.30	641.30	665.80	705.60	727.40	766.20	783.10	821.00	841.10	878.40
Part-time	234.80	239.20	249.30	253.10	273.70	279.20	294.60	301.00	328.20	335.80
<i>Total</i>	504.50	533.00	544.50	573.70	582.10	610.20	625.10	652.80	670.20	697.60

Source: ABS data available on request, Survey of Employee Earnings and Hours, May 2002.

## SERVICE INDUSTRIES SURVEY 2000–01

Some information about employment in sports and physical recreation industries is available from the 2000–01 Service Industries Survey which included within its scope businesses classified to ANZSIC Group 931 Sport. As with the Survey of Employee Earnings and Hours, the scope of the survey was limited to employing businesses. Many sports clubs have no employees and hence would have been excluded from the survey along with self-employed persons not employing any wage or salary earners. More information obtained from the Service Industries Survey is presented in Chapter 8.

The Service Industries Survey provides data about persons employed in sports and physical recreation regardless of their occupation or whether it was their main job. It also provides information about voluntary work. The data include all persons who were employed or did voluntary work, regardless of their age. Other surveys focus on persons aged 18 years and over (the Voluntary Work Survey), or persons aged 15 years and over (the Survey of Involvement in Organised Sport and Physical Activity).

The Service Industries Survey found that, at the end of June 2001, there were 6,517 employing organisations involved in the provision of sports and physical recreation services (excluding government agencies). They employed a total of 87,448 persons and received help from almost 180,000 volunteers in the month of June 2001. Over half (56.9%) of all paid employees and almost all (97.5%) volunteers worked for not-for-profit organisations.

### 5.5 SPORTS AND PHYSICAL RECREATION INDUSTRIES, By sector—2000–01

SECTOR.....	For profit		Total
	For profit	Not for profit	
Number of organisations at end June	3 668	2 849	6 517
Total employment at end June	37 705	49 743	87 448
Total volunteers during June	4 404	174 433	178 837

Source: *Sports Industries, Australia, 2000–01* (cat. no. 8686.0).

Over a quarter (26.7%, or 23,312 persons) of those employed in sports and physical recreation industries undertook work within the Sports and physical recreation clubs, teams and sports professionals industry. There were 15,900 persons (18.2%) working for the Horse and dog racing industry.

Of the 87,448 persons employed in sports and physical recreation industries, an estimated 40,212 (46.0%) worked in a sports related occupation, including 20,862 (23.9%) Coaches, instructors, teaches and development officers; 8,503 (9.7%) Sports officials, 7,951 (9.1%), Professional sportspersons, and 2,896 (3.3%) persons employed in sports related occupations in the Horse and dog industry (Stablehands, strappers and handlers; Horse trainers; and Apprentice jockeys and trackwork riders). The remaining 47,236 (54.0%) worked in a range of other occupations such as Managers and administrators (13,543 or 15.5%), Curators, ground and other maintenance staff (5,982 or 6.8%) and Catering staff (5,189 or 5.9%).

SERVICE INDUSTRIES SURVEY 2000–01 *continued*

## 5.6 EMPLOYMENT IN SPORTS AND PHYSICAL RECREATION INDUSTRIES—2000–01

	SPORTS AND PHYSICAL RECREATION VENUES...			SPORTS AND PHYSICAL RECREATION SERVICES.....		
	<i>Horse and dog racing</i>	<i>Health/fitness centres and gymnasia</i>	<i>Other sports and physical recreation venues, grounds and facilities</i>	<i>Sports and physical recreation administrative organisations</i>	<i>Sports and physical recreation clubs, teams and sports professionals</i>	<i>Sports and physical recreation support services</i>
Managers and administrative staff	1 943	2 243	2 774	2 363	3 073	1 147
Marketing and event management staff	na	227	370	361	469	*192
Coaches/instructors/teachers/development officers	na	7 829	2 238	1 251	3 409	6 135
Professional sports persons	1 767	—	**102	447	5 621	*14
Sports officials	1 159	*132	1 463	5 749	np	np
Medical staff	na	na	na	27	np	np
Curators, ground and other maintenance staff	1 156	239	1 075	178	3 259	*75
Bar managers and bar staff	1 506	**7	708	315	2 510	—
Gaming staff and cashiers	(a)1 011	na	na	52	194	—
Catering staff	1 905	112	1 540	590	1 017	**25
Security staff	80	na	na	*7	*25	—
Other event day staff	3 714	5	2 084	224	np	np
Horse trainers	568	..	..	..	..	..
Stablehands, strappers and handlers	1 767	..	..	..	..	..
Apprentice jockeys and trackwork riders	561	..	..	..	..	..
Other	530	1 757	3 490	250	1 511	344
<b>Total employment at end June</b>	<b>15 900</b>	<b>12 552</b>	<b>15 842</b>	<b>11 814</b>	<b>23 312</b>	<b>8 028</b>

na not available, but included in Other where applicable

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

— nil or rounded to zero (including null cells)

\*\* estimate has a relative standard error of 50% or more and is considered too unreliable for general use

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

.. not applicable

(a) Includes 845 persons employed as totalisator operator staff.

Source: *Sports Industries, Australia, 2000–01* (cat. no. 8686.0).

The majority (170,329 or 95.2%) of all sports and physical recreation volunteers worked within the Sports and physical recreation services industry. The largest number of volunteers (106,427 or 59.5%) undertook voluntary work for Sports and physical recreation administrative organisations (e.g. sporting associations and leagues) (table 5.7).

Within the Sport and physical recreation services industry, the number of persons working as a volunteer Manager or administrator (37,572) outnumbered those in paid employment as a Manager or administrator (6,583), by over five to one. The majority of volunteers working for the Sports and physical recreation services industry (84.6%) worked for organisations which employed fewer than 20 persons.

SERVICE INDUSTRIES SURVEY 2000–01 *continued***5.7 SPORTS AND PHYSICAL RECREATION SERVICES INDUSTRY, Volunteers—2000–01**

<i>Volunteers</i>	<i>Sports and physical recreation administrative organisations</i>	<i>Sports and physical recreation clubs, teams and sports professionals</i>	<i>Sports and physical recreation support services</i>	<i>Total</i>
Managerial/administrative	19 993	16 929	651	37 572
Teaching, coaching and instructing	19 937	*18 523	*817	39 276
Officials	35 338	10 814	182	46 334
Other	31 161	15 684	*302	47 147
<b>Total during June</b>	<b>106 427</b>	<b>61 950</b>	<b>1 952</b>	<b>170 329</b>

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

Source: *Sports Industries, Australia, 2000–01* (cat. no. 8686.0).

## SURVEY OF INVOLVEMENT IN ORGANISED SPORT AND PHYSICAL ACTIVITY

The Survey of Involvement in Organised Sport and Physical Activity enables estimates to be made of the number of persons who were involved in either a playing role, or in a non-playing role such as coach, umpire or administrator.

The 2001 survey found that there were 1.4 million persons (9.5% of all persons aged 15 years and over) involved in at least one non-playing role in organised sport and physical activity during the 12 months ended April 2001. A third (33.8%) of these were involved in more than one non-playing role. In total, there were 2.1 million non-playing involvements among the 1.4 million persons.

There were 595,000 persons involved as a Committee member or administrator; 558,400 as a Coach, instructor or teacher; and 340,000 as a Referee or umpire. Males had higher participation rates than females in the roles of Coach, instructor or teacher (4.7% of males and 2.8% of females); Referee or umpire (2.8% of males and 1.8% of females); and Committee member or administrator (4.7% of males and 3.3% of females).

Of the 1.4 million persons with some non-playing involvement, 53.6% (760,600) were associated with school or junior sport and 33.6% (477,500) had completed a course or qualification relevant to their role.

SURVEY OF INVOLVEMENT IN ORGANISED SPORT AND PHYSICAL ACTIVITY *continued***5.8 TYPE OF INVOLVEMENT IN ORGANISED SPORT AND PHYSICAL ACTIVITY(a)—2001**

	MALES.....		FEMALES.....		PERSONS.....	
	Total involvements	Participation rate	Total involvements	Participation rate	Total involvements	Participation rate
	'000	%	'000	%	'000	%
Playing	2 022.5	27.3	1 494.0	19.7	3 516.4	23.5
Non-playing roles						
Coach, instructor, teacher	346.0	4.7	212.4	2.8	558.4	3.7
Referee or umpire	205.2	2.8	134.8	1.8	340.0	2.3
Committee member or administrator	347.7	4.7	247.3	3.3	595.0	4.0
Scorer or timekeeper	224.3	3.0	229.4	3.0	453.7	3.0
Medical support	42.1	0.6	48.0	0.6	90.1	0.6
Other involvement	42.8	0.6	44.3	0.6	87.1	0.6
Total non-playing involvements	1 208.2	..	916.1	..	2 124.3	..
<b>Total involvements(b)</b>	<b>3 230.7</b>	<b>..</b>	<b>2 410.1</b>	<b>..</b>	<b>5 640.8</b>	<b>..</b>

.. not applicable

(a) Relates to involvement by persons aged 15 years and over in organised sport and physical activity during a 12-month period prior to April 2001.

(b) Total involvements is greater than the number of persons involved because one individual can be active in more than one area (e.g. coaching, umpiring and scoring).

Source: *Involvement in Organised Sport and Physical Activity, Australia, April 2001* (cat no. 6285.0).

Of the 2.1 million non-playing involvements, 11.0% (233,500) received some payment for their involvement. By comparison, 2.5% of the 3.5 million players (88,100) received some payment for their playing role. Those who were paid for their involvement were likely to spend more time in the role. For non-playing roles, 34.9% of paid involvements were for 40–52 weeks of the year. However, the vast majority of these paid involvements were part-time, with over 90% being for less than 20 hours a week during the weeks of involvement.

Of the 1.9 million unpaid (volunteer) involvements in non-playing roles, 42.9% (811,200 involvements) were for 1–13 weeks, 27.7% (523,100) were for 14–26 weeks, 7.9% (149,900) were for 27–39 weeks and 21.5% (406,300) were for 40–52 weeks of the year. For 64.2% (1.2 million) of unpaid non-playing involvements, the time spent was less than three hours per week during the weeks of involvement. A further 30.5% (576,700) of these involvements were for 3–9 hours per week, and 5.3% (99,900) were for more than 10 hours per week.

There was some variation in the amount of time involved across the non-playing roles. For example, 37.2% of Committee members or administrators were involved for 40–52 weeks of the year, whereas only 14.2% of Referees or umpires and 12.3% of Scorers or timekeepers were involved for this length of time.

SURVEY OF INVOLVEMENT IN ORGANISED SPORT AND PHYSICAL ACTIVITY *continued*

**5.9 TYPE OF INVOLVEMENT, By number of weeks and number of hours per week—2001**

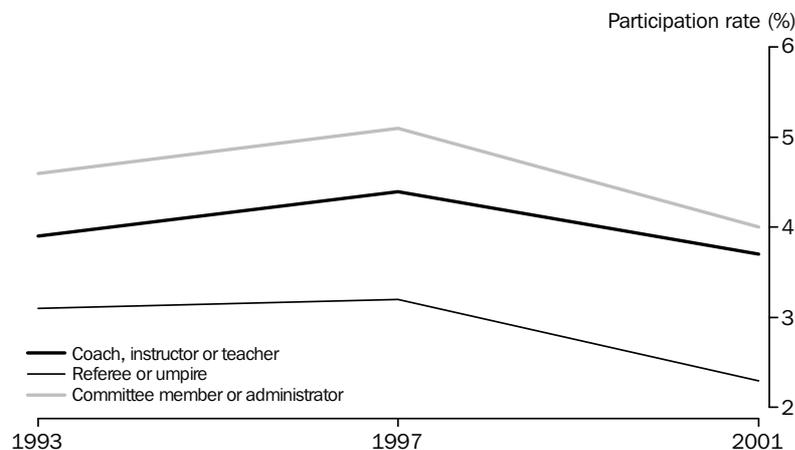
	UNPAID INVOLVEMENTS.....			PAID INVOLVEMENTS.....		
	Playing	Non-playing roles	Total unpaid involvements	Playing	Non-playing roles	Total paid involvements
	'000	'000	'000	'000	'000	'000
Number of weeks						
1–13 weeks	821.4	811.2	1 632.7	19.8	62.4	82.0
14–26 weeks	857.6	523.1	1 380.8	24.0	54.3	78.1
27–39 weeks	401.5	149.9	551.6	*15.4	35.8	51.0
40–52 weeks	1 347.7	406.3	1 754.1	29.1	81.4	110.5
Number of hours per week						
Less than 3 hours	1 369.1	1 214.3	2 583.3	16.6	102.1	118.8
3–9 hours	1 823.7	576.7	2 400.4	42.0	87.8	129.8
10–19 hours	205.4	88.2	293.6	21.6	21.3	42.8
20 hours or more	30.1	11.7	41.8	8.0	22.3	30.3
<b>Total involvements</b>	<b>3 428.3</b>	<b>1 890.9</b>	<b>5 319.2</b>	<b>88.1</b>	<b>233.5</b>	<b>321.6</b>

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

Source: ABS data available on request, Involvement in Organised Sport and Physical Activity, April 2001.

A comparison of participation rates for 1993, 1997 and 2001 can be made for the three non-playing roles of Coach, instructor or teacher; Referee or umpire; and Scorer or timekeeper. Between 1993 and 1997, there was no significant change in participation rates for the role of Referee or umpire, while there were increases for the roles of Coach, instructor or teacher (from 3.9% to 4.4%) and Committee member or administrator (from 4.6% to 5.1%). There was a significant decrease in participation rates for each of these roles from 1997 to 2001 (from 4.4% to 3.7% for the Coach, instructor or teacher role; from 3.2% to 2.3% for Referees or umpires; and from 5.1% to 4.0% for Committee members or administrators).

**5.10 INVOLVEMENT IN NON-PLAYING ROLES—1993, 1997 and 2001**



Source: *Involvement in Organised Sport and Physical Activity, Australia, April 2001* (cat no. 6285.0).

## VOLUNTARY WORK SURVEY 2000

In 2000 the ABS conducted a Voluntary Work Survey to measure the extent to which Australians donate their time. Almost a third (4.4 million persons) of Australians aged 18 years and over undertook voluntary work in the 12 months before interview in the year 2000. Sports and physical recreation organisations had the largest number of volunteers, receiving help from 1.1 million persons. Education, training and youth development organisations also had more than one million volunteers during this period, while Community and welfare organisations had just under one million.

Overall, the proportion of the population who volunteered was slightly higher for females than males—33.0% of females undertook voluntary work compared with 30.5% of males. However, for sports organisations, the rate was higher for males—10.0% of males undertook voluntary work for sports organisations compared with 6.5% of females.

## 5.11 VOLUNTEERS(a), By type of organisation assisted—2000

	NUMBER.....			VOLUNTEER RATE.....		
	<i>Males</i>	<i>Females</i>	<i>Persons</i>	<i>Males</i>	<i>Females</i>	<i>Persons</i>
	'000	'000	'000	%	%	%
Organisations in scope of the ACLC(b)						
Heritage and arts	117.1	163.1	280.2	1.7	2.3	2.0
Sports and physical recreation	686.4	454.3	1 140.7	10.0	6.5	8.2
Interest clubs and groups	355.7	313.2	669.0	5.2	4.5	4.8
Religious organisations	297.1	446.3	743.4	4.3	6.4	5.4
Other culture and leisure	69.9	*46.4	116.3	1.0	*0.7	0.8
<i>Total(c)</i>	1 378.4	1 269.4	2 647.9	20.2	18.1	19.1
Other organisations						
Business, professional and union	134.2	55.8	190.0	2.0	0.8	1.4
Community and welfare	376.5	593.5	970.0	5.5	8.5	7.0
Education, training and youth development	357.7	665.5	1 023.2	5.2	9.5	7.4
Emergency services	122.8	58.2	181.1	1.8	0.8	1.3
Environment and animal welfare	64.5	60.9	125.3	0.9	0.9	0.9
Foreign and international	**8.9	*21.3	*30.2	**0.1	*0.3	*0.2
Health	96.6	200.8	297.4	1.4	2.9	2.1
Law, justice and political	*42.2	*36.9	79.1	*0.6	*0.5	0.6
Other	*18.8	*34.0	52.7	*0.3	*0.5	0.4
<i>Total(c)</i>	1 025.0	1 527.7	2 552.7	15.0	21.8	18.4
<b>Total volunteers(c)</b>	<b>2 080.9</b>	<b>2 314.6</b>	<b>4 395.6</b>	<b>30.5</b>	<b>33.0</b>	<b>31.8</b>

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

\*\* estimate has a relative standard error of 50% or more and is considered too unreliable for general use

(a) Excludes persons whose only voluntary work was for the 2000 Olympic and/or Paralympic Games.

(b) Australian Culture and Leisure Classifications.

(c) Components do not add to the total as some persons undertook voluntary work for more than one organisation.

Source: ABS data available on request, Voluntary Work, 2000.

VOLUNTARY WORK SURVEY 2000 *continued*

The median age of sports and physical recreation volunteers was 40 years, compared with a median of 44 years for other volunteers. Almost a third (31%) of volunteers who worked for sports and physical recreation organisations were aged 35–44 years. By comparison, only 25% of volunteers for other organisations were in this age group. Relative to other volunteers, a higher percentage of sports volunteers were in the younger age groups, with 34% of all sports volunteers being aged under 35 years (compared with 27% for other volunteers). Conversely, there was a lower percentage of sports volunteers aged 55 years and over, compared with other volunteers.

Persons with children aged 5–14 years were more likely to be involved in a volunteer role in sports and physical recreation, compared with other volunteer roles. This is evident from the volunteer rates—14% of persons with children aged 5–14 years had some voluntary work involvement in sports and physical recreation, compared with just 7% of persons with no children in this age group. Some 40% of sports volunteers had children aged 5–14 years, whereas 31% of other volunteers had children in this age group. It is likely that, for some parents, their volunteer involvement in sports and physical recreation is related to the sports participation of their children.

Persons undertaking voluntary work for sports and physical recreation organisations spent a total of 130 million hours working for those organisations in the year before interview. This is the equivalent of about 70,000 persons working full-time for an entire year. Sports volunteers spent an average of 98 hours per year on their sports involvements. This compares with an average of 108 hours per year spent by all volunteers. Thus, even though more persons were involved as sports volunteers relative to other kinds of organisations, they volunteered for slightly fewer hours per year on average. Nevertheless, it should be recognised that, for many sports and physical recreation organisations, volunteers may be required intensively through the main competition season (e.g. in winter for football), and so the patterns of hours may be different from that of other organisations.

The median number of hours for sports and physical recreation involvements (40 hours per year) was less than half of the mean number of hours (98 hours per year). The median indicates that 50% of sports volunteers worked less than 40 hours per year. The fact that the mean is so much higher indicates that there were some sports volunteers who worked very long hours.

INTRODUCTION

Sports and physical recreation facilities can be divided into those which are buildings and those which are not. The former include gymnasia, bowling alleys, ice-skating rinks, squash centres, indoor sports stadia and the building component of outdoor sports stadia. The latter include golf courses, tennis courts, racecourses, outdoor swimming pools, sports grounds and the non-building component of outdoor sports stadia.

Information regarding sports and physical recreation buildings has been sourced from the Building Approvals Collection. Details of approved building jobs (including expected value on completion) are collected each month from all local government and other approving authorities. The ABS uses the Functional Classification of Buildings to categorise these jobs according to the intended use of the building when completed. One category in the classification is Entertainment and recreation buildings. Examination of the details of individual building jobs allocated to this category has made it possible to isolate those concerned with sports and physical recreation, and also those concerned with other leisure, from the remainder of the category. Figures relating to sports and physical recreation buildings are presented in this Chapter, while figures relating to other leisure buildings are presented in Chapter 12.

Information regarding sports and physical recreation facilities other than buildings has been sourced from the quarterly Engineering Construction Survey (ECS) for the category Recreation. The ECS aims to measure the value of all engineering construction work undertaken in Australia. Its scope consists of all business units recorded on the ABS central register of businesses as having engineering construction as their main activity, together with all other units known to be undertaking a significant level of this type of work.

Information about the availability of sports facilities to discrete Indigenous communities was obtained from the Community Housing and Infrastructure Needs Survey. This was conducted throughout Australia between March and June 2001.

Chapter 8 includes information about the operation of Sports and physical recreation venues, grounds and facilities, and Chapter 7 includes information about government funding to support their operation. The purpose of this Chapter is to present information about the construction of these facilities, and their availability to discrete Indigenous communities.

BUILDING APPROVALS FOR SPORTS AND PHYSICAL RECREATION BUILDINGS

The total value of work approved for sports and physical recreation buildings during 2000–01 was \$418.8m, over three-quarters of which was for buildings owned by the private sector. New buildings accounted for 35.2% (\$112.3m) of private sector work approved, whereas the percentage contribution they made to work approved for the public sector was higher at 66.6% (\$66.1m). Overall, 42.6% (\$178.3m) of the total value of work approved was for new buildings.

BUILDING APPROVALS FOR SPORTS AND PHYSICAL RECREATION BUILDINGS *continued*

The total value of \$418.8m includes \$150.6m from building jobs identified as being for sports clubs. It is likely that many of these clubs, although associated with sports, get most of their income from providing hospitality (e.g. drinks and meals for consumption on the premises). Clubs associated with sports, but predominantly engaged in providing hospitality, are classified as hospitality clubs within the ACLC. The details available from building approvals data for individual building jobs are not sufficient to enable hospitality orientated sports clubs to be separated from the rest.

Most of the value of approved work was for building jobs located in the larger states. Between them, New South Wales and Victoria accounted for just over two-thirds (\$280.1m) of the Australian total. At the other end of the scale, the combined value of approved work in South Australia, Tasmania, the Northern Territory and the Australian Capital Territory came to \$32.7m which was less than the \$51.1m approved in fourth-placed Western Australia.

Although private sector work (\$319.4m) made up 76.3% of the total value of work approved for Australia as a whole (\$418.8m), there were considerable differences in the ratio of private to public sector work among the individual states and territories. For each of the Australian Capital Territory, New South Wales, South Australia and Queensland over 90% of the total value was contributed by the private sector. On the other hand, the private sector contribution to the value of work approved in Western Australia, Tasmania and the Northern Territory was less than 25% in each case. In Victoria there was a more even division between the private and public sectors, with private sector jobs accounting for 62.0% of building work approved.

**6.1 BUILDING APPROVALS, Sports and physical recreation buildings—2000–01**

	SECTOR OF OWNERSHIP.....		
	<i>Private</i>	<i>Public</i>	<i>Total</i>
	\$m	\$m	\$m
	.....		
	TYPE OF WORK		
New	112.3	66.1	178.3
Alterations and additions	200.6	27.7	228.3
Fitouts and refurbishments	6.6	5.5	12.1
<i>Total</i>	319.4	99.3	418.8
	.....		
	STATE OR TERRITORY OF LOCATION		
New South Wales	178.6	3.5	182.0
Victoria	60.8	37.3	98.1
Queensland	50.6	4.2	54.9
South Australia	14.0	0.5	14.5
Western Australia	10.8	40.3	51.1
Tasmania	0.5	12.8	13.2
Northern Territory	0.1	0.8	1.0
Australian Capital Territory	4.0	—	4.0
<i>Total</i>	319.4	99.3	418.8

— nil or rounded to zero (including null cells)

Source: ABS data available on request, Building Approvals Collection.

## ENGINEERING CONSTRUCTION OF SPORTS AND PHYSICAL RECREATION FACILITIES

Prior to 1999–2000, any data concerning the engineering construction category Recreation included landscaping projects. Since that time, however, it has been possible to obtain data which exclude landscaping and are thus more closely aligned to the ACLC concept of sports and physical recreation facilities. However, they are not completely aligned. The Recreation category includes amphitheatres which the ACLC would class as cultural facilities, and excludes pleasure boat marinas and marine pleasure piers which the ACLC would regard as being for sports and physical recreation. Table 6.2 presents the three years of the data excluding landscaping which are so far available.

Over the three years, the estimate of the total value of work done dipped from \$477.1m in 1999–2000 to \$373.0m in 2000–01 before recovering to \$410.9m in 2001–02. During this time the percentage contribution by the public sector increased from 31.1% to 35.0% and then 36.3% (\$149.1m) in 2001–02.

Although all recreation projects undertaken by the public sector are for the construction of publicly-owned facilities, the private sector undertakes projects for a mixture of both private and public owners. For 2001–02, the value of work done by the private sector for public sector owners was \$50.1m which was 19.1% of the total value of work done by the private sector.

## 6.2 ENGINEERING CONSTRUCTION ACTIVITY, Recreation projects (excluding landscaping)

	<i>Work commenced</i>	<i>Work done</i>	<i>Work yet to be done</i>
	\$m	\$m	\$m
.....			
VALUE OF WORK UNDERTAKEN BY THE PRIVATE SECTOR			
1999–00	309.0	328.4	62.3
2000–01	206.3	242.5	27.8
2001–02	243.5	261.8	42.0
.....			
VALUE OF WORK UNDERTAKEN BY THE PUBLIC SECTOR			
1999–00	150.9	148.6	27.9
2000–01	132.7	130.5	39.4
2001–02	141.8	149.1	26.2
.....			
TOTAL VALUE OF ENGINEERING CONSTRUCTION WORK UNDERTAKEN			
1999–00	459.9	477.1	90.2
2000–01	339.1	373.0	67.2
2001–02	385.3	410.9	68.3
.....			

Source: ABS data available on request, Engineering Construction Survey.

Although excluding landscaping results in a purer measure of sports and physical recreation activity, it is also useful to look at the data with landscaping included. This is because it is directly comparable with earlier data and provides a time series covering the years leading up to, and immediately subsequent to, the Olympic and Paralympic Games held in Sydney in 2000.

ENGINEERING CONSTRUCTION OF SPORTS AND PHYSICAL RECREATION FACILITIES *continued*

The work done on recreation projects, including landscaping, increased by over 20% annually from \$377.4m in 1993–94 to \$776.6m in 1996–97. Thereafter, smaller rises and declines occurred for most years between 1996–97 and 2001–02. The exception was the larger increase in activity for the financial year prior to the Sydney Olympic Games. During 1999–2000, work worth \$1,073.4m was done on recreation projects, an increase of 27.8% over the previous year. The value of work done in 2001–02 was \$1,141.4m.

**6.3 ENGINEERING CONSTRUCTION ACTIVITY, Recreation projects (including landscaping)**

	<i>Work commenced</i>	<i>Work done</i>	<i>Work yet to be done</i>
	\$m	\$m	\$m
.....			
VALUE OF WORK UNDERTAKEN BY THE PRIVATE SECTOR			
1993–94	270.9	276.7	17.3
1994–95	388.5	366.6	47.4
1995–96	464.5	452.1	54.7
1996–97	705.0	670.5	67.3
1997–98	749.6	758.2	84.2
1998–99	701.8	700.0	64.2
1999–00	871.3	910.4	95.5
2000–01	828.6	859.2	61.4
2001–02	923.1	952.0	58.5
.....			
VALUE OF WORK UNDERTAKEN BY THE PUBLIC SECTOR			
1993–94	93.1	100.7	17.0
1994–95	101.9	98.2	13.9
1995–96	132.5	114.1	23.0
1996–97	117.3	106.0	23.9
1997–98	119.7	102.8	31.3
1998–99	135.7	140.2	28.0
1999–00	165.4	163.0	31.9
2000–01	150.7	151.7	46.9
2001–02	166.1	189.4	30.1
.....			
TOTAL VALUE OF ENGINEERING CONSTRUCTION WORK UNDERTAKEN			
1993–94	364.0	377.4	34.3
1994–95	490.4	464.8	61.3
1995–96	597.0	566.2	77.7
1996–97	822.3	776.6	91.2
1997–98	869.3	861.0	115.5
1998–99	837.5	840.2	92.3
1999–00	1 036.7	1 073.4	127.5
2000–01	979.4	1 010.9	108.3
2001–02	1 089.3	1 141.4	88.6
.....			

Source: ABS data available on request, Engineering Construction Survey.

## ACCESS TO SPORTING FACILITIES BY INDIGENOUS COMMUNITIES

The 2001 Community Housing and Infrastructure Needs Survey found that there were 327 Indigenous communities with a population of 50 or more. Of these, 213 (65.1%) had some form of sporting facilities while 108 (33.0%) had no sporting facilities at all. For the remaining 6 (1.8%), the information was not provided.

The sports facilities which were most common were outdoor courts and sports grounds. Of the communities with sports facilities, 82.6% (176) had outdoor courts and 77.9% (166) had sports grounds.

The state with the highest percentage of Indigenous communities lacking any sporting facilities was New South Wales where 53.1% (26) were in this situation. The state with the lowest percentage was Queensland where only 11.4% (5 communities) had no sporting facilities.

#### 6.4 INDIGENOUS COMMUNITIES WITH A POPULATION OF 50 OR MORE, Access to sporting facilities by state and territory—2001

##### COMMUNITIES WITH SPORTING FACILITIES.....

<i>State or territory</i>	<i>Sports grounds</i>	<i>Outdoor courts</i>	<i>Indoor or covered sporting facilities</i>	<i>Swimming pools</i>	<i>Other buildings used for sport</i>	<i>Other community sporting facilities</i>	<i>No sporting facilities</i>	<i>All communities(a)</i>
New South Wales	13	14	3	1	4	1	26	49
Queensland	27	29	7	5	17	2	5	44
South Australia	17	17	2	1	6	1	8	26
Western Australia	41	56	2	8	12	—	21	81
Northern Territory	66	58	15	7	15	5	48	124
<b>Australia(b)</b>	<b>166</b>	<b>176</b>	<b>29</b>	<b>22</b>	<b>55</b>	<b>9</b>	<b>108</b>	<b>327</b>

— nil or rounded to zero (including null cells)

(a) Includes 'Whether community has sporting facilities' not stated.

(b) Victoria and Tasmania included in Australia for confidentiality reasons. The Australian Capital Territory did not have any discrete Indigenous communities.

Source: *Housing and Infrastructure in Aboriginal and Torres Strait Islander Communities, Australia, 2001* (cat. no. 4710.0).

## INTRODUCTION

The purpose of this Chapter is to present information about the levels of financial support provided to sports and physical recreation by both the government and the business sectors.

Information about the level of funding provided during 2000–01 by Commonwealth, state and territory governments was obtained from annual reports and budget papers, and by direct contact with the relevant agencies. Estimates of local government funding were obtained from a survey which the ABS conducted in respect of the same year.

Information about support by the business sector was obtained from the 2000–01 Business Generosity Survey for the category Sports and recreation. Besides sports and physical recreation, this category also includes social, leisure and hobby club activities. Businesses were asked to provide details of not only monetary support, but also the ‘dollar equivalent values’ of any goods and services which they provided.

In addition to the information obtained from providers of financial support to sports and physical recreation, there is also some information available which has been obtained from recipients. The 2000–01 Service Industries Survey included businesses mainly engaged in operating sports and physical recreation venues or providing sports and physical recreation services (Groups 32 and 33 of the ACLC Industry Classification—see Chapter 8 for further details). They were asked how much of their income came from government funding, and how much from sponsorship and other support from the business sector.

## GOVERNMENT FUNDING 2000–01

The total level of funding provided for sports and physical recreation by government in 2000–01 was \$2,124.2m. Of this, the Commonwealth Government contributed \$198.9m (9.4%), state and territory governments \$875.2m (41.2%) and local governments \$1,050.1m (49.4%).

The majority of the funding went to Venues, grounds and facilities. They received \$1,292.2m which was 60.8% of the total. A further \$527.8m or 24.8% went to fund Participation and special events.

Local government contributed most of the funds provided to Venues, grounds and facilities (\$997.5m or 77.2%). On the other hand, the state and territory governments contributed the majority of the funds for Participation and special events (\$441.9m or 83.7%), and Other services (\$58.6m or 59.6%). They also contributed the largest share of funding for Administration and regulation (\$94.4m or 45.9%).

GOVERNMENT FUNDING 2000–01 *continued*

The Sydney 2000 Olympic and Paralympic Games were held during the 2000–01 financial year. While the Commonwealth and New South Wales Governments contributed most of the government funding for these events, other state and territory governments provided funds for hosting events and providing training venues for overseas athletes. The Commonwealth Government contributed an estimated \$71.8m and the New South Wales Government \$382.3m. Funding for Olympic venues during 2000–01 has been included under Venues and sports grounds, while all other sports and physical recreation funding associated with the Olympics has been included under Special events.

Funding provided by government for sports and physical recreation comprised \$1,585.5m (74.6%) for recurrent expenditure and the remaining \$538.6m for capital expenditure. The majority of funding from all levels of government was allocated to recurrent expenditure. At 96% (\$190.8m), the percentage allocated to recurrent expenditure by the Commonwealth Government was the highest.

**7.1 GOVERNMENT FUNDING OF SPORTS AND PHYSICAL RECREATION—2000–01**

Category	LEVEL OF GOVERNMENT...				Percentage of total %
	Common-wealth \$m	State and territory \$m	Local \$m	Total \$m	
Recurrent	190.8	667.8	726.9	1 585.5	74.6
Capital	8.1	207.3	323.2	538.6	25.4
Administration and regulation					
Administration, policy and planning	29.8	74.2	37.3	141.2	6.6
Regulation and control	39.7	20.3	4.6	64.6	3.0
Total	69.5	94.4	41.9	205.8	9.7
Venues, grounds and facilities					
Venues and sports grounds	14.5	185.8	410.1	610.5	28.7
Recreation parks and waterways	—	94.4	587.4	681.8	32.1
Total	14.5	280.2	997.5	1 292.2	60.8
Participation and special events					
Participation by clubs, teams and individuals	2.4	67.0	6.5	75.9	3.6
Special events	77.0	374.9	—	451.9	21.3
Total	79.4	441.9	6.5	527.8	24.8
Other services					
Horse and dog racing	—	22.5	na	(a)22.5	1.1
Coaching and training	24.4	26.5	na	(a)50.9	2.4
Other support services	11.2	9.6	na	(a)20.8	1.0
Total	35.5	58.6	4.2	98.4	4.6
<b>Total</b>	<b>198.9</b>	<b>875.2</b>	<b>1 050.1</b>	<b>2 124.2</b>	<b>100.0</b>

— nil or rounded to zero (including null cells)

na not available

(a) Excludes local government.

Source: *Sport and Recreation Funding by Government, 2000–01* (cat. no. 4147.0).

## BUSINESS GENEROSITY SURVEY 2000–01

There are three types of support which businesses can provide. These are:

- Donations — money, goods or services given unconditionally by a business in order to show support, not receive a benefit
- Business to community projects — cooperative arrangements involving the provision of money, goods or services in exchange for strategic business benefits such as improved staff expertise, wider networking and enhanced community reputation
- Sponsorship — the provision of money, goods or services in exchange for advertising or promotional benefits.

The total value of business support for all activities during 2000–01 was \$1,446.6m, of which the largest share (\$628.0m or 43.4%) went to fund Sports and recreation. The majority of the Sports and recreation funding (\$479.8m or 76.4%) was provided through Sponsorship. The remainder was made up of \$108.8m in Donations (17.3%) and \$39.4m (6.3%) from Business to community projects.

The industry division which provided the most funding to Sports and recreation was Manufacturing with \$179.8m. This was 28.6% of the total. Other divisions to provide at least \$60m in funding were Wholesale trade (\$91.1m), Property and business services (\$79.9m), Accommodation, cafes and restaurants (\$62.0m) and Finance and insurance (\$60.0m). The least funding came from Education with \$0.5m and Health and community services with \$1.1m.

Manufacturing was the industry division which provided the most funding through Sponsorship, and also through Business to community projects. However, its \$7.8m in Donations was exceeded by three other industry divisions: Property and business services which donated \$38.1m; Accommodation, cafes and restaurants which donated \$28.6m; and Retail trade which donated \$9.7m.

BUSINESS GENEROSITY SURVEY 2000–01 *continued*

## 7.2 BUSINESS SUPPORT FOR SPORTS AND RECREATION—2000–01

Industry	TYPE OF SUPPORT.....			Total funding \$'000
	Donations \$'000	Business to community projects \$'000	Sponsorship \$'000	
Mining	840	137	2 843	3 821
Manufacturing	7 840	23 986	147 982	179 809
Electricity, gas and water supply	130	680	6 652	7 462
Construction	2 661	715	6 264	9 639
Wholesale trade	4 719	480	85 916	91 115
Retail trade	9 748	3 548	31 380	44 675
Accommodation, cafes and restaurants	28 578	4 693	28 778	62 049
Transport and storage	2 912	183	36 518	39 613
Communication services	np	np	21 168	21 505
Finance and insurance	4 023	66	55 920	60 009
Property and business services	38 082	3 446	38 344	79 871
Education	52	np	np	473
Health and community services	np	np	np	1 118
Cultural and recreational services	5 250	916	14 070	20 237
Personal and other services	3 112	304	3 163	6 579
<b>Total</b>	<b>108 765</b>	<b>39 436</b>	<b>479 776</b>	<b>627 976</b>

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

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

## SERVICE INDUSTRIES SURVEY 2000–01

From information provided for the 2000–01 Service Industries Survey, it was estimated that businesses mainly engaged in operating sports and physical recreation venues, or providing sports and physical recreation services, received \$158.8m in Government funding during 2000–01. Almost half of this (47.2% or \$74.9m) was funding provided to administrative organisations. Approximately another third (33.8% or \$53.6m) was for businesses operating venues. Of the venue funding, nearly all (\$52.5m) went to businesses operating venues other than health and fitness centres or gymnasia.

It was estimated that Sponsorship and fundraising income contributed \$477.2m to the total income of businesses mainly engaged in operating sports and physical recreation venues, or providing sports and physical recreation services. Clubs, teams and sports professionals took slightly more than half of this (52.9% or \$252.3m), while another 38.5% (\$183.9m) went to administrative organisations. In both cases Financial sponsorships were by far the most important source of Sponsorship and fundraising income and contributed 77.4% (\$195.3m) for clubs, teams and sports professionals; and 91.6% (\$168.5m) for administrative organisations.

SERVICE INDUSTRIES SURVEY 2000–01 *continued***7.3 SPORTS AND PHYSICAL RECREATION INDUSTRIES, Income from government funding, sponsorship and fundraising—2000–01**

	<i>Health/fitness centres and gymnasia</i>	<i>Other sports and physical recreation venues, grounds and facilities</i>	<i>Sports and physical recreation administrative organisations</i>	<i>Sports and physical recreation clubs, teams and sports professionals</i>	<i>Sports and physical recreation support services</i>	<i>Total</i>
	\$m	\$m	\$m	\$m	\$m	\$m
<b>Government funding(a)</b>						
Federal	np	np	34.5	*1.9	*4.5	*50.1
State/territory	np	np	38.8	7.1	14.7	84.6
Local	np	np	*1.6	*1.9	*0.2	24.1
<i>Total</i>	<i>*1.1</i>	<i>52.5</i>	<i>74.9</i>	<i>10.9</i>	<i>19.3</i>	<i>158.8</i>
<b>Sponsorship and fundraising income</b>						
Financial sponsorships	np	np	168.5	195.3	4.1	396.3
In-kind sponsorships	np	np	4.4	9.1	*2.2	*15.9
Donations and bequests	np	np	*3.3	9.5	0.6	np
Other(b)	np	np	7.7	38.3	*2.6	np
<i>Total</i>	<i>*2.1</i>	<i>29.4</i>	<i>183.9</i>	<i>252.3</i>	<i>9.5</i>	<i>477.2</i>

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

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

(a) Excludes funding for the Sydney Organising Committee for the Olympic Games and the Sydney Paralympic Organising Committee Limited. Government funding of these organisations amounted to \$110m.

(b) Includes raffles, bingo and other fundraising.

Source: *Sports Industries, Australia, 2000–01* (cat. no. 8686.0) and ABS data available on request.

INTRODUCTION

The purpose of this Chapter is to present information about businesses that operate within the Sports and Physical Recreation Industries, as defined in the ACLC. Sports and physical recreation is Division 3 of the ACLC Industry Classification and consists of business units mainly engaged in the presentation or provision of sports and physical recreation and associated services. Also included in Division 3 are business units which are mainly engaged in the manufacture, wholesale or retail of sports and physical recreation goods.

Division 3 consists of four industry groups: Group 31 Horse and dog racing; Group 32 Sports and physical recreation venues; Group 33 Sports and physical recreation services; and Group 34 Sports and physical recreation goods manufacturing and sales. Each of these groups consists of a number of industry classes.

Information about businesses classified to Groups 31, 32 and 33 has been obtained from the 2000–01 Service Industries Survey. For Group 34, some information about retailers of sports and physical recreation goods (Class 343) has been obtained from the 1998–99 Retail Industry Survey. Information about manufacturers and wholesalers of sports and physical recreation goods is only available in combination with information about manufacturers and wholesalers of other leisure goods. This information (from the 2000–01 Manufacturing Industry Survey and 1998–99 Wholesale Industry Survey) is presented in Chapter 11.

SERVICE INDUSTRIES SURVEY 2000–01

The 2000–01 Service Industries Survey used ANZSIC to classify industry and determine the scope of the survey. However, the survey forms included questions which would enable data to be output according to ACLC Industry Classification definitions. For most of the industries included in table 8.1, the data presented cover the full range of their in-scope activities. The exceptions are Other sports and physical recreation venues, grounds and facilities (ACLC Class 322); and Sports and physical recreation support services (ACLC Class 334). Class 322 omits recreational parks, while Class 334 omits services such as horse breeding, sports veterinary services, horse transport, boat ramp operation and marina operation. The services omitted were outside the scope of the ANZSIC classes included in the survey. ACLC Class 333 Outdoor recreation guiding operations fell entirely outside the scope of the survey and hence has no data available.

Because of the large and temporary impact of the Olympic and Paralympic Games, data relating to the activities of the respective organising committees have been excluded from the general tables. Instead these data are summarised in a separate dedicated table (table 8.4).

SERVICE INDUSTRIES SURVEY 2000–01 *continued*

At the end of June 2001, Sports and physical recreation clubs, teams and sports professionals (ACLC Class 332) was the industry which had the greatest number of organisations (1,937). It also had the most employment (23,312 persons) and the highest level of income (\$1,381.8m). However, it was one of two sports industries which recorded an operating loss/deficit for 2000–01, the other being Other sports and physical recreation venues, grounds and facilities.

The industry with the largest operating profit/surplus was Sports and physical recreation administrative organisations (ACLC Class 331) with \$45.7m, even though all 755 organisations were not for profit. The next highest profit/surplus levels were recorded by Horse and dog racing (ACLC Class 311) with \$30.6m, and Sports and physical recreation support services with \$28.0m, the latter deriving its profit from a total income of only \$215.2m.

The number of males employed exceeded the number of females for all industries except Health and fitness centres and gymnasia (ACLC Class 321), and Sports and physical recreation support services. Health and fitness centres and gymnasia had the highest level of female employment, both in absolute terms (8,062) and as a percentage of persons employed (64.2%).

SERVICE INDUSTRIES SURVEY 2000–01 *continued***8.1 SPORTS AND PHYSICAL RECREATION INDUSTRIES, Summary of operations by industry and profit status—2000–01**

		<i>Horse and dog racing</i>	<i>Health and fitness centres and gymnasia</i>	<i>Other sports and physical recreation venues, grounds and facilities</i>	<i>Sports and physical recreation administrative organisations</i>	<i>Sports and physical recreation clubs, teams and sports professionals</i>	<i>Sports and physical recreation support services</i>
FOR PROFIT							
Businesses/organisations at end June	no.	750	620	743	..	372	1 181
Employment at end June							
Males	no.	2 260	3 119	6 665	..	2 701	2 964
Females	no.	1 275	6 454	6 132	..	1 660	4 476
Persons	no.	3 536	9 573	12 797	..	4 360	7 439
Total income	\$m	188.7	238.2	621.9	..	290.9	188.7
Total expenses	\$m	178.2	226.1	627.1	..	298.2	161.4
Operating profit before tax	\$m	*10.5	11.9	**–3.3	..	**–7.5	26.6
NOT FOR PROFIT							
Businesses/organisations at end June	no.	285	47	119	755	1 565	78
Employment at end June							
Males	no.	7 381	1 371	1 574	8 443	13 036	177
Females	no.	4 984	1 608	1 471	3 370	5 916	412
Persons	no.	12 365	2 979	3 045	11 814	18 951	589
Total income	\$m	947.0	56.1	111.9	1 000.9	1 090.9	26.5
Total expenses	\$m	929.0	52.0	127.2	954.5	1 088.6	25.1
Operating surplus before tax	\$m	20.1	4.1	*–15.3	45.7	**–5.0	*1.4
TOTAL							
Businesses/organisations at end June	no.	1 034	667	863	755	1 937	1 259
Employment at end June							
Males	no.	9 641	4 490	8 239	8 443	15 736	3 141
Females	no.	6 259	8 062	7 603	3 370	7 575	4 887
Persons	no.	15 900	12 552	15 842	11 814	23 312	8 028
Total income	\$m	1 135.6	294.3	733.8	1 000.9	1 381.8	215.2
Total expenses	\$m	1 107.3	278.1	754.3	954.5	1 386.9	186.5
Operating profit/surplus before tax	\$m	30.6	16.0	*–18.6	45.7	**–12.5	28.0

.. not applicable

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

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

Source: ABS data available on request, Sports Industries, Australia, 2000–01.

SERVICE INDUSTRIES SURVEY 2000–01 *continued*

Net distributions from TAB authorities to Horse and dog racing organisations were \$555.4m which was 48.9% of their total income for 2000–01 of \$1,135.6m. Training fees contributed a further \$141.2m (12.4%) to this total.

For Health and fitness centres and gymnasia, the main income source was membership fees of \$190.7m. This was 64.8% of the \$294.3m total income. A further \$54.7m (18.6%) came from casual playing fees.

Casual playing fees were the largest source of income for Other sports and physical recreation venues, grounds and facilities. These fees contributed \$295.1m or 40.2% to the total income of \$733.8m.

At \$77.5m (10.6%), Sales of food and beverages was the next largest income source for Other sports and physical recreation venues, grounds and facilities. This source was the third largest for Horse and dog racing organisations (\$73.7m or 6.5%) and Health and fitness centres and gymnasia (\$9.9m or 3.4%).

The total expenses of Horse and dog racing organisations for 2000–01 were \$1,107.3m. Prize money and trophy expenses of \$404.2m accounted for the largest share (36.5%) of this figure. Labour costs of \$242.2m contributed another 21.9%.

For Health and fitness centres and gymnasia, labour costs were the biggest expense. They contributed \$119.8m (43.1%) to total expenses of \$278.1m. A further \$35.4m (12.7%) was spent on Rent, leasing and hiring expenses.

Labour costs were also the largest expense for Other sports and physical recreation venues, grounds and facilities. At \$228.3m, these costs accounted for 30.3% of total expenses.

SERVICE INDUSTRIES SURVEY 2000–01 *continued***8.2 HORSE AND DOG RACING, AND SPORTS AND PHYSICAL RECREATION VENUES INDUSTRIES—2000–01**

	<i>Horse and dog racing</i>	<i>Health and fitness centres and gymnasia</i>	<i>Other sports and physical recreation venues, grounds and facilities</i>
	\$m	\$m	\$m
INCOME			
Net distributions from TAB authorities	555.4	..	..
Training fees	141.2	..	..
Admission charges	26.5	0.6	27.8
Membership fees	20.8	190.7	31.1
Casual playing fees	..	54.7	295.1
Sales of food and beverages	73.7	9.9	77.5
Rent, leasing and hiring	17.6	5.7	62.2
Other income	300.4	32.7	240.1
<i>Total</i>	<i>1 135.6</i>	<i>294.3</i>	<i>733.8</i>

EXPENSES			
Labour costs			
Wages and salaries	210.9	107.2	199.3
Other labour costs	31.3	12.6	29.0
<i>Total</i>	<i>242.2</i>	<i>119.8</i>	<i>228.3</i>
Purchases	64.5	13.1	67.7
Prize money and trophy expenses	404.2	..	..
Rent, leasing and hiring expenses	20.5	35.4	65.8
Depreciation and amortisation	42.9	9.6	97.0
Other expenses	333.0	100.2	295.5
<i>Total</i>	<i>1 107.3</i>	<i>278.1</i>	<i>754.3</i>

.. not applicable

Source: *Sports Industries, 2000–01* (cat. no. 8686.0).

Together, the three main income sources of Sports and physical recreation administrative organisations contributed 50% of their total income. Admission charges (\$203.6m); Sponsorship and fundraising (\$183.9m); and non-government grants, distributions and affiliation fees (\$112.3m) accounted for 20.3%, 18.4% and 11.2% respectively of total income of \$1,000.9m.

The three main sources of income for Sports and physical recreation clubs, teams and sports professionals were Membership fees, Sponsorship and fundraising, and Sales of food and beverages. Membership fees of \$313.1m contributed 22.7% to total income of \$1,381.8m. This was followed by Sponsorship and fundraising income with \$252.3m (18.3%) and Sales of food and beverages with \$201.4m (14.6%).

Important sources of income for Sports and physical recreation support services were Casual playing fees (\$36.0m) and Funding from government (\$19.3m). These contributed 16.7% and 9.0% respectively to the total income of \$215.2m.

SERVICE INDUSTRIES SURVEY 2000–01 *continued*

The largest expense item for Sports and physical recreation administrative organisations was \$237.4m in Grants, distributions and affiliation fees paid to other organisations. This contributed 24.9% to the total expenses of \$954.5m. At \$203.0m (21.3%), Labour costs were also a major expense.

The largest expense item for Sports and physical recreation clubs, teams and sports professionals was Labour costs. At \$595.1m, these costs contributed 42.9% to total expenses of \$1,386.9m. Purchases were the second largest expense item at \$150.8m or 10.9%

Labour costs were also the largest expense item for Sports and physical recreation support services. At \$83.2m they accounted for 44.6% of total expenses of \$186.5m. Another major expense was Depreciation and amortisation of \$16.2m (8.7%).

**8.3 SPORTS AND PHYSICAL RECREATION SERVICES INDUSTRIES—2000–01**

	<i>Sports and physical recreation administrative organisations</i>	<i>Sports and physical recreation clubs, teams and sports professionals</i>	<i>Sports and physical recreation support services</i>
	\$m	\$m	\$m
.....			
<b>INCOME</b>			
Admission charges	203.6	87.3	0.7
Membership fees	80.5	313.1	11.7
Casual playing fees	—	143.2	36.0
Sales of food and beverages	26.8	201.4	1.8
Rent, leasing and hiring	20.6	26.3	2.8
Sponsorship and fundraising income	183.9	252.3	9.5
Funding from government	74.9	10.9	19.3
Other grants, distributions and affiliation fees(a)	112.3	131.9	1.8
Other income	298.2	215.5	131.6
<i>Total</i>	<i>1 000.9</i>	<i>1 381.8</i>	<i>215.2</i>
.....			
<b>EXPENSES</b>			
Labour costs			
Wages and salaries	171.6	508.8	74.4
Other labour costs	31.4	86.3	8.8
<i>Total</i>	<i>203.0</i>	<i>595.1</i>	<i>83.2</i>
Purchases	52.9	150.8	10.3
Prize money and trophy expenses	29.7	19.1	0.6
Rent, leasing and hiring expenses	35.9	47.3	16.2
Depreciation and amortisation	20.3	82.6	3.9
Grants, distributions and affiliation fees paid to other organisations	237.4	32.9	2.2
Other expenses	375.2	459.2	70.1
<i>Total</i>	<i>954.5</i>	<i>1 386.9</i>	<i>186.5</i>

— nil or rounded to zero (including null cells)

(a) In some instances, income from grants, distribution and affiliation fees may be duplicated as different tiers of affiliated organisations receive this income.

Source: *Sports Industries, Australia, 2000–01* (cat. no. 8686.0).

SERVICE INDUSTRIES SURVEY 2000–01 *continued*

Major income items for the organising committees for the Sydney Olympic and Paralympic Games were:

- \$1,137m from television and broadcasting rights
- \$737m from sponsorship and fundraising
- \$642m from admission charges.

The committees received \$110m in funding from government. Their labour costs came to \$422m.

#### 8.4 ORGANISING COMMITTEES FOR SYDNEY OLYMPIC AND PARALYMPIC GAMES—2000–01

\$m	
INCOME	
Television and broadcasting rights	1 137
Sponsorship and fundraising	737
Admission charges	642
Funding from government	110
Other income	349
<i>Total</i>	<i>2 975</i>
EXPENSES	
Labour costs	422
Other expenses	2 553
<i>Total</i>	<i>2 975</i>

(a) Data for the Sydney Organising Committee for the Olympic Games relates to the 18-month period ended December 2000.

Source: *Sports Industries, Australia, 2000–01* (cat. no. 8686.0).

## RETAIL INDUSTRY SURVEY 1998–99

The ACLC Industry Classification includes Class 343 for Sports and physical recreation goods retailing. It would be ideal for data to be available for this class as defined in the ACLC. However, the 1998–99 Retail Industry Survey used ANZSIC to classify industry. As a result the best data available are for the ANZSIC classes which correspond most closely in scope to ACLC Class 343. These ANZSIC classes are 5241 Sport and camping equipment retailing and 5245 Marine equipment retailing. The scope of the former is wholly contained within the scope of ACLC Class 343. However, the scope of the latter includes the retailing of marine equipment for non-recreation purposes. This falls outside the scope of the ACLC altogether. There are some primary activities in scope of ACLC Class 343 which fall outside the scope of the ANZSIC classes 5241 and 5245. Examples are sports apparel retailing and sports footwear retailing.

RETAIL INDUSTRY SURVEY 1998–99 *continued*

In 1998–99, the total income of Sport and camping equipment retailers was \$1,483.2m of which \$1,386.4m (93.5%) came from retail sales. Sport and camping equipment includes such items as bicycles, sports firearms, canoes, skis, fishing tackle and sleeping bags. The operating profit margin for Sport and camping equipment retailers was 4.4% compared with 3.2% for the Retail Industry as a whole. Their total expenses came to \$1,431.7m of which \$967.5m (67.6%) went on Purchases and \$211.1m (14.7%) on Labour costs.

Marine equipment includes boats and their accessories, boat trailers and jet skis. The total income for marine equipment retailers during 1998–99 was \$696.6m of which \$656.3m (94.2%) came from retail sales. The operating profit margin was 3.2%, somewhat less than for Sport and camping equipment retailers, but on a par with the Retail industry as a whole. The total expenses for Marine equipment retailers were \$685.9m, of which 78.9% (\$541.2m) was Purchases and 9.9% (\$68.1m) Labour costs.

At the end of June 1999, there were 10,534 persons employed by Sport and camping equipment retailers. Of the total employment, 59.9% (6,313 persons) were full-time and 68.6% (7,227 persons) were male. Marine equipment retailers employed 2,632 persons of which 80.0% (2,105) were full-time and 80.7% (2,124) male.

For both types of retailers discussed above, the largest group of workers were full-time males. For the retail industry as a whole, however, the largest group of workers were part-time females. Of the total retail industry employment of 1.1m persons, only 45.7% (504,488 persons) were full-time (including working proprietors and partners) and 45.8% (506,305 persons) were male.

RETAIL INDUSTRY SURVEY 1998–99 *continued***8.5 SPORT, CAMPING AND MARINE EQUIPMENT RETAILERS—1998–99**

		<i>Sport and camping equipment retailers</i>	<i>Marine equipment retailers</i>
Businesses at end June	no.	1 931	424
Employment at end June			
Full-time(a)	no.	6 313	2 105
Part-time	no.	4 222	527
Males	no.	7 227	2 124
Females	no.	3 307	508
Total	no.	10 534	2 632
Income			
Retail sales	\$m	1 386.4	656.3
Other income	\$m	*96.8	40.3
Total	\$m	1 483.2	696.6
Expenses			
Labour costs			
Wages and salaries	\$m	190.5	59.4
Other labour costs	\$m	20.6	8.7
Total	\$m	211.1	68.1
Purchases	\$m	967.5	541.2
Other expenses	\$m	253.1	76.6
Total	\$m	1 431.7	685.9
Operating profit before tax	\$m	64.2	22.0
Operating profit margin	%	4.4	3.2

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

(a) Includes working proprietors and partners.

Source: *Retail Industry, 1998–99* (cat. no. 8622.0).

INTRODUCTION

The purpose of this Chapter is to present information about the manufacture of, trade in, supply of, and demand for, sports and physical recreation products. The term ‘products’ encompasses both goods—such as a cricket bat or tennis racquet—and services—such as entry to a game of Australian Football League football or the use of a squash court.

The latest information about the manufacture of sports and physical recreation products has been obtained from the 2000–01 Manufacturing Industry Survey. For wholesaling and retailing, data are collected less frequently and the latest available is from the Wholesale Industry Survey and Retail Industry Survey conducted in respect of 1998–99. The information about exports and imports has been obtained from FASTTRACCS, an ABS product which provides electronic delivery of international trade statistics sourced from customs records. Supply and demand data come from the ABS Australian National Accounts Input-Output Tables.

The products selected from each of these data sources for inclusion in the tables presented in this Chapter are those which most closely align with one or more sports and physical recreation product classes as defined in the ACLC Product Classification. The ACLC Product Classification lists all classes of products which the ABS defines as pertaining to culture and leisure. A subset of these are defined as pertaining to sports and physical recreation.

Some sports and physical recreation products could not be included in some of the tables because, for the relevant data source, they were part of a larger product category which was predominantly out of scope of the ACLC Product Classification. Conversely, some out-of-scope products are included in the tables because they were part of a product category which was predominantly in scope. In addition, there are instances of a product category having significance for other leisure products as well as sports and physical recreation products. In these cases, the category has been included in not only the sports and physical recreation products table(s) in this Chapter, but also in the equivalent table(s) for other leisure products in Chapter 12.

MANUFACTURING INDUSTRY SURVEY

For the 2000–01 and subsequent Manufacturing Industry Surveys, the business unit from which data are collected, and for which industry is classified, is the management unit. However, for earlier surveys, the relevant unit was the establishment. Although, for the majority of businesses, these units will be one and the same, larger businesses may consist of one management unit but several establishments. As a result of the change in collection methodology, the data for 2000–01 are not comparable with data from earlier surveys. However, the data from the earlier surveys are comparable with each other.

MANUFACTURING INDUSTRY SURVEY *continued*

Sports apparel and sports footwear are examples of sports and physical recreation products which could not be included in the table from the Manufacturing Industry Survey (table 9.1) because they were part of a larger product category predominantly out of scope of the ACLC Product Classification. Conversely, tarpaulins and motor vehicle covers are examples of out-of-scope products which are included in the table because they are part of a product category which is predominantly in scope. In addition, the first product category in the table (Articles for funfair, etc.) is a mixture of sports and physical recreation products (e.g. snooker tables, bowling alley equipment) and other leisure products (e.g. pinball machines, tables for casino games). This category is also included in the equivalent table for other leisure products in Chapter 12 (table 12.1). As a result of the preceding, it is not appropriate to sum the values for each product in table 9.1 to obtain an estimate of the total value of production of all sports and physical recreation products.

For 2000–01, the product category with the greatest value of production (\$230.5m) was Boats for pleasure or sport (between 5 and 50 tonnes displacement). This was followed by Sporting equipment and accessories with production of \$225.3m, and Small boats (under 5 tonnes displacement) with \$175.3m.

The same three product categories were also major contributors to the value of sports and physical recreation products manufactured during earlier years. Although not comparable with 2000–01, the figures show that these categories also occupied the top three spots (in different orders) for both 1997–98 and 1998–99. For 1999–2000 they occupied positions two through four.

During the three years of directly comparable data, the value of production of Boats for pleasure or sport (between 5 and 50 tonnes displacement) increased from \$164.5m to \$174.3m and then to \$246.1m. On the other hand, for Small boats (under 5 tonnes displacement) value of production increased from \$115.2m to \$160.9m before falling to \$126.5m; while, for Sporting equipment and accessories, value of production decreased from \$172.6m to \$127.2m before rising to \$214.0m.

## 9.1 SELECTED SPORTS AND PHYSICAL RECREATION PRODUCTS, Value of manufacturing production

Product	VALUE OF PRODUCTION.....			
	1997-98 \$m	1998-99 \$m	1999-00 \$m	2000-01(a) \$m
Articles for funfair, table or parlour games (incl. articles and accessories for billiards, snooker or pool; pintables, special tables for casino games and bowling alley equipment)(b)	*71.7	*17.0	*41.3	18.0
Boats (incl. rowing or sail), yachts, dinghies and other vessels, for pleasure or sport, over 5 and under 50 tonnes displacement (excl. inflatables)	164.5	174.3	246.1	230.5
Knitted sweatsuits, tracksuits, jogging suits, leisure suits and jumpsuits	42.8	*54.0	332.6	*30.2
Saddlery and harness, of any material	*36.5	*12.2	np	10.6
Small boats (incl. rowing or sail), yachts and canoes under 5 tonnes displacement (excl. inflatables)	115.2	160.9	126.5	175.1
Sporting equipment and accessories (incl. fishing gear and gloves specially designed for use in sport)	172.6	127.2	214.0	225.3
Swimwear (excl. infants')	53.4	np	**85.4	*52.9
Textile tarpaulins (incl. canvas), sails, tents, annexes, pneumatic mattresses and motor vehicle covers	115.1	95.0	103.1	112.5

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

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

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

(a) Note that the figures for 2000-01 are not comparable with those for earlier years because of changes to the data collection methodology.

(b) This category is a mixture of sport and physical recreation products (e.g. snooker tables, bowling alley equipment) and other leisure products (e.g. pinball machines, tables for casino games) and hence has also been included in the equivalent table for other leisure products in Chapter 12.

Source: ABS data available on request, Manufacturing Industry Survey.

## WHOLESALE INDUSTRY SURVEY 1998-99

Sports footwear is an example of sports and physical recreation products which could not be included in the table from the Wholesale Industry Survey (table 9.2) because they were part of a larger product category predominantly out of scope of the ACLC Product Classification. Conversely, bait supplies for fishing is an example of out-of-scope products which are included in the table because they are part of a product category which is predominantly in scope. In addition, the product category Bicycles and ride-on toys combines a sports and physical recreation product (bicycles) with other leisure products (ride-on toys). This category is also included in the equivalent table for other leisure products in Chapter 12 (table 12.2). As a result of the preceding, it is not possible to sum the sales figures for each product in table 9.2 to obtain an estimate of total sales of all sports and physical recreation products.

WHOLESALE INDUSTRY SURVEY 1998–99 *continued*

For 1998–99, the product category with the greatest value of wholesale sales was Swimwear, tracksuits and other sportswear which recorded \$526.4m. This was followed by Other sporting goods with \$462.4m. These categories also had the highest percentage margins with 39.1% and 33.4% respectively. Other sporting goods includes the balls, bats, racquets and other equipment used in the playing of sport.

**9.2 SELECTED SPORTS AND PHYSICAL RECREATION PRODUCTS, Wholesale sales—1998–99**

Product	Sales value \$m	Sales margin(a) \$m	Percentage margin(b) %
Bicycles and ride-on toys(c)	*209.7	*64.1	30.6
Camping equipment	53.7	14.7	27.3
Fishing tackle and bait supplies	*101.7	*33.6	33.0
Other sporting goods	*462.4	*154.6	33.4
Swimwear, tracksuits and other sportswear	*526.4	*206.0	39.1

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

(a) The difference between purchase price and selling price.

(b) Sales margin as a percentage of sales value.

(c) This category combines a sports and physical recreation product (bicycles) with other leisure products (ride-on toys) and hence has also been included in table 12.2 for other leisure products in Chapter 12.

Source: *Wholesale Industry, 1998–99* (cat. no. 8638.0).

## RETAIL INDUSTRY SURVEY 1998–99

Wetsuits is an example of sports and physical recreation products which could not be included in the table from the Retail Industry Survey (table 9.3) because they were part of a larger product category predominantly out of scope of the ACLC Product Classification. Conversely, bait supplies for fishing is an example of out-of-scope products which are included in the table because they are part of a product category which is predominantly in scope.

In 1998–99, the total value of retail sales of the selected sports and physical recreation products included in table 9.3 was \$3,799.2m.

The product category with the greatest value of retail sales was Other sporting goods which recorded \$893.0m. Other categories with relatively high levels of sales were Swimwear, tracksuits and other sportswear at \$799.8m, and New boats, outboard motors and boat trailers with \$620.5m.

The product categories with the highest percentage margins were Swimwear, tracksuits and other sportswear (40.1%) and Other sports footwear (37.3%). Percentage margins were also relatively high for Running and jogging shoes (35.5%) and Camping equipment (34.3%). Boats, outboard motors and boat trailers provided the two lowest percentage margins at 18.8% for new and 16.3% for used.

RETAIL INDUSTRY SURVEY 1998–99 *continued***9.3 SELECTED SPORTS AND PHYSICAL RECREATION PRODUCTS, Retail sales—  
1998–99**

<i>Product</i>	<i>Sales value</i>	<i>Percentage margin(a)</i>
	<i>\$m</i>	<i>%</i>
Bicycles	334.4	31.4
Boats, outboard motors and boat trailers, new	620.5	18.8
Boats, outboard motors and boat trailers, used	*124.0	16.3
Camping equipment	380.9	34.3
Fishing tackle and bait supplies	160.2	30.9
Other sporting goods	893.0	29.3
Hiking boots	*29.8	31.5
Running and jogging shoes	309.1	35.5
Other sports footwear	147.5	37.3
Swimwear, tracksuits and other sportswear	799.8	40.1
<b>Total</b>	<b>3 799.2</b>	<b>31.0</b>

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

(a) Sales margin as a percentage of sales value. Sales margin is the difference between purchase price and selling price.

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

## INTERNATIONAL TRADE IN SPORTS AND PHYSICAL RECREATION PRODUCTS

Sports apparel is an example of sports and physical recreation products which could not be included in the international trade tables because they were part of a larger product category predominantly out of scope of the ACLC Product Classification. Another that could not be included is automatic bowling alley equipment, which is part of the category Other articles for funfair, table or parlour games. This category is predominantly in scope of the Other leisure products part of the ACLC Product Classification. Hence, automatic bowling equipment is included in the tables in the international trade section of Chapter 12 as part of Other articles for funfair, table or parlour games.

Australia's trade in the selected sports and physical recreation goods is in deficit. Imports of these goods during 2001–02 were valued at \$1,233.9m. This is more than two and a half times the \$463.4m in sports and physical recreation goods which was exported during that year. Boats, yachts and other vessels for pleasure or sports (\$185.6m) and Horses (\$129.9m) were the main contributors to the overall export figure and together accounted for over two-thirds of total exports. The two product categories contributing the most to imports were Sports or physical recreation footwear (\$166.0m) and Marine outboard motors (spark ignition only) (\$156.2m). However, their combined contribution to total imports was little more than a quarter.

INTERNATIONAL TRADE IN SPORTS AND PHYSICAL RECREATION PRODUCTS *continued*

The main sources of imported sports and physical recreation goods during 2001–02 were China (\$373.4m) and the United States of America (\$266.2m), together accounting for over half of all imports of these goods. The United States of America was also the largest market for exported sports and physical recreation goods (\$95.5m), but was followed closely by New Zealand (\$94.7m). The combined purchases by these countries of Australian sports and physical recreation exports accounted for 41% of the total.

Australia's international trade in sports and physical recreation services is relatively small. As a result, sports and physical recreation services are not identified separately in trade statistics, but are instead combined with cultural and entertainment services, other leisure services, and health and medical services. In 2001–02, Australia recorded its fourth successive surplus for trade in these combined services. Earnings came to \$137m, while payments overseas were only \$60m.

## EXPORTS OF SPORTS AND PHYSICAL RECREATION GOODS

Sports and physical recreation goods exported from Australia during 2001–02 were valued at \$463.4m, 21.7% higher than the \$380.7m recorded for 2000–01. Since 1995–96, exports of these goods (at current prices) have risen steadily, apart from a 7.5% fall in 1998–99 to \$258.6m which was followed by a 20.8% rise in 1999–2000 to \$312.4m.

Since 1995–96, the product categories Horses and Boats, yachts and other vessels for pleasure or sports have been the dominant contributors to the total value of sports and physical recreation goods exported. During that time, their combined contribution has never been lower than 50%. Exports of both categories have increased considerably since 1995–96. For Horses, the value (in current prices) has almost trebled from \$45.2m in 1995–96 to \$129.9m in 2001–02. For Boats, yachts and other vessels for pleasure or sports the value has increased more than two and a quarter times from \$81.9m to \$185.6m.

Other product categories which have made substantial contributions to total exports since 1995–96 are Water-skis, surf-boards, sailboards and other water sports equipment; Golf clubs and other golf equipment; and Marine outboard motors (spark ignition only).

Exports of water sports equipment have remained fairly constant since 1995–96 with a low point in 1996–97 of \$20.8m and a high in 1998–99 of \$27.7m. In 2001–02, the value was \$25.4m. As a percentage of total exports of sports and physical recreation goods, this category has declined from 9.9% in 1995–96 to 5.5% in 2001–02 as total exports have risen.

Exports of golf equipment have fluctuated quite markedly from a low of \$9.8m in 1995–96 to a high of \$40.9m in 2000–01. In 2001–02 the value was \$27.6m.

The high mark in exports of spark ignition marine outboard motors was \$14.7m in 1995–96. After a fall the level of exports recovered in the following two years to be just over \$13m for 1998–99 and 1999–2000. However, it has since dropped again and was down to \$8.2m for 2001–02.

EXPORTS OF SPORTS AND PHYSICAL RECREATION GOODS *continued*

## 9.4 EXPORTS OF SELECTED SPORTS AND PHYSICAL RECREATION GOODS(a)

	1995-96	1996-97	1997-98	1998-99	1999-00	2000-01	2001-02
	\$m						
Horses	45.2	42.8	63.8	62.6	95.5	93.3	129.9
Tents	0.5	1.0	0.4	0.8	1.0	1.3	1.6
Sleeping bags	—	0.1	0.1	0.1	0.1	0.1	0.1
Other camping goods of textile fabric	0.6	2.4	1.5	1.7	1.6	0.8	1.3
Parachutes	0.1	0.2	0.1	0.1	0.2	0.1	0.2
Track suits	4.1	3.8	3.0	1.3	0.1	0.3	0.1
Ski suits	1.0	0.8	0.7	0.7	—	0.1	0.2
Swimwear for men and boys	2.4	2.1	2.8	2.4	2.4	1.5	1.8
Swimwear for women and girls	2.9	3.1	4.2	3.8	5.0	6.3	5.3
Saddlery and harness, for any animal, of any material	6.3	6.4	6.0	5.7	6.2	6.0	8.3
Sports or physical recreation footwear	10.8	12.4	8.7	8.2	8.6	8.1	8.3
Snow-skis, other snow-ski equipment, ice skates and roller skates	2.3	4.6	3.5	4.8	2.1	1.8	4.1
Water-skis, surf-boards, sailboards and other water sports equipment	24.8	20.8	22.5	27.7	23.8	23.2	25.4
Gymnasium or athletics articles and equipment	7.9	5.2	7.1	8.0	9.4	10.2	13.2
Gloves, mittens and mitts of leather or composition leather, designed for use in sports	0.6	2.7	2.4	0.6	0.4	0.2	0.1
Golf clubs and other golf equipment	9.8	14.5	21.3	11.2	11.3	40.9	27.6
Tennis, badminton and similar racquets	0.3	0.3	0.1	0.1	0.1	0.1	0.1
Sports balls	4.4	3.8	5.6	3.7	3.1	3.0	3.9
Fishing rods and other line fishing tackle; fish landing nets, butterfly and similar nets; decoy 'birds' and similar hunting or shooting requisites	4.9	3.9	4.7	4.7	4.2	4.8	6.0
Billiard articles and accessories	4.7	11.5	4.3	6.5	1.4	0.9	0.9
Sporting, hunting or target-shooting shotguns and rifles	1.3	1.4	1.8	2.3	1.3	0.9	1.8
Articles and equipment for table tennis	0.2	0.1	0.3	0.5	0.2	0.1	0.1
Other articles and equipment for sports or physical recreation; swimming pools and paddling pools	11.7	12.3	11.8	5.9	10.2	10.7	15.6
Snowmobiles; and golf cars and similar vehicles	4.1	2.0	4.7	2.4	3.0	3.9	2.7
Bicycles and other cycles, not motorised	0.7	0.5	0.9	1.0	1.2	1.6	2.4
Boats, yachts and other vessels for pleasure or sports	81.9	89.1	84.7	73.9	102.6	144.3	185.6
Inflatable vessels	0.2	0.8	0.5	1.5	0.2	0.6	0.5
Sails	1.0	0.7	1.3	1.3	1.7	2.3	3.3
Marine outboard motors (spark ignition only)	14.7	11.6	9.2	13.3	13.2	8.5	8.2
Gliders and hang gliders	1.3	0.9	1.0	1.2	1.3	3.8	4.2
Balloons and dirigibles and other non-powered aircraft	0.6	0.7	0.4	0.5	1.1	0.9	0.5
<b>Total</b>	<b>251.4</b>	<b>262.6</b>	<b>279.7</b>	<b>258.6</b>	<b>312.4</b>	<b>380.7</b>	<b>463.4</b>

— nil or rounded to zero (including null cells)

(a) All data are presented in Australian dollars using 'Free on Board' valuations.

Source: *International Trade, Australia: FASTTRACCS Service—Electronic Delivery, 2003* (cat. no. 5460.0).

## DESTINATION OF EXPORTS

Throughout the period 1995–96 to 2001–02, the United States of America and New Zealand have been the major destinations for sports and physical recreation goods exported from Australia. For 2001–02, exports to the two countries were very similar at around \$95m each. This was more than double the \$43.2m worth of goods exported to Hong Kong (SAR of China) which was the third-placed export destination.

The 2001–02 figure of \$95.5m for exports to the United States of America was the fourth successive increase since the \$38.1m recorded in 1997–98.

Japan is another important market for exported sports and physical recreation goods. Since 1995–96, Japan has consistently received between \$20m and \$27m worth of these exports.

The level of exports of sports and physical recreation goods received by some countries has increased markedly in the last couple of years. Exports to New Zealand had averaged \$70.7m from 1995–96 to 2000–01, but then jumped to \$94.7m for 2001–02. After averaging \$8.9m for the years 1995–96 to 2000–01, exports to the United Kingdom rose to \$21.3m for 2001–02. Exports to Malaysia rose to \$19.8m for 2001–02 after averaging \$5.6m for the previous six years. Exports to Macau (SAR of China) averaged \$5.3m from 1995–96 to 2000–01, but rose to \$14.5m for 2001–02. It remains to be seen whether these higher export levels are maintained into the future or drop back as was the case with Thailand. It received exports of \$31.4m in 2000–01 after averaging \$2.3m for the previous five years, but dropped back to \$13.9m in 2001–02.

An isolated large order for a particular good can result in a country receiving an unusually large level of exports in one year before reverting to a more usual level. One such case is the \$33.0m recorded by Spain in 1997–98. Another probable case is the \$30.9m of exports to Greece for 2001–02. After not having broken \$1m in any of the preceding six years, orders for over \$30m worth of Motorboats with inboard motors made Greece the fourth biggest overseas market for Australian sports and physical recreation goods during 2001–02.

DESTINATION OF EXPORTS *continued***9.5 DESTINATION OF EXPORTS OF SELECTED SPORTS AND PHYSICAL RECREATION GOODS(a)**

	1995-96	1996-97	1997-98	1998-99	1999-00	2000-01	2001-02
<i>Country of destination</i>	\$m						
United States of America	28.1	53.9	38.1	50.8	65.2	90.6	95.5
New Zealand	68.9	69.5	67.4	67.0	75.9	75.6	94.7
Hong Kong (SAR of China)	23.6	15.9	29.3	19.4	29.8	31.3	43.2
Greece	0.1	0.3	0.1	0.9	0.9	0.8	30.9
Japan	27.4	20.5	20.4	26.5	23.3	26.1	26.1
United Kingdom	8.3	9.4	6.1	8.8	9.0	11.7	21.3
Malaysia	4.9	5.5	8.2	3.9	5.3	6.0	19.8
Macau (SAR of China)	0.4	6.9	0.7	8.8	5.5	9.4	14.5
Thailand	1.9	3.8	1.8	1.4	2.7	31.4	13.9
Singapore	12.5	11.0	10.9	7.6	11.2	16.8	10.5
United Arab Emirates	1.9	1.1	0.8	1.1	3.2	2.6	6.9
Italy	2.1	2.8	3.8	4.4	5.4	5.0	6.6
Spain	1.3	1.0	33.0	3.6	5.7	4.8	6.2
New Caledonia	6.1	18.2	3.9	7.0	5.0	3.9	5.6
Korea, Republic of	2.6	4.0	1.9	0.9	2.6	2.2	5.3
South Africa	5.4	3.2	6.4	3.6	6.2	4.4	4.8
Puerto Rico	—	—	—	1.1	2.1	3.7	4.7
Germany	4.0	2.7	2.6	2.8	4.3	5.9	4.0
Indonesia	3.3	1.2	1.6	0.4	2.5	2.6	3.9
Fiji	1.9	1.8	1.6	1.5	1.6	1.8	3.1
Other countries	46.9	29.8	41.3	37.1	44.9	44.0	41.8
<b>Total</b>	<b>251.4</b>	<b>262.6</b>	<b>279.7</b>	<b>258.6</b>	<b>312.4</b>	<b>380.7</b>	<b>463.4</b>

— nil or rounded to zero (including null cells)

(a) All data are presented in Australian dollars using 'Free on Board' valuations.

Source: *International Trade, Australia: FASTTRACCS Service—Electronic Delivery, 2003* (cat. no. 5460.0).

## IMPORTS OF SPORTS AND PHYSICAL RECREATION GOODS

The value (at current prices) of sports and physical recreation goods imported into Australia increased with each successive year from \$735.6m in 1995-96 to \$1,275.2m in 2000-01, before slipping back to \$1,233.9m in 2001-02.

Sports and physical recreation footwear and Marine outboard motors (spark ignition only) were the product categories which contributed most to total imports of sports and physical recreation goods in 2001-02. These two categories were usually in the top four in terms of value of goods imported during the previous six years. Other categories to appear in the top four in more than one year were Boats, yachts and other vessels for pleasure or sports (\$140.1m in 2001-02); Bicycles and other cycles, not motorised (\$116.4m in 2001-02); and Horses (\$71.3m in 2001-02).

Together, the five sports and physical recreation product categories accounted for 52.7% (\$650.0m) of total imports of sports and physical recreation goods in 2001-02, and not less than 47% of the total in any other year since 1995-96.

IMPORTS OF SPORTS AND PHYSICAL RECREATION GOODS *continued*

At current prices, the value of imports of Sports and physical recreation footwear has increased each year, reaching \$166.0m 2001–02, considerably more than double the 1995–96 figure of \$75.3m. For Marine outboard motors (spark ignition only), imports have generally increased, reaching a high of \$156.2m in 2001–02. This is just slightly more than double the 1995–96 level of \$77.7m.

Imports of Boats, yachts and other vessels for pleasure or sports reached a high of \$199.2m in 2000–01 after increasing each year from the 1995–96 level of \$42.4m (almost a five-fold increase). However, the 2000–01 high point was followed by a 29.7% fall to \$140.1m in 2001–02. Imports of Bicycles and other cycles, not motorised followed a similar pattern, increasing each year from the 1995–96 level of \$76.0m, reaching a high in 2000–01 of \$123.4m (an overall increase of 62.4%) before dropping by 5.7% to \$116.4m in 2001–02.

Imports of Horses also rose each year, but peaked in 1999–2000 at \$126.1m, an increase of 69.7% on the 1995–96 value of \$74.3m. This was followed by a fall of over 50% to \$60.1m in 2000–01 before an 18.6% recovery to \$71.3m in 2001–02.

IMPORTS OF SPORTS AND PHYSICAL RECREATION GOODS *continued*

## 9.6 IMPORTS OF SELECTED SPORTS AND PHYSICAL RECREATION GOODS(a)

	1995-96	1996-97	1997-98	1998-99	1999-00	2000-01	2001-02
	\$m	\$m	\$m	\$m	\$m	\$m	\$m
Horses	74.3	90.6	110.8	120.7	126.1	60.1	71.3
Tents	21.8	21.5	25.5	29.4	26.7	35.8	36.7
Sleeping bags	6.1	5.9	6.7	9.4	9.5	13.4	11.1
Other camping goods of textile fabric	5.1	3.9	6.9	5.7	5.8	6.7	8.9
Parachutes	4.7	5.0	6.2	2.7	6.8	5.2	3.1
Track suits	6.1	7.2	9.6	6.4	4.2	6.8	3.5
Ski suits	0.6	0.5	0.3	0.3	0.3	0.4	0.2
Swimwear for men and boys	2.8	2.0	2.5	4.5	3.1	3.8	7.2
Swimwear for women and girls	8.3	8.3	10.0	14.8	18.3	21.3	28.1
Saddlery and harness, for any animal, of any material	9.3	11.2	12.8	14.8	17.4	18.9	22.3
Sports or physical recreation footwear	75.3	88.9	98.3	106.7	135.4	146.3	166.0
Snow-skis, other snow-ski equipment, ice skates and roller skates	31.4	25.0	29.1	23.2	18.7	20.2	15.1
Water-skis, surf-boards, sailboards and other water sports equipment	18.6	20.3	21.0	22.7	25.2	28.0	32.0
Gymnasium or athletics articles and equipment	72.4	85.2	58.9	50.2	53.2	69.8	84.6
Gloves, mittens and mitts of leather or composition leather, designed for use in sports	10.4	8.5	9.6	9.7	10.2	10.1	10.7
Golf clubs and other golf equipment	52.0	59.2	80.9	69.8	72.8	92.4	98.1
Tennis, badminton and similar racquets	9.6	9.9	11.5	11.4	14.4	13.8	14.2
Sports balls	20.8	19.3	22.1	22.8	23.0	27.1	31.0
Fishing rods and other line fishing tackle; fish landing nets, butterfly and similar nets; decoy 'birds' and similar hunting or shooting requisites	38.6	46.4	43.4	45.5	47.4	58.4	65.2
Billiard articles and accessories	4.3	3.6	4.3	4.1	5.0	5.2	5.6
Sporting, hunting or target-shooting shotguns and rifles	10.2	33.0	10.5	4.7	6.6	10.2	12.0
Articles and equipment for table tennis	0.9	1.0	1.1	1.3	1.6	1.7	2.0
Other articles and equipment for sports or physical recreation; swimming pools and paddling pools	40.4	45.6	52.6	60.2	66.8	130.1	65.7
Snowmobiles; and golf cars and similar vehicles	6.7	6.1	8.5	9.3	10.5	14.5	13.2
Bicycles and other cycles, not motorised	76.0	80.2	83.9	88.0	102.9	123.4	116.4
Boats, yachts and other vessels for pleasure or sports	42.4	73.5	82.5	85.4	107.3	199.2	140.1
Inflatable vessels	3.9	3.7	5.6	5.0	5.3	6.0	6.3
Sails	1.2	0.9	1.2	1.9	2.2	2.6	2.7
Marine outboard motors (spark ignition only)	77.7	72.1	99.8	122.4	120.5	140.0	156.2
Gliders and hang gliders	1.2	0.7	0.7	1.0	0.6	1.3	1.5
Balloons and dirigibles and other non-powered aircraft	2.4	3.6	1.6	1.4	2.3	2.5	2.9
<b>Total</b>	<b>735.6</b>	<b>842.8</b>	<b>918.2</b>	<b>955.7</b>	<b>1 050.0</b>	<b>1 275.2</b>	<b>1 233.9</b>

(a) All data are presented in Australian dollars using the Australian Customs Value.

Source: *International Trade, Australia: FASTTRACCS Service—Electronic Delivery, 2003* (cat. no. 5460.0).

## ORIGIN OF IMPORTS

Throughout the period 1995–96 to 2001–02, China and the United States of America have been the major sources of sports and physical recreation goods imported into Australia. For 2001–02, the combined imports from these two countries amounted to \$639.6m, just over half the total of all imports of these goods. The \$266.2m contributed to this figure by the United States of America placed it second as a source of Australia's imports. This was more than double the \$115.4m worth of goods imported from Japan which was the third-placed import source. Following Japan were Taiwan, from which imports worth \$103.7m were obtained in 2001–02, and New Zealand which provided imports worth \$79.7m.

These countries were the top five sources of imports for every year of the period 1995–96 to 2001–02. Together they provided more than three-quarters of Australia's imports of sports and physical recreation goods for each year except 1996–97 when their combined share was just under at 73%.

At current prices, imports from China have more than doubled over the seven-year period, from \$166.3m in 1995–96 to \$373.4m in 2001–02. The value increased each year up to a high of \$388.5m in 2000–01 before falling by 3.9% to the 2001–02 level. The level of imports from the United States of America in 2001–02 (\$266.2m) was 65.3% higher than the \$161.0m recorded in 1995–96. After increases each year, a high point of \$282.3m was reached in 2000–01 prior to a 5.7% fall to the 2001–02 level.

The value of imports from Japan has increased each year without exception, and the value recorded for 2001–02 (\$115.4m) is more than two and a half times greater than the 1995–96 level of \$41.0m. The levels of imports from Taiwan and New Zealand have both fluctuated over the years. Taiwan recorded a low point of \$90.3m in 1998–99 before rising to a high of \$120.0m two years later. Imports from New Zealand increased each year from \$75.7m in 1995–96 to \$115.2m in 1999–2000, before decreasing 30.8% over two years to be \$79.7m in 2001–02.

ORIGIN OF IMPORTS *continued***9.7 ORIGIN OF IMPORTS OF SELECTED SPORTS AND PHYSICAL RECREATION GOODS(a)**

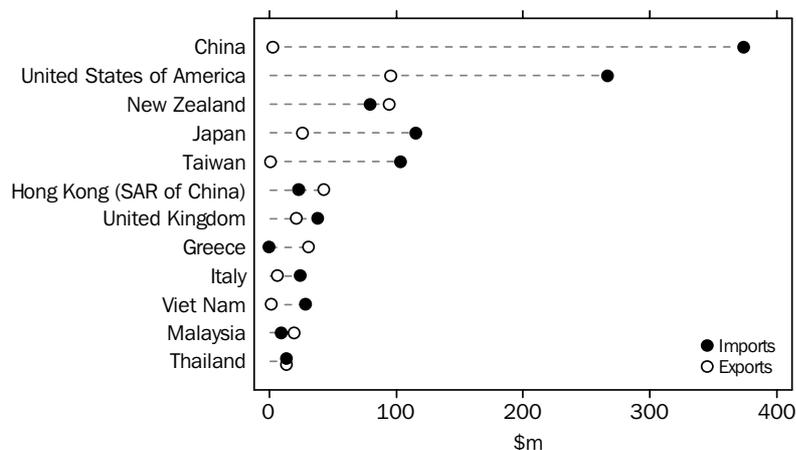
	1995-96	1996-97	1997-98	1998-99	1999-00	2000-01	2001-02
Country of origin	\$m	\$m	\$m	\$m	\$m	\$m	\$m
China	166.3	185.9	209.2	232.7	276.9	388.5	373.4
United States of America	161.0	175.2	223.8	225.0	232.6	282.3	266.2
Japan	41.0	45.2	57.3	77.9	80.3	96.5	115.4
Taiwan	112.7	118.0	104.3	90.3	93.4	120.0	103.7
New Zealand	75.7	91.6	96.2	103.1	115.2	83.2	79.7
United Kingdom	17.7	24.6	30.7	27.3	39.5	46.7	38.3
Viet Nam	4.3	10.0	9.5	12.8	16.2	22.4	28.8
Italy	14.0	21.9	16.7	21.3	21.6	35.2	24.2
France	9.5	11.5	13.8	15.4	18.8	25.4	23.5
Hong Kong (SAR of China)	7.5	16.1	16.8	17.2	18.7	18.9	23.1
India	14.3	14.8	16.4	17.2	18.1	18.7	21.2
Canada	11.8	15.1	19.8	12.6	14.3	18.9	16.0
Indonesia	15.8	16.7	17.0	16.7	17.7	19.3	14.2
Thailand	8.7	9.6	13.3	8.8	8.8	10.5	13.7
Germany	4.0	4.2	3.8	5.0	9.0	11.9	12.3
Korea, Republic of	22.5	18.0	13.5	11.9	11.7	13.3	11.4
Malaysia	6.1	7.2	11.0	9.1	6.9	8.9	9.3
Pakistan	3.6	3.4	3.8	3.7	4.2	4.5	5.8
Philippines	4.6	4.0	6.7	4.4	4.9	4.2	4.4
Singapore	1.3	1.5	1.8	2.4	3.9	6.1	4.2
Other countries	33.1	48.4	32.8	40.9	37.0	39.9	45.3
<b>Total</b>	<b>735.6</b>	<b>842.8</b>	<b>918.2</b>	<b>955.7</b>	<b>1 050.0</b>	<b>1 275.2</b>	<b>1 233.9</b>

(a) All data are presented in Australian dollars using the Australian Customs Value.

Source: *International Trade, Australia: FASTTRACCS Service—Electronic Delivery, 2003* (cat. no. 5460.0).

## BALANCE OF TRADE IN SPORTS AND PHYSICAL RECREATION GOODS

The countries shown in graph 9.8 were Australia's major trading partners in sports and physical recreation goods for 2001-02. That is, they were the countries with which total transactions (exports and imports) were greatest. Australia had a trade deficit with many of these countries in 2001-02. The largest trade deficit was with China (\$370.5m), followed by the United States of America (\$170.7m), Taiwan (\$102.4m) and Japan (\$89.2m). Australia's largest trade surplus in sports and physical recreation goods was with Greece (\$30.8m), while exports to Hong Kong (SAR of China) and New Zealand exceeded imports by \$20.1m and \$15.0m respectively.

BALANCE OF TRADE IN SPORTS AND PHYSICAL RECREATION GOODS *continued***9.8 BALANCE OF TRADE IN SELECTED SPORTS AND PHYSICAL RECREATION GOODS—2001–02**

Source: *International Trade, Australia: FASTTRACCS Service—Electronic Delivery, 2003* (cat. no. 5460.0).

## INTERNATIONAL TRADE IN SPORTS AND PHYSICAL RECREATION SERVICES

In addition to trade in goods, there are also flows of funds between Australia and other countries for the export and import of services relating to sports and physical recreation. Export dollars that flow into Australia as a result of services supplied overseas by Australian residents are termed service credits. These include gross receipts from overseas tours by Australian sporting teams, prize moneys and appearance fees earned overseas by Australian sportspersons, and management and entrepreneurial services provided by Australian residents. Amounts paid to non-residents in the form of prize money, appearance fees or management fees are payments for the importation of sports and physical recreation services and are termed service debits.

Australia's international trade in sports and physical recreation services is relatively small. As a result, sports and physical recreation services are not identified separately in trade statistics, but are instead combined with cultural and entertainment services, other leisure services, and health and medical services.

Australia's trade in this group of services has historically been in deficit. However, as can be seen in table 9.9, it moved into surplus (\$19m) in 1998–99 and has remained there ever since. A 44.2% increase in service credits to \$137m, coupled with a 25.9% decrease in service debits to \$60m, has resulted in the surplus for 2001–02 reaching \$77m. This is four times the size of the previous highest surplus (\$19m in 1998–99).

INTERNATIONAL TRADE IN SPORTS AND PHYSICAL RECREATION SERVICES *continued***9.9 INTERNATIONAL TRADE IN SPORTING, ENTERTAINMENT, CULTURAL, HEALTH AND MEDICAL SERVICES**

	<i>Credits (earnings)</i>	<i>Debits (payments)</i>	<i>Excess of credits over debits</i>
	\$m	\$m	\$m
1995–96	39	52	–13
1996–97	46	54	–8
1997–98	61	63	–2
1998–99	83	64	19
1999–00	75	64	11
2000–01	95	81	14
2001–02	137	60	77

Source: *Balance of Payments and International Investment Position, Australia, 1999–2000* (cat. no. 5363.0) and ABS data available on request, Balance of Payments.

International trade in Audiovisual and related services includes payments for the broadcast rights to sporting fixtures, but these payments are not recorded separately in the trade statistics. However, it has been determined that the service credits of \$1,226m for Audiovisual and related services in 2000–01 included \$1,025m associated with the broadcast rights for the Sydney 2000 Olympic Games.

**SUPPLY OF, AND DEMAND FOR, SPORTS AND PHYSICAL RECREATION PRODUCTS**

Sports apparel and sports footwear are examples of sports and physical recreation products which could not be included in the supply and demand tables because they were part of a larger product category predominantly out of scope of the ACLC Product Classification. Conversely, tarpaulins and motor vehicle covers are examples of out-of-scope products which are included in the tables because they are part of a product category which is predominantly in scope. In addition, one product category included in the tables (Articles for funfair, etc.) is a mixture of sports and physical recreation products (e.g. snooker tables, bowling alley equipment) and other leisure products (e.g. pinball machines, tables for casino games). This category is also included in the equivalent tables for other leisure products in Chapter 12.

As a result of the preceding, the totals presented in the tables below should not be viewed as the total supply of, and demand for, sports and physical recreation products. They are merely the total values of the products for which data were available and they unavoidably include a limited range of out-of-scope products. In addition, the Articles for funfair, etc. category is included in the totals for both sports and physical recreation products, and other leisure products.

The total supply of the selected sports and physical recreation products in 1996–97 was \$6,634.9m. Major contributors to this were Sports and services to sports n.e.c. (which includes clubs, administration and coaching) with \$1,889.1m, Horse and dog racing operation with \$1,213.9m and Sports ground and similar facilities operation n.e.c. with \$1,048.3m.

SUPPLY OF, AND DEMAND FOR, SPORTS AND PHYSICAL RECREATION PRODUCTS *continued*

The overall contribution of imports to the supply of the selected sports and physical recreation products was only 13.6% (\$903.6m). However, for two product categories, imports were the predominant source of supply. Imports of Sporting equipment and accessories were \$536.8m which was 75.6% of the total supply of these products (\$710.0m). This was also 59.4% of all imports of the selected sports and physical recreation products (\$903.6m). The \$84.2m in imports of Articles for funfair, etc. was 51.2% of the total supply of \$164.3m.

**9.10 SUPPLY OF SELECTED SPORTS AND PHYSICAL RECREATION PRODUCTS—1996–97(a)**

<i>Product</i>	<i>Australian production</i>	<i>Imports</i>	<i>Total</i>
	\$m	\$m	\$m
Horse studs	407.7	90.8	498.5
Textile tarpaulins (incl. canvas), sails, tents, annexes, pneumatic mattresses and motor vehicle covers	117.0	27.0	144.0
Swimwear; knitted sweatsuits, tracksuits, jogging suits, leisure suits and jumpsuits	236.1	31.5	267.5
Saddlery and harness, of any material; leather articles n.e.c.	47.0	23.6	70.6
Small boats (incl. rowing or sail), yachts and canoes under 5 tonnes displacement (excl. inflatables)	98.7	9.2	107.9
Boats and other vessels for pleasure and sport between 5 and 50 tonnes displacement	116.7	57.4	174.1
Articles for funfair or table games (incl. billiards, snooker or pool, pintables articles and accessories)	80.0	84.2	164.3
Sporting equipment and accessories (incl. fishing gear and gloves specially designed for use in sport)	173.2	536.8	710.0
Recreational parks and gardens operation	326.2	—	326.2
Horse and dog racing operation	1 170.7	43.1	1 213.9
Sports grounds and similar facilities operation n.e.c.	1 048.3	—	1 048.3
Ski slope and similar services	20.5	—	20.5
Sports and services to sports n.e.c.	1 889.1	—	1 889.1
<b>Total</b>	<b>5 731.2</b>	<b>903.6</b>	<b>6 634.9</b>

— nil or rounded to zero (including null cells)

(a) Basic values. That is, the net amounts received by producers after deducting any indirect taxes.

Source: Australian National Accounts: Input-Output Tables Product Details, 1996–97 (cat. no. 5215.0).

SUPPLY OF, AND DEMAND FOR, SPORTS AND PHYSICAL RECREATION PRODUCTS *continued*

Products supplied are:

- used up in the production of other products (intermediate usage)
- purchased by consumers (final consumption)
- exported
- capitalised
- added to the volume of stocks held.

Final consumption expenditure by households accounted for \$4,495.7m (67.8%) of the total supply of the selected sports and physical recreation products. A further \$1,275.8m (19.2%) was used up in the production of other products. Only 3.1% (\$207.7m) of the total supply was exported.

For most individual product categories, final consumption expenditure by households made the largest contribution to overall demand. One exception was Horse studs for which intermediate usage of \$366.0m accounted for 73.4% of the \$498.5m supplied. Another exception was Saddlery and harness, etc. for which intermediate usage was also the main contributor to demand. For Recreational parks and gardens operation, final consumption expenditure by government was the main contributor. Its share of the total demand of \$326.2m was \$235.8m (72.3%).

Recreational parks and gardens operation also contributed the most (59.7%) to the total final consumption expenditure by government (\$395m). Sports and services to sports n.e.c. was the product category having the largest share of both intermediate usage expenditure (33.1%) and final consumption expenditure by households (31.3%). Sporting equipment etc. had the largest share of exports (23.2%).

SUPPLY OF, AND DEMAND FOR, SPORTS AND PHYSICAL RECREATION PRODUCTS *continued***9.11 DEMAND FOR SELECTED SPORTS AND PHYSICAL RECREATION PRODUCTS(a)—1996–97**

<i>Product</i>	FINAL CONSUMPTION EXPENDITURE.....				
	<i>Intermediate usage</i>	<i>Households</i>	<i>Government</i>	<i>Exports</i>	<i>Total(b)</i>
	\$m	\$m	\$m	\$m	\$m
Horse studs	366.0	73.0	—	33.4	498.5
Textile tarpaulins (incl. canvas), sails, tents, annexes, pneumatic mattresses and motor vehicle covers	48.1	87.3	—	5.5	144.0
Swimwear; knitted sweatsuits, tracksuits, jogging suits, leisure suits and jumpsuits	88.7	160.6	—	4.5	267.5
Saddlery and harness, of any material; leather articles n.e.c.	37.3	17.6	—	12.3	70.6
Small boats (incl. rowing or sail), yachts and canoes under 5 tonnes displacement (excl. inflatables)	3.6	59.7	—	14.3	107.9
Boats and other vessels for pleasure and sport between 5 and 50 tonnes displacement	3.2	102.1	—	22.6	174.1
Articles for funfair or table games (incl. billiards, snooker or pool, pintables articles and accessories)	37.2	73.4	—	30.4	164.3
Sporting equipment and accessories (incl. fishing gear and gloves specially designed for use in sport)	71.9	475.4	—	48.1	710.0
Recreational parks and gardens operation	42.4	48.0	235.8	—	326.2
Horse and dog racing operation	18.2	1 154.3	4.7	36.6	1 213.9
Sports grounds and similar facilities operation n.e.c.	137.2	816.2	94.9	—	1 048.3
Ski slope and similar services	—	20.5	—	—	20.5
Sports and services to sports n.e.c.	422.0	1 407.6	59.5	—	1 889.1
<b>Total</b>	<b>1 275.8</b>	<b>4 495.7</b>	<b>395.0</b>	<b>207.7</b>	<b>6 634.9</b>

— nil or rounded to zero (including null cells)

(a) Basic values. That is, the net amounts received by producers after deducting any indirect taxes.

(b) Includes gross fixed capital expenditure and changes in stocks.

Source: ABS data available on request, Australian National Accounts: Input-Output Tables Product Details, 1996–97.

PART **B**

**OTHER LEISURE** .....

## INTRODUCTION

This Chapter presents information about gambling which has been obtained from three different sources.

The first source was the 2000–01 Service Industries Survey. Among the businesses included in this survey were those operating within the Gambling industry, as defined in the ACLC. Gambling is Group 41 of the ACLC Industry Classification and consists of business units mainly engaged in providing gambling services such as casinos, totalisator or bookmaker betting facilities, and lotteries and related games of chance. The survey also collected data from businesses outside the Gambling industry which were likely to have gambling as a secondary source of income (e.g. pubs and hospitality clubs). Hence the survey obtained, not only economic data for the Gambling industry, but also net takings data for total gambling activity by all in-scope businesses.

The second source was the Census of Population and Housing from which was obtained the number of persons working in gambling occupations, cross-classified by occupation and sex, for the years 1996 and 2001.

The third source was the Household Expenditure Survey. Estimates of household expenditure on gambling for 1993–94 and 1998–99 were obtained from this survey, along with details of how the percentage of households having some gambling expenditure differs for different household characteristics.

In addition, there is some information about gambling presented in Chapter 12. The details of building work approved for other leisure buildings include approvals for casinos and other gambling places. Also, several types of gambling service are among the products included in the information about the supply of, and demand for, other leisure products.

## SERVICE INDUSTRIES SURVEY 2000–01

At the end of June 2001 there were 6,012 businesses which had some involvement in gambling activity but only 18.2% (1,092) of these were part of the Gambling industry. Most businesses involved in gambling activity were either Hospitality clubs or Pubs, taverns and bars. Between them these two categories accounted for 75.1% (4,518) of businesses involved in gambling activity.

SERVICE INDUSTRIES SURVEY 2000–01 *continued***10.1 BUSINESSES WITH GAMBLING ACTIVITY, By industry—2000–01(a)**

	<i>Businesses at end June</i>
	no.
Pubs, taverns and bars	2 566
Hospitality clubs	1 952
Thoroughbred, harness and greyhound racing clubs	28
Other sporting clubs and venues	279
Casinos	13
Other gambling services	1 079
Accommodation	95
<b>Total</b>	<b>6 012</b>

(a) Excluding lottery agencies.

Source: *Gambling Industries, Australia, 2000–01* (cat. no. 8684.0).

The total net takings from all gambling during 2000–01 were \$13,838.6m, or \$944 per head of adult population.

Poker machines contributed 63.2% (\$8,752.4m) of total net takings. There were 185,512 poker machines in operation at the end of June 2001 of which 10,853 (5.9%) were in casinos. Casinos had an 11.7% (\$1,020.5m) share of net poker machine takings. Most of the net takings from poker machines came from machines located in Clubs (\$4,411.3m or 50.4%) and Pubs, taverns and bars (\$3,279.6m or 37.5%).

**10.2 GAMBLING ACTIVITY, Net takings from gambling, by type of gambling and venue—2000–01**

	\$m
Poker/gaming machines in	
Pubs, taverns and bars	3 279.6
Clubs	4 411.3
Casinos	1 020.5
Accommodation businesses	41.0
Total	8 752.4
On-course totalisator	102.9
Off-course TAB	1 691.5
Thoroughbred, harness and greyhound betting bookmakers	43.7
Lotteries and lotto style games (a)	1 726.1
Casino games (b)	1 482.9
Other gambling (c)	39.0
<b>Total</b>	<b>13 838.6</b>

(a) Includes non-casino keno.

(b) Includes casino keno.

(c) Includes bookmakers' takings other than on thoroughbred, harness and greyhound betting, and casino games via the Internet.

Source: *Gambling Industries, Australia, 2000–01* (cat. no. 8684.0).

SERVICE INDUSTRIES SURVEY 2000–01 *continued*

The total income of the gambling industries (net of payouts to players) for 2000–01 was \$9,543.0m. Casinos contributed \$3,136.8m (32.9%) of this, while \$6406.3m (67.1%) was generated by Other gambling services. The total operating profit before tax of the gambling industries was \$1,357.7m, of which \$536.8m came from Casinos and \$820.9m from Other gambling services.

Income from gambling made up 96.0% (\$6,149.3m) of the total income of Other gambling services, but only 79.9% (\$2,505.3m) of the total income of Casinos. This reflects their greater diversity of income sources (e.g. the bars and restaurants within a casino).

For Casinos, labour costs made up 32.4% (\$841.8m) of total expenses (\$2,598.7m) whereas, for Other gambling services, labour costs of \$311.7m were only 5.6% of total expenses (\$5,580.4m).

At the end of June 2001, there were 32,591 persons employed by the gambling industries (including the 3,073 working in TAB agencies). Casinos employed 20,413 persons of which 56.2% (11,462) were male. Excluding TAB agencies, Other gambling services employed 9,105 persons of which 63.9% (5,814) were female.

**10.3 GAMBLING INDUSTRIES—2000–01**

		Casinos	Other gambling services(a)	Total
Businesses at end June	no.	13	1 079	1 092
Employment at end June(b)(c)				
Males	no.	11 462	3 291	14 753
Females	no.	8 951	5 814	14 765
Total	no.	20 413	9 105	29 518
Income				
Net takings from gambling	\$m	2 503.5	6 050.6	8 554.1
Commissions from gambling	\$m	1.8	98.7	100.5
Other income	\$m	631.5	257.0	888.4
Total	\$m	3 136.8	6 406.3	9 543.0
Expenses				
Labour costs				
Wages and salaries	\$m	732.5	274.4	1 006.9
Other labour costs	\$m	109.3	37.3	146.6
Total	\$m	841.8	311.7	1 153.5
Gambling and gaming taxes and levies	\$m	502.8	2 514.2	3 017.0
Other expenses	\$m	1 254.1	2 754.5	4 008.6
Total	\$m	2 598.7	5 580.4	8 179.1
Operating profit before tax	\$m	536.8	820.9	1 357.7

(a) Includes TAB agencies.

(b) Includes working proprietors and partners.

(c) Excludes 3,073 persons working in TAB agencies.

Source: *Gambling Industries, Australia, 2000–01* (cat. no. 8684.0).

## CENSUS OF POPULATION AND HOUSING

The 2001 census found that there were 11,204 persons who identified their main job as working in a gambling occupation. This was 5.1% lower than in 1996 when 11,805 persons identified their main job in this way.

The gender breakdown of workers in gambling occupations was slightly more even in 2001 than in 1996. In 2001, females made up 53.3% of these workers, down from 55.9% in 1996.

For both years the gambling occupations with the most persons were Gaming dealer and Betting agency counter clerk. In 2001, 35.8% (4,011) were Gaming dealers and a further 18.0% (2,016) were Betting agency counter clerks.

**10.4 EMPLOYMENT IN GAMBLING OCCUPATIONS, By sex—1996 and 2001**

Occupation	1996 CENSUS.....			2001 CENSUS.....		
	Males	Females	Persons	Males	Females	Persons
Bookmaker	368	36	404	271	37	308
Betting agency branch manager	708	1 305	2 013	419	825	1 244
Gaming workers n.f.d.	46	38	84	81	88	169
Gaming pit boss	327	273	600	190	82	272
Gaming table supervisor	631	489	1 120	947	875	1 822
Gaming dealer	2 228	1 946	4 174	2 373	1 638	4 011
Betting clerks n.f.d.	—	4	4	14	27	41
Betting agency counter clerk	466	1 760	2 226	612	1 404	2 016
Telephone betting clerk	54	359	413	107	655	762
Bookmaker's clerk	287	48	335	151	53	204
Betting clerks n.e.c.	92	340	432	64	291	355
<b>Total gambling occupations</b>	<b>5 207</b>	<b>6 598</b>	<b>11 805</b>	<b>5 229</b>	<b>5 975</b>	<b>11 204</b>
Total employment	4 272 051	3 364 266	7 636 317	4 546 783	3 751 823	8 298 606

— nil or rounded to zero (including null cells)

Source: *Employment in Sport and Recreation, Australia, August 2001* (cat. no. 4148.0).

## HOUSEHOLD EXPENDITURE SURVEY

From information obtained from the 1998–99 Household Expenditure Survey, it was estimated that the average weekly household expenditure on Gambling was \$5.80 and that more than half of this (\$3.47) was for Lotteries, lotto-style and 'instant money' games. However, it is believed that respondents to the survey tend to understate their gambling expenditure, so this result should be interpreted with caution.

HOUSEHOLD EXPENDITURE SURVEY *continued*

Besides estimates of expenditure on Gambling, the survey also provided information about the characteristics of households which have this expenditure. It was estimated that there were 3,655,100 which had some expenditure on gambling during the two-week enumeration period in 1998–99. This figure was 51.3% of the total number of households (7,122,800). However, the percentage of households with gambling expenditure was higher than this for households with some characteristics, and lower for households with others. For example, 53.5% of households outside the eight capital cities had gambling expenditure, whereas the figure was only 50.0% for households within the eight capital cities. Following table 10.5, the incidence of gambling in 1998–99 is examined for various other household characteristics.

### 10.5 EXPENDITURE ON GAMBLING AT CONSTANT PRICES(a)—1993–94 and 1998–99

	AVERAGE HOUSEHOLD EXPENDITURE..		TOTAL HOUSEHOLD EXPENDITURE.....		Number of households reporting expenditure(b)
	1993–94 \$/week	1998–99 \$/week	1993–94 \$/m/year	1998–99 \$/m/year	1998–99 '000
Lotteries, lotto-style and 'instant money' games	3.80	3.47	1 309.4	1 288.7	2 835.7
Other gambling	1.92	2.33	662.3	865.3	1 935.1
<b>Total</b>	<b>5.70</b>	<b>5.80</b>	<b>1 967.8</b>	<b>2 154.0</b>	<b>3 655.1</b>
Total expenditure on all products	664.28	698.97	229 178.8	259 586.7	7 121.8

(a) At 1998–99 prices.

(b) Households reporting expenditure in the two-week enumeration period.

Source: ABS data available on request, Household Expenditure Survey, 1993–94 and 1998–99.

The states which had the highest percentages of households reporting gambling expenditure were Queensland and Western Australia with 55.4% and 53.2% respectively. The lowest percentages were recorded by the Australian Capital Territory with 45.6% and Tasmania with 46.3%.

The household composition with the highest percentage of households with gambling expenditure was Other couple families, that is households consisting of couples with families with no dependent children. There were 69.4% of these households which had gambling expenditure. The next highest percentage was recorded by Couple only households with 59.2%. The household compositions with the lowest percentages reporting gambling expenditure were One parent with dependent children only (34.5%), and Lone person households (38.9%).

For income quintile groups, the percentage of households with gambling expenditure increased progressively from 41.9% for the lowest (first) quintile up to 59.5% for the highest (fifth) quintile.

HOUSEHOLD EXPENDITURE SURVEY *continued*

Household characteristics include characteristics of the reference person. For Household Expenditure Survey purposes, the reference person:

- in a one-person household is that person
- in a one-parent household is the parent
- in a couple household is the partner with the highest income.

Households can be grouped according to the age group of the reference person. The age group for which the highest percentage of households had gambling expenditure was 45–64 years. There were 59.1% of these households with gambling expenditure. The next highest percentage was the 53.9% recorded for the age group 65 years or more. The age groups with the lowest percentages of households reporting gambling expenditure were Less than 25 years (35.0%), and 25–34 years (42.0%).

Of households with the reference person born overseas in one of the main English-speaking countries, 57.4% reported some gambling expenditure. By comparison, the equivalent figure for households with the reference person born overseas in another country was only 42.3%. For households with an Australian-born reference person, 52.3% had some gambling expenditure.

In terms of the labour force status of the reference person, households with a full-time employee as reference person had the highest percentage reporting gambling expenditure (54.0%). Households with a part-time employee as reference person were next with 53.4%. By far the lowest percentage with gambling expenditure was the 28.3% recorded by households with an unemployed reference person.

The overall percentage of households with an employed reference person having gambling expenditure was 53.2%. However, the percentage was higher than this for some occupations and lower for others. The highest percentages of households reporting gambling expenditure were recorded by households with a reference person who was an Intermediate clerical, sales or service worker (60.6%); or an Advanced clerical or service worker (60.4%). By comparison, the lowest percentages were recorded by households with a reference person who was a Professional (46.9%); or Elementary clerical, sales or service worker (49.8%).

## INTRODUCTION

The purpose of this Chapter is to present information about businesses operating in Other leisure industries. These industries are part of Division 4 Other culture and leisure of the ACLC.

Division 4 consists of eight industry groups, four of which are relevant to Other leisure. These are Group 41 Gambling, Group 42 Amusement industries, Group 43 Hospitality and Group 48 Other culture and leisure goods manufacturing and sales. Each of these groups consists of a number of industry classes. For Group 43, it is only Class 433 Hospitality clubs for which information is presented. Information about Group 41 Gambling was presented in Chapter 10.

Amusement industries consist of business units mainly engaged in providing recreation and entertainment services in the form of amusement parks, arcades and centres; and other amusement activities. Information about these units has been obtained from the 2000–01 Service Industries Survey. For Amusement and theme parks (ACLC Class 421) data were collected from all such parks which operated on a commercial basis from a permanently fixed site with multiple rides and attractions and had over 50,000 visits for the year. For Amusement arcades and centres and other amusement operations (ACLC Class 422) the survey included amusement machine centres, indoor play centres, mini-golf centres, go-kart venues and similar operations.

Hospitality clubs are organisations which provide members with facilities for eating, drinking and socialising. In addition, they may also provide gambling facilities. The 2000–01 Service Industries Survey is the source of information about these organisations also.

For Group 48, some information about retailers of other leisure goods (Class 483) has been obtained from the 1998–99 Retail Industry Survey. Information about manufacturers and wholesalers of other leisure goods (Classes 481 and 482) is only available in combination with information about manufacturers and wholesalers of sports and physical recreation goods. The combined information (from the 2000–01 Manufacturing Industry Survey and 1998–99 Wholesale Industry Survey) is presented in this Chapter.

## AMUSEMENT INDUSTRIES

The total income of the amusement industries for 2000–01 was \$424.1m, of which \$287.2m (67.7%) was generated by Amusement and theme parks, and the remainder by Amusement arcades, centres and other operations. Takings from admissions and rides contributed \$161.5m (56.2%) to the income of Amusement and theme parks, while Sales of food and beverages provided another \$51.5m (17.9%). The total number of visits to Amusement and theme parks during 2000–01 was 8.9 million and there were 30 parks in operation at 30 June 2001.

AMUSEMENT INDUSTRIES *continued*

For Amusement arcades, centres and other operations the main source of income was takings from coin-operated amusement machines. This source contributed \$72.6m (53.0%) to their overall income of \$136.9m. Another \$42.1m (30.8%) came from takings from admissions and playing fees. At 30 June 2001 there were 288 of these businesses operating from 384 locations.

Labour costs contributed \$118.3m (37.8%) to the total expenses of \$312.8m incurred by Amusement and theme parks. For Amusement arcades, centres and other operations, the labour cost share of the \$136.0m in total expenses was \$41.0m (30.2%).

Overall, 2000–01 was not a profitable year for the amusement industries. This was particularly so for Amusement and theme parks. Although Amusement arcades, centres and other operations managed to just break even, Amusement and theme parks lost \$26.7m.

At 30 June 2001, the majority of the amusement industry workforce was employed on a casual basis. For Amusement and theme parks the casual workforce of 2,243 persons was 54.0% of the total of 4,150. For Amusement arcades, centres and other operations; the proportion of casual employees was even larger, with 60.8% (1,698) of the workforce of 2,793 persons being employed casually.

Amusement and theme parks employed more females than males. The female employment of 2,183 was 52.6% of the total. For Amusement arcades, centres and other operations; male employment was larger. The 1,493 males employed accounted for 53.5% of all employment.

AMUSEMENT INDUSTRIES *continued***11.1 AMUSEMENT INDUSTRIES—2000–01**

		Amusement and theme parks	Amusement arcades, centres and other operations	Total
Businesses at end June	no.	(a)30	288	318
Employment at end June				
Permanent(b)	no.	1 907	1 095	3 002
Casual	no.	2 243	1 698	3 941
Males	no.	1 967	1 493	3 460
Females	no.	2 183	1 300	3 483
Total	no.	4 150	2 793	6 943
Income				
Takings from admissions, rides and playing fees	\$m	161.5	42.1	203.6
Takings from coin-operated amusement machines	\$m	na	72.6	72.6
Takings from sales of food and beverages	\$m	51.5	10.4	61.9
Other income	\$m	74.2	11.8	86.0
Total	\$m	287.2	136.9	424.1
Expenses				
Labour costs				
Wages and salaries	\$m	101.0	36.2	137.2
Other labour costs	\$m	17.3	4.8	22.1
Total	\$m	118.3	41.0	159.3
Purchases	\$m	40.6	15.1	55.7
Other expenses	\$m	153.8	79.9	233.7
Total	\$m	312.8	136.0	448.8
Operating profit before tax	\$m	-26.7	**0.1	-26.6

na not available separately but included in Other income if applicable

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

(a) This is the number of individual parks.

(b) Includes working proprietors and partners.

Source: *Selected Amusement and Leisure Industries, Australia, 2000–01* (cat. no. 8688.0).

## HOSPITALITY CLUBS

Hospitality clubs can include community clubs, working men's clubs, ethnic clubs and those sports or physical recreation clubs which generate more income from hospitality services than they do from sports services.

At the end of June 2001, there were 2,911 Hospitality club organisations operating 112,127 gaming machines and employing 64,990 persons. Of these organisations, 1,513 (52.0%) were Sports hospitality clubs. That is, clubs which obtained the largest portion of their income from the provision of hospitality services, but identified themselves in the survey as being sports or physical recreation clubs. These clubs operated 36,970 gaming machines (33.0%) and employed 23,530 persons (36.2%). The fact that over half of Hospitality clubs were associated with sports but accounted for only around a third of employment and gaming machines suggests that, on average, they were smaller operations than the clubs not associated with sports. This is further evidenced by the figures for income, expenses and profits which all show the larger share being contributed by the non-sports clubs.

The total income of Hospitality clubs during 2000–01 was \$6,297.1m of which \$2,010.3m (31.9%) was generated by the sports clubs. Over half (54.1%) the income of Sports hospitality clubs was derived from gambling (\$1087.7m). A further \$546.7m (27.2%) came from Sales of liquor and other beverages. The main income sources which were directly related to sports were Casual playing fees, which provided \$41.2m, and the Membership fees of sports participants and players which amounted to \$38.4m.

Sports hospitality clubs had total expenses of \$1,895.8m which was 32.0% of the \$5,924.6m incurred by all Hospitality clubs. Labour costs contributed \$574.2m to the expenses of Sports hospitality clubs (30.3%) while purchases accounted for a further \$356.9m (18.8%).

The operating surplus before tax of Sports hospitality clubs was \$114.1m. This was 30.5% of the overall surplus of \$374.4m achieved by all Hospitality clubs.

The 23,530 persons employed by Sports hospitality clubs were fairly evenly split between males and females, and between permanent and casual. Female employment of 11,965 was 50.8% of the total, and casual employment of 12,015 was 51.1%.

HOSPITALITY CLUBS *continued***11.2 HOSPITALITY CLUBS—2000–01**

		Sports hospitality clubs(a)	Other hospitality clubs	Total
Organisations at end June	no.	1 513	1 398	2 911
Poker/gaming machines in use at end June	no.	36 970	75 157	112 127
Employment at end June				
Permanent	no.	11 515	22 505	34 020
Casual	no.	12 015	18 955	30 970
Males	no.	11 564	18 744	30 309
Females	no.	11 965	22 716	34 681
Total	no.	23 530	41 460	64 990
Income				
Gambling income	\$m	1 087.7	2 747.5	3 835.2
Sales of liquor and other beverages	\$m	546.7	860.2	1 406.9
Sales of meals and other food	\$m	153.2	393.4	546.6
Membership fees				
Sports participants and players	\$m	38.4	8.9	47.3
Other membership fees	\$m	19.2	60.4	79.6
Total	\$m	57.7	69.2	126.9
Casual playing fees	\$m	41.2	16.4	57.6
Spectator admissions				
To sporting events	\$m	3.1	*0.2	3.3
To other events	\$m	1.4	9.1	10.5
Total	\$m	4.5	9.3	13.8
Rent, leasing and hiring income				
Sporting venues and facilities	\$m	*6.0	5.5	11.6
Other	\$m	7.2	24.9	32.1
Total	\$m	13.3	30.4	43.7
Other income	\$m	106.0	160.4	266.4
Total	\$m	2 010.3	4 286.8	6 297.1
Expenses				
Labour costs				
Wages and salaries	\$m	509.2	1 046.7	1 555.9
Other labour costs	\$m	65.0	156.1	221.0
Total	\$m	574.2	1 202.8	1 777.0
Poker/gaming machine and other gambling taxes and levies	\$m	207.9	562.9	770.7
Purchases	\$m	356.9	641.1	998.0
Other expenses	\$m	756.8	1 622.1	2 378.9
Total	\$m	1 895.8	4 028.9	5 924.6
Operating surplus before tax	\$m	114.1	260.3	374.4

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

(a) Clubs which obtained the majority of their income from providing hospitality (e.g. bar, restaurant and gambling income) but identified themselves as sports clubs.

Source: ABS data available on request, Clubs, Pubs, Taverns and Bars, 2000–01.

## MANUFACTURING INDUSTRY SURVEY

The ACLC Industry Classification includes the classes 341 for Sports and physical recreation goods manufacturing, and 481 for Other culture and leisure goods manufacturing. It would be ideal for data to be separately available for both classes. However, the Manufacturing Industry Survey uses ANZSIC to classify industry. The only ANZSIC class which corresponds closely in scope to ACLC classes 341 and 481 is 2942 Toy and sporting good manufacturing. The scope of this ANZSIC class is wholly contained within, but much narrower than, the combined scope of the two ACLC classes.

In 2000–01, the total income of Toy and sporting good manufacturers was \$303.7m of which 90.2% (\$273.9m) came from sales of goods manufactured by the business. Total expenses came to \$273.2m. Of this figure, 55.0% (\$150.3m) went on purchases while labour costs accounted for a further 23.2% (\$63.3m). The contribution of wages and salaries to labour costs was \$55.0m (86.9%).

At the end of June 2001, there were 2,386 persons employed by Toy and sporting good manufacturers.

For the 2000–01 and subsequent Manufacturing Industry Surveys, the business unit from which data are collected, and for which industry is classified, is the management unit. However, for earlier Manufacturing Industry Surveys the relevant unit was the establishment. Although, for the majority of businesses, these units will be one and the same, larger businesses may consist of one management unit but several establishments. As a result of the change in collection methodology, the data for 2000–01 are not comparable with data from earlier surveys. However, the data from the earlier surveys are comparable with each other.

Because of the design of the establishment-based surveys, only limited data are available at the individual ANZSIC class level (e.g. Class 2942) as can be seen in table 11.3. For the years 1997–98 to 1999–2000, the available data items are employment, sales of goods manufactured by the business, wages and salaries, and purchases. All were at their highest level in 1997–98 before falling in 1998–99 and then partially recovering in 1999–2000.

MANUFACTURING INDUSTRY SURVEY *continued***11.3 TOY AND SPORTING GOOD MANUFACTURERS**

		1997–98	1998–99	1999–00	2000–01(a)
Employment at end June(b)	no.	2 764	1 920	2 237	2 386
<b>Income</b>					
Sales of goods manufactured by the business	\$m	274.1	191.8	241.8	273.9
Other income	\$m	na	na	na	29.8
<i>Total</i>	<i>\$m</i>	<i>na</i>	<i>na</i>	<i>na</i>	303.7
<b>Expenses</b>					
<b>Labour costs</b>					
Wages and salaries	\$m	72.1	48.7	59.1	55.0
Other labour costs	\$m	na	na	na	8.3
<i>Total</i>	<i>\$m</i>	<i>na</i>	<i>na</i>	<i>na</i>	63.3
Purchases	\$m	146.7	111.1	137.3	150.3
Other expenses	\$m	na	na	na	59.6
<i>Total</i>	<i>\$m</i>	<i>na</i>	<i>na</i>	<i>na</i>	273.2
Operating profit before tax	\$m	na	na	na	40.2
Operating profit margin	%	na	na	na	13.3

na not available at the individual ANZSIC class level

(a) Note that the figures for 2000–01 are not comparable with those for earlier years because of changes to the data collection methodology.

(b) Includes working proprietors and partners.

Source: ABS data available on request, Manufacturing Industry Survey.

## WHOLESALE INDUSTRY SURVEY 1998–99

The ACLC Industry Classification includes the classes 342 for Sports and physical recreation goods wholesaling, and 482 for Other culture and leisure goods wholesaling. It would be ideal for data to be separately available for both classes. However, the 1998–99 Wholesale Industry Survey used ANZSIC to classify industry. The only ANZSIC class which corresponds closely in scope to ACLC classes 342 and 482 is 4793 Toy and sporting good wholesaling. The scope of this ANZSIC class is wholly contained within, but much narrower than, the combined scope of the two ACLC classes.

In 1998–99, the total income of Toy and sporting good wholesalers was \$1,339.1m of which 95.8% (\$1,282.2m) was contributed by wholesale sales. Total expenses came to \$1,299.1m. Of this figure, almost two-thirds (\$851.0m) went on purchases while labour costs accounted for a further 12.0% (\$155.7m). The contribution of wages and salaries to labour costs was \$132.7m (85.2%).

At the end of June 1999, there were 4,173 persons employed by Toy and sporting good wholesalers. Of the total employment, 82.8% (3,455 persons) were full-time and 59.5% (2,483 persons) were male. The equivalent percentages applying for the wholesale trade industry in total were 83.6% for full-time workers and 68.4% for males.

WHOLESALE INDUSTRY SURVEY 1998–99 *continued***11.4 TOY AND SPORTING GOOD WHOLESALERS—1998–99**

		<i>Value</i>
Businesses at end of June	no.	825
Employment at end of June		
Full-time(a)	no.	3 455
Part-time	no.	718
Males	no.	2 483
Females	no.	1 690
<i>Total</i>	<i>no.</i>	<i>4 173</i>
Income		
Wholesale sales	\$m	1 282.2
Other income	\$m	*56.9
<i>Total</i>	<i>\$m</i>	<i>1 339.1</i>
Expenses		
Labour costs		
Wages and salaries	\$m	132.7
Other labour costs	\$m	23.0
<i>Total</i>	<i>\$m</i>	<i>155.7</i>
Purchases	\$m	851.0
Other expenses	\$m	292.4
<i>Total</i>	<i>\$m</i>	<i>1 299.1</i>
Operating profit before tax	\$m	**33.4
Operating profit margin	%	2.5

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

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

(a) Includes working proprietors and partners.

Source: *Wholesale Industry, 1998–99* (cat. no. 8638.0).

## RETAIL INDUSTRY SURVEY 1998–99

The ACLC Industry Classification includes the class 483 for Other culture and leisure goods retailing n.e.c. Because the 1998–99 Retail Industry Survey used ANZSIC to classify industry, data are not available for the full scope of the class 483 as defined in the ACLC. What is available are data for the ANZSIC classes which correspond most closely in scope to ACLC class 483. These ANZSIC classes are 5242 Toy and game retailing and 5313 Trailer and caravan dealing. The scope of the former is wholly contained within the scope of ACLC class 483. However, the scope of the latter includes dealing in trailers used for non-recreation purposes which falls outside the scope of the ACLC altogether. There are also some primary activities in scope of ACLC class 483 which fall outside the scope of ANZSIC classes 5242 and 5313. An example is the retailing of electronic game consoles.

The total income of Toy and game retailers for 1998–99 was \$563.5m. Retail sales contributed 98.0% (\$552.4m) of this figure. For Trailer and caravan dealers, retail sales contributed 91.0% (\$343.4m) to the total income figure of \$377.5m. Total expenses for Toy and game retailers were \$570.1m of which \$363.3m (63.7%) went on purchases and \$65.4m (11.5%) on labour costs. Wages and salaries made up 89.8% (\$58.7m) of labour costs. Trailer and caravan dealers had total expenses of \$367.0m. Purchases accounted for \$301.0m (82.0%) of this while the labour cost component was \$30.6m (8.3%). The contribution of wages and salaries to labour costs was 84.6% (\$25.9m). Trailer and caravan dealers achieved an operating profit margin of 3.6%. However, Toy and game retailers recorded an overall loss. This resulted in an operating profit margin of –1.3%.

The number of persons employed by Toy and game retailers at the end of June 1999 was 4,828 of which 2,942 (60.9%) were part-time and 3,011 (62.4%) female. For the retail industry as a whole, part-time employment was 54.3% of the total while female employment was 54.2%. Employment by Trailer and caravan dealers, on the other hand, was dominated by full-timers and males. Of 1,105 persons employed at the end of June 1999, 844 (76.4%) were full-time and 836 (75.7%) were male.

RETAIL INDUSTRY SURVEY 1998–99 *continued***11.5 TOY AND GAME RETAILERS AND TRAILER AND CARAVAN DEALERS—1998–99**

		<i>Toy and game retailers</i>	<i>Trailer and caravan dealers</i>
Businesses at end June (no.)	no.	524	211
Employment at end June			
Full-time(a)	no.	1 884	844
Part-time	no.	2 942	262
Males	no.	1 817	836
Females	no.	3 011	269
<i>Total</i>	<i>no.</i>	<i>4 828</i>	<i>1 105</i>
Income			
Retail sales	\$m	552.4	343.4
Other income	\$m	*11.1	*34.1
<i>Total</i>	<i>\$m</i>	<i>563.5</i>	<i>377.5</i>
Expenses			
Labour costs			
Wages and salaries	\$m	58.7	25.9
Other labour costs	\$m	6.7	4.7
<i>Total</i>	<i>\$m</i>	<i>65.4</i>	<i>30.6</i>
Purchases	\$m	363.3	301.0
Other expenses	\$m	141.4	35.4
<i>Total</i>	<i>\$m</i>	<i>570.1</i>	<i>367.0</i>
Operating profit before tax	\$m	**–7.1	*13.4
Operating profit margin	%	–1.3	3.6

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

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

(a) Includes working proprietors and partners.

Source: *Retail Industry, 1998–99* (cat. no. 8622.0).

INTRODUCTION

The purpose of this Chapter is to present information about the manufacture of, trade in, supply of, demand for, and household expenditure on other leisure products. It also presents information about building approvals for work on other leisure buildings. The term ‘products’ encompasses both goods—such as a deck of playing cards or a model train—and services—such as a sightseeing tour or services provided by a licensed club.

The latest information about the manufacture of other leisure products has been obtained from the 2000–01 Manufacturing Industry Survey. However, for wholesaling and retailing, data are collected less frequently and the latest available are from the Wholesale Industry Survey and Retail Industry Survey conducted in respect of 1998–99. The information about exports and imports has been obtained from FASTTRACCS, an ABS product which provides electronic delivery of international trade statistics sourced from customs records. Supply and demand data come from the ABS Australian National Accounts Input-Output Tables, while the source of information about household expenditure on other leisure products was the Household Expenditure Survey. The monthly Building Approvals collection was the source of information about the value of building work approved for other leisure buildings during 2000–01.

The products selected from each of these data sources for inclusion in the tables presented in this Chapter are those which most closely align with one or more other leisure product classes as defined in the ACLC Product Classification. The ACLC Product Classification lists all classes of products which the ABS defines as pertaining to culture and leisure. A subset of these are defined as pertaining to other leisure.

Some other leisure products could not be included in some of the tables because, for the relevant data source, they were part of a larger product category which was predominantly out of scope of the ACLC Product Classification. Conversely, some out-of-scope products are included in the tables because they were part of a product category which was predominantly in scope. In addition, there are instances of a product category having significance for sports and physical recreation products as well as other leisure products. In these cases, the category has been included in not only the other leisure products table(s) in this Chapter, but also in the equivalent table(s) for sports and physical recreation products in Chapter 9.

MANUFACTURING INDUSTRY SURVEY

For the 2000–01 and subsequent Manufacturing Surveys, the business unit from which data are collected, and for which industry is classified, is the management unit. However, for earlier Manufacturing Surveys the relevant unit was the establishment. Although, for the majority of businesses, these units will be one and the same, larger businesses may consist of one management unit but several establishments. As a result of the change in collection methodology, the data for 2000–01 is not comparable with data from earlier surveys. However, the data from the earlier surveys are comparable with each other.

MANUFACTURING INDUSTRY SURVEY *continued*

The first product category in table 12.1 (Articles for funfair, etc.) is a mixture of sports and physical recreation products (e.g. snooker tables, bowling alley equipment) and other leisure products (e.g. pinball machines, tables for casino games). This category is also included in the equivalent table for sport and physical recreation products in Chapter 9 (table 9.1). As a result of this, it is not possible to sum the values for each product in table 12.1 to obtain an estimate of the total value of production of all other leisure products.

For 2000–01, the product category with the greatest value of production (\$296.2m) was Coin or disc operated games. Another category with a large value was Caravans and camper trailers with production of \$159.6m.

Although not comparable with 2000–01, the figures for earlier years show that Coin or disc operated games also had by far the greatest value of production for 1997–98 and 1999–2000 (\$721.2m and \$471.2m respectively). Unfortunately, the figure for 1998–99 could not be published because of confidentiality requirements. Of the publishable production figures for 1998–99, Caravans and camper trailers had the greatest value with \$162.7m.

During the three years of directly comparable data, Articles for funfair, etc. and Coin or disc operated games both recorded their highest value in 1997–98 (\$71.7m and \$721.2m respectively). On the other hand, Caravans and camper trailers recorded its high of \$162.7m in 1998–99.

**12.1** SELECTED OTHER LEISURE PRODUCTS, Value of manufacturing production

Product	VALUE OF PRODUCTION.....			
	1997–98 \$m	1998–99 \$m	1999–00 \$m	2000–01(a) \$m
Articles for funfair, table or parlour games (incl. articles and accessories for billiards, snooker or pool; pintables, special tables for casino games and bowling alley equipment)	*71.7	*17.0	*41.3	18.0
Caravans, camper trailers and similar vehicles	*90.0	162.7	*154.2	159.6
Coin or disc operated games (incl. video games and poker machines)	721.2	np	471.2	296.2
Toys and puzzles and parts (e.g. dolls' carriages, scooters, model assembly kits) (excl. fur or leather)	**21.8	**21.9	*27.2	*20.9

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

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

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

(a) Note that the figures for 2000–01 are not comparable with those for earlier years because of changes to the data collection methodology.

Source: ABS data available on request, Manufacturing Industry Survey.

## WHOLESALE INDUSTRY SURVEY 1998–99

The information presented here comes from the publication *Wholesale Industry, Australia, 1998–99* (cat. no. 8638.0). The two product categories in table 12.2 are the only ones used in that publication which closely correspond to products included in the ACLC Product Classification. The category Bicycles and ride-on toys combines other leisure products (ride-on toys) with a sports and physical recreation product (bicycles). Hence, this category is also included in the equivalent table for sports and physical recreation products in Chapter 9 (table 9.2). As a result of the preceding, it is not possible to sum the sales figures for each of the two product categories in table 12.2 to obtain an estimate of the total sales for all other leisure products.

At \$519.1m, Other toys and games had the greater wholesale sales for 1998–99. The percentage margins for the two product categories were almost identical; 30.5% for Other toys and games, and 30.6% for Bicycles and ride-on toys.

**12.2** SELECTED OTHER LEISURE PRODUCTS, Wholesale sales—1998–99

Product	Sales value \$m	Sales margin \$m	Percentage margin %
Bicycles and ride-on toys	*209.7	*64.1	30.6
Other toys and games	519.1	158.2	30.5

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

Source: *Wholesale Industry, 1998–99* (cat. no. 8684.0).

## RETAIL INDUSTRY SURVEY 1998–99

The information presented here comes from the publication *Retail Industry, Commodity Sales, Australia, 1998–99* (cat. no. 8624.0). The product categories included in table 12.3 are those which were used in that publication and most closely align with one or more other leisure product classes as defined in the ACLC.

For 1998–99, Other toys and games had by far the greatest level of retail sales. Its value of \$1,088.5m was almost two-thirds of the total spent on selected other leisure products. However, the product categories with the highest percentage margins were Pets at 40.4% and Hobby equipment at 34.2%. The percentage margin for Other toys and games was 31.1%.

The two lowest percentage margins were provided by Caravans and camping trailers. The margins were 17.6% for new and 22.1% for used.

RETAIL INDUSTRY SURVEY 1998–99 *continued***12.3** SELECTED OTHER LEISURE PRODUCTS, Retail sales—1998–99

<i>Product</i>	<i>Sales value</i>	<i>Percentage margin</i>
	\$m	%
Caravans and camping trailers, new	212.0	17.6
Caravans and camping trailers, used	140.0	22.1
Hobby equipment	96.2	34.2
Pets	*95.3	40.4
Ride-on-toys	25.1	31.9
Other toys and games	1 088.5	31.1
<b>Total</b>	<b>1 657.1</b>	<b>29.3</b>

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

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

## INTERNATIONAL TRADE IN OTHER LEISURE PRODUCTS

One other leisure product which could not be included in the international trade tables was recorded media for computer games. This is because, within the trade data, recorded media containing these games cannot be separately identified from recorded media containing general software. A product which should have been included in the tables relating to sports and physical recreation (see Chapter 9) rather than other leisure was automatic bowling alley equipment. However, this equipment could not be separately identified because it is included in the trade data as part of the category Other articles for funfair, table or parlour games. This category consists largely of other leisure products. Hence, it has been necessary to include automatic bowling alley equipment in the tables relating to other leisure as part of Other articles for funfair, table or parlour games.

Australia's trade in the selected other leisure goods is in deficit. Imports of these goods during 2001–02 were valued at \$969.6m. This is almost seven times the \$140.4m in other leisure goods which was exported during that year. Poker machines and other coin or disc operated games (\$55.7m) and Video games of a kind used with a television receiver (\$32.7m) were the main contributors to the overall export figure and together accounted for 63% of the total. The product categories contributing the most to imports were Puzzles and other toys (\$344.8m), Video games of a kind used with a television receiver (\$185.1m) and Dolls and toys representing human beings, animals or non-human creatures (\$180.1m). Their combined contribution to total imports was 73%.

The main source of imported other leisure goods during 2001–02 was China (\$498.2m) which accounted for over half of all imports of these goods. New Zealand was the largest overseas market for Australian other leisure goods (\$51.3m). Its purchases contributed 37% to total other leisure exports.

## EXPORTS OF OTHER LEISURE GOODS

Other leisure goods exported from Australia during 2001–02 were valued at \$140.4m, which was down 16.4% from the \$167.9m recorded for 2000–01 (at current prices), but still 13.6% up from the previous high point of \$123.6m recorded a year earlier.

The product categories Poker machines and other coin or disc operated games, and Video games of a kind used with a television receiver have, since 1997–98, been the dominant contributors to the total value of exports of the selected other leisure goods. During that time, their combined contribution has never been lower than 58%. At current prices, exports of Video games have increased each year since the 1995–96 figure of \$3.2m, resulting in an overall tenfold increase by 2001–02. Exports of Poker machines, etc. fluctuated throughout the period since 1995–96, reaching a low of \$35.5m in 1997–98 and a high of \$90.5m in 2000–01. For 2001–02 the level has dropped 38.5% from the previous year to \$55.7m.

Other product categories making substantial contributions to total exports over the years are Puzzles and other toys, and Other articles for funfair, table or parlour games (including automatic bowling alley equipment). For 2001–02 the levels of exports for these categories were \$15.4m and \$17.9m respectively.

## 12.4 EXPORTS OF SELECTED OTHER LEISURE GOODS(a)

	1995–96	1996–97	1997–98	1998–99	1999–00	2000–01	2001–02
	\$m	\$m	\$m	\$m	\$m	\$m	\$m
Trailers and semi-trailers of the caravan type, for housing or camping	2.9	3.3	3.6	1.7	1.5	2.0	1.8
Dolls' carriages and wheeled toys designed to be ridden by children	0.1	0.3	0.3	0.3	0.7	0.8	0.4
Dolls and toys representing human beings, animals or non-human creatures	4.8	4.1	4.5	5.1	5.1	6.0	5.5
Toy electric trains and their accessories; scale model assembly kits and other constructional toys	2.6	2.4	1.9	1.4	2.3	2.6	3.5
Puzzles and other toys	9.8	12.3	13.7	13.4	11.8	12.4	15.4
Playing cards	1.4	2.0	1.2	0.9	3.5	2.4	4.7
Video games of a kind used with a television receiver	3.2	3.8	16.4	22.0	23.7	29.6	32.7
Poker machines and other coin or disc operated games	48.0	36.4	35.5	39.7	59.6	90.5	55.7
Other articles for funfair, table or parlour games (incl. automatic bowling alley equipment)	33.1	12.2	9.6	13.6	12.8	20.0	17.9
Fairground amusements such as merry-go-rounds, swings, and shooting galleries	13.1	6.6	1.9	2.2	2.5	1.4	2.9
<b>Total</b>	<b>119.0</b>	<b>83.3</b>	<b>88.5</b>	<b>100.4</b>	<b>123.6</b>	<b>167.9</b>	<b>140.4</b>

(a) All data are presented in Australian dollars using 'Free on Board' valuations.

Source: *International Trade, Australia: FASTTRACCS Service—Electronic Delivery*, 2003 (cat. no. 5460.0).

## DESTINATION OF EXPORTS

Throughout the period 1995–96 to 2001–02, New Zealand has been the largest market for other leisure goods exported from Australia. It has received between 26.2% (1995–96) and 40.6% (1999–2000) of all exports of these goods during those years. However, the United States of America and, more recently, Singapore have also been important markets. In 2001–02, the three countries together received goods worth \$91.3m. This was 65.0% of all exports of selected other leisure goods for that year.

After averaging \$16.9m for the years 1995–96 to 1999–2000, exports to the United States of America rose to \$34.4m in 2000–01. However, the level has since dropped back to \$19.6m in 2001–02. Exports to Singapore were averaging \$6.5m before rising to \$21.2m in 2000–01. The level for 2001–02 was little changed at \$20.4m.

**12.5 DESTINATION OF EXPORTS OF SELECTED OTHER LEISURE GOODS(a)**

	1995–96	1996–97	1997–98	1998–99	1999–00	2000–01	2001–02
<i>Country of destination</i>	\$m	\$m	\$m	\$m	\$m	\$m	\$m
New Zealand	31.2	25.8	29.3	33.9	50.1	52.2	51.3
Singapore	5.8	5.1	4.3	8.6	8.8	21.2	20.4
United States of America	17.1	17.9	16.9	16.0	16.7	34.4	19.6
Hong Kong (SAR of China)	3.0	5.1	14.4	10.8	13.8	14.0	9.7
United Kingdom	2.6	3.1	3.2	9.1	12.5	8.4	8.3
Philippines	0.8	3.2	0.7	1.1	0.7	2.3	6.6
Malaysia	1.3	0.9	2.0	1.9	2.8	14.5	5.7
South Africa	0.7	0.4	1.6	5.6	3.0	6.4	3.4
Germany	4.9	1.4	0.5	1.8	0.2	0.6	1.8
Japan	22.6	2.1	2.6	2.7	2.2	2.8	1.7
Peru	—	0.1	—	—	—	0.4	1.6
Netherlands	8.9	1.1	1.4	2.3	4.0	1.0	1.0
Other countries	20.1	17.0	11.4	6.6	9.0	9.6	9.1
<b>Total</b>	<b>119.0</b>	<b>83.3</b>	<b>88.5</b>	<b>100.4</b>	<b>123.6</b>	<b>167.9</b>	<b>140.4</b>

— nil or rounded to zero (including null cells)

(a) All data are presented in Australian dollars using 'Free on Board' valuations.

Source: *International Trade, Australia: FASTTRACCS Service—Electronic Delivery, 2003* (cat. no. 5460.0).

## IMPORTS OF OTHER LEISURE GOODS

The value (at current prices) of other leisure goods imported into Australia increased with each successive year from \$508.3m in 1995–96 to \$969.6m in 2001–02, for an average annual increase of 11.6% over the period.

In every year, Puzzles and other toys was the product category which contributed most to total imports of other leisure goods. The other category which appeared in the top three each year was Dolls and toys representing human beings, animals or non-human creatures. Video games of a kind used with a television receiver was the only other category to make the top three for more than one year. Together, these three product categories accounted for 73.2% (\$710.0m) of total imports of other leisure goods in 2001–02. Their contribution in other years ranged from 65.3% in 1995–96 to 74.9% in 1998–99.

At current prices, the value of imports of Puzzles and other toys has increased each year with the result that the 2001–02 figure of \$344.8m is close to double the 1995–96 figure of \$176.4m. For Dolls and toys representing human beings, animals or non-human creatures, the movement in value of imports has been generally upward to the 2001–02 level of \$180.1m. The only exception was a 2.1% fall to \$150.4m in 1999–2000. This was more than recovered with the following year's rise to \$160.2m. In 2001–02, the value of imports was 73.8% higher than it was in 1995–96 (\$103.6m).

Imports of Video games of a kind used with a television receiver rose each year from 1995–96 to the 1998–99 figure of \$139.8m, more than two and a half times what it was in 1995–96 (\$52.2m). However, over the next two years, the level of imports fell by over 50% to be \$66.3m in 2000–01. It then jumped to \$185.1m in 2001–02, 32.4% up on the previous high point three years earlier.

## 12.6 IMPORTS OF SELECTED OTHER LEISURE GOODS(a)

	1995–96	1996–97	1997–98	1998–99	1999–00	2000–01	2001–02
	\$m						
Trailers and semi-trailers of the caravan type, for housing or camping	0.1	0.2	0.3	0.2	0.3	0.4	0.7
Dolls' carriages and wheeled toys designed to be ridden by children	8.7	9.3	10.2	14.7	18.1	27.4	19.1
Dolls and toys representing human beings, animals or non-human creatures	103.6	107.9	149.0	153.7	150.4	160.2	180.1
Toy electric trains and their accessories; scale model assembly kits and other constructional toys	37.6	40.6	35.5	39.4	38.4	46.3	65.9
Puzzles and other toys	176.4	212.7	217.0	229.6	252.0	320.3	344.8
Playing cards	1.8	2.1	2.1	2.4	5.5	4.4	4.4
Video games of a kind used with a television receiver	52.2	71.5	126.2	139.8	89.4	66.3	185.1
Poker machines and other coin or disc operated games	56.4	45.2	41.4	42.7	51.2	97.7	72.8
Other articles for funfair, table or parlour games (incl. automatic bowling alley equipment)	61.8	65.4	84.9	64.4	105.1	83.0	85.6
Fairground amusements such as merry-go-rounds, swings, and shooting galleries	9.7	8.4	5.5	11.5	5.5	5.6	11.3
<b>Total</b>	<b>508.3</b>	<b>563.3</b>	<b>672.1</b>	<b>698.5</b>	<b>715.8</b>	<b>811.6</b>	<b>969.6</b>

(a) All data are presented in Australian dollars using the Australian Customs Value.

Source: *International Trade, Australia: FASTTRACCS Service—Electronic Delivery*, 2003 (cat. no. 5460.0).

## ORIGIN OF IMPORTS

Throughout the period 1995–96 to 2001–02, China has been the largest source of other leisure goods imported into Australia. Its figure of \$498.2m for 2001–02 was five times higher than the \$97.3m worth of other leisure goods imported from the second largest source, the United States of America. Nevertheless, the United States of America and also Japan have been significant sources of other leisure imports throughout the seven-year period. In terms of import value, these countries and China made up the top three for each of the seven years. For 2001–02, the combined other leisure imports sourced from the top three amounted to \$683.9m, which was 70.5% of the total imports of these goods. In previous years their contribution had been even higher, peaking at 78.6% in 1997–98.

At current prices, imports from China have increased each year and, in 2001–02, were more than double the level of \$233.8m recorded for 1995–96. The level of imports from the United States of America has fluctuated over the seven years. The \$97.3m achieved for 2001–02 was down 23.3% from the high of \$126.8m recorded the previous year. The lowest import level occurred in 1997–98 (\$59.8m).

The value of imports from Japan increased each year until it reached \$151.5m in 1998–99, almost two and a half times higher than the 1995–96 value of \$62.7m. However, over the next two years the value fell by almost two-thirds to be \$53.6m in 2000–01 before recovering somewhat to \$88.4m in 2001–02.

An isolated large order for a particular good can result in a country providing an unusually large level of imports for a particular year. One such case is the \$68.0m of imports received from Hungary in 2001–02. After not having broken \$0.5m in any of the preceding six years, orders for nearly \$68m worth of Video games of a kind used with a television receiver made Hungary the fourth biggest source of imports of other leisure goods in 2001–02.

**12.7 ORIGIN OF IMPORTS OF SELECTED OTHER LEISURE GOODS(a)**

	1995–96	1996–97	1997–98	1998–99	1999–00	2000–01	2001–02
<i>Country of origin</i>	\$m						
China	233.8	254.2	328.1	331.8	346.9	456.0	498.2
United States of America	71.3	65.0	59.8	64.0	99.0	126.8	97.3
Japan	62.7	90.8	140.0	151.5	100.7	53.6	88.4
Hungary	—	0.4	0.2	—	—	—	68.0
Hong Kong (SAR of China)	11.1	14.8	19.3	19.2	25.8	28.1	33.1
United Kingdom	17.5	21.2	20.3	18.6	19.6	18.8	22.2
Taiwan	18.8	17.1	15.7	18.8	19.2	20.7	21.4
Denmark	10.3	12.4	9.3	14.0	9.9	11.4	18.4
Germany	5.9	4.9	5.2	7.0	6.6	7.0	18.0
Switzerland	6.2	8.5	5.1	5.3	10.0	12.8	14.3
Korea, Republic of	3.3	2.8	2.3	8.3	6.2	7.2	10.8
Malaysia	6.7	5.2	5.6	5.4	3.8	4.4	10.4
Other countries	60.7	65.9	61.1	54.6	68.1	64.7	69.0
<b>Total</b>	<b>508.3</b>	<b>563.3</b>	<b>672.1</b>	<b>698.5</b>	<b>715.8</b>	<b>811.6</b>	<b>969.6</b>

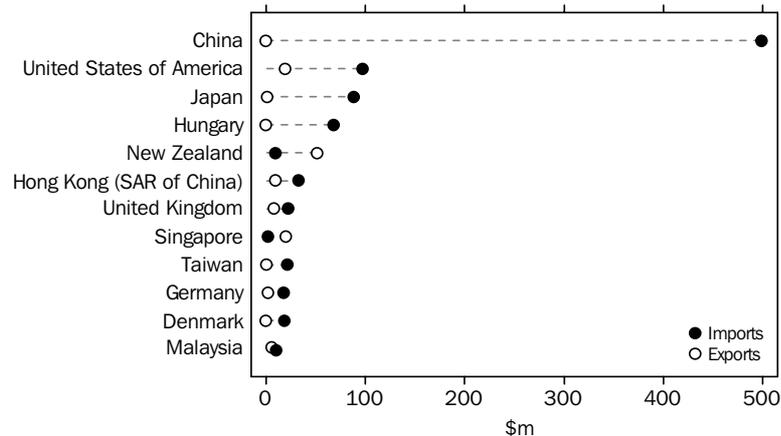
— nil or rounded to zero (including null cells)

(a) All data are presented in Australian dollars using the Australian Customs Value.

Source: *International Trade, Australia: FASTTRACCS Service—Electronic Delivery, 2003* (cat. no. 5460.0).

## BALANCE OF TRADE IN OTHER LEISURE GOODS

The countries which appear on the graph below were Australia's major trading partners in the selected other leisure goods for 2001–02. That is, they were the countries with which total transactions (exports and imports) were greatest. Australia had a trade deficit with most of these countries in 2001–02. By far the largest trade deficit was with China (\$498.1m). This was followed by Japan (\$86.7m), the United States of America (\$77.7m) and Hungary (\$68.0m). Australia's only trade surpluses with its major trading partners in other leisure goods were with New Zealand (\$42.2m) and Singapore (\$18.0m).

**12.8** BALANCE OF TRADE IN SELECTED OTHER LEISURE GOODS—2001–02

Source: *International Trade, Australia: FASTTRACCS Service—Electronic Delivery, 2003* (cat. no. 5460.0).

## SUPPLY OF, AND DEMAND FOR, OTHER LEISURE PRODUCTS

Car trailer hire is an example of an out-of-scope product which is included in the supply and demand tables because it is part of a product group which is predominantly in scope of other leisure products. In addition, one product category included in the tables (Articles for funfair, etc.) is a mixture of other leisure products (e.g. pinball machines, tables for casino games) and sports and physical recreation products (e.g. snooker tables, bowling alley equipment). This category is also included in the equivalent tables for sports and physical recreation products in Chapter 9.

The product category Caravans, camper trailers and similar vehicles is in scope of the ACLC Product Classification but could not be included in the tables. This was because, due to confidentiality considerations, 1996–97 data for this category were not separately available.

As a result of the preceding, the totals presented in the tables below should not be viewed as the total supply of, and demand for, other leisure products. They are merely the total values of the products for which data were available and they unavoidably include a limited range of out-of-scope products. In addition, the Articles for funfair, etc. category is included in the totals for both other leisure products, and sports and physical recreation products.

SUPPLY OF, AND DEMAND FOR, OTHER LEISURE PRODUCTS *continued*

The total supply of the selected other leisure products in 1996–97 was \$10,119.8m. Major contributors to this were Licensed and non-licensed club services (which include net takings from poker machines) with \$3,378.0m, Recreation services n.e.c. (which include the services of theme parks and amusement arcades) with \$2,123.2m and Casinos operation with \$1,302.5m.

The overall contribution of imports to the supply of other leisure products was \$921.8m or 9.1%. However, there were two product categories for which imports were the predominant source of supply. Imports of Toys were \$462.1m which was 94.7% of the total supply of these products (\$487.8m), and 50.1% of all imports of the selected other leisure products. The \$84.2m in imports of Articles for funfair, etc. was 51.2% of their total supply of \$164.3m.

**12.9 SUPPLY OF SELECTED OTHER LEISURE PRODUCTS—1996–97(a)**

<i>Product</i>	<i>Australian production</i>	<i>Imports</i>	<i>Total</i>
	<i>\$m</i>	<i>\$m</i>	<i>\$m</i>
Video games, poker machines and other coin or disc operated games	523.3	117.7	641.0
Toys (excl. fur or leather)	25.7	462.1	487.8
Articles for funfair or table games (incl. billiards, snooker or pool, pintables articles and accessories)	80.0	84.2	164.3
Licensed and non-licensed club services	3 378.0	—	3 378.0
Caravan, car trailer, box trailer or horse trailer hire	104.0	3.9	107.8
Lottery operation	680.5	32.0	712.4
Casinos operation	1 235.7	66.8	1 302.5
Gambling services n.e.c.	258.8	6.8	265.6
Totalisator agency services	900.9	36.4	937.2
Recreation services n.e.c.	2 011.3	111.9	2 123.2
<b>Total</b>	<b>9 198.2</b>	<b>921.8</b>	<b>10 119.8</b>

— nil or rounded to zero (including null cells)

(a) Basic values. That is, the net amounts received by producers after deducting any indirect taxes.

Source: *Australian National Accounts: Input-Output Tables Product Details, 1996–97* (cat. no. 5215.0).

Final consumption expenditure by households accounted for \$8,417.9m (83.2%) of the total supply of the selected other leisure products. Intermediate usage in the production of further products was \$672.5m (6.6%) and products valued at \$399.7m (3.9%) were exported.

For most individual other leisure product categories, final consumption expenditure by households made the largest contribution to overall demand. One exception was Video games, poker machines, etc. for which intermediate usage of \$424.7m accounted for 66.3% of the \$641.0m supplied. The other exception was Caravan, car trailer, etc. hire for which intermediate usage was also the main contributor to demand.

SUPPLY OF, AND DEMAND FOR, OTHER LEISURE PRODUCTS *continued*

For Video games, poker machines, etc. there was no final consumption expenditure by households. This is as would be expected. These products are mainly purchased by businesses for intermediate usage in the provision of amusement services and gambling services.

Licensed and non-licensed club services contributed the most (\$3,378.0m or 40.1%) to the total final consumption expenditure by households, and households accounted for 100% of the demand for this product category. Recreation services n.e.c. had the largest share of final consumption expenditure by government, contributing 89.1% (\$253.8m) to the total (\$284.8m). This category also had the largest share of exports with its contribution of \$152.0m accounting for 38.0% of the total. Video games, poker machines, etc. provided the highest proportion of intermediate usage expenditure (63.2%).

**12.10 DEMAND FOR SELECTED OTHER LEISURE PRODUCTS(a)—1996–97**

Product	FINAL CONSUMPTION EXPENDITURE.....				
	Intermediate usage	Government	Households	Exports	Total(b)
	\$m	\$m	\$m	\$m	\$m
Video games, poker machines and other coin or disc operated games	424.7	—	—	23.7	641.0
Toys (excl. fur or leather)	123.6	228.6	—	12.7	487.8
Articles for funfair or table games (incl. billiards, snooker or pool, pintables articles and accessories)	37.2	73.4	—	30.4	164.3
Licensed and non-licensed club services	—	3 378.0	—	—	3 378.0
Caravan, car trailer, box trailer or horse trailer hire	57.7	40.9	—	3.1	107.8
Lottery operation	—	674.3	—	38.1	712.4
Casinos operation	—	1 190.5	12.8	99.2	1 302.5
Gambling services n.e.c.	—	244.4	18.2	3.0	265.6
Totalisator agency services	—	899.8	—	37.5	937.2
Recreation services n.e.c.	29.2	1 688.1	253.8	152.0	2 123.2
<b>Total</b>	<b>672.5</b>	<b>8 417.9</b>	<b>284.8</b>	<b>399.7</b>	<b>10 119.8</b>

— nil or rounded to zero (including null cells)

(a) Basic values. That is, the net amounts received by producers after deducting any indirect taxes.

(b) Includes gross fixed capital expenditure and changes in stocks.

Source: ABS data available on request, Australian National Accounts: Input-Output Tables Product Details, 1996–97.

## HOUSEHOLD EXPENDITURE SURVEY

Table 12.11 presents information about household expenditure on selected other leisure products during 1998–99. Information regarding household expenditure on gambling is presented in Chapter 10.

Because there is not an exact match between categories of the Household Expenditure Classification (used by the Household Expenditure Survey) and those of the ACLC Product Classification, there are some instances of individual products which are not classed as other leisure in the ACLC being included, and products which are classed as other leisure being excluded. For example; skipping ropes and skateboards are part of Recreation and education equipment n.e.c. (which relates mainly to other leisure) in the Household Expenditure Classification. However, in the ACLC Product Classification, they are classed as sports and physical recreation equipment.

The average weekly household expenditure on the selected other leisure products during 1998–99 was \$29.26. This was 4.2% of the average of \$698.97 spent each week on all products.

More than two-thirds (71.8% or \$21.00 per week) of other leisure expenditure was for Food and beverage serving services. The remainder (\$8.25 per week) was spent on a range of other leisure products including Toys and other recreational equipment (\$3.11 per week) and Sightseeing tours (\$2.04 per week).

The highest expenditure for an individual category of other leisure products was recorded for Meals served in restaurants, hotels, clubs and related (\$14.51 per week), while the lowest expenditure was for the use of Amusement arcade machines (\$0.10 per week).

In 1998–99, Australian households spent a total of \$10,866.7m on the selected other leisure goods and services. Of this expenditure, \$7,799.1m went on Food and beverage serving services and \$1,155.0m on Toys and other recreational equipment.

HOUSEHOLD EXPENDITURE SURVEY *continued***12.11 EXPENDITURE ON SELECTED OTHER LEISURE PRODUCTS BY AUSTRALIAN HOUSEHOLDS—1998–99**

	Average household expenditure	Total household expenditure	Number of households reporting expenditure(a)
	\$/week	\$m/year	'000
<b>Food and beverage serving services</b>			
Meals served in restaurants, hotels, clubs and related	14.51	5 388.8	3 452.9
Alcoholic beverages served in licensed premises	6.49	2 410.3	2 686.8
<i>Total</i>	21.00	7 799.1	4 234.4
<b>Miscellaneous other leisure products</b>			
Caravan related expenditure	1.12	416.0	(b)283.4
Amusement arcade machines	0.10	37.1	159.8
Toys and other recreational equipment	3.11	1 155.0	1 409.2
Sightseeing tours	2.04	757.6	(b)422.7
Animal purchases	0.41	152.3	88.7
Dance and nightclub fees and charges	0.80	297.1	518.7
Club and association subscriptions(c)	0.69	256.3	595.4
<i>Total</i>	8.25	3 063.9	2 669.4
<b>Total expenditure on selected other leisure products</b>	<b>29.26</b>	<b>10 866.7</b>	<b>5 021.1</b>
Total expenditure on all products	698.97	259 586.7	7 121.8

(a) Households reporting expenditure in the two week enumeration period unless otherwise noted.

(b) Households reporting expenditure in the 12 months, three months or two weeks prior to interview for different commodities within this category.

(c) Excludes sports clubs.

Source: ABS data available on request, Household Expenditure Survey, 1998–99.

Table 12.12 presents a comparison of both average weekly and total annual expenditures on selected other leisure products (excluding Meals served in restaurants, hotels, clubs and related) at constant prices for 1993–94 and 1998–99.

The average weekly household expenditure on Alcoholic beverages served in licensed premises decreased from \$7.53 per week to \$6.49 per week or by 13.8% during this period. For the remainder of the selected other leisure products, the overall fall in expenditure was only 2.1% from \$8.43 per week to \$8.25 per week.

The total annual household expenditure on Alcoholic beverages served in licensed premises decreased by \$186.2m from \$2,596.5m in 1993–94 to \$2,410.3m in 1998–99. For the remaining other leisure products, total expenditure increased by \$157.3m from \$2,906.6m to \$3,063.9m over the same period.

HOUSEHOLD EXPENDITURE SURVEY *continued***12.12 EXPENDITURE ON SELECTED OTHER LEISURE PRODUCTS AT CONSTANT PRICES(a)—1993–94 and 1998–99**

	AVERAGE HOUSEHOLD EXPENDITURE.....		TOTAL HOUSEHOLD EXPENDITURE.....	
	1993–94 \$/week	1998–99 \$/week	1993–94 \$/year	1998–99 \$/year
Alcoholic beverages served in licensed premises	7.53	6.49	2 596.5	2 410.3
Miscellaneous other leisure products	8.43	8.25	2 906.6	3 063.9
<b>Total expenditure on selected other leisure products(b)</b>	<b>15.95</b>	<b>14.74</b>	<b>5 503.1</b>	<b>5 474.2</b>
Total expenditure on all products	664.28	698.97	229 178.8	259 586.7

(a) At 1998–99 prices.

(b) Excludes Meals served in restaurants, hotels, clubs and related.

Source: ABS data available on request, Household Expenditure Survey, 1993–94 and 1998–99.

## BUILDING APPROVALS FOR OTHER LEISURE BUILDINGS

As mentioned in Chapter 6, building approvals data relating to other leisure buildings has been isolated by examining the details of individual building jobs classified to the Functional Classification of Buildings category Entertainment and recreation buildings.

There were no new Casinos or other gambling places approved during 2000–01. The entire \$52.6m of work approved for this category was for building jobs to be undertaken on existing structures. The only states to have a substantial level of approvals for gambling places were Western Australia with \$30.1m and Queensland with \$16.0m.

Compared with the value of work approved for gambling places, the \$3.5m approved for Amusement parks and arcades was small. Of this figure, \$3.2m was for the construction of new buildings and \$3.4m was for work to be undertaken in Queensland.

By far the greatest amount of work approved was the \$291.0m for Other facilities. This category covers a wide range of other leisure buildings and includes community, church, scout and other halls; convention centres; senior citizen, youth and community centres; and clubs other than sports clubs. The majority of the amount approved for other facilities was for work on existing buildings (\$176.9m).

Most of the value of approved work for Other facilities was for building jobs located in the larger states. Between them, New South Wales, Victoria and Queensland accounted for over 80% (\$234.4m) of the Australian total. At the other end of the scale, the combined value of approved work in South Australia, Tasmania, Northern Territory and Australian Capital Territory came to \$23.0m which was less than the \$33.6m approved in fourth-placed Western Australia. The contribution of the private sector to the Australian total was 75.8% (\$220.6m).

BUILDING APPROVALS FOR OTHER LEISURE BUILDINGS *continued*

Building jobs for work on club buildings accounted for 33.2% (\$98.6m) of the value of work approved for Other facilities. This figure included work for community, ethnic, workers, service and country clubs (but not sports clubs which are covered in Chapter 6). It is likely that some of these clubs get most of their income from providing hospitality (e.g. drinks and meals for consumption on the premises) and would hence be classified as Hospitality clubs within the ACLC. The details available from building approvals data for individual building jobs are not sufficient to enable hospitality orientated clubs to be separated from the rest.

**12.13** BUILDING APPROVALS, Other leisure buildings—2000–01

	CATEGORY OF BUILDING.....			
	<i>Casinos and other gambling places</i>	<i>Amusement parks and arcades</i>	<i>Other facilities</i>	<i>Total</i>
	\$m	\$m	\$m	\$m
	.....			
	TYPE OF WORK			
New	—	3.2	114.2	117.4
Alterations and additions	50.9	0.3	159.9	211.1
Fitouts and refurbishments	1.7	—	17.0	18.7
<i>Total</i>	52.6	3.5	291.0	347.1
	.....			
	STATE OR TERRITORY OF LOCATION			
New South Wales	1.3	0.2	117.8	119.2
Victoria	2.1	—	53.3	55.4
Queensland	16.0	3.4	63.3	82.7
South Australia	3.0	—	6.9	9.9
Western Australia	30.1	—	33.6	63.7
Tasmania	—	—	2.2	2.2
Northern Territory	0.1	—	10.6	10.7
Australian Capital Territory	—	—	3.3	3.3
<i>Australia</i>	52.6	3.5	291.0	347.1

— nil or rounded to zero (including null cells)

Source: ABS data available on request, Building Approvals Collection.

## GLOSSARY .....

<b>Aerobics</b>	Includes callisthenics, gymnasium work, exercise bike, circuits.
<b>Air sports</b>	Includes parachuting, gliding, hang-gliding, model aircraft.
<b>Attendance</b>	Attendance at a sporting event, match or competition as a spectator, irrespective of whether an admission fee is paid.
<b>Attendance rate</b>	For any group, the number of persons who attended a sporting event at least once during the year, expressed as a percentage of the total population of that group.
<b>Australian Culture and Leisure Classifications (ACLIC)</b>	The ACLIC consists of three parts; the Industry Classification, the Product Classification, and the Occupation Classification. The categories used for the presentation of data in this publication are those which closely align with one or more of the sport and recreation classes from the relevant classification within the ACLIC. For example, the categories used to present industry data are those which closely align with classes in the ACLIC Industry Classification Division 3, Sports and physical recreation; or with other leisure classes in Division 4 Other culture and leisure.
<b>Basketball</b>	Includes indoor and outdoor.
<b>Capital city</b>	The six state capital city statistical divisions. The Darwin Statistical Division and the Canberra Statistical Division are excluded.
<b>Casual employees</b>	Employees not entitled to take paid holidays.
<b>Club or association</b>	Includes work social club, community club, church group, old scholars association.
<b>Country of birth</b>	Classified according to the <i>Australian Standard Classification of Countries for Social Statistics (ASCCSS)</i> (cat. no. 1269.0). The group 'Main English-speaking countries' comprises United Kingdom, Ireland, New Zealand, Canada, United States of America, and South Africa.
<b>Cycling</b>	Includes BMX and mountain bikes.
<b>Employed</b>	For the definition of employed persons, see the ABS publication <i>Labour Force, Australia</i> (cat. no. 6203.0).
<b>Employment at end June</b>	Working proprietors and partners, and employees (including working directors) working for the business during the last pay period ending in June. It excludes volunteers and subcontracted workers.

<b>Exercise level</b>	Based on frequency, intensity (i.e. walking, moderate exercise and vigorous exercise) and duration of exercise (for recreation, sport or fitness) in the two weeks prior to interview. From these components, an exercise score was derived using factors to represent the intensity of the exercise. Scores were grouped for output as follows: <ul style="list-style-type: none"> <li>▪ <i>Sedentary</i> — less than 100 (includes no exercise)</li> <li>▪ <i>Low</i> — 100 to less than 1,600</li> <li>▪ <i>Moderate</i> — 1,600–3,200, or more than 3,200 but less than 2 hours of vigorous exercise</li> <li>▪ <i>High</i> — more than 3,200 and 2 hours or more of vigorous exercise.</li> </ul>
<b>Full-time employees</b>	Employees who usually work 35 hours a week or more.
<b>Gambling industries</b>	Include businesses mainly engaged in operating casinos, or in providing other gambling services such as lotteries and lotto-type games, TAB and totalisators, and bookmaker services.
<b>Gambling commissions</b>	Includes commissions received by agencies for TAB operations; commissions from lotteries, keno, lotto, football pools and instant money for businesses or clubs which operate on a commission basis and do not have ownership of the machines; commissions for racing clubs from on-course totalisator operators for the right to operate a totalisator on the racetrack; and commissions from poker/gaming machines applicable to businesses or clubs which operate on a commission basis and who do not have ownership of the machines.
<b>Gambling and gaming taxes and levies</b>	Includes all taxes and levies paid to the government and funds transferred to government bodies. The latter component applies to lottery and TAB businesses which have an agreement to transfer a percentage of their profit or turnover to government bodies in return for the right to operate in a particular state or territory. It includes any franchise or licence fees paid to government where applicable. It also includes turnover tax paid to government by bookmakers. This is a regulatory fee which bookmakers must pay to the relevant state government and is based on a percentage of their turnover. This percentage may vary across states.
<b>Government funding</b>	Recurrent funding for operational costs (e.g. wages and salaries, rent, food), bounties, subsidies and export grants, Jobstart, apprenticeship schemes, and funding provided for specific capital items or on a once-off basis.
<b>Gymnastics</b>	Includes trampolining.
<b>Hockey</b>	Excludes indoor hockey, ice hockey.
<b>Horse riding</b>	Includes equestrian, rodeo, polo, polocrosse.
<b>Household</b>	A group of people who usually reside and eat together. This may be: <ul style="list-style-type: none"> <li>▪ a one person household, that is, a person who makes provision for his or her own food or other essentials for living without combining with any other person; or</li> <li>▪ a multi-person household, that is, a group of two or more persons, living within the same dwelling, who make common provision for food or other essentials for living.</li> </ul>

<b>Household expenditure</b>	<p>The cost of goods and services acquired during the reference period for private use, whether or not those goods were paid for or consumed. For example, goods purchased by credit card are counted as expenditure at the time they were acquired rather than at the time the credit card bill was paid.</p> <p>Expenditure is net of refunds or expected refunds. For example, payments for health services are net of any refunds received or expected to be received. Similarly, gambling wins are offset against gambling outlays to show net gambling expenditure.</p>
<b>Household Expenditure Survey</b>	<p>A survey, conducted at approximately five-yearly intervals, which records the expenditure of households rather than individuals because some expenditures (e.g. on domestic inground swimming pools, caravans, boats) are usually for the benefit of everyone in the household and therefore cannot be attributed in a meaningful way to any particular person in the household.</p> <p>Information about most types of expenditure is obtained from a diary maintained by all persons aged 15 years and over in households selected in the sample. Some infrequent items of expenditure are collected on a 'recall' or 'last payment' basis the length of the recall period ranging from two years for house purchases to three months for health expenses.</p> <p>A household's expenditure on sports, physical recreation and other leisure can be affected by many things including:</p> <ul style="list-style-type: none"> <li>▪ the size of the household — the more people a household contains, the larger the expenditure is likely to be</li> <li>▪ the location of the household</li> <li>▪ the income of the household — expenditure on many goods and services increases as income increases</li> <li>▪ the composition of the household — the age and sex of household members and their relationships within the household will impact on their interests and spending habits.</li> </ul>
<b>Ice/snow sports</b>	Include ice hockey, ice skating, snow skiing.
<b>Involvement</b>	Involvement in sport or physical activity in either a playing role, or a non-playing role such as coach, umpire or administrator.
<b>Labour costs</b>	Include wages and salaries, employer contributions to superannuation funds, workers' compensation costs, payroll tax and fringe benefits tax. Exclude payments to self-employed persons such as consultants, contractors and persons paid solely by commission without a retainer; and payments to proprietors and partners of unincorporated businesses.
<b>Main English-speaking countries</b>	Comprise United Kingdom, Ireland, New Zealand, Canada, United States of America, and South Africa.
<b>Martial arts</b>	Include Taekwondo, Aikido, judo, karate, kickboxing.
<b>Motor sports</b>	Include car and motor cycle racing and rallying; and speedway, drag and go-kart events.
<b>Netball</b>	Includes indoor and outdoor netball.
<b>Net takings</b>	Gross takings less payments of prize money and winnings.

<b>Not-for-profit organisations</b>	Organisations not permitted to be a source of income, profit or other financial gain for the units that establish, control or finance them.
<b>Operating profit before tax</b>	A measure of the level of profit achieved prior to extraordinary items being brought to account, income tax being deducted and dividends being paid. It is derived as total income minus total expenses plus closing inventories minus opening inventories.
<b>Organised sports and physical activities</b>	Sports and physical activities which were organised by a club, association or school. The club or association need not be sporting body. It may be a work social club, church group or old scholars association. Physical activity such as aerobics and other exercise sessions organised by fitness centres or gymnasia are also included.
<b>Paid involvement</b>	Persons were classed as being paid for involvement in sport or physical activity in a particular role if they received any payment at all for that involvement. If a person undertook more than one role, payment had to be received for each role for all involvements to be classed as paid.
<b>Participants</b>	Persons playing a sport or undertaking physical activity. Persons involved only in non-playing roles such as coach, umpire or administrator are excluded.
<b>Participation rate</b>	For any group, the number of persons involved (either as participants or otherwise) in sports or physical activities, expressed as a percentage of the total population of that group.
<b>Part-time employees</b>	Employees who usually work less than 35 hours per week.
<b>SAR of China</b>	Special Administrative Region of China.
<b>Shooting sports</b>	Include pistol and rifle shooting, hunting, and paintball.
<b>Soccer</b>	Excludes indoor soccer.
<b>Sports hospitality clubs</b>	Clubs which obtained the largest portion of their income from the provision of hospitality services, but identified themselves as being sports or physical recreation clubs
<b>Surf sports</b>	Includes surfing and windsurfing. Excludes surf-lifesaving.
<b>Tennis</b>	Includes indoor and outdoor tennis.
<b>Unemployed</b>	For the definition of unemployed persons, see the ABS publication <i>Labour Force, Australia</i> (cat. no. 6203.0).
<b>Volleyball</b>	Includes indoor and outdoor volleyball.
<b>Volunteer rate</b>	For any group, the number of volunteers, expressed as a percentage of the total population of that group.
<b>Volunteers</b>	Persons who willingly gave unpaid help in the form of time, service or skills, to assist an organisation or group. The reimbursement of expenses and the bestowing of small gifts are not regarded as payment for services rendered. Hence, persons who received these (and nothing else) are still treated as volunteers.
<b>Waterskiing/powerboating</b>	Includes jet skiing.

- Weekly ordinary time earnings** Weekly earnings of employees which are attributable to award, standard or agreed hours of work. They are calculated before taxation and any other deductions (e.g. superannuation, board and lodging) have been made. Included are award and workplace and enterprise bargaining payments and other agreed base rates of pay, over-award and over-agreement payments, shift and other allowances, commissions and retainers, bonuses and similar payments related to the reference period, payments under incentive or piecework, payments under profit sharing schemes normally paid each pay period, payments for leave taken during the reference period, workers' compensation payments made through the payroll, and salary payments made to directors. Excluded are overtime payments, retrospective pay, pay in advance, leave loadings, severance pay, termination and redundancy payments, payments under salary packaging attracting Fringe Benefit Tax, and other payments not related to the reference period.
- Weekly total earnings** Weekly ordinary time earnings of employees plus weekly overtime earnings of employees.

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