

Cultural Trends in Australia

A Statistical Overview 1997

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1997

W. McLennan
Australian Statistician
Australian Bureau of Statistics

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INQUIRIES

- For information about other ABS statistics and services, please refer to the back page of this publication.
- For further information about these statistics, contact Chris Giddings on Adelaide 08 8237 7326.

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LIST OF ABBREVIATIONS AND OTHER USAGES

SYMBOLS USED

n.a.	not available
n.e.c.	not elsewhere classified
n.f.d.	not further defined
n.p.	not for publication
..	not applicable
*	subject to high sampling variability (relative standard error between 25% and 50%)
**	subject to high sampling variability (relative standard error exceeds 50%)
—	nil or less than half the final digit shown

LIST OF ABBREVIATIONS

ABA	Australian Broadcasting Authority
ABC	Australian Broadcasting Corporation
ABS	Australian Bureau of Statistics
ANA	Australian National Accounts
ANZSIC	Australian and New Zealand Standard Industrial Classification
BTR	Bureau of Tourism Research
CD	compact disc
FTE	Full-time equivalent (allows part time and casual staff to be expressed in terms of equivalent full-time staff)
GDP	gross domestic product
PSM	Population Survey Monitor
SBS	Special Broadcasting Service
SIS	Service Industries Surveys
TAFE	Technical and Further Education
UNESCO	United Nations Educational, Scientific and Cultural Organisation
VCR	video cassette recorder

OTHER FORMS OF USAGE

Where figures have been rounded, discrepancies may occur between sums of component items and totals.

Adjustments are made randomly to data from the Population and Housing Census to protect the confidentiality of individuals and therefore no reliance should be placed on the value of small cells.

INTRODUCTION

Governments and the cultural industries themselves require reliable statistical information to ensure effective policy and planning decisions.

This publication, *Cultural Trends in Australia: A Statistical Overview*, has been produced jointly by the Australian Bureau of Statistics (ABS) and the Commonwealth Department of Communications and the Arts. It brings together a range of data from both ABS and non-ABS sources and updates most of the material presented in the first issue released in 1994. This second issue differs from the first in that it presents cultural data on both a topic basis (e.g. attendance at venues, employment) and a sector basis (e.g. museums, visual arts). It also includes a wider range of cultural statistics available since the release of the first issue.

The publication uses a definition of cultural industries based on the National Culture/Leisure Industry Statistical Framework produced by the Cultural Ministers Council. This framework was devised so data about cultural activities could be collected on a consistent basis.

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

This publication, while not intended to be exhaustive, offers a helpful overview of the most up-to-date statistics on the cultural sector and facilitates assessment of the sector's contribution to our economy and way of life.

GENERAL ACKNOWLEDGMENT

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*.

MAIN FEATURES

- Most Australians had attended at least one cultural venue during the year ended March 1995. Some 62.1% had attended the cinema, 38.4% had visited libraries, 27.8% had visited museums, 22.3% had visited art galleries, 16.6% had attended the theatre and 19.3% had attended operas or musicals (page 8).
- In 1996, virtually all households possessed a TV, with 59.1% possessing more than one TV. Some 79.3% had a VCR. About 1 in 20 households received pay TV (page 13).
- Some 30.3% of households had a computer at home in September 1996. About 310,000 people aged five years and over in these households used this home computer to access the Internet. They comprised 7.8% of people who frequently used the computer at home and 1.9% of the total Australian population (page 13).
- In 1993–94, households spent an average of \$25.59 per week on culture (e.g. to purchase books, audio-visual equipment, CDs, admission fees). This represents 4.3% of their total expenditure on goods and services. Total expenditure on culture by all households in 1993–94 totalled \$8,800m (pages 18–20).
- Governments provided \$3,195m of funding for cultural activities in 1995–96. About 43% was provided by the Commonwealth Government, 38% by State and Territory Governments and 19% by local governments (page 22).
- Almost 2.2 million Australians had worked in cultural activities in the year ended March 1997. Another 2.6 millions were involved in these activities as a hobby only. Cultural activities in which people had worked included organising fetes and festivals, doing arts and crafts, teaching, writing and performing (pages 24–25).
- About 255,000 people had their main job in culture in August 1996. Common cultural occupations included architects, librarians, music teachers, photographers, graphic designers, journalists and musicians (pages 28–30).
- Cultural industries accounted for about 2.5% of Australia's gross domestic product (GDP) (page 34). In terms of value of output, cultural industries were about the same size as the road transport industry, the residential building construction industry and the education industry (page 33).
- Exports of cultural goods earned Australia \$750m in 1994–95, while imports in the same period totalled \$3,364m (page 35).
- Royalties earned by Australia for the use of cultural property (e.g. Australian TV programs, music) overseas totalled \$156m in 1995–96. Royalties paid to the rest of the world for the right to use their cultural property totalled \$655m (page 38).

PART **1**

OVERVIEW

Part 1 of this publication provides an overview of Australian culture. The information presented in this overview provides data on the contribution of culture to the economy, and focuses on topics such as participation, employment, expenditure, trade and tourism. The purpose of this overview is two-fold—to show how culture impacts on our lives, and the relative importance of the individual cultural sectors presented in Part 2.

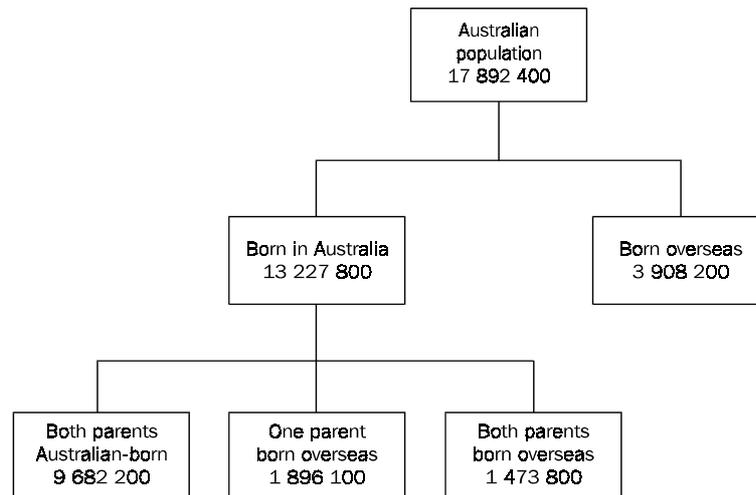


CULTURAL DIVERSITY

Australia is a multicultural society given the fact that most residents can trace their ancestry to other countries and many practise the customs and traditions of the countries from which they originated. Consequently, in looking at the cultural activities that Australians pursue, it is helpful to examine the make-up of our population, as this provides some clues as to how Australian society has developed.

In the 1996 Population Census, 17,892,400 people were counted in Australia. Of these, 3,908,200 (21.8%) were born overseas. Another 3,369,900 (18.8%) were born in Australia but had at least one parent born overseas. Thus, 7,278,100 people (40.7%) were either overseas born or had an overseas-born parent.

1.1 BIRTHPLACE OF THE AUSTRALIAN POPULATION(a)—1996 Census



(a) Excluding 'birthplace not stated' and 'birthplace of parents not stated'.

Source: ABS (unpub.)a.

Table 1.2 shows those countries which have made an impact on Australia's cultural diversity through migration. About 14% of Australia's population was either born in the United Kingdom or had a parent born there. Other European countries, such as Italy and Greece, have also had a significant impact on Australia's cultural diversity. Outside of Europe, New Zealand provides a sizeable number of migrants. Countries which have recently supplied a large number of migrants include China, Viet Nam and the Philippines.

1.2 PERSONS BORN OVERSEAS OR WITH AN OVERSEAS-BORN PARENT— 1996 Census

Country	Overseas born	Australian-born with at least one parent born in country shown	Total	Percentage of total population
United Kingdom	1 072 600	1 444 500	2 517 000	14.1
Italy	238 200	333 900	572 100	3.2
New Zealand	291 400	200 000	491 400	2.7
Greece	126 500	153 900	280 500	1.6
Germany	110 300	139 300	249 600	1.4
Netherlands	87 900	142 500	230 400	1.3
Viet Nam	151 100	46 800	197 800	1.1
Lebanon	70 200	82 600	152 800	0.9
China	111 000	40 200	151 200	0.8
Ireland	51 500	95 100	146 600	0.8
Malta	50 900	77 300	128 200	0.7
Philippines	92 900	35 200	128 100	0.7
India	77 600	43 800	121 300	0.7
Poland	65 100	55 500	120 700	0.7
Malaysia	76 300	30 600	106 800	0.6
Hong Kong	68 400	19 300	87 800	0.5
United States of America	49 500	36 900	86 400	0.5

Source: ABS (unpub.)a.

A key to ethnic origin is data on language spoken at home. The 1996 Census found English was the only language spoken while at home by over four-fifths (81.2%) of people aged five years and over. The most commonly spoken languages other than English were Italian (spoken by 2.2%), Greek (1.6%), Cantonese (1.1%), Arabic (1%) and Vietnamese (0.8%).

Over 350,000 Australians were of Aboriginal or Torres Strait Islander origin in the 1996 Census. About one in eight of these people spoke an Indigenous language at home.

RELIGION

Christianity is by far the predominant religion in Australia, with almost three-quarters (70.3%) of the population identifying as Christians in the 1996 Census. Some 3.4% were of other faiths, such as Buddhism, Islam and Judaism. About 16.5% of people stated that they had no religion while 8.7% did not answer the optional question.

The religious beliefs of Australia's population can be traced to their birthplace to some extent. For example, over 90% of people born in Italy, Malta and Croatia were Catholic, while over 90% of people born in Greece belonged to the Orthodox Church.

Culture in Australia is incredibly diverse, as shown by the types of activities we do in our spare time. Everything from a stroll in a botanic garden, to turning on the TV, picking up a book, going to football, the theatre, a circus... all of those things are cultural activities.

ATTENDANCE AT SELECTED CULTURAL VENUES

In March 1995, a household survey of people aged 15 years and over conducted by the ABS found the most popular venue was the cinema, with over three-fifths (62.1%) of all people having seen a movie at least once in the last 12 months, as table 2.1 shows. As with most other cultural activities, cinema attendance tended to decline with age—about nine in ten people (89.7%) aged 15–17 went to the cinema, compared with less than a third (28.9%) of people aged 65 years and over.

Australians huge interest in sport is shown by the fact that 44.3% attended a sporting event in the 12 months to March 1995.

**2.1 PERSONS ATTENDING CULTURAL VENUES—
12 months ended March 1995**

<i>Venue/activity</i>	<i>Number of people attending</i>	<i>Percentage of total population</i>
Art gallery	3 134 100	22.3
Museum	3 905 600	27.8
Animal and marine parks	4 966 000	35.3
Botanic gardens	5 410 500	38.5
National, State or local library	5 403 100	38.4
Popular music	3 790 700	26.9
Classical music	1 081 300	7.7
Theatre	2 336 300	16.6
Dance	1 407 500	10.0
Opera or musical	2 722 100	19.3
Other performing arts	2 634 400	18.7
Cinema	8 733 800	62.1
Sporting events	6 237 800	44.3

Source: ABS 1995, 1996g.

The survey also showed that many Australians were interested in flora and fauna. About two-fifths (38.5%) had visited a botanic garden at least once in the previous 12 months, while about a third (35.3%) had been to an animal or marine park (including one-fifth of the population who had visited zoos).

Australians were also frequent users of libraries—almost two-fifths (38.4%) of the population aged 15 years and over had been to a National, State or local library in the previous 12 months and, of these, over half had visited the library more than five times during the year.

ATTENDANCE AT SELECTED CULTURAL VENUES *continued*

Most Australians were interested in the heritage of their country and this is shown by the large number who visited museums. Over a quarter (27.8%) of the population had visited a museum in the previous 12 months, with about half of these (46.3%) making at least two visits during this period. Attendance rates were highest for parents with children aged under 15 years (33.2%) and for full-time students aged 15–24 years (34.0%).

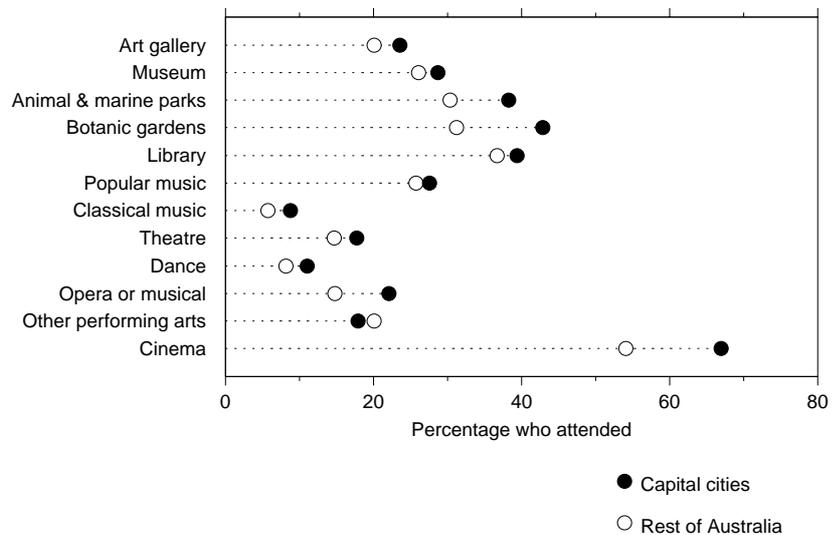
Attendance rates at the performing arts ranged from 7.7% for classical music to 19.3% for opera/musicals.

Another ABS survey, conducted in May 1992, showed that almost two-thirds (62.9%) of Australians had visited a heritage area, national or State park in the previous 12 months.

ATTENDANCE BY PLACE OF USUAL RESIDENCE

People living in the capital cities generally have better access to cultural venues and this is reflected in their attendance rates. As graph 2.2 shows, people in capital cities were much more likely to go to animal and marine parks (and particularly zoos), botanic gardens, operas/musicals and the cinema. The only venue that people living outside of the capital cities were more likely to visit than their city counterparts was other performing arts (and this can be attributed to their higher attendance at circuses).

**2.2 ATTENDANCE AT CULTURAL VENUES,
By Usual Residence—12 months ended March 1995**



Source: ABS 1995.

SEX DIFFERENCES

Females had higher participation rates than males for all of the types of venues in the survey. The largest differences were for libraries (44.4% for females compared with 32.2% for males) and opera/musicals (23.8% for females compared with 14.7% for males).

ATTENDANCE BY COUNTRY OF BIRTH

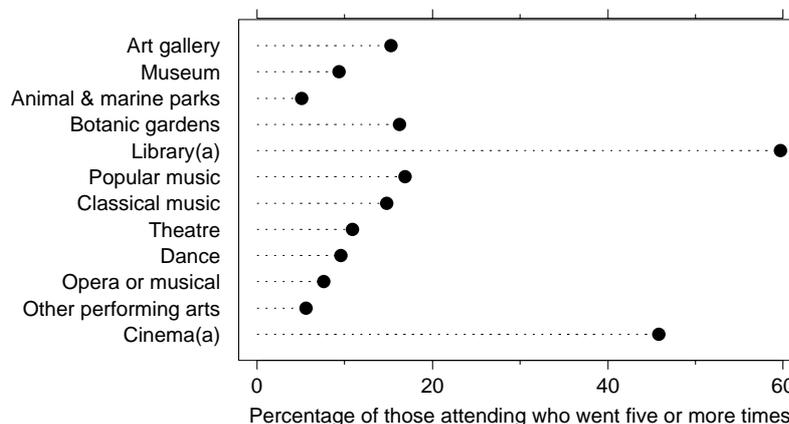
Attendance rates also varied according to country of birth. Australian-born people were more likely to go to cultural activities such as popular music performances (28.4% compared with 22.9% for overseas-born people) and the cinema (64.9% compared with 54.1%). Overseas-born people were more likely to visit a botanical garden (41.4% compared with 37.4%).

Of the overseas-born, rates of attendance were generally higher for those born in English speaking countries than non-English speaking countries.

FREQUENCY OF ATTENDANCE

About three-fifths of library users visited the library more than five times a year while almost half of cinema goers attended the cinema more than five times a year, as graph 2.3 shows. Attendance at the other cultural venues surveyed was much less frequent with most who attended a venue only going once or twice a year.

2.3 FREQUENCY OF ATTENDANCE AT CULTURAL VENUES—1995



(a) Percentage who went six or more times.

Source: ABS 1995.

CHANGES IN ATTENDANCE OVER TIME

Data on participation in cultural activities were also collected in an ABS survey in 1991, although information was only collected about people aged 18 years and over. Comparison of this 1991 survey with the 1995 survey shows that most venues experienced a slight decline in their attendance rates. The largest change was in attendance at museums, where the percentage of people aged 18 years and over attending fell from 30.0% in 1991 to 27.4% in 1995.

COMPARISONS WITH OTHER COUNTRIES

An appreciation of how Australians' cultural activities differ from other countries can be gained by examining the percentage of people in different countries who participate in these activities. Both Canada and Finland have conducted similar participation surveys to Australia. However, caution must be exercised in comparing the figures due to differences in definitions of cultural venues and variations in data collection techniques.

COMPARISONS WITH OTHER COUNTRIES *continued*

Some differences in the types of cultural activities undertaken are due to factors such as available facilities, climate and demographic factors such as the age distribution of the population. Each of these factors helps to mould the cultural characteristics peculiar to a nation.

Table 2.4 shows that Australians were less inclined to visit art galleries and museums than their Canadian and Finnish counterparts. Australians were less likely to go to a theatre or dance performance than Finns, although their overall attendance at the performing arts (classical music, theatre, dance, opera or musical) was roughly on a par with Canadians. Australians were much more likely to go to the cinema than Canadians—and probably Finns as well (only 33% of Finns had been to the cinema in the six months before interview).

2.4 ATTENDANCE AT SELECTED VENUES—In 12 months before interview

	PROPORTION OF TOTAL POPULATION.....		
	<i>Australia</i> 1995	<i>Canada</i> 1992	<i>Finland</i> 1991
	%	%	%
Art gallery	22	n.a.	(a)44
Museum	28	n.a.	42
Art gallery or museum	(b)37	56	n.a.
Popular music	27	24	n.a.
Theatre	17	n.a.	37
Dance	10	n.a.	18
Opera(c)	5	n.a.	4
Classical music, theatre, dance, opera or musical	(b)34	30	n.a.
Cinema	62	49	n.a.

(a) Includes art exhibitions.

(b) This is less than the sum of the individual categories as some people attended more than one type of venue and this total excludes double-counting.

(c) Excludes musical productions.

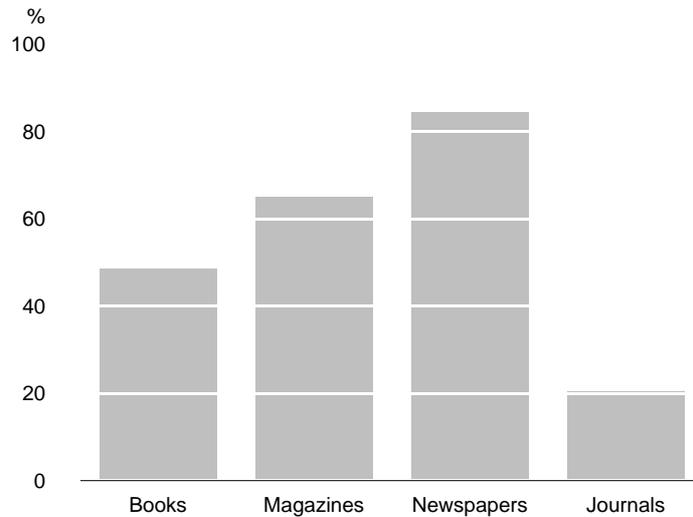
Sources: ABS 1995; Statistics Canada 1995; Statistics Finland 1995.

ACTIVITIES MAINLY UNDERTAKEN AT HOME

Some cultural activities are mainly done at home. Data collected by the ABS in 1994 showed that reading was a popular pastime for most Australians—95% of Australians had read in the previous week.

Graph 2.5 shows that almost half (48.5%) of the population had read books in the week before they were interviewed, while almost two-thirds (65%) had read magazines. However, the most popular reading material was newspapers, read by 84.4% of people.

**2.5 PERSONS AGED 15 YEARS AND OVER,
Who Had Read in Last Week—November 1994**



Source: ABS (unpub.)d.

Australians' avid interest in news and current affairs is also shown by the types of television programs we watch. Table 2.6 shows about four-fifths (79.4%) of the population regularly watched news and current affairs programs. Other popular programs watched regularly were movies, documentaries and sports.

**2.6 PROGRAMS REGULARLY WATCHED,
Persons Aged 18 Years and Over—November 1994**

.....

	<i>Percentage of all people</i>
.....	
News, current affairs	79.4
Movies	45.6
Documentaries	40.5
Sports	38.2
Serials/series	22.6
Light entertainment	19.4
Game/panel shows	16.1
Children's programs	8.4
Other	1.3
No regular programs	1.9
.....	

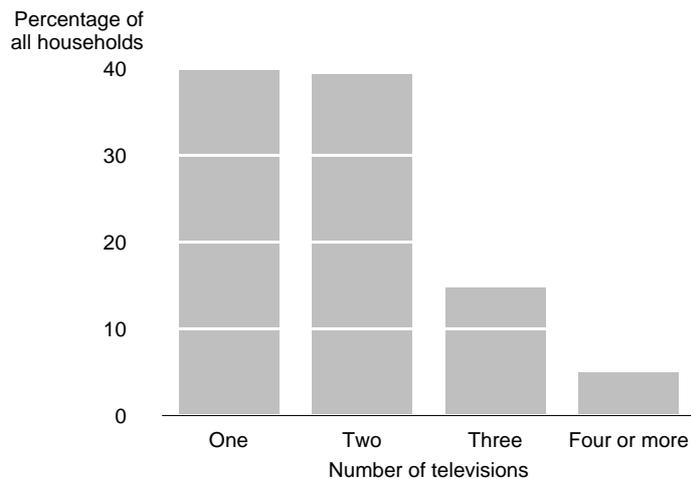
Source: ABS (unpub.)d.

Watching videos is also a popular pastime in Australia. The November 1994 Population Survey Monitor (PSM) also showed that almost half (46.3%) of households had hired a pre-recorded video in the previous month.

CULTURAL EQUIPMENT IN THE HOME

In September 1996, virtually all (98.9%) households in Australia possessed at least one television in working order according to data in the PSM conducted by the ABS. Graph 2.7 shows that about two-fifths of households possessed one television and another two-fifths possessed two televisions. Interestingly, 5% had four or more televisions.

The September 1996 survey also showed that about 1 in 20 households (5.3%) received pay TV. The November 1994 PSM survey showed that about four-fifths (79.3%) of households had a VCR.

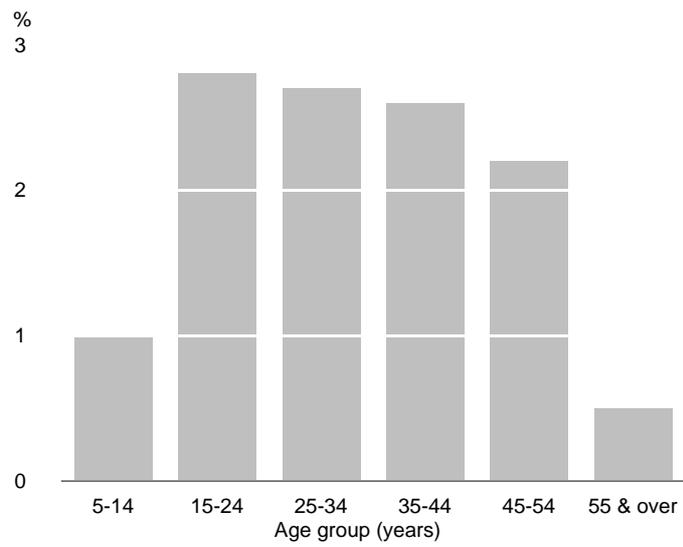
2.7 NUMBER OF TELEVISIONS IN HOUSEHOLD—September 1996

Source: ABS (unpub.)d.

The computer and Internet age has also had a small impact on cultural activities. About 3 households in 10 (30.3%) had a computer at home according to the September 1996 PSM. Some of these computers are able to show the user multimedia products (e.g. electronic products that combine text, sound and video). Although there is no data available on multimedia usage, the PSM has collected information on whether people accessed the Internet at home. The survey found that 308,600 people aged five years and over used their home computer to access the Internet. While this made up 7.8% of those who frequently used a computer at home, it was only 1.9% of the total population. Graph 2.8 shows that while over 2% of all people aged between 15 and 54 years accessed the Internet at home, very few aged 55 years and over (0.5%) used the Internet.

Males were more likely to access the Internet than females. Overall, 2.7% of males aged five years and over accessed the Internet on their home computer, compared with 1.1% of females.

2.8 INTERNET USAGE—February to November 1996



Source: ABS (unpub.)d.

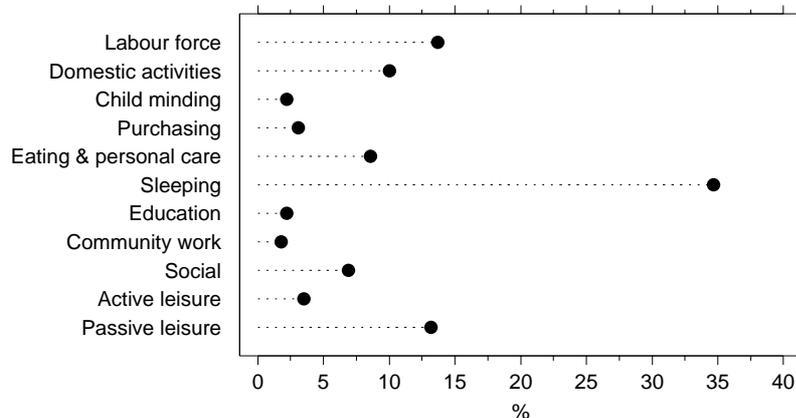
Every waking moment of every day Australians spend their time on a variety of activities including paid work, housework, shopping, studying, child-minding, socialising and sport. The time they spend on cultural activities depends on the amount of 'free' time they have and their particular interests.

To determine how Australians use their time, the ABS conducted a survey of people aged 15 years and over in 1992 to measure the time they spent on different activities. Respondents were asked to complete a diary describing their activities for two days. They were required to complete details on the main activity they were undertaking as well as any other activity they were engaged in at the same time (e.g. cooking and listening to the radio).

TIME SPENT ON MAIN ACTIVITIES

Graph 3.1 shows that on average, Australians spent a large part of their day in paid employment, performing domestic activities (e.g. housework) and in passive leisure (e.g. watching television). Time spent on cultural and recreational activities were recorded in three categories—social, active leisure and passive leisure. Social included visiting cultural, entertainment and sporting venues as well as socialising. Active leisure included participating in sport and hobbies. Passive leisure included activities such as watching television.

3.1 TIME SPENT ON MAIN ACTIVITIES—1992



Source: ABS 1994a.

Australians spent an average of 5 hours and 41 minutes per day on social activities, active leisure and passive leisure. Not surprisingly, they spent more time on these activities on weekends (7 hours 31 minutes per day) than on weekdays (4 hours 56 minutes per day).

TIME SPENT ON MAIN ACTIVITIES *continued*

Table 3.2 shows the most popular cultural and recreational pursuits undertaken as a main activity. It is important to realise that not everyone does all activities, nor do those people who engage in an activity do it every day. The difference between the average time spent by all people and average time spent by participants is largest for those activities undertaken infrequently by people and/or by only a small proportion of the population. For example, only 1.5% of people went to watch sport on any one day. Consequently, the average time spent per day by all people (2 minutes) is much less than the time spent by participants (150 minutes).

3.2 MAIN ACTIVITY, Average Time Spent on Culture and Leisure Pursuits—1992

Activity	By all people	By participants
	Minutes per day	Minutes per day
Religious activities	6	106
Religious practice	4	88
Socialising	77	151
Visiting entertainment and cultural venues	4	114
Attending sports events	2	150
Sport, exercise and outdoor activities	27	102
Playing organised sport	8	144
Going for a walk	4	51
Fishing, bushwalking etc.	9	115
Games, cards etc.	6	82
Hobbies, arts, crafts etc.	8	109
Crafts	5	115
Holiday travel, driving for pleasure	5	123
Reading	23	65
Reading books	7	72
Reading newspapers	9	42
Watching TV or videos	108	147
Watching TV	103	143
Listening to radio, CDs etc.	5	49
Listening to radio	4	44
Relaxing, thinking etc.	36	62
Talking (incl. phone)	16	37
Writing/reading own correspondence	2	45

Source: ABS (unpub.)e.

Table 3.2 shows that, on average, people watched 108 minutes of television and videos per day. However, as only 73% of people watched it on any one day, the average time spent by those participants was somewhat higher, at 147 minutes.

There were some distinct differences in the time spent on some cultural activities between males and females. Females tended to spend proportionally more time engaging in less physically demanding activities such as socialising, hobbies, arts and crafts, and talking. Males spent proportionally more time playing sport, doing exercise and outdoor activities, and also spent more time watching television and videos.

TIME SPENT ON MAIN ACTIVITIES *continued*

For some cultural and recreational activities (e.g. playing organised sport), it is difficult to do another activity at the same time. However, there are some activities which are suited to being carried out simultaneously with another task. Table 3.3 shows that while, on average, people listened to the radio as their main activity for 4 minutes a day (e.g. listening to a news bulletin), they spent an average of 101 minutes a day listening to the radio. Other activities carried out with another, which often assumed only secondary importance, were hobbies, arts and crafts (e.g. embroidery), reading, watching television and talking.

3.3 CULTURE AND LEISURE ACTIVITY, Average Time Spent By All People—1992

Activity	<i>As the main activity</i>	<i>As an activity</i>
	Minutes per day	Minutes per day
Religious activities	6	6
Religious practice	4	4
Socialising	77	78
Visiting entertainment and cultural venues	4	5
Attending sports events	2	3
Sport, exercise and outdoor activities	27	31
Organised sport	8	8
Going for a walk	4	4
Fishing, bushwalking etc.	9	11
Games, cards etc.	6	9
Hobbies, arts, crafts etc.	8	13
Crafts	5	8
Holiday travel, driving for pleasure	5	5
Reading	23	42
Reading books	7	10
Reading newspapers	9	16
Watching TV or videos	108	179
Watching TV	103	172
Listening to radio, CDs etc.	5	120
Listening to radio	4	101
Relaxing, thinking etc.	36	47
Talking (incl. phone)	16	128
Writing/reading own correspondence	2	3

Source: ABS (unpub.)e.

Most spending on culture in Australia is made by households which buy cultural products and services for the enjoyment and satisfaction they get from them. However, governments also spend significant amounts of money on culture, in part to provide facilities so that people can view the cultural product. Business also spends money on culture (e.g. in the form of sponsorship) because of the benefits it can indirectly receive (e.g. increasing people's awareness of the company; wanting to be seen as a 'good' corporate citizen). The production of cultural goods and services is analysed in Chapter 6.

Of the money spent on cultural goods and services, about three-quarters is by private households, about 10% is by the Commonwealth Government, 10% by the State and Territory Governments, 5% by local government and less than 1% by the corporate sector.

EXPENDITURE ON CULTURE BY HOUSEHOLDS

The most comprehensive source of data on cultural expenditure by individuals is the ABS Household Expenditure Survey. This survey, which is conducted at five-yearly intervals, records the expenditure of households rather than individuals. This is because some expenditures (e.g. on housing, furniture, televisions) are often for the benefit of everyone in the household and so cannot be attributed in a meaningful way to any particular person in the household.

A household's expenditure on culture is affected by many factors including:

- the size of the household—the more people a household contains, the larger the expenditure is likely to be;
- the location of the household (e.g. households in capital cities have better access to cultural venues such as cinemas and theatres);
- the income of the household—expenditure on most goods and services increases as income increases; and
- the composition of the household—the age and sex of the people in the household is related to their interests, position in the life cycle etc.

Household expenditure in 1993–94

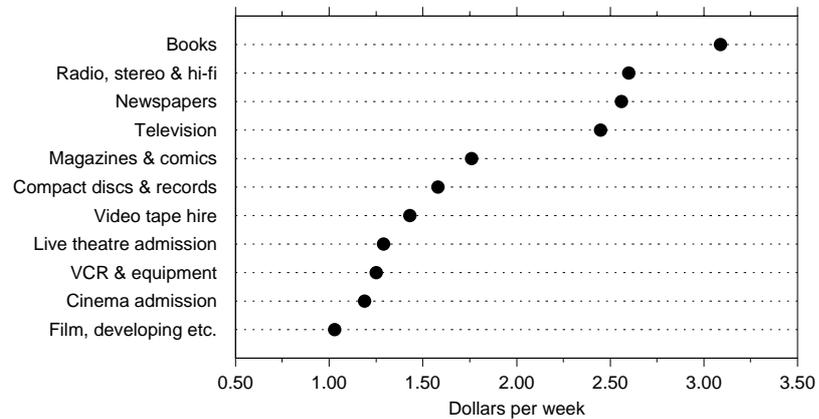
Households spent an average of \$25.59 per week on culture, according to a 1993–94 Household Expenditure Survey. Cultural goods and services are defined as those which are produced as the direct result of the creative input of people (e.g. books, CDs) and those goods which are needed to produce or display the creative work (e.g. photographic film, TVs).

This cultural spending was 4.3% of their total expenditure on goods and services.

Household expenditure in 1993–94 *continued*

Graph 4.1 shows that households spent an average of \$3.09 per week on books and a further \$2.56 on newspapers in 1993–94. Other significant items of expenditure included the purchase of televisions (\$2.45) and radio, stereo and hi-fi equipment (\$2.60).

4.1 AVERAGE WEEKLY HOUSEHOLD EXPENDITURE ON CULTURE(a)—1993–94



(a) Selected cultural items.

Source: ABS 1996c.

There were about 6.6 million households in Australia in 1993–94. With an average weekly expenditure on culture of \$25.59 per household, this equates to expenditure on cultural goods and services of \$8,801m in 1993–94 by all households in Australia. This estimate is derived by multiplying the average weekly expenditure by the number of weeks in the year (to convert it to an annual amount) and then by multiplying by the total number of households.

Table 4.2 shows that households in Australia spent about \$2,600m on literature and almost \$2,500m on television and video, in 1993–94. Over 60% of the expenditure on television and video was for the purchase or repair of equipment. Over half of the expenditure on music was on the purchase of radio, stereo and hi-fi equipment.

4.2 ANNUAL EXPENDITURE ON CULTURE BY HOUSEHOLDS—1993–94

	\$m
Television	843
Television aerial	*114
Video cassette recorder and equipment	430
TV games	*76
Blank video cassettes	83
Pre-recorded video cassettes and discs	165
Television hire	52
Video cassette recorder hire	*28
Video cassette tapes hire	492
Membership of video cassette library	**
Repairs to audio-visual equipment	172
Repair insurance for audio-visual equipment	14
<i>Total television and video</i>	<i>2 467</i>
Radio, stereo and hi-fi equipment	895
Compact discs and records (audio)	544
Audio-cassettes and tapes	117
Musical instruments and accessories	*158
<i>Total music</i>	<i>1 714</i>
Books	1 063
Newspapers (excluding specialist type magazines)	881
Magazines and comics	606
Other printed material	*45
<i>Total literature</i>	<i>2 594</i>
Cinema admission charges	409
Live theatre admission charges	444
National park and zoo fees	45
Art gallery and museum fees	41
<i>Total admission fees to cultural venues</i>	<i>939</i>
Education (cultural and other non-sporting lessons)	327
Photographic equipment	*158
Photographic films and chemicals (including developing)	354
Studio and other professional photography	114
Paintings, carvings and sculptures	*134
<i>Other culture</i>	<i>760</i>
Total expenditure on culture	8 801

Source: ABS (unpub.)c.

Changes in cultural expenditure over time

In 1993–94, average weekly household expenditure on culture was 66.4% higher than a decade earlier. Reasons for this increase include:

- changes in prices;
- changes in the average number of people in the household;
- changes in people's preferences; and
- the introduction of new cultural goods (e.g. VCRs and CD players).

4.3 CHANGE IN EXPENDITURE PER WEEK ON CULTURE

	1984	1993–94	Change
	\$/week	\$/week	%
CURRENT PRICES			
Television and video	5.38	7.20	33.8
Music	2.40	4.98	107.5
Literature	4.17	7.54	80.8
Admission fees to cultural venues	1.30	2.72	109.2
Cultural education	0.47	0.95	102.1
Other	1.67	1.36	-18.6
Total	15.38	25.59	66.4
CONSTANT PRICES(a)			
Television and video	6.04	7.20	19.2
Music	2.78	4.98	79.1
Literature	8.89	7.54	-15.2
Admission fees to cultural venues	2.46	2.72	10.6
Cultural education	1.12	0.95	-15.2
Other	2.37	1.36	-42.6
Total	23.66	25.59	8.2

(a) In 1993–94 prices (1984 expenditures have been adjusted to 1993–94 prices).

Source: ABS 1996c.

The second part of table 4.3 shows that, when measured in real terms (i.e. adjusted for inflation by expressing expenditures in constant prices), expenditure on culture increased by 8.2% over the 10-year period to 1993–94.

Expenditure on television and video in real terms increased by almost a fifth over this period. However, while real expenditure on television roughly doubled, that on VCRs fell by about a third. In real terms, expenditure on pre-recorded videos increased approximately ten-fold between 1984 and 1993–94.

Expenditure on music and related equipment increased by about 80% in real terms over the 10-year period. However, the increase was not uniform among goods included in this category. For instance, real expenditure on radio, stereo and hi-fi equipment roughly tripled over this period (this is despite the fact that, overall, the prices of radio, stereo and hi-fi equipment actually fell over the period). This change in expenditure would most probably have been due to the introduction of CD players in the 1980s with many people making their initial purchase of a CD player or upgrading their hi-fi equipment to include a CD player. Sales of CDs and records almost tripled in real terms over this period, while sales of audio-cassette tapes fell in real terms by around a third.

Spending on literature fell in real terms over the 10-year period. This was mainly the result of lower expenditure on newspapers—anecdotal evidence suggests a link to the fact many of the afternoon newspapers in Australia ceased production over this period.

EXPENDITURE ON CULTURE BY GOVERNMENTS

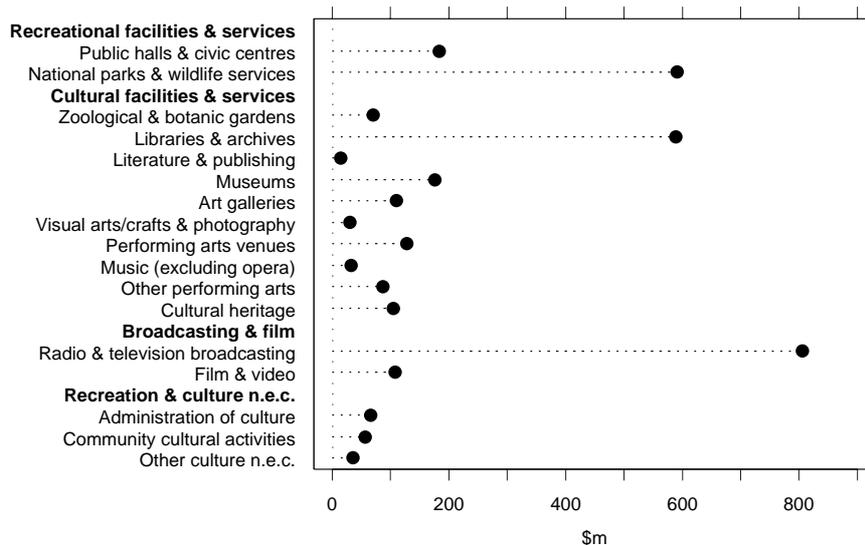
Governments provide considerable financial assistance to organisations involved in culture. This assistance includes the direct funding of organisations (e.g. libraries, the Australian Broadcasting Corporation (ABC)), subsidies to other organisations (e.g. the National Trusts) and grants to individuals (e.g. for artists from the Australia Council). Organisations can in some instances also benefit from tax concessions.

In 1995–96, the ABS compiled financial statistics on assistance provided for cultural activities in Australia by the Commonwealth Government, State, Territory and local governments. It showed that assistance from these governments totalled \$3,195m in 1995–96. Of this funding, 43% was provided by the Commonwealth Government, 38% by the State and Territory Governments and 19% by local government.

Most cultural funding in 1995–96 was of a recurrent nature, with only 13.7% of funding being for capital purposes.

Graph 4.4 shows the amount of funding provided by governments in 1995–96 for various cultural activities.

4.4 GOVERNMENT CULTURAL FUNDING—1995–96



Source: ABS 1997f.

Virtually all funding for radio and television broadcasting was provided by the Commonwealth Government as well as most (72%) of the funds for film and video.

State and Territory Governments provided the bulk of the outlays (82%) on national parks and wildlife services. Other activities predominantly funded by the State and Territory Governments were zoos and botanic gardens (83%), art galleries (62%) and museums (68%).

Local government provided the bulk of government funds for public halls and civic centres and one-half of the funding for libraries and archives.

EXPENDITURE ON CULTURE BY BUSINESSES

Business provides funds for cultural activities in a variety of ways. For example, as well as sponsoring events etc., it may provide support-in-kind (e.g. products, materials and services), free advertising and donations.

In 1993–94, about 10% of all big businesses provided sponsorship for cultural organisations/events, compared with 6.5% of medium-sized businesses and 0.3% of small businesses, according to a survey conducted by the ABS for the Department of Communications and the Arts.

The total value of sponsorship provided by business was \$31.2m in 1993–94. Firms within the finance and insurance industry (banks, insurance companies etc.) were the most prominent, contributing \$7m in sponsorship. By comparison, manufacturing firms contributed \$4m.

DONATIONS

Many cultural organisations receive donations to help them carry out their activities. Donations differ from sponsorships in that they are made unconditionally. The donor can receive a tax deduction for the donation under either of two schemes—the Register of Cultural Organisations and the Taxation Incentives for the Arts Scheme.

Organisations on the Register of Cultural Organisations can offer donors tax deductibility for any cash donations they make. In 1993–94, these donations totalled \$8.2m, of which \$4.3m was received from the public, \$2.1m from businesses and \$1.8m from trusts and foundations.

The Taxation Incentives for the Arts Scheme encourages people to make donations of culturally significant items to public art galleries, museums and libraries, by offering a tax deduction equivalent to the value of the gift. In 1993–94, there were 568 items donated, which were collectively valued at \$17.8m. Of this amount, items worth \$1.7m were donated by corporations. In addition to this \$17.8m, approximately \$7m in cash donations were received by public art galleries, museums and libraries under this scheme.

Tax deductible donations can also be made to National Trust organisations for conservation work to places of heritage significance. Funds raised for cultural heritage total about \$5m per year.

Over the last quarter of the century, the entire structure of industry in Australia has undergone massive changes. In particular, the share of employment in manufacturing and other goods production industries has shrunk, while the share of service-orientated industries has increased. As most cultural activities are service-orientated, it is likely that their share of employment has increased.

However, it is difficult to measure how many people are employed in culture. Some people have only short-term jobs, some have a cultural job but it is not their main one while others are not paid for their work. Nevertheless, there are several data sources which provide an indication of the number of people working in culture. The two main sources are an ABS survey conducted in 1997 on work in cultural activities and the Census of Population and Housing.

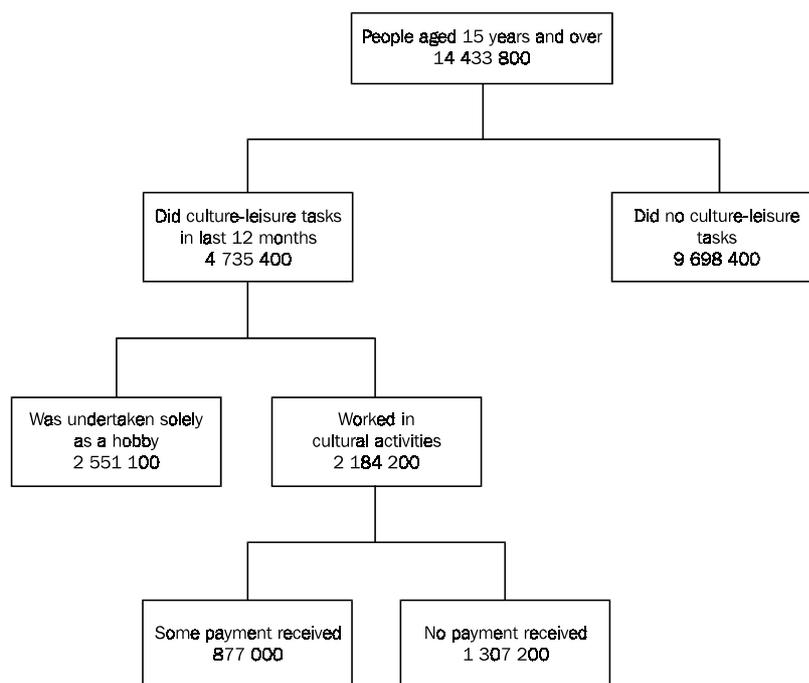
WORK IN CULTURAL ACTIVITIES

A March 1997 ABS household survey found that about 4.7 million people aged 15 years and over were involved in cultural tasks in the previous 12 months. This was about one-third (32.8%) of the population.

Of these 4.7 million people, about 2.6 million were involved in a hobby capacity only—the activity was solely for their own use or the use of their family. Consequently, there were 2.2 million people who undertook the tasks as a work activity.

Graph 5.1 sets out any involvement people may have had in cultural tasks in the 12 months to March 1997. It shows that only about two-fifths (40.2%) of the people who did culture-leisure work received any payment.

5.1 CULTURAL INVOLVEMENT—12 months ended March 1997



Source: ABS 1997m.

WORK IN CULTURAL ACTIVITIES *continued*

The type of cultural work performed by these people is given in table 5.2. As a person can be involved in more than one activity (e.g. working in museums and heritage organisations), the total number of involvements (3,775,000) exceeds the number of people who did culture-leisure work (2,184,200).

5.2 WORK INVOLVEMENTS IN CULTURE-LEISURE ACTIVITIES, Type of Activity—12 months ended March 1997

<i>Type of activity</i>	<i>Number involved</i>	<i>Proportion receiving some payment</i>
	'000	%
Museums	39.5	25.7
Art galleries	34.4	36.7
Libraries and archives	87.7	55.5
Heritage organisations	46.5	18.7
Arts organisations/agencies	41.1	25.8
Art/craft show	144.8	14.9
Fete organising	378.8	2.4
Festival organising	202.7	14.2
Botanic gardens	8.4	43.8
Animal/marine parks	19.6	45.1
Teaching cultural activities		
Secondary school teachers	71.4	81.8
Other teachers	208.7	56.7
Radio	84.6	27.0
Television	56.7	64.1
Cinema/video	42.7	52.9
Film production	38.8	48.1
Design	240.1	67.3
Art activities		
Drawing	130.3	37.3
Painting	129.4	37.6
Sculpture	38.5	35.6
Photography	116.7	37.5
Print-making	34.8	54.1
Electronic art	64.2	56.3
Other art	12.9	48.7
Craft activities		
Pottery/ceramics	68.6	34.3
Textiles	76.2	32.6
Jewellery	21.6	53.2
Furniture/wood crafts	88.5	50.0
Glass crafts	21.2	42.0
Other craft	95.8	31.7
Writing	542.8	39.4
Publishing	113.7	58.1
Music		
Music as a live performer	208.8	28.8
Music with no involvement as a live performer	51.5	26.5
Performing arts		
Performing arts as a performer	145.8	17.9
Performing arts with no involvement as a performer	67.1	17.1
Total involvements	3 775.0	35.8

Source: ABS 1997m.

WORK IN CULTURAL ACTIVITIES *continued*

The cultural activities that had the largest number of involvements were fete and festival organising, cultural teaching, design, writing and music. Activities for which most people were likely to receive payment for their work were libraries and archives, cultural teaching, television, design, print-making, electronic art, jewellery and publishing.

Of the 1,352,200 involvements where some payment was received, 20.5% (276,500) usually involved 35 hours or more of work per week while 48.8% (659,600) involved work for at least six months of the year as table 5.3 shows. Only 14.8% (199,800) of involvements were for 35 hours or more per week and for at least six months of the year. About 50% (668,000) involved less than 10 hours per week.

5.3 WORK INVOLVEMENTS WITH SOME PAYMENT RECEIVED— 12 months ended March 1997

	WEEKS PER YEAR.....				Number of involvements no.
	1-13 %	14-26 %	27-52 %	Total %	
<i>Usual hours per week</i>					
1-9	22.8	7.8	18.8	49.4	668 000
10-19	6.6	2.8	8.6	18.0	243 300
20-34	4.4	*1.2	6.5	12.2	164 300
35 or more	4.1	1.6	14.8	20.5	276 500
Total	37.9	13.4	48.8	100.0	1 352 200

Source: ABS 1997m.

Table 5.4 shows that, of the 2,422,900 involvements where there was no payment received, only 2.4% (59,100) usually involved 35 hours or more of work per week while 22.4% (542,300) involved work for at least six months of the year. Over 80% (1,984,500) involved less than 10 hours per week.

5.4 WORK INVOLVEMENTS WITH NO PAYMENT RECEIVED— 12 months ended March 1997

	WEEKS PER YEAR.....				Number of involvements no.
	1-13 %	14-26 %	27-52 %	Total %	
<i>Usual hours per week</i>					
1-9	54.1	9.5	18.3	81.9	1 984 500
10-19	7.8	0.9	2.8	11.5	279 500
20-34	3.0	*0.4	0.8	4.1	99 800
35 or more	1.9	*0.1	*0.4	2.4	59 100
Total	66.7	10.9	22.4	100.0	2 422 900

Source: ABS 1997m.

EMPLOYMENT IN CULTURAL OCCUPATIONS

Information about the occupations in which people work is collected in the Census of Population and Housing. However, this gives an incomplete picture of the number of people who do cultural work because:

- it only looks at the occupation in the main job in which the person worked (some people in cultural jobs such as musicians may only have the cultural job as their second job);
- it excludes people who worked in cultural occupations voluntarily (e.g. volunteers working for the National Trusts); and
- it excludes people working in a cultural occupation who were 'between jobs'—as some types of cultural work are periodic in nature, some people employed in cultural occupations have frequent short periods of unemployment.

The 1996 Census showed that there were over 150,000 people employed in cultural occupations. Graphic designers, architects and library workers were the most common types of cultural occupations, as table 5.5 shows.

5.5 EMPLOYED PERSONS, Cultural Occupations—1996 Census

<i>Cultural occupation</i>	<i>Males</i>	<i>Females</i>	<i>Persons</i>
Media producer/artistic director n.f.d.	3	—	3
Media producer	2 863	1 889	4 752
Artistic director	142	125	267
Environment, parks and landcare manager	1 889	447	2 336
Park ranger	1 438	257	1 695
Architect/landscape architect n.f.d.	12	—	12
Architect	8 290	1 671	9 961
Landscape architect	820	489	1 309
Librarian	1 723	7 843	9 566
Archivist	257	384	641
Art teacher (private)	229	650	879
Music teacher (private)	2 121	4 992	7 113
Dance teacher (private)	380	2 381	2 761
Drama teacher (private)	84	312	396
Artist/related professional n.f.d.	1 691	1 912	3 603
Visual art/craft professional n.f.d.	90	120	210
Painter (visual arts)	1 126	1 288	2 414
Sculptor	323	148	471
Potter or ceramic artist	898	1 257	2 155
Visual art/craft professional n.e.c.	2 028	2 240	4 268
Photographer	4 405	1 854	6 259
Designer/illustrator n.f.d.	1 297	845	2 142
Fashion designer	499	2 167	2 666
Graphic designer	7 066	6 020	13 086
Industrial designer	1 386	291	1 677
Interior designer	1 032	1 954	2 986
Illustrator	884	472	1 356
Journalist/related professional n.f.d.	884	660	1 544
Editor	1 152	1 094	2 246
Print journalist	3 238	2 585	5 823
Television journalist	517	476	993
Radio journalist	344	295	639
Copywriter	520	370	890
Technical writer	716	595	1 311
Journalist/related professional n.e.c.	327	580	907
Author/related professional n.f.d.	15	20	35
Author	1 216	1 128	2 344
Book editor	136	543	679
Script editor	40	83	123
Film/TV/radio/stage director n.f.d.	46	20	66

Source: ABS 1997g.

5.5 EMPLOYED PERSONS, Cultural Occupations—1996 Census *continued*

<i>Cultural occupation</i>	<i>Males</i>	<i>Females</i>	<i>Persons</i>
Art director (film, TV or stage)	159	78	237
Director (film, TV, radio or stage)	1 206	495	1 701
Director of photography	248	32	280
Film & video editor	749	273	1 022
Stage manager	221	152	373
Program director (radio or TV)	200	106	306
Technical director	167	21	188
Film/TV/radio/stage director n.e.c.	544	202	746
Musician/related professional n.f.d.	121	46	167
Music director	237	108	345
Singer	702	542	1 244
Instrumental musician	4 208	1 325	5 533
Composer	217	44	261
Musician/related professional n.e.c.	24	43	67
Actor/dancer/related professional n.f.d.	23	13	36
Actor	846	660	1 506
Dancer or choreographer	291	736	1 027
Actor/dancer/related professional n.e.c.	934	603	1 537
Media presenter n.f.d.	23	10	33
Radio presenter	1 717	415	2 132
Television presenter	224	136	360
Conservator	158	203	361
Museum or gallery curator	348	414	762
Architectural associate	4 164	939	5 103
Theatre or cinema manager	521	416	937
Library technician	561	4 940	5 501
Interior decorator	260	902	1 162
Museum or art gallery technician	165	144	309
Performing arts support worker n.f.d.	113	11	124
Sound technician	2 550	332	2 882
Camera operator (film, TV, video)	976	33	1 009
Television equipment operator	524	186	710
Broadcast transmitter operator	78	29	107
Motion picture projectionist	588	38	626
Light technician	560	68	628
Production assistant (film, TV, radio)	283	654	937
Production assistant (theatre)	55	17	72
Make-up artist	50	427	477
Performing arts support worker n.e.c.	184	135	319
Piano tuner	327	34	361
Photographer's assistant	176	335	511
Library assistant	1 236	7 379	8 615
Museum or gallery attendant	251	465	716
Ticket collector or usher	1 550	1 275	2 825
Total	80 866	75 873	156 739

Source: ABS 1997g.

PEOPLE EMPLOYED IN CULTURE-RELATED INDUSTRIES

Industry data were also obtained from the 1996 Census by coding the organisations for which people worked to the Australian and New Zealand Standard Industrial Classification (ANZSIC).

Some people work in culture-related industries even though they do not have a cultural occupation. For example, a ticket seller in a cinema or a security guard at a museum can be considered to be employed in culture.

There were over 150,000 people employed in culture-related industries in 1996 as table 5.6 shows. However, of these, almost two-fifths (58,181) had a cultural occupation and so have already been included as part of the 156,739 people in cultural occupations outlined in the previous section. However, the remaining 98,359 people in culture-related industries do not have cultural occupations. Over one-quarter of these people were employed in the publishing or printing and publishing industries.

5.6 PERSONS EMPLOYED IN CULTURE-RELATED INDUSTRIES— 1996 Census

<i>Culture-related industry</i>	<i>In cultural occupations</i>	<i>In non-cultural occupations</i>	<i>Total</i>	<i>% in cultural occupations</i>
Newspaper printing or publishing	7 287	19 133	26 420	27.6
Other periodical publishing	1 900	3 656	5 556	34.2
Book and other publishing	1 187	4 666	5 853	20.3
Recorded media manufacturing and publishing	119	1 408	1 527	7.8
Book and magazine wholesaling	178	4 663	4 841	3.7
Recorded music retailing	97	3 798	3 895	2.5
Film and video production	4 860	2 896	7 756	62.7
Film and video distribution	362	1 347	1 709	21.2
Motion picture exhibition	2 280	2 773	5 053	45.1
Radio services	2 989	3 483	6 472	46.2
Television services	6 844	7 709	14 553	47.0
Libraries	6 530	7 198	13 728	47.6
Museums	1 552	3 691	5 243	29.6
Zoological and botanic gardens	64	2 030	2 094	3.1
Recreational parks and gardens	1 116	4 069	5 185	21.5
Music and theatre productions	5 790	2 257	8 047	72.0
Creative arts	5 911	1 366	7 277	81.2
Sound recording studios	630	423	1 053	59.8
Performing arts venues	1 295	2 871	4 166	31.1
Services to the arts n.e.c.	565	1 463	2 028	27.9
Video hire outlets	94	9 655	9 749	1.0
Photographic studios	4 429	2 742	7 171	61.8
Total(a)	58 181	98 359	156 540	37.2

(a) Includes people employed in culture-related industries who did not provide sufficient information to determine in which particular culture-related industry they worked.

Source: ABS 1997g.

NUMBER OF PEOPLE EMPLOYED IN CULTURE

The total number of people employed in culture can be worked out by adding the number of people employed in cultural occupations (156,739) to the number employed in non-cultural occupations in culture-related industries (98,359). Thus, there were 255,098 people counted in the 1996 Census who can be identified as working in culture.

This figure of 255,098 people is a minimum estimate of people working in culture because:

- it does not include the activities of people who did voluntary work;
- it does not include people whose main job was not in culture but whose second job was; and
- it does not include those people who work in cultural occupations but who were temporarily unemployed at the time of the Census.

Some of the previous chapters have provided an indication of the significance of culture in the Australian economy. For example, in Chapter 4, it was shown that household expenditure on cultural goods and services totalled \$8,800m in 1993–94 while in Chapter 5, people whose main job was in culture numbered over 250,000 in 1996.

This chapter provides the contribution of culture to the Australian economy, based on data from the Australian National Accounts (ANA). The ANA is designed to provide a systematic summary of the economic activity of the nation. Consequently, this data source is not subject to limitations in scope which many other data sources are (e.g. the Household Expenditure Survey only looks at household expenditure, whereas the ANA also looks at expenditure in Australia by businesses, governments and people from overseas).

THE NATIONAL ACCOUNTS

The ANA is used for a variety of purposes and different measures are produced so that people can pick that which best suits their needs. Table 6.1 shows those commodity items used in the input-output tables of the ANA which can be considered to have a cultural component. The transactions in this table have been valued at what is termed basic values. This is the ex-plant value or the net price received by the producer (i.e. the amount received after deducting any indirect taxes).

Table 6.1 shows that Australian production of cultural goods and services totalled \$19,295m in 1993–94. The largest cultural category was for commodities associated with publishing and recorded media (\$5,997m). This included the publishing of newspapers, magazines, books, CDs and pre-recorded videotapes.

The category *advertising services* also recorded Australian production of over \$3,000m in 1993–94.

Imports into Australia of cultural goods and services totalled \$1,593m. Of this, \$1,266m was for publishing and recorded media commodities. For all categories except *musical instruments and strings*, the value of Australian production was greater than the value of imports.

The total value of cultural goods and services becoming available in 1993–94 can be calculated as the sum of Australian production plus imports.

The goods and services becoming available must either be:

- used up in the production of other goods and services;
- purchased by consumers;
- exported; or
- an addition to the volume of stocks held.

Australian production made up the vast majority (92%) of the \$20,887m of cultural goods and services available in 1993–94, as table 6.1 shows.

6.1 PRODUCTION OF CULTURAL GOODS AND SERVICES(a)—1993–94

<i>Commodity item(c)</i>	<i>Australian production</i>	<i>Competing imports(b)</i>	<i>Total</i>
	\$m	\$m	\$m
Motion picture, radio etc.			
Motion picture production	501.6	0.0	501.6
Film hiring services	168.1	0.0	168.1
Motion picture theatre services	410.1	3.5	413.6
Radio and TV station services	2 915.0	0.0	2 915.0
<i>Total(d)</i>	4 002.7	3.5	4 006.1
Libraries, museums, arts			
Library, museum and art gallery services	524.3	25.5	549.8
Zoological and botanical services	156.4	0.0	156.4
Recreational parks and gardens operation	356.5	0.0	356.5
Music and theatre production operation	320.7	1.2	321.9
Creative arts	405.3	23.4	428.7
Sound recording studios operation	59.3	0.7	60.0
Performing arts venue operation	355.6	0.2	355.8
Casting agency operation	12.8	0.0	12.8
News reporting services	75.6	13.0	88.6
Services to the arts n.e.c.	92.0	3.0	95.1
<i>Total(d)</i>	2 376.8	67.1	2 443.8
Other cultural commodity items			
Publishing; recorded media and publishing	5 997.4	1 265.5	7 262.9
Musical instruments and strings	5.6	81.7	87.3
Architectural services	1 089.5	3.7	1 093.2
Advertising services	3 414.3	171.0	3 585.3
Commercial art and display services	2 156.2	0.0	2 156.2
Photographic services n.e.c.	252.2	0.0	252.2
<i>Total</i>	12 915.2	1 521.9	14 437.1
Total	19 294.7	1 592.5	20 887.1

(a) At basic values.

(b) Competing imports are defined as those commodities that could be produced in Australia. Almost all of Australia's imports are defined as competing imports while a very small percentage are defined as complementary imports (an example of the latter is natural rubber). Note: This column also includes duty on the imports.

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

(d) Includes general government consumption of fixed capital.

Source: ABS 1997b.

COMPARISON WITH OTHER INDUSTRIES

Australian production of cultural goods and services totalled \$19,295m in 1993–94. This means the output of culture-related industries had roughly the same value as the output of the road transport industry (\$15,041m), the residential building construction industry (\$24,755m) and the education industry (\$23,557m).

SIZE OF THE CULTURAL INDUSTRIES

The preceding data shows the size of cultural goods and services in terms of output produced by the relevant industries in Australia. This is a gross measure which includes the value of output contributed by other industries in the form of input of goods and services into the production of cultural goods and services. For example, for the category Radio and TV station services, the stations purchase the right to broadcast sports events which are the output of another industry (sport, recreation and gambling services). The value of an industry's outputs after deducting the value of goods and services used in producing them is termed 'value added'. This is a net measure of the size of the industry's output.

Value added is the sum of two components:

- wages and salaries paid by the cultural industries; and
- the gross operating surplus (profit) of the cultural industries.

Unfortunately, value added data are not available for the cultural commodities shown, except for publishing and recorded media. However, value added data are available at a broader level of classification of the commodities. At this level, about two-thirds of the total production of cultural goods and services can be identified.

The value added of these culture-related industries totalled \$5,962m in 1993–94, as table 6.2 shows. As the goods and services of these industries were valued at \$12 487m, about 48% was paid to factors of production (labour, capital etc.) and 52% to other industries for the goods and services (including indirect taxes paid to the government) used to produce these cultural goods and services.

6.2 OUTPUT AND VALUE ADDED, Selected Cultural-related Industries(a)—1993–94

	<i>Australian production(b)</i>	<i>Value added</i>
	\$m	\$m
Publishing; recorded media etc.	6 107.0	2 747.4
Motion picture, radio etc.	4 002.7	1 549.7
Libraries, museums, arts	2 376.8	1 665.2
<i>Total cultural</i>	<i>12 486.5</i>	<i>5 962.3</i>
Total all industries	756 687.1	(c)378 292.1

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

(b) These figures differ from those shown in table 6.1 as they include the value of all output produced by the firm (e.g. some publishing firms may also be involved in printing or wholesaling).

(c) This is equivalent to GDP which on an Input-Output basis varies slightly from official GDP estimates.

Source: ABS 1997a.

These selected culture-related industries account for 1.6% of Australia's domestic production (in terms of value added). As these selected industries produce about two-thirds of the output of all culture-related industries, it seems likely that the culture-related industries as a whole account for about 2.5% of Australia's domestic production.

Australian culture has evolved over the years and has been influenced by the unique cultures of many other countries. While much of this overseas influence has been brought by migrants from a variety of countries, it is also the result of the trade in goods and services (their computers, films, music etc.). This chapter looks at the types of cultural goods and services imported into Australia as well as Australia's cultural exports to other countries.

OVERVIEW

In 1994–95, Australia earned \$904m in foreign exchange from culture—cultural goods exported earned \$750m, cultural and entertainment services provided overseas earned \$26m while royalties received totalled \$128m. However, as table 7.1 shows, these export earnings (\$904m) were substantially less than the equivalent import payments (\$4,035m).

Cultural goods accounted for over four-fifths of Australia's international trade in culture in 1994–95. Royalties formed a small, though significant, part of international trade in culture. Cultural services were relatively small by comparison.

7.1 CULTURAL COMPONENT OF AUSTRALIA'S BALANCE OF PAYMENTS
.....

	1993–94	1994–95
	\$m	\$m
.....		
CREDITS (EARNINGS)		
Exports of cultural goods	705	750
Cultural services provided(a)	28	26
Royalties received	108	128
Total	841	904
.....		
DEBITS (PAYMENTS)		
Imports of cultural goods	3 004	3 364
Cultural services received(a)	52	43
Royalties paid	588	628
Total	3 644	4 035
.....		

(a) Includes entertainment services etc.

Sources: ABS 1997c, (unpub.)b.

In terms of the total overseas trade in all goods and services, cultural goods and services are relatively insignificant—in 1994–95, they accounted for only 2.9% of the trade in goods and 0.2% of the trade in services. However, the cultural component in royalty payments was relatively significant (34.5%).

IDENTIFYING CULTURAL GOODS

The ABS uses very detailed classifications to record exports and imports of goods. The criterion used to determine whether goods are cultural is whether they are predominantly used in a cultural activity. Consequently, cultural goods are defined to include goods which are produced as a direct result of the creative input of people (e.g. books, CDs) and those goods which are needed to produce or display the creative work (e.g. TVs, photographic film).

EXPORTS AND IMPORTS OF CULTURAL GOODS

In 1994–95 cultural goods exported comprised 1.1% of Australia's total exports of goods, while cultural goods imported comprised 4.5% of total imports of goods.

Table 7.2 shows that exports of cultural goods totalled \$749.9m in 1994–95, which was 6.4% higher than in the previous year. Of these exports, about half (50.2%) were photographic in nature (mainly unexposed film).

7.2 EXPORTS AND IMPORTS OF CULTURAL GOODS

Type of cultural good	Exports	Imports	Excess of exports over imports
	\$m	\$m	\$m
1993–94			
Visual arts	25.9	87.2	-61.3
Musical instruments	3.4	77.7	-74.3
Record media	105.9	143.5	-37.6
Photographic	331.7	485.3	-153.6
Home entertainment equipment	75.3	1 385.2	-1 309.9
Print media	162.5	825.4	-662.9
Total	704.6	3 004.3	-2 299.7
1994–95			
Visual arts	35.7	114.6	-78.9
Musical instruments	4.2	84.3	-80.1
Record media	91.4	175.0	-83.6
Photographic	376.7	508.8	-132.2
Home entertainment equipment	70.1	1 644.7	-1 574.6
Print media	171.8	836.8	-664.9
Total	749.9	3 364.2	-2 614.3

Source: ABS (unpub.)b.

Imports of cultural goods totalled \$3,364.2m in 1994–95, an increase of 12% over the previous year. The largest category of imports was home entertainment equipment (\$1,644.7m), which includes items such as VCRs, televisions and sound systems. Print media (e.g. books and periodicals) was the next largest category, accounting for \$836.8m of imports. Books, the major component of the print media category, accounted for \$493.3m of imports.

EXPORTS AND IMPORTS OF CULTURAL GOODS *continued*

Australia buys more than it sells overseas in every type of cultural good. Table 7.2 shows that the value of imports of cultural goods in 1994–95 (\$3,364.2m) was more than four times the value of exports of cultural goods (\$749.9m). That is, Australia had a trade deficit in cultural goods of \$2,614.3m. The trade deficit was largest for the category home entertainment equipment—imports for this category exceeded exports by 23 times. Australia was closest to self-sufficiency in the photographic category—imports only exceeded exports by a third.

Over half (53.6%) of Australia's exports of cultural goods went to just three countries—New Zealand, Hong Kong and Singapore. Almost half of New Zealand imports of cultural goods from Australia were in the print media category (e.g. books, newspapers, journals). New Zealand also imported significant quantities of photographic supplies (film and paper) and recorded music (CDs) from Australia. Both Hong Kong and Singapore had photographic films as their main cultural import from Australia.

TRADE IN CULTURAL SERVICES

The previous section provided information on merchandise trade (i.e. movable goods that cross Australia's customs frontier). However, this is only one part of Australia's total trade in cultural products. Services provided overseas by Australian companies also earn export dollars for Australia.

The ABS conducts monthly, quarterly and annual collections of international trade in services. Unfortunately, the surveys do not collect information in sufficient detail to identify trade in cultural services. Because of its small size, cultural services are combined with sporting and entertainment services in the collections.

The category 'Sporting, entertainment and cultural services' in these surveys includes gross receipts from tours overseas by Australian performers; performance fees paid to non-resident performers; sporting events' prize moneys and appearance fees; and actors' performance fees.

7.3 INTERNATIONAL TRADE, Sporting, Entertainment & Cultural Services(a)

.....

	<i>Credits</i> (earnings)	<i>Debits</i> (payments)	<i>Excess of</i> <i>credits over</i> <i>debits</i>
	\$m	\$m	\$m
1991–92	33	33	—
1992–93	22	34	–12
1993–94	28	52	–24
1994–95	26	43	–17
1995–96	39	51	–12

(a) Includes health and medical services.

Source: ABS 1997c.

TRADE IN CULTURAL SERVICES *continued*

The relatively small sample covering this sector prior to 1993–94 means that the data should be used with caution. Nevertheless, it appears that Australia's earnings from providing sporting, entertainment and cultural services to the rest of the world are less than what it pays the rest of the world for their sporting, entertainment and cultural services. For example, Australia provided sporting, entertainment and cultural services overseas worth approximately \$39m in 1995–96, while it received services of about \$51m. Consequently, for sporting, entertainment and cultural services, Australia had a net deficit of \$12m in 1995–96.

The category 'sporting, entertainment and cultural services' forms only a very small part of Australia's trade in services. Sporting, entertainment and cultural services comprised only 0.2% of Australia's total services credits and 0.2% of Australia's total services debits in 1995–96.

CULTURAL ROYALTIES

Other international payments arise through royalties. These are moneys received for permitting people to use intangible assets (e.g. royalties paid for the right to show films and television programs).

Table 7.4 shows cultural royalties received by Australia totalled \$156m in 1995–96. Australia earned \$121m from royalties arising from film, TV programs and video tapes. These were very significant in terms of export dollars earned by cultural products.

Most royalty payments made to overseas countries were the result of the right to use film, TV and video tapes (\$489m in 1995–96), although payments for music royalties were also significant (\$166m).

Table 7.4 also shows that in 1995–96 there was a net deficit of \$499m dollars as a result of royalty payments arising from the use of cultural assets. In each of the categories, royalties paid to overseas countries exceeded those received in Australia, approximately four-fold.

Royalty payments arising from the use of cultural assets formed a significant part of total royalties. In 1995–96, Australia's total credits (earnings) for royalties totalled \$454m, and, of this, cultural assets contributed \$156m (34.4%). Australia's total debits (payments) for royalties totalled \$1,830m, of which 35.8% was the result of the use of overseas-owned cultural assets.

7.4 ROYALTIES EARNED OVERSEAS AND PAID TO OVERSEAS

Type	1991-92 \$m	1992-93 \$m	1993-94 \$m	1994-95 \$m	1995-96 \$m
CREDITS (EARNINGS)					
Film	12	28	13	20	15
TV programs	35	39	60	73	91
Video tapes	15	18	8	6	11
<i>Total</i>	62	85	82	99	(a)121
Music	27	29	25	29	35
Publications	1	—	1	(a)	(a)
<i>Total</i>	90	114	108	128	156
Other royalties	150	222	263	291	298
<i>Total</i>	240	336	371	419	454
DEBITS (PAYMENTS)					
Film	88	73	104	94	98
TV programs	239	240	244	266	302
Video tapes	93	89	96	102	89
<i>Total</i>	420	402	444	462	489
Music	141	130	128	166	166
Publications	6	17	16	(b)	(b)
<i>Total</i>	567	549	588	628	655
Other royalties	972	985	1 145	1 105	1 175
<i>Total</i>	1 539	1 534	1 733	1 733	1 830
EXCESS OF CREDITS OVER DEBITS					
Film	-76	-45	-91	-74	-83
TV programs	-204	-201	-184	-193	-211
Video tapes	-78	-71	-88	-96	-78
<i>Total</i>	-358	-317	-362	-363	-368
Music	-114	-101	-103	-137	-131
Publications	-5	-17	-15	(a)	(a)
<i>Total</i>	-477	-435	-480	-500	-499
Other royalties	-822	-763	-882	-814	-877
Total	-1 299	-1 198	-1 362	-1 314	-1 376

(a) Includes \$4m for multimedia.

(b) No longer collected separately (included in Other royalties).

Source: ABS 1997c.

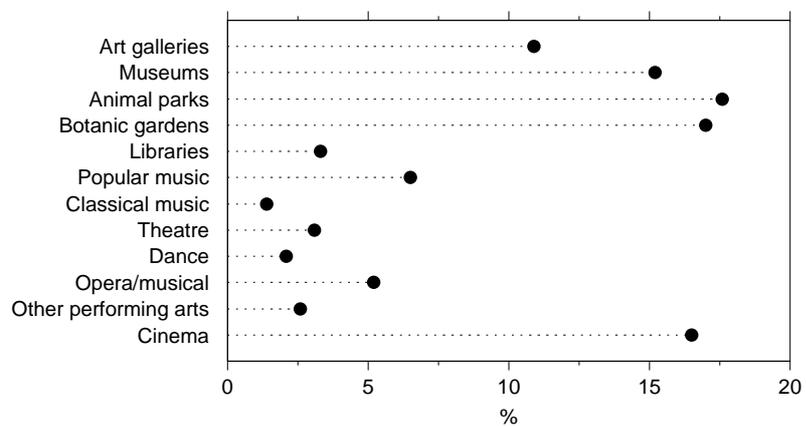
Cultural tourism relates to those travellers who want to experience, understand and appreciate the character and culture of a place. It is about people travelling for cultural motivations, such as to visit historical sites or to attend festivals or the performing arts. A good example of cultural tourism is people travelling on study tours as the activities they undertake are predominantly culturally motivated. Nevertheless, most tourists itineraries include an element of cultural tourism.

DOMESTIC CULTURAL TOURISM

In 1995, the ABS conducted a survey on attendance at cultural venues. In part, it measured the magnitude of cultural tourism by Australians, as it questioned people on whether they had visited cultural venues while staying at least 40 km away from home. As the people had to spend at least one night away from home to be asked these questions, the data excluded the cultural activities of 'day-trippers'.

A total of 10,250,000 (72.9%) people aged 15 years and over spent one or more nights at least 40 km away from home in the 12 months to March 1995. Of these people, only 47.4% visited one or more cultural venues while they were away. Graph 8.1 shows that the most popular cultural venues attended while away were animal parks, botanic gardens, cinemas and museums. For example, 15.2% of all persons 15 years and over who had stayed away from home had visited a museum.

8.1 PERSONS WHO STAYED AWAY FROM HOME, Attendance—1995



Source: ABS 1995.

Of those who visited cultural venues while away from home, 63.3% visited venues in their own State, 52.8% visited venues interstate and 13.6% visited venues overseas. The percentages add to more than 100% as people could visit venues, say, in both their own State and interstate.

Of the 10,250,000 people who spent one or more nights away from home, 16.1% attended a sports event while they were away. The most common sports events attended were Australian Rules football and horse, harness and dog racing.

INTERNATIONAL CULTURAL TOURISM

In 1996, there were 4,164,800 people from overseas who visited Australia with the intention of staying for less than a year. There were 2,732,000 Australians who left Australia in 1996 but who intended to return within a year.

Many short-term visitors to Australia stayed for less than a week (30.6%) or for between one and two weeks (31.5%). Australians travelling overseas were more likely to take longer trips—only 11.0% went away for less than one week.

A survey conducted by the Bureau of Tourism Research (BTR) in the September quarter of 1995 for the Department of Communications and the Arts looked at the purchase of arts and crafts by international visitors aged 15 years and over. It found that about one-half (49%) of these visitors bought at least one item that they identified as being art or craft. Most purchases were of items which could easily be carried in hand luggage. The visitors' expenditure on art and craft during this three-month period was estimated at \$50 million. (This implies that spending by international visitors on arts and crafts are in the order of \$200m per year.)

Handcrafted clothing was bought by almost a fifth (18.0%) of international visitors to Australia aged 15 years and over, as table 8.2 shows. Those who bought handcrafted clothing spent an average of \$162 on these items during their visit. Those who purchased leather items also spent a significant amount of money on these items (an average of \$163 each), but as only 9.2% of all visitors purchased leather items, the average by all visitors was only \$15, compared with \$29 for handcrafted clothing.

8.2 PURCHASES OF ARTS AND CRAFTS BY INTERNATIONAL VISITORS—September Quarter 1995

	<i>Proportion of total visitors who purchased item</i>	<i>Average expenditure by all visitors</i>	<i>Average expenditure by visitors who purchased item</i>
	%	\$	\$
Paintings, drawings or prints	5.5	5	83
Sculpture	1.1	1	59
Wood or furniture	7.6	5	67
Ceramics or pottery	3.9	2	55
Glass	1.4	1	66
Handcrafted clothing	18.0	29	162
Other textiles	2.6	4	154
Metal work	0.6	**	60
Leather	9.2	15	163
Other handcrafts	4.0	4	100

Source: Department of Communications and the Arts 1996b.

INTERNATIONAL CULTURAL TOURISM *continued*

This BTR survey also asked international visitors about the entertainment venues they visited while in Australia. Table 8.3 shows that the most commonly visited venues were animal parks, zoos and aquariums as well as national parks. Even though only 8% of international visitors undertook adventure activities (scuba diving, white water rafting etc.), this category accounted for about a third of the total expenditure on entertainment.

8.3 ATTENDANCE AT ENTERTAINMENT VENUES, By International Visitors—September Quarter 1995

	<i>Proportion of total visitors who attended venue</i>	<i>Average expenditure by all visitors</i>	<i>Average expenditure by persons who attended venue</i>
	%	\$	\$
Nightclubs, discos, karaoke	10	5.60	58
Museums or art galleries	18	1.70	10
National parks	27	1.10	4
Historic sites or houses	13	0.30	3
Cinemas or movie theatres	13	4.70	37
Theatre, opera or ballet	7	3.70	50
Classical music	1	0.20	20
Contemporary music	2	0.70	34
Sporting venues	5	2.10	38
Adventure activities	8	17.20	204
Theme or amusement parks	15	3.80	25
Animal parks, zoos or aquariums	32	4.10	13
Adult entertainment	2	2.20	91
Other entertainment	13	4.20	32

Source: Department of Communications and the Arts, 1996b.

PART **2**

PROFILES OF THE CULTURAL SECTORS

Part 2 of this publication presents information on Australian culture by sector, as defined by the National Culture/Leisure Industry Statistical Framework. The available data on each sector are grouped under the headings employment, products, organisations and consumers. However, for some sectors (e.g. festivals) only limited information is available. The ABS is endeavouring to collect more information on these sectors.

There is a growing awareness among Australians of heritage places and the importance of preserving them. The preservation of our national heritage places matters because they foster community spirit and give a sense of belonging, adding to the wellbeing of Australians. As well as affecting people's lives, Australia's heritage places can have an impact on tourism, employment, the balance of payments etc.

This chapter contains information on the Aboriginal environment, the historic environment and the natural environment (these three categories are often collectively referred to as comprising 'the National Estate').

The Aboriginal environment includes Aboriginal sites, areas, structures and other features which have historic, scientific, aesthetic, social or traditional value. For example, it includes the recording, conservation and study of Aboriginal sites.

The historic environment includes places of significance since the European settlement of Australia such as old buildings, towns, shipwrecks, streetscapes, parks and gardens.

The natural environment covers the study and preservation of native flora and fauna as well as outdoor recreation facilities (excluding those catering for organised sport). It includes national and State parks and reserves, picnic and recreation grounds.

EMPLOYMENT

There is only limited data available on employment in the heritage sector. An ABS survey showed that 46,500 people were involved with heritage organisations in the 12 months ending March 1997. The heritage sector relies heavily on voluntary workers—37,800 (81%) of the 46,500 people involved were not paid for their involvement. Of the 46,500 people involved, only about one-tenth (10.4%) had the involvement as part of their main job.

The Census of Population and Housing provides information on paid employment. The heritage sector cannot be separately identified as an industry in the Census. However, the occupation classification contains the category 'park ranger', which describes people who control national parks, scenic areas, historic sites, nature reserves and recreation areas. In the 1996 Census, there were 1,695 persons classified as having an occupation of park ranger. There were also 2,336 persons classified as an environment, parks or landcare manager. These people are responsible for managing and developing conservation plans for nature parks, land and other natural resources.

PRODUCTS

Places of heritage significance are listed by State and Territory Heritage agencies, local governments, National Trusts, and professional bodies such as the Royal Australian Institute of Architects and the Institution of Engineers.

Aboriginal places in the Register of the National Estate

All States and Territories have specific legislation which protects Aboriginal archaeological sites regardless of land tenure. Other places of significance (for example, sacred sites) are protected by various Acts of Parliament in most States and Territories.

There were 888 Aboriginal places in the Register of the National Estate at 30 June 1997. Most of these places encompassed a number of Aboriginal sites.

Table 9.1 shows that New South Wales, Queensland and South Australia had the largest number of Aboriginal places listed in the Register. Of the 888 places listed, 207 (23.3%) were art sites.

9.1 ABORIGINAL PLACES IN THE REGISTER OF THE NATIONAL ESTATE(a)—30 June 1997

Type	NSW	Vic.	Qld	SA	WA	Tas.	NT	ACT	Aust.
Occupation site	17	8	9	18	9	27	3	2	93
Shell midden	14	17	15	5	—	17	—	—	68
Fish/eel trap	3	3	5	6	1	—	1	—	19
Hunting hides/traps	—	—	—	3	—	—	—	—	3
Grinding grooves	7	8	2	—	—	—	—	2	19
Quarries	3	7	7	9	3	5	—	1	35
Wells	1	3	3	4	—	—	—	—	11
Modified trees (scarred and carved)	23	8	9	2	2	—	—	16	60
Art sites	68	17	32	42	25	5	16	2	207
Stone arrangements	9	4	26	8	3	3	—	1	54
Ceremonial sites	5	3	10	—	—	—	—	—	18
Places of significance to Aboriginal people	22	—	12	21	9	2	48	1	115
Burials/cemeteries/graves	10	13	2	1	1	3	1	—	31
Historic/contact sites	15	9	2	7	6	1	7	—	47
Site complexes	18	4	16	17	16	13	23	—	107
Organic resource area	—	—	—	—	—	1	—	—	1
Total	215	104	150	143	75	77	99	25	888

(a) Includes places on the Interim List.

Source: Australian Heritage Commission (unpub.).

Historic places in the Register of the National Estate

There were 9,124 historic places listed in the Register of the National Estate at 30 June 1997. As table 9.2 shows, almost 30% of these historic places were houses. Three States accounted for almost 80% of the houses in the Register—New South Wales had 809 houses of historic significance, Victoria had 870 and Tasmania had 388.

9.2 HISTORIC PLACES IN THE REGISTER OF THE NATIONAL ESTATE(a)—30 June 1997

Type	NSW	Vic.	Qld	SA	WA	Tas.	NT	ACT	Aust. (b)
Residential houses	809	870	137	171	205	388	23	22	2 626
Hotels, motels, inns	144	78	32	40	57	77	4	6	438
Retail and wholesale	227	105	71	51	118	83	3	1	661
Government and administration	37	48	18	20	24	24	3	8	183
Finance	64	72	22	24	15	8	2	—	207
Community facilities	101	65	25	16	18	5	6	3	239
Recreation and entertainment	76	73	25	14	39	16	1	6	250
Parks, gardens and trees	82	46	14	26	18	13	3	14	216
Education	137	69	25	41	39	36	1	10	358
Religion	212	177	80	103	62	137	5	12	789
Cemeteries and burial sites	21	7	9	6	15	12	7	5	82
Monuments and memorials	26	9	68	8	11	3	—	9	134
Health services	12	17	7	12	5	3	—	—	56
Public utilities	16	12	5	15	5	7	—	4	64
Postal and communications	69	34	14	14	22	16	8	—	177
Shipwrecks	2	3	2	6	43	2	1	—	59
Rail transport	74	59	34	31	13	12	7	—	230
Road transport	64	48	14	35	8	20	3	1	193
Air transport	—	—	3	—	—	—	3	—	6
Water transport	39	20	16	26	16	25	3	1	146
Maritime industry	2	1	—	2	1	—	—	—	6
Mining and mineral processing	13	27	21	21	4	3	9	—	98
Forestry and timber industry	—	—	—	3	—	1	—	—	4
Manufacturing and processing	16	34	5	16	7	32	1	1	112
Farming and grazing	166	210	28	54	67	179	6	20	732
Law and enforcement	198	85	27	50	37	26	11	1	435
Military	50	38	13	6	13	16	18	3	157
Scientific facilities	3	3	—	—	—	—	—	1	7
Exploration, survey and places of historical events	17	5	5	7	8	5	10	1	66
Urban area	211	47	15	33	27	28	5	12	380
Landscape	9	—	2	1	—	1	—	—	13
Total	2 897	2 262	737	852	897	1 178	143	141	9 124

(a) Includes places on the Interim List.

(b) Includes External Territories.

Source: Australian Heritage Commission (unpub.).

The natural environment in the Register of the National Estate

Management of the natural environment ensures the preservation of local flora and fauna; controls or precludes development of the area for fishing, forestry, mining or agriculture; and ensures that areas involved are generally accessible to the public.

The jurisdiction for proclaiming national parks and other conservation areas lies with State Governments. Some consistency in the terminology used to describe these types of areas is achieved by looking at internationally set criteria.

There were 2,032 natural environment places in the Register of the National Estate at the end of June 1997. Many of these were national parks and reserves, but other common types included wetlands, endangered species habitats and geological monuments.

ORGANISATIONS

The functions of identifying, surveying, classifying, conserving and protecting Australia's heritage places are shared between all levels of government, with help being provided by individuals, academic and professional bodies, and community conservation organisations (e.g. the National Trusts).

The Department of Communications and the Arts provides policy advice to the Commonwealth Government, manages programs and administers legislation regarding cultural heritage places, and in particular the historic environment. Assistance is provided through the Tax Incentive for Heritage Conservation Program, the Heritage Properties Restoration Program, grants to the National Trusts, and the Historic Shipwrecks Program.

The Australian Heritage Commission was established by the Commonwealth Government in 1976 as a statutory authority with the objective of identifying the National Estate and advising the Government on its conservation and presentation. At June 1996, the Commission employed 132 people and, in 1995–96, outlayed \$18.6m on its programs. One of the Commission's functions is to compile and maintain the Register of the National Estate. This is a national list of all Australia's Aboriginal, historic and natural heritage places which should be maintained and preserved for present and future generations of Australians. The National Estate is defined as (Australian Heritage Commission 1997):

those places, being components of the natural environment of Australia, or the cultural environment of Australia, that have aesthetic, historic, scientific or social significance or other special value for future generations as well as for the present community.

Other Commonwealth authorities involved in heritage include the Aboriginal and Torres Strait Islander Commission and the Biodiversity Group, Environment Australia (formerly called the Australian Nature Conservation Agency).

The aim of the Commonwealth Government is to work in partnership with State and Territory Governments on heritage place issues. However, it does undertake heritage activities on its own account where the implications of these activities go beyond State boundaries. Examples of this include the nomination of sites for World Heritage listing and management of Old Parliament House.

ORGANISATIONS *continued*

State and Territory Governments have the key heritage environment legislative responsibility. Each has specific legislation which protects Aboriginal archaeological sites and also have legislation to protect places of historical significance.

Local governments also play an important role in heritage conservation through their role in the planning approval process.

Voluntary organisations involved in heritage

The Australian National Trust movement is the major voluntary organisation involved in promoting the conservation of Australia's national heritage. The goal of the National Trusts of Australia is to preserve past places for present and future generations. They seek to achieve this goal by acquiring, conserving and presenting heritage sites for the benefit of the public. Their activities include maintaining registers of heritage sites and conducting surveys of Aboriginal, historic and natural environments in order to identify and document places of heritage significance.

Commercial organisations involved in heritage

While many commercial organisations have some involvement in conserving Australia's heritage, only a few have it as their primary activity. Types of services provided by these organisations range from appraisals of heritage sites and preparation of conservation plans through to restoration work. Many of the firms which provide services to the heritage sector are involved in the conservation of the historic environment (e.g. those involved in building restorations). Some of the organisations that operate in the heritage field are commercial arms of government departments (e.g. Artlab Australia, which operates the largest and most advanced conservation facility of its type in Australia, is part of the South Australian Department for the Arts and Cultural Heritage. It is principally involved in moveable items displayed in museums and art museums).

CONSUMERS

The Australia Council sponsored a national survey in 1991 to examine the proportion of Australians who undertook cultural activities while travelling in Australia. It found that in the two months before interview, 111,000 people aged 14 years and over (2% of all tourists) had undertaken a domestic trip which involved a visit to an Aboriginal site.

The survey also estimated that there were 660,000 domestic tourists (13%) who had visited historic buildings, sites, monuments or towns in the two months before interview. Visits to national and State parks were also popular—824,000 (17%) had visited these.

In 1994, the Australia Council funded a survey to determine the interest that international visitors had in the arts and culture. The survey was carried out by interview with a sample of departing passengers at eight international airports in Australia.

Of the international visitors to Australia in 1994, 238,000 (8%) had visited Aboriginal sites during their trip to Australia. Almost one-third (30%) had visited historical sites while 50% had visited national and State parks.

Museums provide a step back in time so we might learn more of ourselves from the past. Though they may vary in size and purpose, or in the way they get their funding, all museums delve into areas which have either scientific, artistic or historic interest. In this their value lies. Museums can be involved in a wide range of activities, including the collection, exhibition and conservation of objects related to:

- natural science;
- applied science;
- history;
- transport; and
- culture (e.g. art).

Australia's museums hold a significant element of Australia's cultural heritage. Australia's collection can be found in large Commonwealth, State and Territory collecting organisations as well as regional, local, specialist museums and galleries, and keeping places.

In July 1997, the Heritage Collections Council, consisting of Commonwealth, State and Territory government representatives and key museum sector interests, was formed with a responsibility to define the nature of Australia's heritage collections, and to advise the Cultural Ministers Council on ways of improving the community's access to its national heritage.

EMPLOYMENT IN MUSEUMS

The larger museums employ people in a diverse range of occupations which require varying skill levels. There were 5,243 people whose main job was working in an art museum or other museum, in the week before the 1996 Census of Population and Housing. This understates the total number of people who were working in museums, as it excludes those whose museum job was not their main occupation (e.g. they may have had a second job working at a museum on weekends as a security guard). The census figure also excludes those people who did only voluntary work for museums.

Of the 5,243 people identified in the Census as working in art museums and other museums, 108 were conservators, 487 were museum or gallery curators, 416 were museum or gallery attendants and 149 were museum or art gallery technicians. Another 392 people employed in museums had other cultural occupations (e.g. librarians, graphic designers). However, the bulk of employment (3,691 people) in museums was in occupations not directly culturally orientated such as managers and administrators, clerks, sales assistants, and guards and security officers.

Volunteers provide a significant source of labour for many museums. Most volunteers in art museums and other museums work as guides, but other tasks performed include providing information, maintaining records, and helping to conserve or maintain exhibits.

EMPLOYMENT IN MUSEUMS *continued*

The 1997 ABS Survey on Work in Selected Culture/Leisure Activities identified all people who had an involvement in art museums and other museums, regardless of whether it was in a paid or voluntary capacity.

This household survey showed that 34,400 people were involved in art museums and 39,500 in other museums in the year to March 1997. Of those involved in art museums, 26,700 had some unpaid involvement, while 7,700 had paid involvement only. Of those involved in other types of museums, 32,200 had some unpaid involvement while 7,400 had paid involvement only. Thus, the number of volunteers greatly exceeds the number of paid staff.

Generally, volunteers did not work as frequently nor for as many hours as those with paid employment.

The 1994–95 Survey of Museums with Paid Staff, conducted by Museums Australia, collected detailed information on paid employment. Employment totalled over 4,300 people in terms of full-time equivalent staff (FTE). The 28 museums with 30 or more staff were relatively large employers, whereas the other 255 museums each employed only a handful of people.

10.1 MUSEUMS WITH PAID STAFF, Average Number of Employees(a)—1994–95

	<i>With 30 or more staff</i>	<i>With less than 30 staff</i>	<i>All museums</i>
Art museums	127	3	11
Other museums	121	4	18
All museums	122	3	15

(a) FTE (e.g. a person working for 3 days a week for the entire year would be counted as being 0.6 of a FTE).

Source: Museums Australia Inc. 1996.

Comparisons with previous surveys show that employment (FTE) at museums with 30 or more paid staff has remained fairly static since 1989–90.

NUMBER AND TYPES OF MUSEUMS

Museums with paid staff make up only a small proportion of all museums.

In total, there were 1,765 museums (with paid or unpaid staff) of all types operating in Australia in the March quarter of 1993. Victoria had the most museums (419), with New South Wales having only slightly fewer. However, per head of population, Tasmania had the most number of museums (261 museums per million population). This data came from a survey of art and other museums by the Statistical Working Group to the Cultural Ministers Council in 1993.

10.2 NUMBER OF MUSEUMS, By State—1993

	<i>Number</i>	<i>Number per million population</i>
New South Wales	398	66
Victoria	419	94
Queensland	304	98
South Australia	226	155
Western Australia	243	145
Tasmania	123	261
Northern Territory	31	183
Australian Capital Territory	21	70
Australia	1 765	100

Source: Cultural Ministers Council Statistics Working Group 1993.

Of the 1,765 museums counted in this survey:

- 124 were art museums. These museums display visual art or craft objects for their aesthetic rather than historical value. An example is the National Gallery of Victoria.
- 67 were public exhibiting galleries. They borrow visual art or craft objects for display. They differ from art museums, which are also responsible for storing and conserving the objects. In the survey, public exhibiting galleries were defined to include art spaces and non-profit galleries operated by artists. An example of a public gallery is the Carclew Youth Arts Centre in Adelaide.
- 28 were art displays. These display visual art or craft objects in a building which is generally used for another purpose e.g. the building may be a library or town hall.
- 1,103 were general museums. They display items of cultural, historic or scientific interest, with the museum being responsible for storing and conserving the items. Also included in this category were museums covering a specific topic e.g. transport, militaria. An example of this type of museum is the Western Australian Museum in Perth.
- 41 were museums located at historic sites. These contained historic items, located on sites which are themselves of historic significance. An example is Captain Cook's Landing Place at Botany Bay.
- 50 were historic displays. These are objects of historic interest displayed in a building generally used for other purposes.
- 238 were house museums. This type of museum is a restored or reconstructed building displaying items relating to the period of the building. An example is Old Government House in Brisbane.
- 114 were outdoor museums. These are historic items (sometimes recreated) which are displayed in an outdoor setting. An example is Sovereign Hill in Ballarat.

CONSUMERS

The 1995 ABS Survey on Attendance at Selected Cultural Venues looked at the people who attended museums and the type of museum attended. People were less likely to have visited an art museum than other museums (22.3% visited art museums and 27.8% visited other museums in the 12-month period to March 1995). For all age groups, attendance at other museums was greater.

Attendance at museums peaked for people in the age group 35–44 years. In part, this would be the result of parents taking their children to museums—many parents consider that museums have both educational and entertainment value. Attendance at both art museums and other museums declined after the age of 44 years, but the drop in participation was more rapid for other museums.

The likelihood of a person visiting a museum varied according to the level of educational qualifications of the person. Of people with a bachelor degree, 48.5% had visited an art museum in the previous year, while 49.8% had visited other types of museums. People who were least likely to visit a museum were those with trade qualifications, an apprenticeship or with no qualifications.

People who visited art museums were more likely to go regularly than people who visited other museums. For example, 4.6% of people who had visited art museums in the previous year had gone there over 10 times in the year, whereas only 2.4% of people who had visited other museums had gone over 10 times. In addition, a lower proportion of those people who had visited art museums had gone there only once in the previous year (43.6% compared with 53.7% for other museums).

An Australia Council survey (1991) provides some information on the circumstances of visits to art museums. While the survey was restricted to visitors at just three South Australian art museums, its results provide some indication of the types of visits made. The survey found that 47% of visitors to these art museums went there alone, 21% went with their family, 31% went with friends and 2% went as part of an organised tour.

Attendance data are available for museums with paid staff from the Museums Survey conducted by Museums Australia. The 283 museums with paid staff comprise about 15% of all museums in Australia (and proportionally much more in terms of attendance, expenditure etc.). The total attendance at museums with paid staff was 16.7 million in 1994–95.

10.3 MUSEUMS WITH PAID STAFF, Total and Average Attendances—1994–95

	<i>With 30 or more staff</i>	<i>With less than 30 staff</i>	<i>All museums with paid staff</i>
	'000	'000	'000
TOTAL ATTENDANCE			
Art museums	3 396	1 950	5 346
Other museums	7 957	3 423	11 380
All museums	11 353	5 373	16 726
AVERAGE ATTENDANCE			
Art museums	485	19	49
Other museums	379	22	65
All museums	405	21	59

Source: Museums Australia Inc. 1996.

This survey highlights the dominance of the major museums (those with 30 or more staff) in the sector. They accounted for over two-thirds of the total attendance, even though they comprised only about a tenth of all museums with paid staff.

SOURCES OF FUNDS

Total government outlays on all museums was approximately \$286.8m in 1995–96, according to an ABS survey on cultural funding. Of these outlays, about two-fifths (38.4%) was provided to art museums.

About two-thirds (65.7%) of all government funding for museums was provided by the State and Territory Governments. The Commonwealth Government provided 25.9% of funding while local government provided 8.4%.

Government funding was still the major source of funds for museums with paid staff, according to the Museums Australia survey in 1994–95. It accounted for about two-thirds (66.9%) of all their operating income, which totalled \$341.9m. Admission fees accounted for 11.6% of total income. Other sources of income included private sector support (9.1%) and merchandising (3.2%). Total income for art museums and other museums was \$104.4m and \$237.5m respectively. Total operating expenditure was \$351m while capital expenditure was \$57.5m. Labour costs contributed significantly (50%) to operating expenditure.

Exploring the beauty of flora and fauna is a popular pastime for locals and tourists alike—so much so that many cities in the world now boast zoological and botanic gardens. Their importance has long been recognised in this country given that many of the major Australian zoos and gardens were established last century. Their popularity is shown by the fact that about one-fifth of the adult population go to a zoo each year while two-fifths visit a botanic garden.

EMPLOYMENT

In the 1996 Census of Population and Housing, there were 2,094 people employed in zoos and botanic gardens. Only 64 of these people were employed in cultural occupations.

The 1997 ABS Survey on Work in Culture/Leisure collected information on work involvements in zoos and botanic gardens. There were 19,600 people who had a work involvement in animal and marine parks and, of these, 8,800 (45.1%) received some payment. Some 8,400 people had a work involvement in botanical gardens and 43.8% of these received some payment for their involvement.

ORGANISATIONS

The ABS will be conducting a survey on the number of zoos and botanic gardens in Australia for the 1996–97 financial year as there is currently no reliable information available.

The ABS Survey on Cultural Funding showed that governments provided funding of \$70.5m in 1995–96. Of this amount, 82.6% was provided by State and Territory Governments.

CONSUMERS

Data on attendance at zoos and botanic gardens is available from the 1995 ABS Survey on Attendance at Selected Cultural Venues.

Over a third (35.3%) of people had visited an animal or marine park in the 12 months to March 1995. This included visits to zoos—22.2% had visited zoos in this 12-month period. Graph 11.1 shows that the four States with traditional zoos (in Sydney, Melbourne, Adelaide and Perth) recorded higher attendance rates than the other two States.

Of those people who visited animal and marine parks in the 12-month period, 42.9% had been there more than once during that time.

11.1 ATTENDANCE AT ZOOS—12 months ended March 1995

Source: ABS 1995.

Attendance at botanic gardens was even higher than attendance at animal and marine parks, with 38.5% visiting a botanic garden during the 12-month period. The higher attendance at botanic gardens can be attributed to their greater popularity among the older age groups—only 24.1% of people aged 45 years and over visited an animal or marine park, compared with 34.1% who visited botanic gardens.

Of those people who went to botanic gardens in the 12-month period, 61.8% had visited more than once during that time.

Common reasons given by people for visiting botanic gardens were walking/relaxing in pleasant surroundings (reported by 69% of all people who visited botanic gardens), to have a picnic (16.4%) and interest in botany/horticulture (11.5%) according to data collected in the May 1995 ABS PSM.

About three-fifths of the population had not visited a botanic garden in the 12 month period. The most common reasons given were no time/ too busy (reported by 33.2% of all people who did not visit a botanic gardens), no interest (28.0%) and too far away (23.4%).

One of the fields that people most closely associate with culture is literature. Literature is a product of the creative minds of authors and it impacts on the lives of all Australians. For example, in any one week, about half the adult population picks up a book and reads it. And even those who rarely read books are still influenced by the writings of others—whether it be reading a newspaper or seeing a movie or TV drama based on a particular book.

In Australia, there are over 6,000 new book titles published every year and there would be many more written than that. After all, about a quarter of a million Australians are involved in writing fiction or non-fiction, even if only a small proportion of writers actually get their works published.

The field of literature includes more than just books, though. People involved in producing newspapers and magazines can legitimately claim to be working in literature. As wholesalers and retailers are part of the chain that connects consumers with the creative thoughts of authors, they too form part of the field.

PRIMARY LITERARY CREATION

This category focuses on people who produce, for publication or performance, written material intended to entertain and/or inform. These people are often described as authors, writers, journalists, reporters and editors. Their products range from articles and essays to poems, plays and works of fiction and non-fiction.

Some 17,534 people stated that their main job was literature-orientated at the 1996 Census of Population and Housing. Table 12.1 shows there were almost 6,000 people who were print journalists in their main job, in the week before the Census.

12.1 EMPLOYMENT IN LITERATURE-ORIENTATED OCCUPATIONS—August 1996
.....

	<i>Males</i>	<i>Females</i>	<i>Persons</i>
Journalist/related professional n.f.d.	884	660	1 544
Editor	1 152	1 094	2 246
Print journalist	3 238	2 585	5 823
Television journalist	517	476	993
Radio journalist	344	295	639
Copywriter	520	370	890
Technical writer	716	595	1 311
Journalist/related professional n.e.c.	327	580	907
<i>Total journalists</i>	<i>7 698</i>	<i>6 655</i>	<i>14 353</i>
Author/related professional n.f.d.	15	20	35
Author	1 216	1 128	2 344
Book editor	136	543	679
Script editor	40	83	123
<i>Total authors and related professionals</i>	<i>1 407</i>	<i>1 774</i>	<i>3 181</i>
Total	9 105	8 429	17 534

Source: ABS 1997g.

PRIMARY LITERARY CREATION *continued*

There were 2,344 people who stated that their main job was as an author. Of the 679 book editors, almost half (47.6%) worked for firms which were involved in book or other publishing.

There were 542,800 people in Australia who were involved in writing some time in the 12 months to March 1997. Of these, 329,200 (61%) were not paid nor expecting payment for their work, according to the 1997 ABS Survey of Work in Selected Culture/Leisure Activities.

Of these 542,800 people, 100,400 (18.5%) wrote educational books, 50,800 (9.3%) wrote other books, 208,900 (38.5%) wrote for newspapers or magazines, 137,300 (25.3%) wrote for journals and 167,900 (30.9%) wrote other items.

The survey figure of the number working in writing differs greatly from the figure derived from census data (542,800 compared with 17,534). The main reasons for the differences are:

- the reference period for the Census is one week (compared with one year);
- the Census covers only the main job held, rather than all jobs;
- many jobs have a component of writing (e.g. an academic may write a research report for a journal article), but if this is not the person's main task at work, they are not classified in the Census as journalists or authors; and
- some people who are not paid for their work may not have been identified in census data as having a job.

BOOKS

The ABS Book Publishers Survey showed there were 81.5 million books published in Australia in 1995–96. As table 12.2 shows, 13.1 million books were published for the primary school market. Non-fiction accounted for 23.6 million books published, of which almost half were hardbacks. There were 16.9 million children's books published in 1995–96.

Book publishers sold the 81.5 million books they published for \$566m. These publishers imported a further 49.2 million books which generated additional sales for them of \$384m. Consequently, sales by Australian book publishers totalled \$950m, of which \$80.3m (8.5%) were books which were exported. About a third (33.1%) of export sales were destined for the United States of America while a fifth each were to the United Kingdom (20%) and New Zealand (22.2%). The average price per book sold ranged from \$23.50 for tertiary education books to \$2.70 for paperback children's titles.

Sales of books in electronic form totalled 500,000 in 1995–96 and generated \$3.7m in revenue. While this represents less than 1% of total sales, this product is likely to show the greatest growth in the next few years as more reference books are released on CD-ROM and more titles become available on the Internet.

12.2 NUMBER AND SALES OF BOOKS PUBLISHED—1995–96

Category of book	TOTAL.....				
	Number published by the business million	Number imported million	Number million	Sales \$m	Average price per book \$
.....					
Education					
Primary	13.1	2.3	15.3	84.7	5.50
Secondary	4.6	1.3	5.9	74.3	12.60
Tertiary	2.1	1.7	3.8	89.2	23.50
Professional and reference	9.8	1.3	11.1	110.9	10.00
Total	29.6	6.6	36.2	359.1	9.90
General hardback					
Non-fiction	11.7	5.3	17.0	152.6	9.00
Fiction	n.p.	n.p.	2.2	27.5	12.50
Children's	2.5	2.3	4.8	25.0	5.20
Total	n.p.	n.p.	24.0	205.0	8.50
General paperback					
Non-fiction	11.9	8.8	20.6	141.4	6.90
Fiction	3.9	12.8	16.6	110.6	6.70
Children's	14.4	11.3	25.6	70.2	2.70
Total	30.1	32.8	62.9	322.2	5.10
Electronic	n.p.	n.p.	0.5	3.7	7.40
Total	74.4	49.2	123.6	890.0	7.20
Books distributed on behalf of other Australian publishers	2.9	..	2.9	37.7	13.00
Books co-published	(a)4.2	..	4.2	22.2	5.30
Total	81.5	49.2	130.6	950.0	7.30

(a) Includes those co-published with overseas publisher.

Source: Department of Communications and the Arts 1997.

NEWSPAPERS AND MAGAZINES

In 1996, there were two national daily newspapers in Australia, 10 metropolitan daily newspapers and 11 metropolitan Sunday newspapers. There were also over 300 regional, rural or special interest newspapers. The metropolitan daily newspapers had an average circulation of 220,000, while the Sunday newspapers had an average circulation of 310,000, according to the Audit Bureau of Circulation.

PUBLISHING

The publishing industry consists of three sections: book publishing; periodicals; and newspaper printing or publishing. Book publishing involves the preparation of material to be printed and bound in the form of a book. Periodicals are publications issued at regular intervals of not more than once a week and include illustrated magazines. Newspapers are printed at regular intervals (daily or weekly) and contain first-hand reporting of current issues.

There were 38,225 people employed in publishing at the end of June 1996, according to the 1995–96 ABS Manufacturing Industry Survey. Of these, 25,725 people were employed in newspaper printing or publishing, 5,514 in other periodical publishing and 6,987 in book and other publishing. Table 12.3 highlights the wages and salaries paid out to these employees along with annual turnover.

12.3 ESTABLISHMENTS, Primary Activity of Publishing—1995–96

	<i>Newspaper printing/ publishing</i>	<i>Other periodical publishing</i>	<i>Book and other publishing</i>	<i>Total publishing</i>
Employment (30 June) (no.)	25 725	5 514	6 987	38 225
Wages and salary (\$m)	959	197	243	1 399
Turnover (\$m)	3 929	1 152	1 483	6 564

Source: ABS 1997j.

DISTRIBUTION AND RETAILING

The ABS 1991–92 Wholesale Industry Survey showed that there were 393 firms which had book and magazine wholesaling as their primary activity. At the same time, there were 3,771 firms which had newspaper, book and stationery retailing as their main activity. These retailers operated at 6,998 locations.

CONSUMERS

In November 1994, the ABS conducted a household survey for the Australia Council to determine the reading habits of Australians. The survey found that 95% of the population aged 15 years and over had read something in the week before interview. Almost half (48.5%) the population had read books in the previous week, while about two-thirds (65.0%) of the population had read magazines.

Newspapers were the most popular reading material, with 84% reporting they had read a newspaper in the previous week. The 15–19 year old age group reported a much lower rate of newspaper reading (71.4%) than any other age group. This was the only group where more people read magazines than newspapers.

From providing old, bound historical tomes, swashbuckling adventures, to the latest in computer archival storage and resources, libraries provide an important cultural service to the community. They offer information to the public, while providing access to literature as a cultural resource. Libraries also maintain valuable educational services. The National Culture/Leisure Industry Statistical Framework divides libraries into five types: the National and State Libraries; public libraries; special libraries; libraries in higher education establishments; and school libraries. All libraries in Australia can be classified into one of these categories.

Archives are institutions whose primary function is the permanent preservation of unique records. Such records are selected because of their administrative, financial, legal or other information value. Archival services include the storage, description and preservation of materials along with the provision for archival research.

EMPLOYMENT

In 1996, the Census recorded 9,566 librarians, 8,615 library assistants and 5,501 library technicians. There were also 641 people who were archivists in their main job.

As table 13.1 shows, library employees were mainly female. Women comprised 82.0% of librarians and 59.9% of archivists.

13.1 MAIN OCCUPATIONS IN LIBRARIES AND ARCHIVES, By Sex—1996
.....

<i>Occupation</i>	<i>Males</i>	<i>Females</i>	<i>Persons</i>	<i>Percentage who were female</i>
.....				
Librarian	1 723	7 843	9 566	82.0
Library technician	561	4 940	5 501	89.8
Archivist	257	384	641	59.9
Total	3 777	20 546	24 323	84.5
.....				

Source: ABS 1997g.

Volunteer work is a vital component of library and archival services. Some 87,700 people were involved in libraries or archives, and a relatively large number (39,000) provided solely unpaid assistance in the 12 months to March 1997. This was according to the ABS Survey of Work in Selected Culture/Leisure Activities, which included voluntary work, infrequent work and work undertaken as a second job.

National and State Libraries

The National Library of Australia is a statutory authority established by the *National Library Act 1960*, when it was separated from the Commonwealth Parliamentary Library. The library's key focus is on the collection, preservation and availability of valuable material from both Australian and overseas sources. The library aims to increase the awareness and understanding of Australia's cultural heritage with the promotion and development of national collections.

Table 13.2 shows the total number of records on catalogue at the National Library of Australia. The number of records for each type of material has increased between 1994–95 and 1995–96, except for aerial photographs which remained the same.

13.2 TOTAL CATALOGUE RECORDS, By Type of Material

	1994–95	1995–96
Monographs	1 827 454	1 836 600
Serials	193 991	204 063
Manuscripts (shelf metres processed)	8 532	8 953
Pictorial collection	44 117	44 268
Films and video cassettes	14 240	14 726
Oral history	44 454	44 955
Music	78 105	81 993
Photographs	9 553	9 849
Maps	95 796	99 144
Aerial photographs	563 843	563 843

Source: National Library of Australia 1996.

According to the National Library of Australia, in 1995–96:

- \$3,589,000 was spent on books (including purchase of monographs, serials and microfilms);
- 288,107 monographs and serials were supplied to reading rooms, along with 124,381 microform and newspapers; and
- 518 permanent and 21 temporary staff were employed at 30 June 1996.

State reference libraries act as public reference centres and, while their operations vary slightly from State to State, they all have the following basic functions:

- to supplement the existing resources offered by public libraries and provide support in terms of reference services;
- to house specialist collections; and
- to promote and participate in the national cooperation and coordination of library services.

Public libraries

Public libraries primarily offer free library services to the community and are funded almost entirely by State and local governments. Library services include access to reference materials and community information, along with provisions for loans and inter-library loans. They also offer specialised services to groups in the community, including children, disabled people, the elderly and multicultural groups. Australia has an extensive public library system with nearly every local government area having its own library.

In 1994 there were 1,383 libraries listed in Australia, with 5,722 full-time employees. Table 13.3 shows that book stock increased by 27.3% between 1986 and 1994 while bookmobiles declined slightly in number over the same period. The most striking increase was in videotapes, which increased by 152% from 1986 to 1990, followed by an even larger increase of 268% from 1990 to 1994. Overall, there was a nine-fold increase between 1986 and 1994. Loans increased by 47.6% from 1986 to 1994. This may reflect the greater variety and diversity of material currently available in libraries.

13.3 PUBLIC LIBRARY LENDING SYSTEM, Selected Characteristics

	1986	1990	1994
Public libraries (no.)	470	523	526
Branches of public libraries (no.)	820	847	857
Total library locations (no.)	1 290	1 370	1 383
Bookmobiles (no.)	116	100	110
Total bookstock ('000)	24 793	26 956	31 565
Serial titles (no.)	42 086	46 907	62 953
Audiorecords/tapes/CDs ('000)	1 267	1 119	1 207
Videotapes (no.)	27 266	68 700	252 744
Loans ('000)	97 793	110 077	144 380
Staff (FTE) (no.)	4 554	4 790	5 722

Note: The National Library of Australia and the State reference libraries are not included.

Source: Bundy and Bundy 1992.

Special libraries

Special libraries serve the information and library needs of all levels of government, professional associations, research institutions, commercial enterprises and other established groups. Services are tailored to meet the needs of the parent institution (e.g. law firm or government agency) and include current information and research services relevant to their subject matter. Many of these libraries include such specialised material as maps, videos, film and photos and offer awareness material to clients. However, most special libraries are not open to the public.

Special libraries continued

An example of a special library is the Commonwealth Parliamentary Library, which employed 199 people in June 1996. Over four-fifths of the requests for information are generated by senators and members of the House of Representatives. The collection reflects the varied interests of the Commonwealth Parliament and, unlike the State parliamentary libraries, a ground floor library is accessible to the public.

Libraries in higher education establishments

Libraries in higher education establishments are dedicated to the collection of materials for the benefit of staff and students, in order to meet course-related and research needs. Higher education establishments include universities, TAFE colleges and theological institutions.

There were 324 higher education institutions in Australia in 1991, with 543 library locations, according to Bundy and Bundy (1992). Some additional information is as follows:

- over 21 million general and short-term loans were made by academic and research libraries in 1991. This is considerably lower than the estimated 144 million public library loans from only a slightly larger book stock;
- there were a total of 5,711 people employed (in FTE terms), of whom 2,051 were professional librarians; and
- the libraries acquired 1,123,100 monographs in 1991.

School libraries

School libraries are located in both primary and secondary schools and provide services to students and staff. These libraries are involved in the collection and organisation of books and teaching resources. They offer students the provision for learning and teach them the skills necessary to access library resources. In 1996 there were 9,629 schools operating in Australia, and while it is expected that most would have a library, the exact number is unknown.

Archives

The Australian Archives is responsible for the preservation, storage and servicing of Commonwealth government records. Table 13.4 shows the level of interest in archived material.

13.4 AUSTRALIAN ARCHIVES, Holdings and Inquiries

<i>Year</i>	<i>Total holdings</i>	<i>Official reference inquiries</i>	<i>Public reference inquiries</i>
	<i>m</i>	<i>no.</i>	<i>no.</i>
1993–94	474 075	2 917	32 294
1994–95	487 522	3 087	33 004
1995–96	478 478	2 561	39 060
1996–97	465 579	2 355	44 045

Source: Australian Archives 1997.

GOVERNMENT FUNDING

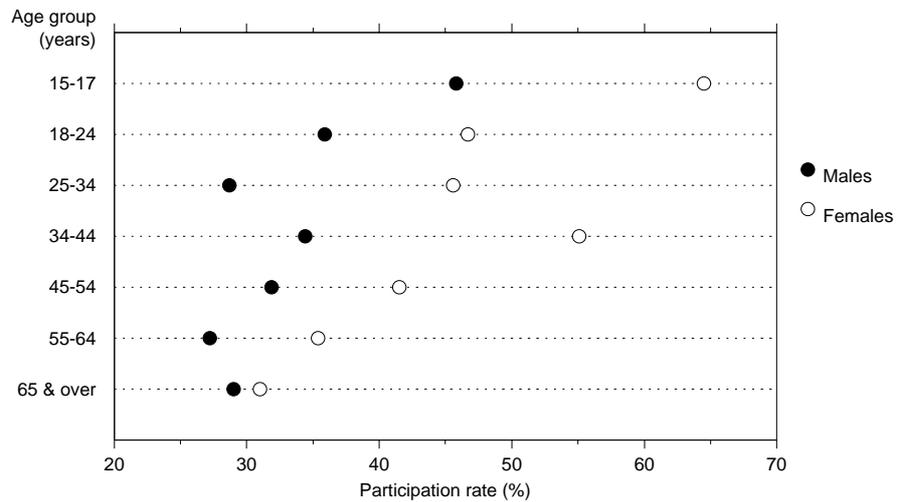
Governments provided funding of \$588.9m to libraries and archives according to the 1995–96 ABS Survey on Cultural Funding. Local governments provided funding of \$295.6m (50.2%), State and Territory Governments provided \$218.9m (37.2%) while the Commonwealth Government provided \$74.4m (12.6%).

CONSUMERS

Data from a 1995 ABS survey showed that 38.4% of all people aged 15 years and over visited a National, State or local library and 17.1% used a school, college or university library in the 12 months to March 1995. The survey also revealed that using a library was the most popular cultural activity of people aged 65 years and over.

The participation rate shows the number of people who visited a library at least once during the year, as a percentage of the civilian population aged 15 years and over in the same group. Graph 13.5 shows females use National, State and local libraries more often than males for all age groups.

13.5 ATTENDANCE AT LIBRARIES—1995



Source: ABS 1995.

When taking into account educational attainment, the highest participation rates were for those still at school (60.2%), followed by people with a bachelor degree or higher (58.8%). Those with a trade qualification had a participation rate of 28.6%. Overall, older users attended libraries more frequently than younger users. Almost 47% of the library users aged 65 and over attended more than 15 times during the 12 months compared with 18.6% of library users aged 25–34 years.

Music plays an integral part in the lives of most Australians. Regardless of whether it is in a concert, on a CD, tape or radio, or even in a film or ad jingle, music's moods, lyrics, and rhythms can be a powerful—and popular—influence.

EMPLOYMENT

About 7,600 people had a musical occupation as their main job in the week before the 1996 Census of Population and Housing. Of these people, almost three-quarters (72.6%) were instrumental musicians. The next most common occupation was singers, which accounted for 16.3% of these people.

Table 14.1 shows males made up about three-quarters (72.3%) of the people involved in music, and outnumbering females in every occupation.

14.1 PEOPLE WHOSE MAIN JOB WAS IN MUSIC—August 1996
.....

<i>Occupation</i>	<i>Males</i>	<i>Females</i>	<i>Persons</i>
.....			
Musicians and related professionals n.f.d.	121	46	167
Music director	237	108	345
Singer	702	542	1 244
Instrumental musician	4 208	1 325	5 533
Composer	217	44	261
Musicians and related professionals n.e.c.	24	43	67
Total	5 509	2 108	7 617

.....
Source: ABS 1997g.

However, the census data paints an incomplete picture of employment in music, as many people are involved in this work in their second job or on a voluntary basis. The ABS Survey on Work in Culture/Leisure Activities showed that 260,300 people had a work involvement in music in the 12 months to March 1997. Of these, 208,800 were involved as a live performer while 51,500 had some other type of involvement (e.g. as a composer or sound engineer). The survey revealed that 186,400 (71.6%) of those involved in music were not paid for their work.

In a report by Throsby and Thompson (1994) 11,500 musicians and singers and 1,000 composers were identified. Of the musicians, 23% were employed on salary or contract while the other 77% were self-employed or freelance. Only 8% of the composers were employed on salary or contract.

There were 3,886 people employed in music businesses in June 1996, according to an ABS census of music businesses. Of these people, 2,324 were employed by record companies and distributors, 493 by manufacturers of recorded music, 269 by music publishers and 800 by sound recording studios.

PRODUCTS

There are two types of musical product: CDs and tapes, and services performances.

Sales of recorded music totalled \$850.5m in 1991–92, according to the ABS Retail Census. In the Census, recorded music was defined to include CDs and records, blank and recorded audio tapes and video tapes. Of these sales, 37% were made by firms which specialised in retailing recorded music, 29% were by firms whose predominant activity was selling domestic appliances while 27% were by department stores.

The Retail Census also found that sales of musical instruments in 1991–92 totalled \$291.7m. This category includes all electric and acoustic instruments and accessories and sheet music.

Recordings made by Australian musicians may be reproduced overseas. As the production of the CDs, tapes etc. occurs overseas, it is not reflected in exports of merchandise. However, the benefit to Australia accrues through royalty payments. In 1995–96, Australia earned \$35m in royalty payments for music (see Chapter 7 for more detail).

ORGANISATIONS

An ABS survey in 1991 identified 172 organisations which were symphony orchestras, chamber or choral groups. During 1991, these organisations employed or contracted a total of 4,874 people and staged a total of 2,736 performances. Over half of their income was in the form of government grants. The survey, Music and the Performing Arts, excluded those organisations mainly involved in popular music (e.g. rock, jazz).

Musica Viva is Australia's national chamber music entrepreneur. It is a non-profit organisation that presents concerts throughout Australia. It also operates an extensive schools program. During 1995, it presented concerts to just under 380,000 patrons in Australia and an additional 52,000 overseas.

The Phonographic Performance Company of Australia is a non-profit organisation set up to license, enforce and administer public performance and broadcast rights in sound recordings. It was set up in 1969 when these rights were first introduced into the Australian Copyright Act. In 1995–96, it reported that the most frequently broadcast artists played by radio and television Australia-wide were (in order):

14.2 MOST BROADCAST ARTISTS—1995–96

- | | |
|----------------|------------------|
| 1 Elton John | 8 Rod Stewart |
| 2 The Beatles | 9 Phil Collins |
| 3 Mariah Carey | 10 Simply Red |
| 4 Billy Joel | 11 Crowded House |
| 5 Tina Arena | 12 Oasis |
| 6 John Farnham | 13 Bon Jovi |
| 7 Madonna | 14 Chris Isaak |

Source: Phonographic Performance Company of Australia, 1996.

At 30 June 1996, there were 541 businesses (comprising record companies, distributors, manufacturers of recorded music, music publishers and sound recording studios) active in the field of music, according to an ABS survey on the business of music. Table 14.3 shows that these businesses generated income of \$1,064m in 1995–96 while incurring expenses of \$994.6m.

14.3 MUSIC BUSINESSES—1995–96

	<i>Record companies and distributors</i>	<i>Manufac- turers of recorded music</i>	<i>Music publishers</i>	<i>Sound recording studios</i>	Total
Businesses at end June 1996 (no.)	153	23	73	292	541
Income					
Sales of goods and services (\$m)	725.5	94.5	22.5	54.9	897.5
Publishing and sound recording royalties (\$m)	41.8	—	93.8	—	135.6
Other income (\$m)	25.1	0.5	3.6	1.7	30.9
<i>Total (\$m)</i>	<i>792.4</i>	<i>95.0</i>	<i>119.9</i>	<i>56.6</i>	1 064.0
Expenses					
Labour costs (\$m)	93.0	19.6	11.0	16.0	139.5
Manufacturing costs and purchases (\$m)	216.9	30.6	10.1	4.6	262.2
Publishing and sound recording royalties (\$m)	215.9	—	75.6	—	291.4
Net advances expensed or provided for (\$m)	11.8	—	1.3	—	13.1
Other expenses (\$m)	214.0	31.9	14.2	28.3	288.4
<i>Total (\$m)</i>	<i>751.5</i>	<i>82.2</i>	<i>112.1</i>	<i>48.8</i>	994.6
Trading stocks					
Opening (\$m)	36.4	4.7	5.2	0.3	46.5
Closing (\$m)	44.3	7.3	5.7	0.2	57.5
Operating profit before tax (\$m)	48.5	15.5	8.3	7.8	80.1

Source: ABS 1997e.

CONSUMERS

Some 26.9% of people aged 15 years or more attended a popular music concert in the 12 months to March 1995, while 7.7% saw a classical music concert, according to the ABS Survey of Attendance at Selected Cultural Venues. The highest attendance rate for popular music concerts was in the 18–24 age group (48.7%), while for classical music concerts, it was in the 45–54 age group (10.5%).

People spent an average of 19 minutes a day listening to music—7 minutes a day listening to records, tapes and CDs and 12 minutes listening to music not further defined in the 1992 ABS Time Use Survey. They spent a further 101 minutes a day listening to the radio (though some of this would be news, talk-back radio and commercials).

Australian households spent an average of \$4.98 per week on music (or \$1,714m annually by all households) in 1993–94. About half this expenditure was on radio, stereo and hi-fi equipment, while almost 40% was on records, tapes and CDs.

The performing arts—theatre, opera, music theatre and dance—are sometimes viewed as catering to the elite in society. Yet in 1995, 16.6% of Australians went to the theatre, 19.3% went to opera or musical theatre, 10% went to dance and 18.7% went to other performing arts.

EMPLOYMENT

There were 8,047 people whose main job was in the industry music and theatre productions as revealed in the 1996 Census of Population and Housing¹. The main cultural occupations in this industry were instrumental musicians (2,661), singers (637), actors (493), and dancers and choreographers (259). Of the 8,047 people employed in this industry, 2,257 did not have a cultural occupation (e.g. they worked as managers, clerks, carpenters, ticket sellers etc.).

It is also possible to get a picture of employment in the performing arts by looking at the type of work that people do, rather than the type of activity their organisation is involved in (i.e. to look at a person's occupation, rather than industry). Table 15.1 shows that many people (5,643) employed in performing arts occupations worked in industries other than music and theatre productions. Some of these people worked in the industries film and video production and television services.

15.1 PERSONS WHOSE MAIN JOB WAS IN PERFORMING ARTS OCCUPATION—August 1996
.....

<i>Occupation</i>	<i>Working in music and theatre productions</i>	<i>Working in other industries</i>	<i>Total</i>
Dancers and choreographers	259	768	1 027
Actor	493	1 013	1 506
Actors, dancers and related professionals n.e.c.	225	1 312	1 537
Directors (film, TV, radio, or stage)	72	1 629	1 701
Art director (TV, film or stage)	15	222	237
Stage manager	123	250	373
Production assistant (theatre)	12	60	72
Performing arts support workers n.f.d. or n.e.c.	54	389	443
Total	1 253	5 643	6 896

Source: ABS 1997g.

Some 145,800 people worked as a performing artist in the 12 months to March 1997, according to the 1997 ABS Survey on Work in Culture/Leisure Activities. However, only 26,000 (17.8%) received any payment for their involvement. Another 67,100 people had a work involvement, although not as a performer (e.g. as a make-up artist, costume designer or a lighting technician). Of these people, only 17.1% received any payment.

¹ Note: Some of the people employed in this industry belong in the music sector of the Culture/Leisure Industry Framework (shown in Chapter 14) rather than in the performing arts sector.

PRODUCTS

In 1991, performing arts organisations in Australia staged a total of 31,377 performances. Of these, 78.4% were staged by theatre organisations. Theatre organisations also attracted the greatest patronage. Opera and music organisations attracted over a third (37.3%) of the total attendances, due to their larger audiences (an average of 900 people per performance).

15.2 PERFORMING ARTS ORGANISATIONS, Performances and Attendances—1991

	<i>Performances</i>	<i>Paid attendances</i>	<i>Average attendance</i>
	no.	'000	no.
Theatre organisations	24 613	3 453	140
Opera and music organisations(a)	3 025	2 711	900
Dance organisations	3 739	1 108	300
Total	31 377	7 272	230

(a) Includes major musicals.

Source: ABS 1993b.

ORGANISATIONS

In 1991, there were 197 theatre organisations (which put on a total of 24,613 performances) along with 41 opera and music theatre organisations, 13 organisations staging major musicals and 49 organisations involved in dance, according to a 1991 ABS survey.

Major musicals generated the most revenue (\$91.3m) in 1991, as table 15.3 shows. Major musicals were the only type of organisation where total revenue differed significantly from total expenses.

15.3 PERFORMING ARTS ORGANISATIONS, Revenue and Expenses—1991

	<i>Revenue</i>	<i>Expenses</i>
	\$m	\$m
Theatre	67.9	67.9
Major musicals	91.3	68.5
Opera and music theatre	48.7	50.1
Dance	31.8	31.7

Source: ABS 1993b.

None of the organisations staging the major musicals received any direct government funding but the majority of the theatre, dance, opera and music theatre organisations were government subsidised.

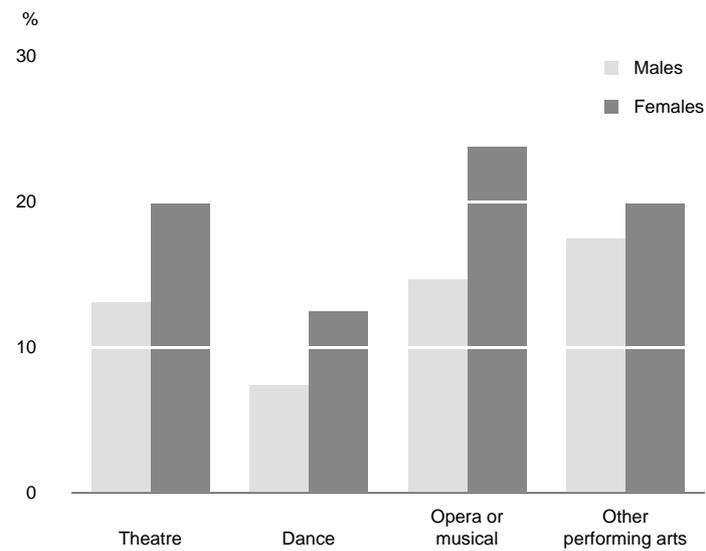
CONSUMERS

Data on attendance at the performing arts were collected in the 1995 ABS Survey on Attendance at Selected Cultural Venues.

Opera/musicals were the most popular choice of performance in Australia, attracting 19.3% of people aged 15 years and over at some time in the past 12 months. Some 16.6% had been to the theatre in the previous 12 months, 10% to see a dance performance, and 18.7% had seen other performing arts (e.g. circuses, comedians and variety shows).

Graph 15.4 shows that females were more likely to attend each type of the performing arts than males. The higher attendance rate of females was evident across all age groups for each type of the performing arts.

**15.4 ATTENDANCE AT THE PERFORMING ARTS—
12 months ended March 1995**



Source: ABS 1995.

Australian households spent an average of \$1.29 per week on admission charges for live theatre, according to the ABS 1993–94 Household Expenditure Survey. These charges included admission to circuses, concert, opera and theatre shows.

From photography to design, to creating sculptures and crafting textiles, the term visual arts takes in a variety of activities. Consequently, the visual arts includes people employed in a diverse range of occupations, such as painters, sculptors, potters, fashion designers and graphic designers. Many people working in these occupations are self-employed or work in small businesses.

Visual arts comprises the following five distinct types of activities:

- *Primary Visual Arts Creation*: includes artists and craftspeople, who create one-off, or a limited series of artwork, examples of which include paintings, murals, photographs, sculptures, pottery, clothing, furniture and video/electronic artworks.
- *Design*: comprises the design of commercial and industrial objects, environments, services or processes, including graphic, fashion, textile and set design.
- *Visual arts commercial outlets*: comprises enterprises mainly engaged in the buying, display and marketing of visual art/craft objects. This includes antique, art/craft and photographic galleries and shops.
- *Commercial, industrial and other photographic services*: includes various artistic photographic services such as commercial, fashion, portrait and advertising photography.
- *Visual arts service providers*: comprises organisations who provide support services to individuals involved in Primary Visual Arts Creation, such as art/craft councils and guilds.

EMPLOYMENT

The 1996 Census identified 41,363 people in Australia whose main job was in a visual arts occupation.

Table 16.1 shows that the most common visual arts occupations were graphic designers (13,086) and photographers (6,259). There were also considerable numbers of artistic painters (2,414), fashion designers (2,666) and interior designers (2,986). At a broader level designers and illustrators (25,075) made up the largest component of jobs in the visual arts sector.

16.1 PERSONS EMPLOYED IN VISUAL ARTS OCCUPATIONS—August 1996

	Males	Females	Persons
Painters, sculptors and related professionals			
Painter (visual arts)	1 126	1 288	2 414
Sculptor	323	148	471
<i>Total</i>	<i>1 449</i>	<i>1 436</i>	<i>2 885</i>
Photographers			
Photographer	4 405	1 854	6 259
Photographer's assistant	176	335	511
<i>Total</i>	<i>4 581</i>	<i>2 189</i>	<i>6 770</i>
Designers and illustrators			
Graphic designer	7 066	6 020	13 086
Fashion designer	499	2 167	2 666
Interior designer	1 032	1 954	2 986
Industrial designer	1 386	291	1 677
Illustrator	884	472	1 356
Designers and illustrators n.f.d.	1 297	845	2 142
Interior decorator	260	902	1 162
<i>Total</i>	<i>12 424</i>	<i>12 651</i>	<i>25 075</i>
Potter or ceramic artist	898	1 257	2 155
Visual arts and craft professionals n.f.d. and n.e.c.	2 118	2 360	4 478
All visual artists	21 470	19 893	41 363

Source: ABS 1997g.

Throsby and Thompson (1994) prepared a report for the Australia Council on people working in the arts field, including the visual arts, based on a survey conducted in 1993.

Their survey aimed to collect information about practising professional artists. Thus, it was designed to count:

- only those artists who were working or seeking to work (i.e. practising); and
- only those who were professionally accepted as artists (e.g. if they had their work professionally exhibited or had taken full-time training as an artist).

People working in the following visual art activities were included in their study:

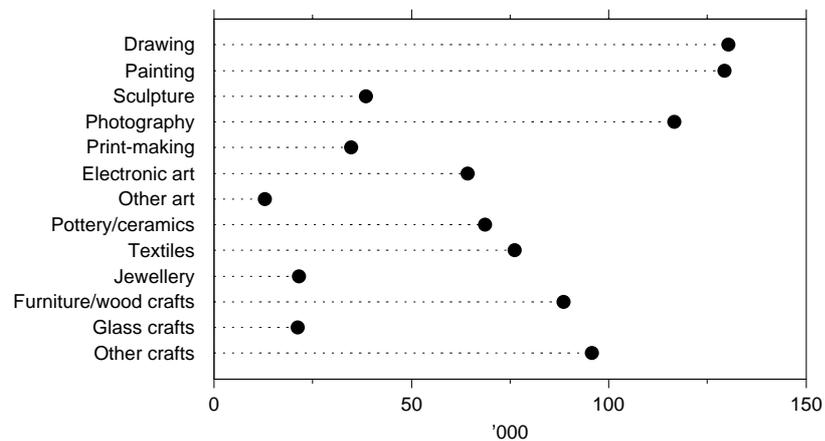
Painter	Graphic artist
Muralist	Installations artist
Sculptor	Set designer
Printmaker	Potter
Photographer	Fibre/textile worker
Video/film artist	Leather worker
Performance artist	Glass maker
Illustrator	Metal or jewellery worker
Cartoonist	Wood worker
Calligrapher	Ceramics worker
Drawing artist	

EMPLOYMENT *continued*

The study estimated that there were 13,000 practising professional artists in the visual arts. Of these, 5,500 were classified as craftworkers and 7,500 as visual artists.

An estimated 763,300 people had worked in the visual arts in the 12 months to March 1997, according to the 1997 ABS Survey of Work in Selected Culture/Leisure Activities. Of these people, 240,100 had a work involvement in design. There were 105,800 involved in graphic design, 33,100 in fashion design, 48,500 in design of multimedia titles and 84,300 in other design activities. About 67% of people involved in design were paid for their work.

Of those involved in arts and crafts, graph 16.2 shows that drawing, painting, photography and furniture/wood crafts were the most commonly undertaken activities. Those activities for which over half the people involved were paid were print-making, electronic art, jewellery and furniture making/wood crafts.

16.2 PERSONS INVOLVED IN ARTS AND CRAFTS(a)—March 1997

(a) Includes both paid and unpaid involvement but excludes involvement in a hobby capacity.

Source: ABS 1997m.

ORGANISATIONS

There were 1,010 commercial art galleries in Australia in 1993, according to a list produced by the Cultural Ministers Council. The list was based on information from organisations such as the Australia Council, the Museums Association of Australia, and the Regional Galleries Association of Australia. These galleries specialised in the distribution of the finished products of visual arts and crafts practitioners. The list also included 219 art museums, displays, and public galleries, which were involved purely in the display of visual artwork.

There are also organisations established to provide assistance to visual artists. They offer services such as classes and workshops, advice, resource materials, and newsletters. Most of these organisations were formed by people practising in the visual arts and they operate for the benefit of their members. The most significant organisations of this type in Australia are Craft Australia and the National Association for the Visual Arts.

CONSUMERS

Sometimes it is services rather than products that consumers receive from the visual arts sector. Many graphic and industrial designers would cater exclusively for firms rather than individuals, creating a unique look and feel for a building, for instance.

Most commonly, people will find visual arts products sold in a variety of retail shops—everywhere from commercial art galleries, variety stores, souvenir shops and florists, as well as other places like open-air markets.

In 1993–94, households in Australia spent an average of \$17.16 on studio and other professional photography and \$20.28 on paintings, carvings and sculptures, according to the ABS Household Expenditure Survey. This added up to an average expenditure of \$37.44 per year on these components of the visual arts. As there were about 6.6 million households in Australia at the time, this equates to total household expenditure on the visual arts of \$248m in 1993–94.

Overseas visitors and tourists were significant purchasers of visual artworks, taking a piece of Australia home with them. In a full year, overseas visitors spent in the order of \$200m on art and craft purchases, according to data from the Department of Communications and the Arts (1996b). The survey found that art and craft shopping accounted for \$66 (14%) of all shopping expenditure by international tourists. Almost one-fifth (18%) of all visitors reported that they had purchased handcrafted clothing.

Further information from this survey is given in Chapter 8 of this report.

When people think of the film and video industry they often think of the success of Australian films abroad (e.g. *Crocodile Dundee*, *Babe* and *Shine*)—films which have given Australia a sense of pride, and increased awareness of Australia overseas. Yet the film industry is not just about films. It encompasses a range of activities, such as the production of movies, TV dramas, documentaries, commercials and music videos.

EMPLOYMENT

Broadly, the film and video industry consists of film and video production, film and video distribution and motion picture exhibition. At the 1996 Census, 15,165 persons had their main job in the film and video industry, and, of these, 7,802 persons were in cultural occupations.

Further employment data are available from the ABS 1993–94 Service Industries Survey (SIS) although numbers cannot be compared with data from the 1996 Census because the SIS surveyed businesses and counted people who worked irregularly or part-time in a second job.

In film and video production, the majority (57%) of employees were male. However, the majority were female in the film and video distribution industry (59%) and the motion picture exhibition industry (56%).

17.1 EMPLOYMENT IN FILM AND VIDEO—June 1994
.....

	<i>Males</i>	<i>Females</i>	<i>Persons</i>
.....			
Film and video production	3 428	2 570	5 998
Film and video distribution	403	578	981
Motion picture exhibition	2 505	3 224	5 729
Total	6 336	6 372	12 708

.....
Source: ABS 1996b, 1996d.

PRODUCTS

The 1993–94 ABS Survey on Film and Video Production found that the film, video and television industries spent \$1,022m making productions specifically for television and a further \$143m making other productions. It also incurred production costs of \$160m in making commercials and advertisements. Table 17.2 shows the types of productions that were made and the costs incurred.

17.2 FILM AND VIDEO PRODUCTION ACTIVITY—1993–94

	Completed airtime	Total production costs
<i>Television production</i>	hours	\$m
Productions made specifically for television		
Drama and situation comedy	15 941	216.4
News, current affairs	21 462	336.2
Documentary	860	48.0
Sport	17 578	168.2
Quiz, panel and game shows	2 823	46.3
Light entertainment, infotainment and sketch comedy	17 906	153.7
Other	4 327	53.4
<i>Total</i>	80 897	1 022.2
Made by		
Film and video production industry	8 463	184.2
Television services industry	72 434	838.1

	Number of productions	Total production costs
<i>Other production</i>	no.	\$m
Productions made other than for television		
Feature film	29	87.3
Short film	20	1.6
Documentary	30	3.9
Corporate/marketing/training video	3 733	43.3
Educational	441	3.9
Interactive programs	33	0.8
Music/video clips	133	2.5
<i>Total</i>	4 420	143.4
Commercial and advertisements	77 830	160.0

Source: ABS 1996b.

Feature films

Some information, shown below, on feature film production and television drama production for 1996–97 by independent producers is from a survey conducted by the Australian Film Commission. Note that there are differences in collection methodology, and definitions between this survey and the 1993–94 ABS survey and so it is not possible to make valid comparisons between the surveys.

- 39 feature films with a production budget of \$249m were produced. Of these, 34 were Australian titles worth \$130m and 5 were foreign titles worth \$119m.
- Of the Australian feature films, drama accounted for 12 titles (35%) and comedy for 11 titles (32%). In addition, six thrillers, two action and three Australian children's adventures were made. The five foreign films shot in Australia had one each in comedy, drama, action, adventure and thriller.

Mini-series

- 10 mini-series with a production budget of \$97m were produced. Of these mini-series, nine (\$81m) were Australian and one (\$15m) was foreign.
- Of these titles, six were adult drama (\$70m) and four were children's productions (\$27m).

Series and serials

- The total production budget of the 23 series and serials produced was \$179m.
- Of the 21 Australian titles, 9 were continuing series and 12 were new series. Only two foreign series were shot in Australia in 1996–97, with their budgets totalling \$46m.

Telemovie production

- 15 titles (10 Australian and 5 foreign) totalling \$36m were produced in 1996–97.
- In 1996–97, there were 10 one-off productions, 2 telemovie pilots for series, and 3 titles shot as part of a telemovie series.

CONSUMERS

The ABS conducted a survey in 1995 on attendance at selected cultural venues. It showed that:

- attending the cinema was the most popular cultural activity undertaken by people aged 15 years and over. Over three-fifths (62.1%) of Australians had been to see a movie at least once in the 12 months ending March 1995;
- females were more likely to go to the cinema than males;
- attendance at the cinema decreased steadily with age—89.7% of 15–17 year olds had been to the cinema in the previous 12 months compared with 28.9% of people aged 65 years and over;
- overseas-born people were less likely to have been to the cinema than Australian-born people (54.1% compared with 64.9%); and
- over a fifth (22.5%) of people who had been to the cinema during the previous 12 months had been more than 10 times.

ORGANISATIONS

Film and video production industry

The film and video industry is a tough one to make money out of, as statistics show. Some 1,179 businesses were identified as having film and video production as their principal activity in the ABS 1993–94 SIS. These firms generated \$607.7m in income through their activities.

Table 17.3 presents an economic summary of these firms in 1993–94. Overall, they made an operating loss before tax of \$98.1m, as total expenses (\$705.8m) exceeded total income (\$607.7m).

17.3 FILM AND VIDEO PRODUCTION INDUSTRY—1993–94

Businesses at end June (no.)	1 179
Total employment at end June (no.)	5 998
Sales of goods and services (\$m)	467.7
All other income (\$m)	140.1
Total expenses (\$m)	705.8
Operating profit before tax (\$m)	-98.1

Source: ABS 1996b.

Film and video distribution industry

The distribution side of the film and video industry fared better. These businesses were mainly engaged in leasing or wholesaling motion pictures to organisations for exhibition (i.e. cinemas). Table 17.4 provides a summary of the activities of these businesses.

17.4 FILM AND VIDEO DISTRIBUTION INDUSTRY—1993–94

Businesses at end June (no.)	69
Total employment at end June (no.)	981
Sales of goods and services (\$m)	571.1
All other income (\$m)	69.6
Total expenses (\$m)	601.1
Operating profit before tax (\$m)	39.6

Source: ABS 1996b.

Motion picture exhibition industry

Doing best of all were those screening films. There were 224 businesses mainly engaged in screening motion pictures at the end of June 1994. Table 17.5 shows these businesses employed 5,729 people. The industry's operating profit before tax of \$75.1m represented a relatively high profit margin of 12% (the average across all industries in 1993–94 was 8.9%).

17.5 MOTION PICTURE EXHIBITION INDUSTRY—1993–94

Businesses (no.)	224
Employment (no.)	5 729
Paid admissions	
Cinemas ('000)	60 047
Drive-ins ('000)	1 557
Gross income (\$m)	635.3
Total expenses (\$m)	560.1
Operating profit before tax (\$m)	75.1

Source: ABS 1996d.

MULTIMEDIA

Multimedia is rapidly emerging as a significant new creative medium. It presents on a computer some combination of media forms such as voice, music, video, photographs, animation and text, usually for the purposes of education, marketing, training or entertainment. A few years ago, different equipment or products were needed to experience each of these methods of presentation, but recent advances in computer technology have enabled them all to be available in one package on a desktop computer. Therefore another simple definition of multimedia is a 'combination of previously separate media'. Multimedia is a subset of the broader 'new media' which has been defined as any and all of the following:

- enrichment of traditional means of communicating information (e.g. digital audio broadcasting, high definition TV, digital audio and video production or post-production);
- combination of previously separate media (e.g. multimedia, digital video conferencing, CD-ROM); or
- creation of entirely new media (e.g. hypertext, hypermedia, virtual reality).

Developments in this last category of new media have made on-line services such as the Internet increasingly easy for people to use.

The terms 'multimedia' and 'new media' are often used interchangeably. The most important feature of multimedia is its potential for 'interactivity', the ability of the user to respond to what is presented and control what is presented next.

Until a few years ago, most computer software was aimed primarily at business and education markets. However the household market has grown rapidly in recent years. In February 1996, 30% (1,960,000) of households in Australia frequently used a computer at home, up from 23% two years earlier. Computer use was more prevalent in households made up of a married couple with children (45% of such households) than in other households. Of the households with a computer, 41% (811,000) were equipped with a CD-ROM drive, up from 12.5% in February 1994, and 23% had a modem or external link compared with 17% two years earlier. Since 1993 most new computers sold in Australia have been equipped with CD-ROM drives, increasing the market for multimedia products on CD-ROM.

In the year to March 1997, there were 48,500 people involved in the design of multimedia titles, according to the ABS 1997 Survey on Work in Culture/Leisure Activities.

The storage capacity of CD-ROMs and market penetration of CD-ROM drives have made them the leading platform for multimedia products (or 'titles'). Of the multimedia titles described in the Australian Film Commission's *Australian Multimedia Catalogue 1996*, 82% are for this platform. On-line multimedia services are hampered by the capacities of public communications networks. However, the rollout of optical fibre cable by telecommunications companies, increasing publicity about information available on the Internet, cheaper access costs, and the potential for modems to be packaged with new personal computers, will all contribute to an expanding market for on-line services.

MULTIMEDIA *continued*

Recent initiatives designed to ensure that Australia is in the forefront of this emerging world business include funding for the establishment of the Australian Multimedia Enterprise to encourage investment in Australian multimedia products and services, and Cooperative Multimedia Centres to provide access to training, expertise and facilities; funding for the *Australia on CD* program; funding for the Australian Film Commission, the Australian Film, TV and Radio School and the Australian Children's TV Foundation to extend their multimedia projects; and sponsorship of industry forums.

The *Australia on CD* program is administered by the Department of Communications and the Arts. The aim of the program is to showcase a wide range of Australian cultural endeavour, artistic performance and heritage achievements while also encouraging the development of the Australian multimedia industry. The set of 10 CD-ROMs will be distributed free to all Australian schools, public libraries, Austrade offices and overseas missions. A wide range of Australian cultural institutions have been involved in the creation of the CD-ROMs, including the National Museum of Australia, National Gallery of Australia, National Institute of Dramatic Art, Australian Opera, Australian Ballet, National Library of Australia, Powerhouse Museum, Australian War Memorial and the Aboriginal and Torres Strait Islander Commission.

Some cultural institutions such as museums have begun to enhance exhibits by using multimedia in displays on computers known as 'information kiosks', often incorporating 'touch-screen technology', where the viewers can decide what they view by touching the screen rather than using a keyboard or mouse.

Administrators of museums, art museums, libraries and historic sites have also begun to make use of the Internet to introduce their collections to people who may not otherwise have visited these institutions. Through the Internet, Australians may now see the latest displays at the Smithsonian Institute in the United States and paintings in the Louvre and view contemporary art from all over the world. The arts community, particularly in the visual arts, has been quick to embrace the Internet to display work, share news and ideas with artists around the world.

Tuning into the radio is a popular pastime for most Australians. On an average day, almost two-thirds (64.0%) of Australians listened to the radio, according to the 1992 Time Use Survey. However, people often listened to the radio while doing something else, such as driving a car, shopping or doing housework. The radio can provide up-to-date news as well as a range of entertainment and has the advantage over television of often being portable.

Radio broadcasting falls within the jurisdiction of the Commonwealth Minister for Communications and the Arts. Some of the Commonwealth bodies involved in radio broadcasting include the ABC, the Special Broadcasting Service (SBS), the Australian Broadcasting Authority (ABA) and the Department of Communications and the Arts.

EMPLOYMENT

There were 6,472 people employed by radio stations of whom 2,989 worked in cultural occupations, in the week before the 1996 Census of Population and Housing.

Of those employed in radio, 16.8% (1,090 persons) were radio presenters and 7.9% (514 persons) were radio journalists. Employment in other culturally orientated occupations were significantly less than this, with directors being the next largest category (5.2% or 337 persons), followed by program directors (3.6% or 233 persons).

Another source of data is the ABS SIS, which collected data in 1993–94 from businesses whose primary activity was providing radio services. While the data relate to businesses mainly engaged in radio broadcasting, it also includes activities such as the collection of news for radio services, and the production of radio programs, whether live or on tape.

The survey showed that:

- at 30 June 1994, there were 3 public broadcasters and 265 private broadcasters (these 265 included 130 community radio stations and 18 narrowcast broadcasters);
- these businesses employed 7,164 people, with the majority in on-air activities;
- in total, private broadcasters employed about twice as many people as the public sector broadcasters; and
- there was a large number (9,608 persons) of volunteers working for the private broadcasters.

PRODUCTS

National radio and television services broadcasting programs are produced by the ABC and SBS. At 30 June 1995, the ABC provided 6 distinctly targeted radio networks across Australia on over 6,000 transmitters which included metropolitan radio stations in 9 cities, Regional Radio with 39 regional stations and 11 smaller studios, Radio National, ABC-FM, and the Triple-J youth radio network. It also provided Radio Australia which is an international radio service broadcast by shortwave and satellite in English and eight other languages to the Asia-Pacific regions and worldwide. SBS Radio became the world's first national multilingual radio service on 26 January 1994, with the commencement of services to Adelaide, Perth, Darwin and Brisbane. At 30 June 1995, SBS Radio used 11 transmitters in all capital cities.

Recent developments in the radio industry include:

- the provision of a greater range of radio stations to Australian listeners with some of these stations targeting teenage audiences;
- the expansion of the Triple J network to a large number of regional centres;
- the licensing of new commercial stations in regional radio markets; and
- the development of digital broadcasting technology which may open the way for broadcasters to deliver a greater range of stations, and stations which are of CD quality.

ORGANISATIONS

There were 268 businesses in the radio services industry at 30 June 1994.

Table 18.1 shows that total gross income for these businesses was \$799.6m and income from the sale of airtime contributed the most (59.8%) to this total. The next largest source of income (\$253.3m) was funding of government-owned radio stations. Labour costs were the largest expenditure, accounting for 38% of total expenses (\$781.9m).

18.1 RADIO SERVICES, Income and Expenses—1993–94

	<i>Private broadcasters</i>	<i>Public broadcasters</i>	<i>Total</i>
	\$m	\$m	\$m
Gross income from the sale of airtime	477.6	0.6	478.3
Funding of government-owned radio stations	—	253.3	253.3
Other income	36.3	31.8	67.9
<i>Gross Income</i>	<i>513.9</i>	<i>285.8</i>	<i>799.6</i>
Wages and salaries	161.0	115.5	276.5
Other labour costs	8.5	13.3	21.9
Other expenses	325.7	157.8	483.6
<i>Total expenses</i>	<i>495.3</i>	<i>286.6</i>	<i>781.9</i>
Operating profit before tax	18.5	-0.8	17.7

Source: ABS 1996e.

CONSUMERS

While people spend more than one and a half hours a day listening to the radio, the ABS Time Use Survey found during almost all of that time, they are doing another (main) activity. Table 18.2 shows that while males listened to the radio more than females, the difference was not great.

18.2 AVERAGE TIME PER DAY SPENT LISTENING TO RADIO—1992

	<i>As main activity</i>	<i>As part of all activities</i>
	mins/d	mins/d
Males	4	103
Females	3	99
Persons	4	101

Source: ABS (unpub.)e.

With people aged over 14 watching an average of 103 minutes per day of television in 1992, it has obviously had a major impact on the lives on Australians. It keeps them up-to-date with the latest news, presents current affairs, provides educational programs and broadcasts a range of entertainment, including live sports events, game shows, serials and movies.

The ABA, established in October 1992 under the *Broadcasting Services Act 1992*, is the broadcasting regulator for radio and television in Australia. One of its objectives is to ensure that television broadcasts develop and reflect a sense of Australian identity, character and cultural diversity.

EMPLOYMENT

In the 1996 Census, a total of 14,553 persons stated that their main job was working for a television station. Of these, 6,844 persons had a culturally orientated occupation.

Table 19.1 shows the number of people employed in selected cultural occupations. The most common occupations were media producers and television journalists.

19.1 TELEVISION STATIONS, Selected Cultural Occupations—1996
.....

Occupation	Proportion of persons employed in television	
	Persons no.	%
Media producer	1 579	10.8
Television journalist	825	5.7
Director (film, TV, radio or stage)	422	2.9
Film and video editor	442	3.0
Television presenter	222	1.5
Sound technician	335	2.3
Camera operator	566	3.9
Television equipment operator	370	2.5
Production assistant	328	2.3

Source: ABS 1997g.

EMPLOYMENT *continued*

The 1993–94 SIS provides more information on employment for all businesses engaged mainly in television broadcasting:

- There were 43 private and 3 public broadcasters employing a total 12,211 persons (7,559 males and 4,653 females) at the end of June 1994. In this industry, males accounted for 62% of total employment which is higher than their proportion in the total Australian workforce (57%).
- Just over 78% of all employees in the industry in June 1994 worked full-time while 22% worked part-time.
- More than half (58%) of employees were predominantly engaged in production activity. While 80% of employees working for public broadcasters were engaged in production activity, only 48% of private broadcasters employees were engaged in this activity.

Another source of data, the 1997 Survey of Work in Selected Culture/Leisure Activities, showed that 56,700 persons had some work involvement in the 12 months to March 1997. Of these people, 30,200 were paid, 20,400 were unpaid and the rest had some paid and unpaid work.

PRODUCTS

In 1993–94, \$838.1m was spent on the production of programs by the television services industry, according to the ABS SIS. These programs represented 32,631 completed airtime hours—the length of a completed program without any advertisements.

Australians love their news and current affairs. Of the 32,631 program airtime hours, news/current affairs programs accounted for the largest (53%) proportion. Light entertainment/infotainment/sketch comedy accounted for 21%, sport was 11%, drama and situation comedy programs were 4% and documentaries were 1%.

19.2 TELEVISION SERVICES, Selected Production Statistics—1993–94

<i>Item</i>	<i>Completed airtime hours.....</i>		<i>Total production costs.....</i>		<i>Average cost per hour</i>
	<i>no.</i>	<i>%</i>	<i>\$m</i>	<i>%</i>	<i>\$</i>
Drama and situation comedy	1 169	3.6	124.8	14.9	106 758
News, current affairs	17 304	53.0	334.2	39.9	19 314
Documentary	480	1.5	23.1	2.8	48 125
Sport	3 640	11.2	163.5	19.5	44 918
Quiz, panel and game show	512	1.6	n.p	n.p	n.p
Light entertainment, infotainment and sketch comedy	6 083	20.8	115.2	13.7	16 934
Other	2 723	8.3	n.p	n.p	n.p
Total	32 631	100.0	838.1	100.0	25 684
Produced specifically for children (included in above airtime hours and production costs)	3 098	9.5	28.6	3.4	9 232

Source: ABS 1996e.

ORGANISATIONS

There were 46 businesses whose main activity was television broadcasting in 1993–94. Of these, 43 were privately operated broadcasters. Total employment in the industry was 12,211 people in June 1994.

19.3 TELEVISION SERVICES, Summary of Operations—1993–94

	<i>Private broadcasters</i>	<i>Public broadcasters</i>	<i>Total</i>
Businesses at end June (no.)	43	3	46
Employment at end June (no.)	8 422	3 789	12 211
Total income (\$m)	2 224.1	452.2	2 676.3
Total expenses (\$m)	1 846.5	452.9	2 299.4
Operating profit before tax (\$m)	377.6	-0.7	376.9

Source: ABS 1996e.

CONSUMERS

Television is a significant part of many people's lives—although slightly more so for females. Most people averaged three hours a day in front of the TV, according to the 1992 ABS Survey on Time Use. Table 19.4 shows that while females watched slightly more television than males per day (an average of 175 minutes, compared with 170 minutes), they were more likely than males to be doing another (main) activity at the same time.

19.4 AVERAGE TIME PER DAY SPENT WATCHING TELEVISION—1992

	<i>As a main activity</i>	<i>As part of all activities</i>
	mins/d	mins/d
Males	114	170
Females	92	175
Persons	103	172

Source: ABS (unpub.)e.

Note: Australia's first pay TV service started in 1995. By September 1996, 5.3% of households received pay TV, either as a satellite or cable service.

Community cultural activities allow individuals, groups and organisations to:

- express themselves, their aspirations and their culture;
- find a sense of belonging within the wider society; or
- contribute to developing Australian culture through artistic activity.

Everything from creating colourful community murals to recording an area's local history or forming community choirs to sing at special events, are examples of this type of cultural activity. Other activities under this heading include work carried out by ethnic communities as a way of fostering their cultures (e.g. festivals, language classes) and work carried out by organisations aiming to strengthen the bonds in a community, as organisations like Rotary, Probus, Kiwanis, the Country Women's Association and various resident associations try to do.

Some features common to most community cultural activities are:

- the involvement of community members in the project;
- the activity being undertaken for the benefit of the community rather than the individuals involved in it;
- the lack of profit motive by the individuals who are involved; and
- the lack of ownership of the end result by an individual.

EMPLOYMENT

There is no information available on employment connected with community cultural activities. Most of this type of work is unpaid and cannot be separately identified.

ORGANISATIONS

There are a large number of organisations involved in community activities, including local government and community-based organisations. There is no ABS data available on the total number of organisations involved. At the national level, the peak funding body is the Australia Council. It provides funding for community activities through a variety of programs, though principally through its Community Cultural Development Board. At the State level, the State Arts Councils also provide some financial assistance.

The 1995–96 Survey on Cultural Funding identified outlays of \$57.2m for community cultural activities. Of this amount, \$34m (59%) was outlaid by the Commonwealth Government, with \$13m (23%) outlaid by State and Territory Governments and \$10.2m (18%) by local governments.

Cultural education is teaching the student knowledge of culturally orientated occupations. This could include instilling in them a love of drama, teaching the nuances of music or passing on knowledge for the television industry.

EMPLOYMENT

Of the 378,200 people who taught cultural activities in the 12 months to March 1997, 98,100 taught only as a primary school teacher, 53,000 taught only as a secondary school teacher while 227,100 had other teaching involvement e.g. as private art, music, dance and drama teachers, hobby class teachers and teachers in post-school education. These data were collected as part of the 1997 ABS Work in Selected Culture/Leisure Activities. (Note that the data in this section includes teaching of cultural activities by primary school teachers. The publication containing the results of this survey excluded primary school teachers.)

Table 21.1 shows that most cultural teachers taught music and the performing arts or art and craft. The table also shows that many primary and secondary school teachers taught more than one field (e.g. music and art), whereas other teachers usually specialised in one area of cultural teaching.

21.1 WORK INVOLVEMENT AS CULTURAL TEACHER—March 1997
.....

<i>Taught</i>	<i>As primary school teacher only(a)</i>	<i>As secondary school teacher only</i>	<i>Other(b)</i>	<i>Total</i>
Radio/television/film/video	5 500	11 100	30 600	47 100
Music/performing arts	51 100	21 900	91 200	164 100
Art/craft	65 200	17 600	87 300	170 100
Writing/publishing	35 600	22 000	36 400	94 000
Design	10 100	9 100	24 600	43 800
Total (c)	98 100	53 000	227 100	378 200

- (a) Note that these people were not included in the publication containing results from this survey (ABS 1997m).
- (b) Includes people who taught at primary/secondary schools if they also taught elsewhere (e.g. as a private music teacher).
- (c) As people may be involved in teaching in more than one field, the total is less than the sum of the individual categories.

Source: ABS (unpub.)f.

ORGANISATIONS

Cultural education stretches out beyond just schools and tertiary institutions—there are a variety of other organisations involved in its teaching, such as:

- Workers Educational Associations;
- Councils of Adult Education; and
- TAFE Colleges.

ORGANISATIONS *continued*

Only a handful of tertiary institutions do not teach some form of the arts. In 1994, 36 of Australia's 43 tertiary institutions provided courses in at least one arts-related field of study, according to the Commonwealth Department of Employment, Education and Training and Youth Affairs which collects information on higher education institutions and its students.

Table 21.2 shows that there were 352 arts-related courses offered, with the most common being music (comprising 25.3% of the total), fine arts (20.2%) and visual and performing arts (15.3%).

This table also shows that of the 352 courses, just over half (50.9%) were higher degrees (e.g. doctorates, masters and post-graduate diplomas).

21.2 TERTIARY INSTITUTIONS PROVIDING ARTS-RELATED COURSES—1994

<i>Field of study</i>	<i>Number of institutions</i>	NUMBER OF COURSES BY LEVEL(a).....			<i>Total</i>
		<i>Higher</i>	<i>Bachelor</i>	<i>Other(b)</i>	
Visual and performing arts	19	33	18	3	54
Conservation of art and cultural material	6	10	1	2	13
Crafts	8	5	10	2	17
Dance	7	3	5	2	10
Dramatic arts	17	17	12	2	31
Film and photographic arts	8	8	6	3	17
Fine arts	21	41	26	4	71
Graphic arts and design	17	7	18	6	31
Music	25	46	28	15	89
Other	12	9	10	—	19
Total	(c)36	179	134	39	352

(a) Each course (e.g. a bachelor's degree and an honours' degree) is counted as a separate course in this table.

(b) Includes associate diplomas, graduate certificates, sub-degree diplomas and enabling courses.

(c) Total is less than the sum of the components as many institutions offered courses in more than one arts-related field.

Source: Department of Employment, Education and Training and Youth Affairs (unpub.).

CONSUMERS

Arts-related studies may be on offer at almost every tertiary institution, but it is still a small, niche area of study there.

There were 19,423 students enrolled in arts-related courses in higher education institutions in 1994, just 3.3% of all enrolments in higher education institutions.

Even though music offered the greatest number of courses, table 21.3 shows that fine arts had the largest number of enrolments, accounting for 25.1% of all arts-related enrolments.

21.3 TERTIARY ENROLMENTS IN ARTS-RELATED COURSES—1994

<i>Field of study</i>	<i>Students enrolled</i>	<i>Proportion of all arts-related enrolments</i>
	no.	%
Visual and performing arts	3 478	17.9
Conservation of art and cultural material	163	0.8
Crafts	704	3.6
Dance	397	2.0
Dramatic arts	925	4.8
Film and photographic arts	872	4.5
Fine arts	4 880	25.1
Graphic arts and design	2 998	15.4
Music	4 066	20.9
Other	940	4.8
Total	19 423	100.0

Source: Department of Employment, Education and Training and Youth Affairs (unpub.).

Tertiary institutions are one way of obtaining arts skills, but they are not the most popular. Actually, a significant proportion of people studying to obtain skills for an arts-related occupation do not attend tertiary institutions. They may be studying at TAFE colleges, community learning centres, adult education centres and similar organisations. The courses these institutions offer are sometimes shorter and often have less stringent entrance requirements.

There were 124,131 people enrolled in 316,823 arts-related modules in 1994 which were not part of tertiary institutions or the schools system (small private tuition businesses excepted). These figures, from the National Centre for Vocational Educational Research, are much larger than the number of people enrolled in tertiary institutions' arts-related courses (19,423).

Table 21.4 shows art made up the largest number of arts-related enrolments in non-tertiary institutions accounting for 51.1% of total enrolments. Craft (24.1%) and graphic arts/fashion design (11%) were other fields with large numbers of enrolments.

21.4 ENROLMENTS, Arts-related Modules Non-Tertiary Institutions(a)—1994

ASSESSED.....

..

	<i>Pass</i>	<i>Fail</i>	<i>Other(b)</i>	<i>Other(c)</i>	<i>Total</i>
Art	82 532	5 145	2 835	71 265	161 777
Graphic arts/fashion design	20 290	1 215	286	12 956	34 747
Craft	23 145	1 044	283	52 003	76 475
Performing arts	5 573	335	176	11 330	17 414
Music	12 123	1 191	180	11 281	24 775
Other arts	825	122	6	682	1 635
Total	144 488	9 052	3 766	159 517	316 823

(a) At institutions which were not tertiary or within the schools system.

(b) Result withheld or not available.

(c) Includes no assessment, status granted through recognition of prior learning or transfer of existing credits, withdrawals and result not stated.

Source: National Centre for Vocational Educational Research (unpub.).

Almost half (157,306) of all arts-related enrolments were formally assessed, with 144,488 (91.9%) recording passes.

The diversity of Australia, from its multicultural roots to its artistic interests, is never more clearly shown than in its many arts and cultural festivals. Everything from flower arranging to folk dancing events are held throughout the year, bringing countless benefits to the community. Some festivals are run biennially, others annually, a few are far less frequent. Duration also varies from one to two days to weeks. However, measuring employment generated from them can be a challenge.

EMPLOYMENT

Most employment created by festivals is only of a short duration—even the major Australian festivals only employ a handful of permanent staff. There is no data available from the Population Census on employment associated with organising festivals.

However, data on work involvements in festivals are available from the ABS 1997 Survey on Work in Culture/Leisure Activities. In total, there were 202,700 people who worked in organising festivals. The short-term nature of this type of work is shown by the survey—28.6% of festival involvements had a duration of one to two weeks and a further 24.9% involved only three to four weeks work. Most people were not paid for their involvement—only 14.2% received any payment for their work.

ORGANISATIONS

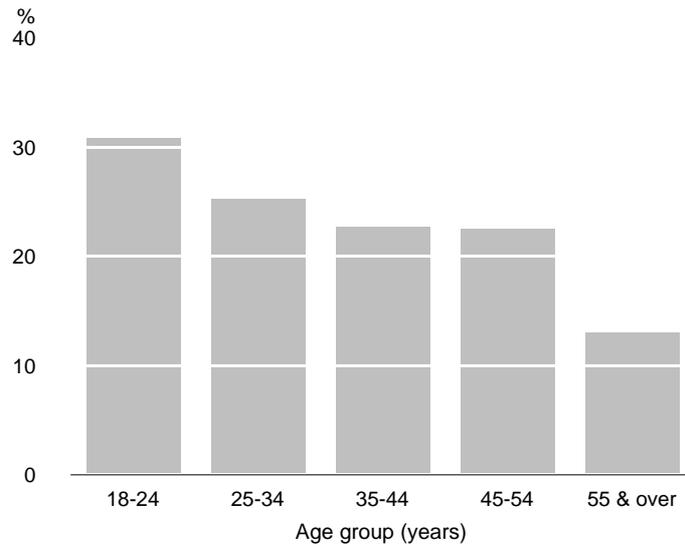
There were 258 festivals identified in 1993–94 by an Australia Council survey—most annual. Autumn and spring were the most popular time for these festivals to be held.

About half of the festivals lasted between two and seven days. Music festivals were the most common type of arts festival. A total of 2.2 million paid visits were made to festivals in 1993–94.

CONSUMERS

Festivals had almost equal appeal to both sexes. Some 20.8% of males and 23% of females over 17 had been to one in 1995–96, according to the ABS PSM. In total, that meant 2,853,000 people (21.9% over 17) had attended a festival in those 12 months.

Attendance varied greatly with age as graph 22.1 shows. Almost a third (30.9%) of people aged 18–24 years attended a festival in the 12 months before interview. The attendance rate was somewhat lower for the next age group (25–34 years), but then fell only slightly for the next two 10-year age groups. However, people aged 55 years and over had a substantially lower attendance rate, with only 13.1% attending a festival in the 12 months before interview.

22.1 FESTIVAL ATTENDANCE, In Previous 12 Months—1996

Source: ABS (unpub.)d.

It should be remembered that people who attend festivals may also have their attendance counted elsewhere in the culture–leisure framework (e.g. a person going to an arts festival may be recorded as attending the theatre or the opera).

CHAPTER 23

SPORT

That great Australian pastime of sport and recreation is often seen as an activity in its own right, rather than a part of culture. But whether one's kicking a football, or perusing an art gallery, Australian culture is about all aspects of life and living. Therefore sport and recreation is included in the Culture/Leisure Industry Statistical Framework.

EMPLOYMENT

The 1996 Census of Population and Housing identified some of the people whose main job was in a specific sport or recreation. Table 23.1 shows that there was a total of about 12,000 people whose main job, in the week before the Census, was as some type of greenkeeper. The table shows that other common jobs were fitness instructors, club managers, animal attendants and gaming dealers.

23.1 EMPLOYMENT IN SPORT AND RECREATION OCCUPATIONS— August 1996

<i>Occupation</i>	<i>Males</i>	<i>Females</i>	<i>Persons</i>
Environment, parks and land care manager	1 889	447	2 336
Sports administrator	728	488	1 216
Horse breeder	653	476	1 129
Park ranger	1 438	257	1 695
Recreation officer	885	1 868	2 753
Club manager (licensed premises)	3 662	1 222	4 884
Caravan park and camping ground manager	1 889	1 539	3 428
Fitness centre manager	486	417	903
Other sports centre manager	2 190	1 487	3 677
Amusement centre manager	655	302	957
Sport and recreation managers n.f.d. and n.e.c.	187	40	227
Jockey	705	169	874
Golfer	1 011	32	1 043
Footballer	986	5	991
Other sportsperson	1 441	450	1 891
Gymnastics coach	239	1 012	1 251
Tennis coach	1 044	312	1 356
Swimming coach	400	532	932
Horseriding coach	91	405	496
Other sports coach	1 727	800	2 527
Sports development officer	460	285	745
Sports umpire	1 403	558	1 961
Horse or dog racing official	351	32	383
Other sports official	60	19	79
Gunsmith	137	9	146
Farrier (including apprentices)	625	20	645
Horse trainer	1 857	527	2 384
Animal trainers n.f.d. and n.e.c.	408	197	605
Greenkeeper	10 782	289	11 071
Apprentice greenkeeper	827	11	838

23.1 EMPLOYMENT IN SPORT AND RECREATION OCCUPATIONS— August 1996 *continued*

<i>Occupation</i>	<i>Males</i>	<i>Females</i>	<i>Persons</i>
Stud hand or stable hand	1 171	1 356	2 527
Sail maker	214	21	235
Boat builder and repairer	2 027	43	2 070
Apprentice boat builder and repairer	139	4	143
Fitness instructors and related workers	2 234	5 435	7 669
Outdoor adventure leader	54	29	83
Animal attendant	1 480	2 542	4 022
Bookmaker	368	36	404
Betting agency branch manager	708	1 305	2 013
Gaming workers n.f.d.	46	38	84
Gaming pit boss	327	273	600
Gaming table supervisor	631	489	1 120
Gaming dealer	2 228	1 946	4 174
Betting agency counter clerk	466	1 760	2 226
Telephone betting clerk	54	359	413
Bookmaker's clerk	287	48	335
Betting clerks n.f.d. and n.e.c.	93	344	437
Total recreational occupations	51 743	30 235	81 978

Source: ABS (unpub.)a.

Playing a sport is popular in Australia, with 28.5% of the population aged over 14 involved in activity. That meant 4,115,200 people played a sport in the 12 months to March 1997, according to the 1997 ABS Survey on Involvement in Sport. Many were involved in other ways, too: coaches, instructors, teachers numbered 628,300. This group was the one most likely to receive some payment for their work—16.0% (100,500) did get paid something. There were many others also involved in sport—456,800 referees or umpires, 266,500 administrators and 605,800 committee members. As table 23.2 shows though, the vast majority of people in the sporting world do not get paid.

23.2 PAID AND UNPAID INVOLVEMENTS IN SPORT— 12 months ended March 1997

	<i>Paid involvements</i>	<i>Unpaid involvements</i>	<i>Total involvements</i>	<i>Participation rate</i>
	'000	'000	'000	%
Playing involvements	142.6	3 972.6	4 115.2	28.5
Non-playing involvements				
Coach/instructor/teacher	100.5	527.8	628.3	4.4
Referee/umpire	75.2	381.6	456.8	3.2
Committee member	13.3	592.5	605.8	4.2
Administrator	28.5	237.9	266.5	1.8
Other non-playing involvement	28.1	541.8	569.9	3.9

Source: ABS 1997i.

ORGANISATIONS

Sports, gambling and recreation is big business in Australia. Table 23.3 shows there were over 11,000 businesses with employment of 163,150 people (at 30 June 1995) in these areas. This information was gathered in the 1994–95 ABS SIS.

23.3 BUSINESSES, Principal Activity of Sport, Gambling or Recreation—1994–95

	<i>Sports industries</i>	<i>Gambling industries</i>	<i>Clubs (hospitality)</i>	<i>Recreation services</i>	<i>Total</i>
Number of businesses (no.)	5 066	2 041	3 284	666	11 057
Employment (30 June) (no.)	58 414	32 062	62 536	10 138	163 150
Wages and salaries (\$m)	603	616	1 173	157	2 549
Gross income (\$m)	2 517	15 511	4 729	610	23 368
Total expenses (\$m)	2 348	14 225	4 304	561	21 438
Operating profit before tax (\$m)	170	1 291	429	52	1 942
Industry gross product (\$m)	913	2 111	2 013	272	5 309

Sources: ABS 1996a, 1996f, 1997h, 1997l.

Table 23.3 also shows that the largest number of businesses were involved in sport while clubs employed the greatest number of people.

CONSUMERS

An average of \$17.23 a week per household—or \$5,928m in 1993–94 for all households, was spent on sport, recreation and gambling, according to the 1993–94 ABS Household Expenditure Survey. Some of the larger expenditures included sporting club subscriptions (average household expenditure of \$1.23 per week), sports equipment (\$2.50) and lotto type games and instant lotto (\$3.12). Admission fees to sporting venues totalled only \$0.53 a week, per household.

Even so over six million people in Australia went to a sporting event in the 12 months to March 1995, according to the 1995 ABS Survey on Sports Attendance. Most were men—who had an attendance rate of 51.5% compared with only 37.4% for women.

23.4 PERSONS WHO ATTENDED SPORTING EVENTS—March 1995

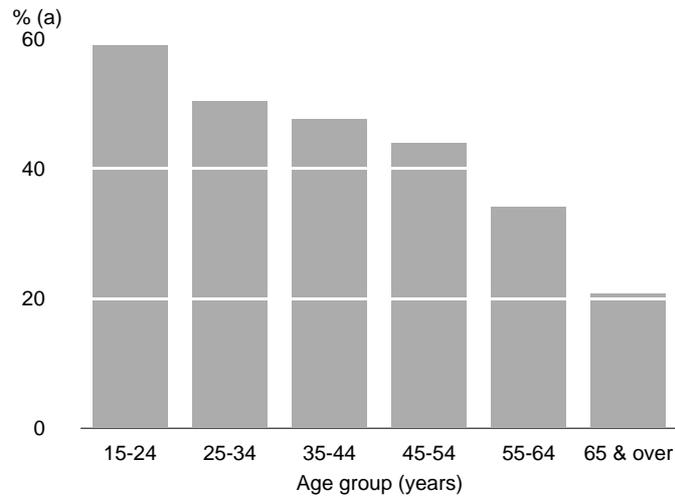
	<i>Males</i>	<i>Females</i>	<i>Persons</i>
Number ('000)	3 564.7	2 673.1	6 237.8
Attendance rate (%) ^(a)	51.5	37.4	44.3

(a) Number attending as a percentage of the total number of people in that group.

Source: ABS 1996g.

The older we get, the less likely we are to get along to a sporting event. As graph 23.5 shows, 59.1% of people aged 15–24 had attended a sporting event, the highest rate. This declined steadily with age until, at the age group 65 and over, only 20.8% were attending.

**23.5 SPORTING EVENTS, Attendance Rates by Age—
12 months ended March 1995**



(a) Number attending as a percentage of the total number of people in that age group.
Source: ABS 1996g.

On the field, Australian Rules was indisputably the most popular sport for the nation, attracting a huge 1,874,200 (13.3%) spectators in the year to March 1995, as table 23.6 shows. The next most popular sports were horse racing (12.1%), rugby league (10.4%) and cricket (8.3%).

**23.6 ATTENDANCE AT SELECTED SPORTS—
12 months ended March 1995**

	no.	%(a)
Australian Rules	1 874.2	13.3
Horse racing	1 701.1	12.1
Rugby league	1 462.1	10.4
Cricket	1 165.9	8.3
Basketball	691.6	4.9
Harness racing	599.7	4.3
Soccer	558.8	4.0
Motor sports	451.5	3.2
Tennis	431.7	3.1
Rugby union	358.4	2.5
Netball	312.3	2.2
Dog racing	301.7	2.1
Golf	145.3	1.0
Baseball	133.2	0.9
Hockey—outdoor	113.9	0.8
Bowls	104.8	0.7

(a) Number attending expressed as a percentage of the population aged 15 years and over.

Note: This table is a count of persons rather than attendances. People may have attended the sport on multiple occasions during the 12-month period, but are counted only once for each sport.

Source: ABS 1996g.

**NATIONAL CULTURE/LEISURE INDUSTRY
STATISTICAL FRAMEWORK**

The scope of the sectors shown in the second part of this publication is defined in the National Culture/Leisure Industry Statistical Framework, Fourth Edition, published by the Statistical Working Group to the Cultural Ministers Council. The framework is based on the 1986 UNESCO Framework for Cultural Statistics.

The National Culture/Leisure Industry Statistical Framework was established because Australia lacked reliable, well-organised and accessible statistics on culture/leisure activities. The adoption of the framework has permitted various organisations which collect culture/leisure statistics to do so on a consistent basis.

The classification contains the following sectors:

- National Heritage
- Museums
- Zoological and Botanic Gardens
- Literature
- Libraries and Archives
- Music
- Performing Arts
- Music and Performing Arts Services
- Visual Arts
- Film and Video
- Radio
- Television
- Community Activities
- Education
- Festivals and Administration
- Sport

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