



ARTS AND CULTURE IN AUSTRALIA: A STATISTICAL OVERVIEW AUSTRALIA

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INQUIRIES

For further information about these and related statistics, contact the National Information and Referral Service on 1300 135 070.

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NOTES

ABOUT THIS PUBLICATION

This publication presents a statistical overview of culture and the arts in Australia. The information is drawn from a variety of data sources, including Australian Bureau of Statistics (ABS) data and non-ABS data, to provide a more complete picture of cultural industries. Care must be taken in comparing data from different sources presented in this publication due to differences in survey methodology, definitions and reference periods. For ABS sources, information on data quality is available (e.g. standard errors), but this is not always available for non-ABS sources.

Wherever possible, data are presented to align with the *Australian Culture and Leisure Classifications, 2008 (Second Edition)* (ACLC) (cat. no. 4902.0). These classifications were developed by the ABS in order to promote a more unified body of statistical information about culture and leisure. In this publication, the cultural sector is defined as those industries in the 'Heritage' and 'Arts' divisions of the industry classification of the Australian Culture and Leisure Classifications (ACLC). This excludes the 'Sports and physical recreation' division of the ACLC as well as recreational industries such as gambling and hospitality.

This is the eighth statistical overview on culture and the arts. Data have been updated where available at the time of release. The table below provides an indication of updated data to be released from late October 2010 which will be used to update the next edition of this publication. Please note that a new approach is expected to be taken for updating the next edition of this publication. Chapters will be updated on a rolling basis as new data becomes available, with updated chapters being progressively released electronically to the ABS website. A PDF version of the publication incorporating the updated chapters will then be generated in October 2011.

INDICATIVE RELEASE DATES

<i>Publication</i>	<i>Indicative release date</i>	<i>Chapter</i>
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Screen Australia, Get the Picture.	Feb 2011	16
Screen Australia, National Survey of Feature Film and Television Drama Production	Feb 2011	16
Australian Recording Industry Association (ARIA), Physical Sales by Unit for the Years Ended 31 December 2010	Mar 2011	13
Australian Recording Industry Association (ARIA), Physical Sales by Value for the Years Ended 31 December 2010	Mar 2011	13
ABS, Australian Industry, 2009–10 (cat. no. 8155.0).	May 2011	6
Tourism Research Australia (TRA), Cultural and Heritage Tourism in Australia, 2011.	Jul 2011	2
TRA, Annual Results of the International Visitors Survey.	Jul 2011	2
TRA, Annual Results of the National Visitors Survey.	Jul 2011	2
National Centre for Vocational Education Research Ltd., Students and Courses 2010.	Jul 2011	18
ABS, Cultural Funding by Government, Australia, 2009–10 (cat. no. 4183.0).	Aug 2011	4, 8-12, 16-17
Australian Major Performing Arts Group (AMPAG), Tracking Changes in Corporate Sponsorship and Private Donations.	Aug 2011	4
ABS, Household Expenditure Survey, Australia: Summary of Results, 2009–10 (cat. no. 6530.0)	Sep 2011	314
Australia Business Arts Foundation (ABaF), Survey of Private Sector Support for the Arts.	Sep 2011	4
Department of Education, Employment and Workplace Relations (DEEWR), Students y Selected Higher Education Statistics.	Sep 2011	18

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ROUNDING

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

MORE INFORMATION ON
ABS CULTURE AND
RECREATION STATISTICS

More information on culture and recreation statistics and the role of the National Centre for Culture and Recreation Statistics (NCCRS), is available from the Culture and Recreation Statistics theme page (available from the Topics @ a Glance menu on the ABS home page www.abs.gov.au). Some data provided in this publication is only available by request. For more information, contact the National Information and Referral Service on 1300 135 070.

Brian Pink
Australian Statistician

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INTRODUCTION

Involvement in heritage and the arts can take many forms, including creative pursuits such as painting, acting or playing a musical instrument. Involvement can also cover the enjoyment one gains through experiencing the creative or artistic works of others. This includes such things as seeing a movie or visiting a museum or art gallery.

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

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

TIME SPENT ON
CULTURAL ACTIVITIES

How people spend their time was the subject of an ABS survey conducted in 2006. People aged 15 years and over were asked to record what they did during a two-day period in five minute intervals. Information was recorded on necessary activities such as eating and sleeping, and the usual activities such as paid work, study, housework and unpaid community work.

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

Many free time activities can be undertaken simultaneously with another activity (e.g. watching TV while eating a meal, or listening to the radio while doing housework). The information presented in table 1.1 shows the time spent by participants on each activity, regardless of whether it was the main activity being undertaken at the time or whether it was a secondary activity being undertaken simultaneously.

It is perhaps not too surprising that watching or listening to TV was found to be the activity which took up most people's leisure time. On a daily basis 87% of Australians watched or listened to TV for an average of just under 3 hours (179 minutes), down slightly from the 1997 figure of 182 minutes. This means that in 2006, Australians aged 15 years and over spent a total of 42 million hours watching or listening to TV each day.

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

1.1 AVERAGE TIME SPENT ON SELECTED CULTURE AND LEISURE ACTIVITIES (a)(b)—2006

	Participants' average	Participation rate	Total time spent by all Australians	Average % of day spent on activity by all Australians
	minutes per day	%	Million of person hours per day	%
Visiting entertainment and cultural venues	114	4.3	1.3	0.3
Attendance at sports event	127	1.6	0.5	0.1
Religious activities/ritual ceremonies	91	5.3	1.3	0.3
Sport and outdoor activity	88	25.6	6.2	1.5
Games/hobbies/arts/crafts	100	17.7	4.9	1.2
Reading	76	43.7	8.9	2.3
TV watching/listening	179	87.4	42.0	10.8
Video/DVD watching	109	8.3	2.4	0.6
Listening to radio	123	47.9	15.9	4.1
Listening to records/tapes/CDs and other audio media	71	5.6	1.1	0.3
Attendance at courses (excluding school and university)	113	0.6	0.2	—
Audio/visual media n.e.c. (c)	83	22.7	5.8	1.3

— nil or rounded to zero (including null cells)

(c) Computer and internet use, other than for games.

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

Source: *How Australians Use Their Time*, 2006 (cat. no.

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

4153.0).

TIME SPENT ON CULTURAL ACTIVITIES

continued

The Time Use Survey found that visiting entertainment and cultural venues attracted about 4% of the population who spent on average about two hours (114 minutes) when they attended. The total time spent by all Australians on visiting entertainment and cultural venues (1.3 million person hours per day) was similar to the time spent on religious activities and listening to records, tapes and CDs (1.3 million person hours per day and 1.1 million person hours per day respectively).

ATTENDANCE AT SELECTED CULTURAL VENUES AND EVENTS

In 1991, the ABS conducted its first survey on *Attendance at Selected Cultural Venues and Events* (cat. no. 4114.0). The survey has been repeated several times since then, the most recent results being for the period 2005–06.

In 2005–06, 65% of adult Australians attended the cinema at least once in the 12-months before their survey interview, making the cinema the most popular cultural venue.

Other popular venues included zoological parks and aquariums (an attendance rate of 36%), local, state and national libraries (34%) and botanic gardens (34%).

The survey also included the following cultural events: popular music concerts, classical music concerts, theatre performances, dance performances, musicals and operas, and other performing arts. Of these activities, popular music concerts had the highest attendance rate, with 25% of Australians aged 15 years or more attending at least one concert in the 12-month period.

ATTENDANCE AT
SELECTED CULTURAL
VENUES AND EVENTS
continued

1.2 PERSONS ATTENDING SELECTED CULTURAL VENUES AND
EVENTS (a)—2005–06

Venue or activity	Number of people attending '000	Attendance rate(b) %
Art galleries	3 630.7	22.7
Museums	3 611.9	22.6
Zoological parks and aquariums	5 699.8	35.6
Botanic gardens	5 390.9	33.7
Local, state and national libraries	5 454.5	34.1
Popular music concerts	4 035.9	25.2
Classical music concerts	1 508.1	9.4
Theatre performances	2 723.2	17.0
Dance performances	1 625.0	10.2
Musicals and operas	2 613.9	16.3
Other performing arts	2 655.0	16.6
Cinema	10 431.4	65.2

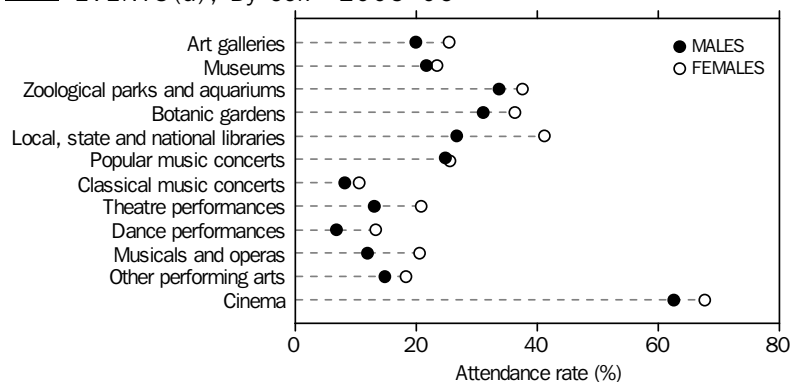
- (a) In the 12 months before interview.
(b) Number attending as a percentage of the population aged 15 years and over.

Source: *Attendance at Selected Cultural Venues and Events, 2005–06* (cat. no. 4114.0).

*Characteristics of
attendees*

Female attendance rates were higher than males at all selected cultural venues or events. The difference was most apparent for local, state and national libraries (41% of females compared with 27% of males) and musicals and operas (21% compared with 12%).

1.3 PERSONS ATTENDING SELECTED CULTURAL VENUES AND
EVENTS (a), By sex—2005–06



- (a) In the 12 months before interview.

Source: *Attendance at Selected Cultural Venues and Events, 2005–06* (cat. no. 4114.0).

Characteristics of attendees continued

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

People aged 15–24 years were those most likely to attend popular music concerts and the cinema, while people aged 25–44 years were those most likely to visit zoological parks and aquariums. By comparison, people aged 45–64 years were those most likely to attend classical music concerts and musicals and operas.

1.4 ATTENDANCE RATES (a), By age—2005–06

	AGE GROUP (YEARS)								Total
	15–17	18–24	25–34	35–44	45–54	55–64	65–74	75 and over	
	ATTENDANCE RATE (%)								
Art galleries	23.1	17.6	22.5	23.4	26.6	25.8	21.5	15.6	22.7
Museums	25.2	15.7	23.6	27.2	25.1	24.9	19.2	11.0	22.6
Zoological parks and aquariums	42.0	35.4	46.5	46.0	32.0	31.0	22.7	11.0	35.6
Botanic gardens	21.0	28.7	37.6	35.9	35.2	37.4	34.9	23.5	33.7
Local, state and national libraries	45.8	33.9	32.7	37.3	33.6	30.3	33.6	29.9	34.1
Popular music concerts	31.2	40.0	30.9	25.1	26.5	18.7	12.9	6.5	25.2
Classical music concerts	6.4	6.0	7.0	8.3	12.4	12.8	11.8	9.6	9.4
Theatre performances	24.5	15.8	15.4	15.5	20.3	20.1	16.8	7.6	17.0
Dance performances	18.9	8.2	9.4	12.3	12.8	8.5	6.7	4.3	10.2
Musicals and operas	18.1	13.7	13.6	17.0	19.0	19.9	16.0	11.5	16.3
Other performing arts	20.0	16.1	19.0	19.3	17.3	15.9	11.7	7.1	16.6
Cinema	93.1	84.5	75.7	68.6	62.7	55.6	44.8	26.7	65.2

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

Source: *Attendance at Selected Cultural Venues and Events, 2005–06* (cat. no. 4114.0).

Frequency of attendance

Some venues and events were more likely to attract repeat visitors than others. More than two-thirds (71%) of local, state and national library attendees reported visiting at least five times during the 12-month period before being interviewed. Similarly, cinemas were popular with over half (54%) the patrons having attended at least five times in 12 months.

The venues or events where the majority of people attending had been only once in the 12-month period were other performing arts, musicals and operas, dance performances and museums.

Frequency of attendance
continued

1.5 FREQUENCY OF ATTENDANCE AT CULTURAL VENUES AND EVENTS—2005–06

	FREQUENCY OF ATTENDANCE(a)			Total	
	Once only	2–4 times	5 times or more	%	'000
Art galleries	36.5	46.1	*17.3	100.0	3 630.7
Museums	50.4	38.9	**10.6	100.0	3 611.9
Zoological parks and aquariums	47.9	43.4	**8.7	100.0	5 699.8
Botanic gardens	37.7	45.1	*17.1	100.0	5 390.9
Local, state and national libraries	4.9	24.1	71.0	100.0	5 454.5
Popular music concerts	34.7	46.8	*18.5	100.0	4 035.9
Classical music concerts	42.1	*42.0	**15.8	100.0	1 508.1
Theatre performances	46.6	41.9	**11.5	100.0	2 723.2
Dance performances	54.4	*37.0	**8.6	100.0	1 625.0
Musicals and operas	54.6	39.0	**6.3	100.0	2 613.9
Other performing arts	63.8	*29.4	**6.9	100.0	2 655.0
Cinema	9.5	36.4	54.1	100.0	10 431.4

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

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

(a) In the 12 months before interview.

Source: *Attendance at Selected Cultural Venues and Events, 2005–06* (cat. no. 4114.0).

Table 1.6 shows attendance rates recorded in 2005–06, compared with attendance rates from previous ABS surveys conducted in 1995 and 1999. Attendance rates in 2005–06 were similar to the earlier years. It is important to note that some changes in survey collection methods have occurred across the years and this may affect the validity of comparisons.

1.6 ATTENDANCE AT SELECTED CULTURAL VENUES AND EVENTS (a)—1995, 1999 and 2005–06

	1995	1999	2005–06
ATTENDANCE RATE (%)			
Art galleries	22.3	21.2	22.7
Museums	27.8	19.9	22.6
Zoological parks and aquariums	35.3	33.9	35.6
Botanic gardens	38.5	36.1	33.7
Local, state and national libraries	38.4	38.1	34.1
Popular music concerts	26.9	25.4	25.2
Classical music concerts	7.7	8.8	9.4
Theatre performances	16.6	16.5	17.0
Dance performances	10.0	9.0	10.2
Musicals and operas	19.3	16.3	16.3
Other performing arts	18.7	17.8	16.6
Cinema	62.1	67.0	65.2

(a) In the 12 months before interview.

Source: *Attendance at Selected Cultural Venues and Events, 2005–06* (cat. no. 4114.0).

READING

In 2006, the ABS Adult Literacy and Life Skills Survey found that reading was a favourite activity for 61% of people aged over 15 years. The activity was a favourite for 73% of females surveyed, compared with 50% of males.

Of those surveyed, 77% read newspapers, 58% read magazines and 48% read books at least once a week. People likely to read more frequently were those in the 45-64 years age group and those with university or higher qualifications.

1.7 PERSONS AGED 15 YEARS AND OVER, READING PREFERENCES (a), By selected characteristics—2006

	Newspapers at least once a week	Books at least once a week	Magazines at least once a week
	%	%	%
Male	78.6	39.2	55.1
Female	75.9	56.1	60.5
Age group (years)			
15–29	67.7	42.8	55.1
30–44	78.8	48.6	57.8
45–64	82.4	50.4	62.2
65 and over	82.0	49.6	50.3
Educational attainment			
University or higher	84.5	64.5	66.5
Trade or diploma	79.4	47.0	59.2
Year 12	77.1	48.8	59.4
Total	77.3	47.7	57.8

(a) In the 12 months before interview.

Source: ABS data available on request, Adult Literacy and Life Skills Survey, 2006.

Research conducted by Starcom for Australia Council for the Arts, *Books Alive 2008 - reader research*, looked at the reading habits of 1,200 Australians aged 16 to 65, who had read a book for pleasure in the last three years. The study found that almost 7 out of 10 people reported reading as their most preferred leisure activity. Of those who read regularly for pleasure, most read magazines (66%), newspapers (61%) or fiction books (58%), while less than half read non-fiction books (41%).

Reading for enjoyment was the main motivation for people, with 83% of readers reporting this as a reason for the activity. General interest was also a popular reason (68%), followed by relaxation and reducing stress (67%) and to improve knowledge (59%).

The main barriers preventing most readers from reading included lack of time (47%) and the cost of new books (40%), however 24% of those surveyed reported that there were no significant barriers to reading.

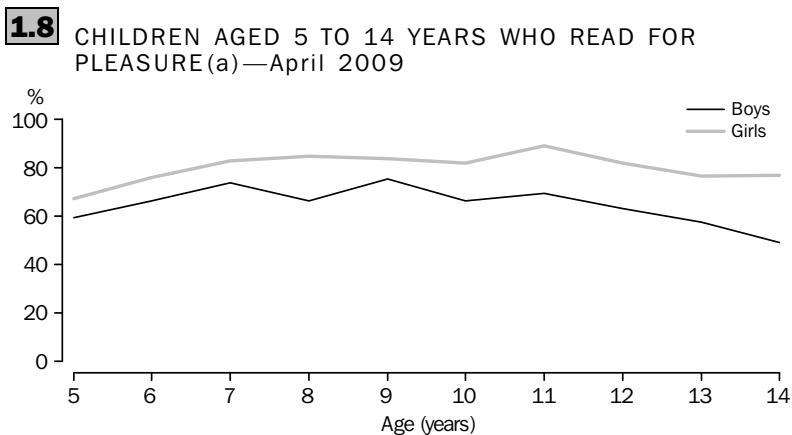
Technology has changed the way some people read books. Data from the *2009 Books Alive Campaign Effectiveness Research* showed that 11% of people who have read a book for pleasure in the last three years currently download electronic books (e-books) from the Internet. These e-books are read on devices such as phones/PDA/laptop (7%) and e-book readers (4%). When asked about their future intentions for adopting reading technologies, one-third said they would consider downloading an e-book, 23% said they

READING *continued*

would consider using an e-book reader and 20% said they would consider reading an e-book on their phone/PDA/laptop. More information on the Books Alive survey can be found at www.australiacouncil.gov.au.

Data from the Time Use and Adult Literacy and Life Skills Surveys should not be compared with data from the Starcom research due to differences in survey methodology, definitions and reference periods.

The 2009 Children's Participation in Selected Cultural and Leisure Activities survey, conducted by the ABS on the activities of 5–14 year olds, showed that girls were more likely to read for pleasure than boys at any age. Overall, 80% of girls read for pleasure during the two-week reference period compared with 65% of boys. Girls also read for longer than boys – the average time spent by girls who read for pleasure during the two-week period was 7.8 hours, compared with 6.4 hours for boys.



(a) Outside of school hours during the past two school weeks prior to interview.
 Source: ABS data available on request, *Children's Participation in Cultural and Leisure Activities, Australia, April 2009*.

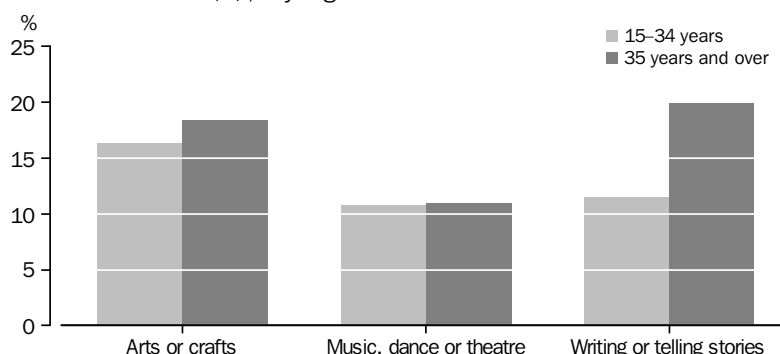
INDIGENOUS
 PARTICIPATION IN
 CULTURAL ACTIVITIES

Aboriginal and Torres Strait Islander people's participation in cultural activities are important elements of traditions and community sustainability, as well as spiritual and social well being. Cultural activities include arts and crafts, music, dance or theatre and writing or telling stories.

The 2008 ABS National Aboriginal and Torres Strait Islander Social Survey (NATSISS) found that of these selected cultural activities, arts and crafts was the most popular, with 17% (almost 56,600) of Indigenous persons aged 15 years and over taking part at least once in the 12 months prior to interview. Participation rates were similar for both age groups interviewed, with 28,400 (16%) persons aged 15 to 34 years and almost 28,200 (18%) persons aged 35 years and over having participated in arts and crafts. Participation in writing or telling stories was higher for Indigenous persons aged 35 years and over (20%), compared with 12% for those aged 15 to 34 years.

INDIGENOUS
PARTICIPATION IN
CULTURAL ACTIVITIES
continued

1.9 INDIGENOUS PARTICIPATION IN SELECTED CULTURAL ACTIVITIES (a), By age—2008

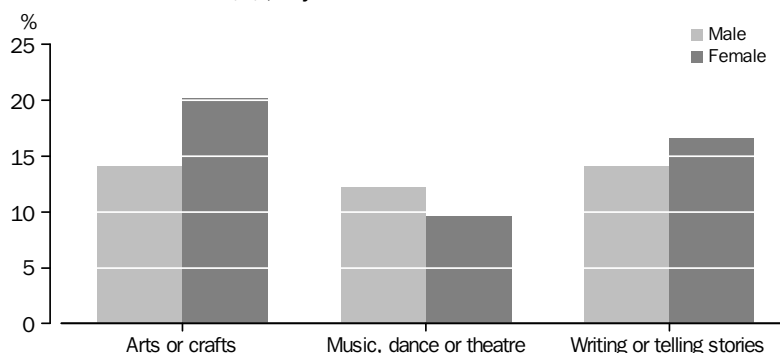


(a) Persons aged 15 years and over.

Source: ABS data available on request, National Aboriginal and Torres Strait Islander Social Survey, 2008.

Female participation rates were higher for arts and crafts (20%) and writing or telling stories (17%) compared with males (14% for both activities). This pattern was evident across both the 15 to 34 year old and 35 years and over age groups. Male participation was higher in music, dance or theatre (12%) compared with females (10%).

1.10 INDIGENOUS PARTICIPATION IN SELECTED CULTURAL ACTIVITIES (a), By sex—2008



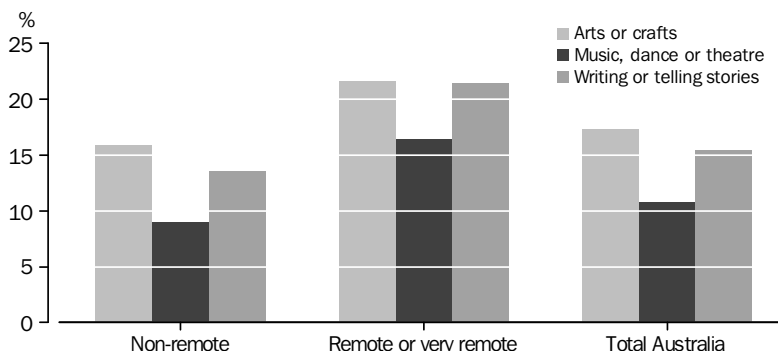
(a) Persons aged 15 years and over.

Source: ABS data available on request, National Aboriginal and Torres Strait Islander Social Survey, 2008.

In 2008, participation in selected cultural activities was higher for those Indigenous persons aged 15 years and over living in remote and very remote areas compared to those living in non-remote areas. For arts and crafts, 22% of Indigenous persons living in remote areas of Australia participated in this activity, compared with 16% living in non-remote areas. Similarly, of those Indigenous persons living in remote areas, 21% participated in writing or telling stories (16% for music, dance or theatre) compared with 14% living in non-remote areas (9.0% for music, dance or theatre).

INDIGENOUS
PARTICIPATION IN
CULTURAL ACTIVITIES
continued

1.11 INDIGENOUS PARTICIPATION IN SELECTED CULTURAL ACTIVITIES (a), By remoteness—2008



(a) Persons aged 15 years and over.

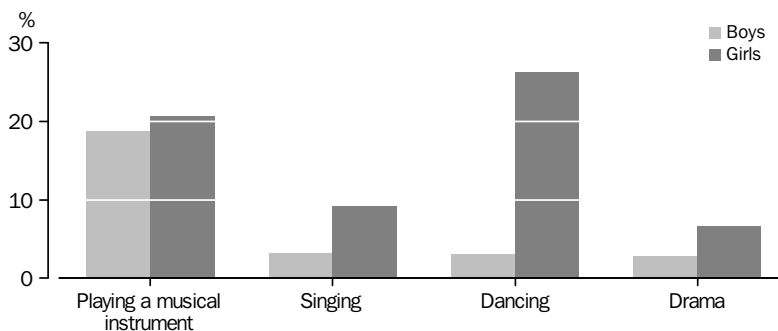
Source: ABS data available on request, National Aboriginal and Torres Strait Islander Social Survey, 2008.

CHILDREN'S
INVOLVEMENT IN
CULTURAL ACTIVITIES

Many children take part in cultural activities during school hours often as part of compulsory lessons. Some children also undertake cultural activities in their own time. The ABS survey of Children's Participation in Cultural and Leisure Activities showed that approximately one-third (34%) of children aged 5–14 years were involved in at least one of four selected organised cultural activities (playing a musical instrument, singing, dancing or drama) outside of school hours in the 12-months to April 2009. Almost twice as many girls as boys (45% compared with 23%) participated in at least one of these activities.

Playing a musical instrument was the most popular of the selected cultural activities (535,400 children), followed by dancing (390,400), singing (164,700) and drama (126,700).

1.12 CHILDREN'S PARTICIPATION IN ORGANISED CULTURAL ACTIVITIES (a)—April 2009



(a) Children aged 5 to 14 years who participated outside of school hours during the 12 months prior to interview in April 2009.

Source: Children's Participation in Cultural and Leisure Activities, Australia, April 2009 (cat. no. 4901.0).

HOBBY ACTIVITIES

Very little data exists on the types of hobbies in which people take part. The ABS collected some data on a limited set of cultural hobbies (art and craft, writing and music) in the 2007 survey of Work in Selected Culture and Leisure Activities.

HOBBY ACTIVITIES

continued

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

The survey showed that in 2007 there were 2.1 million people aged 15 years and over in Australia who were involved in art and craft as a hobby activity only. This is down from 2.5 million people in 2004. The survey also showed that there were 356,900 people involved in writing as a hobby only and 265,000 involved in music as a hobby only. This is up from 317,200 and 158,700 respectively in 2004.

INTRODUCTION

Tourism may be motivated by the desire to visit friends and relatives or to experience the character and culture of a destination. Tourism Research Australia (TRA) conducts the International Visitor Survey and the National Visitor Survey. The International Visitor Survey represents the most comprehensive source of information on international visitors to Australia. The National Visitor Survey is the major source of information on the characteristics and travel patterns of domestic tourists within Australia.

INTERNATIONAL
CULTURAL TOURISM

The 2009 International Visitor Survey found that more than half (51%) of all overseas visitors attended at least one cultural attraction while in Australia.

Of the 2.6 million international cultural and heritage visitors in 2009, 16% were from other Asia (Asia excluding China, Japan, Korea and Singapore), 15% were from the United Kingdom and 13% were from New Zealand. The most popular destinations for both international and domestic cultural heritage visitors were New South Wales, Queensland and Victoria, however participation in cultural and heritage activities was higher in the Northern Territory, the Australian Capital Territory and Tasmania.

Historical or heritage buildings, sites or monuments had the highest rate of attendance by international cultural and heritage visitors (62%), followed by museums or art galleries (57%).

According to Tourism Research Australia's *Snapshots 2009 Cultural and Heritage Tourism in Australia*, international cultural and heritage visitors spent \$16,292m on trips to Australia in 2009. The average amount spent per trip was \$6,280 compared to other international visitors who spent on average \$3,832. It is likely that this higher spend was due to the longer average length of stay (45 nights compared to other international visitors who spent 23 nights on average).

INTERNATIONAL
CULTURAL TOURISM
continued

2.1 OVERSEAS CULTURAL AND HERITAGE VISITORS, By activity type—2009

Type of cultural and heritage tourism activity	Percentage of overseas cultural and heritage visitors
Attend theatre, concerts or other performing arts	24
Visit museums or art galleries	57
Visit art/craft workshops/studios	17
Attend festivals/fairs or cultural events	22
Experience Aboriginal art/craft and cultural displays	20
Visit an Aboriginal site/community	11
Visit historical/heritage buildings, sites or monuments	62

Source: Tourism Research Australia 2009, *Cultural and Heritage Tourism in Australia, 2009*.

DOMESTIC CULTURAL
TOURISM

According to the 2009 National Visitor Survey, the most popular reason for spending time away from home was to go on a holiday (50%). Other reasons were to visit friends and relatives (30%) and travelling for business (14%).

The National Visitor Survey reported that Australians aged 15 years and over took 144.4 million day trips in 2009, compared with 135.6 million in 2008. A day trip is a round trip distance of at least 50 kilometres, with the traveller being away from home for at least four hours, but not overnight. Routine travel such as commuting between work and home is excluded.

Data from the TRA Culture and Heritage Tourism in Australia publication shows that 9.5 million domestic day trips were cultural and heritage day trips. A cultural and heritage trip is one that includes visiting or experiencing at least one of the following:

- The theatre, a concert, or other performing art
- A museum or art gallery
- Art, craft workshops or studios
- Festivals, fairs or cultural events
- Aboriginal art, craft and cultural displays
- An Aboriginal site or community
- Historical/heritage buildings, sites or monuments

During 2009, Australians aged 15 years and over took 66.1 million overnight trips within Australia. Of this, 14% (9.3 million) were cultural and heritage visitors, who spent a collective 50 million nights away, that involved travelling at least 40 kilometres from home.

Visiting museums or art galleries was the most popular cultural activity for domestic overnight visitors, with 43% attending, compared to 36% of domestic day visitors. Visits to historical/heritage buildings, sites or monuments attracted 29% of overnight visitors and 25% of day visitors.

DOMESTIC CULTURAL
TOURISM *continued*

According to Tourism Research Australia's *Snapshots 2009 Cultural and Heritage Tourism in Australia*, domestic overnight cultural and heritage visitors spent \$9,600m in 2009. The average amount spent per trip was \$1,030 compared to those not participating in cultural and heritage activities, who spent on average \$578 per trip.

2.2 DOMESTIC CULTURAL AND HERITAGE VISITORS, By activity type—2009

<i>Type of cultural and heritage tourism activity</i>	<i>Percentage of domestic overnight cultural and heritage visitors</i>	<i>Percentage of domestic day cultural and heritage visitors</i>
	<i>%</i>	<i>%</i>
Attend theatre, concerts or other performing arts	23	23
Visit museums or art galleries	43	36
Visit art/craft workshops/studios	6	5
Attend festivals/fairs or cultural events	19	20
Experience Aboriginal art/craft and cultural displays	3	2
Visit an Aboriginal site/community	2	1
Visit historical/heritage buildings, sites or monuments	29	25

Source: Tourism Research Australia 2009, *Cultural and Heritage Tourism in Australia*, 2009.

INTRODUCTION

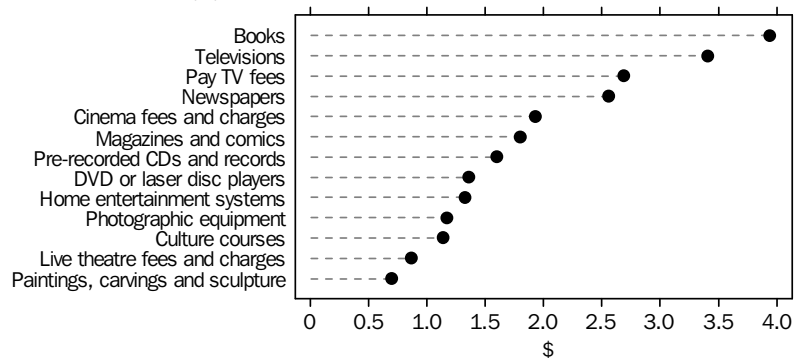
According to the most recent ABS Household Expenditure Survey (2003–04) there were an estimated 7.7 million households in Australia, each spending an average of \$36.40 per week on culture – equivalent to a total annual expenditure of \$14,694m by all households. The Household Expenditure Survey collected detailed information at the household rather than personal level because some expenditures (e.g. DVD players) benefit the whole family and cannot be meaningfully attributed to an individual within a household.

Many factors influence household spending on culture, including:

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

EXPENDITURE ON CULTURE

3.1 AVERAGE WEEKLY HOUSEHOLD EXPENDITURE ON CULTURE (a) —2003–04



(a) Selected cultural items.

Source: Household Expenditure Survey, Australia: Detailed Expenditure Items, 2003–04 (cat. no. 6535.0.55.001).

In 2003–04, Australian households spent 4% of their total expenditure on cultural goods and services. Households spent the largest amounts on books (\$1,587m), televisions (\$1,376m), pay TV fees (\$1,084m) and newspapers (\$1,031m).

3.2 EXPENDITURE ON CULTURE BY AUSTRALIAN HOUSEHOLDS—2003–04

	Average household expenditure	Total household expenditure
	\$/week	\$/year
Literature		
Books	3.94	1 587
Newspapers	2.56	1 031
Magazines and comics	1.80	727
Other printed material	0.14	55
Total	8.44	3 400
Music		
Pre-recorded compact discs and records (audio)	1.60	646
Audio cassettes and tapes	0.05	19
Total	1.65	665
Performing arts		
Live theatre fees and charges	0.87	353
Music concert fees and charges	0.72	291
Total	1.59	644
Visual arts and crafts		
Studio and other professional photography	0.50	203
Paintings, carvings and sculptures	0.70	282
Art and craft materials	0.46	184
Total	1.66	668
Broadcasting, electronic media and film		
Hire of video cassette tapes and TV or computer games	1.17	473
Pre-recorded video cassettes and video discs	2.08	840
Cinema fees and charges	1.93	779
Pay TV fees	2.69	1 084
Total	7.87	3 176
Other arts		
Musical instruments and accessories	*0.67	*272
Culture courses	1.14	459
Cultural fees and charges n.e.c	0.05	19
Total	1.86	750
Heritage		
Art gallery and museum fees and charges	0.15	61
National park and zoos fees and charges	0.24	98
Total	0.39	159
Other culture		
Radios	0.07	27
CD players	0.36	145
Integrated sound systems	0.25	100
Other audio equipment(a)	*0.58	*239
Televisions	3.41	1 376
Home entertainment systems	1.33	537
Television aerials	*0.06	*26
Video cassette recorders	0.36	145
Video cameras	0.92	371
Digital video disc players or laser disc players	1.36	550
Other video equipment(b)	*0.42	*168
Audiovisual parts n.e.c	0.22	90
Hire of televisions	*0.06	*26
Blank video cassettes and video discs	0.21	86
Repair and maintenance of audiovisual equipment and personal computers	1.00	404
Audiovisual equipment and personal computer repairs insurance	0.09	37
Photographic equipment (excluding film and chemicals)	1.17	471
Photographic film and chemicals (including developing)	1.07	433
Total(c)	12.94	5 231
Total expenditure on culture	36.40	14 694

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

(a) Includes amplifiers and tuner-amplifiers, speakers, and audio equipment n.e.c.

(b) Includes set top boxes and video equipment n.e.c.

(c) Also includes hire of video cassette recorders, but this was negligible.

Source: Household Expenditure Survey, Australia: Detailed Expenditure Items, 2003–04 (cat. no. 6535.0.55.001); ABS data available on request, Household Expenditure Survey, 2003–04.

CHANGES IN SPENDING
PATTERNS

Between 1998–99 and 2003–04, total household expenditure on culture increased from \$26.74 to \$36.40 per week. Part of this increase can be attributed to inflation over the 5-years between surveys, when prices of goods and services, as measured by the Consumer Price Index, rose by 18%.

3.3 AVERAGE WEEKLY HOUSEHOLD EXPENDITURE AT CURRENT PRICES(a)—1984 to 2003–04

	1984	1988–89	1993–94	1998–99	2003–04
	\$/week	\$/week	\$/week	\$/week	\$/week
Literature	4.16	5.82	7.54	7.56	8.43
Music	0.68	1.21	1.29	2.07	1.65
Performing arts(b)	0.81	0.92	1.92	1.48	1.59
Visual arts and crafts(c)	0.42	0.58	0.72	1.09	1.66
Broadcasting, electronic media and film(d)	1.28	2.01	3.13	4.13	7.87
Other arts(e)	0.95	1.22	1.41	1.28	1.86
Heritage	0.09	0.13	0.25	0.17	0.39
Other culture(f)(g)	6.94	7.94	9.13	8.90	12.94
Total(c)(e)	15.33	19.83	25.39	26.74	36.40

(a) Not adjusted for inflation.

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

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

(d) Excludes the hire of TV games for surveys prior to 1998–99.

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

(f) Includes the hire of TV games for surveys prior to 1998–99.

(g) For 1998–99 and 2003–04, includes other audiovisual equipment and parts which were included in other cultural categories in previous surveys.

Source: *Household Expenditure Survey, Australia: Detailed Expenditure Items, 2003–04* (cat. no. 6535.0.55.001).

INTRODUCTION

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

GOVERNMENT FUNDING

In 2008–09, government funding for cultural activities totalled \$6,772.5m, with state and territory governments providing almost half (45% or \$3,033.7m), the Australian Government contributing 38% (\$2,584.5m) and local government making up the balance of 17% (\$1,154.2m).

Recurrent expenditure accounted for 87% (\$5,911.2m) of cultural funding by all levels of government in 2008–09, while funding for capital expenditure accounted for the remaining 13% (\$861.3m).

Total funding for cultural activities by all levels of government in Australia increased by \$491.4m (7.8%), from \$6,281.1m in 2007–08 to \$6,772.5m in 2008–09. This resulted in a 5.4% increase in the value of funding per-person, from \$295.75 in 2007–08 to \$311.77 in 2008–09.

Apart from direct funding, the Australian Government also provides assistance through tax concessions such as the Cultural Gifts Program, which offers tax deductions to encourage the donation of items of cultural significance to public art galleries, museums and libraries. According to the 2008–09 Annual Report of the Department of Environment, Water, Heritage and the Arts (DEWHA), 652 donations were made to the program in that year with a total value of \$82.9m.

4.1 CULTURAL FUNDING BY LEVEL OF GOVERNMENT—2008–09

	<i>Value of funding</i>	<i>Percentage of total</i>
	\$m	%
Australian Government(a)		
Heritage		
Art museums	91.5	1.4
Other museums and cultural heritage	266.0	3.9
Environmental heritage	207.0	3.1
Libraries	60.0	0.9
Archives	105.4	1.6
<i>Total heritage</i>	<i>729.8</i>	<i>10.8</i>
Arts		
Literature and print media	31.2	0.5
Music performance	59.3	0.9
Drama	28.3	0.4
Dance	21.6	0.3
Music theatre and opera	24.0	0.4
Other performing arts	7.0	0.1
Performing arts venues	—	—
Music composition and publishing	0.7	—
Visual arts and crafts	33.4	0.5
Design	0.2	—
Radio and television services	1 391.1	20.5
Film and video production and distribution	115.5	1.7
Multimedia	6.2	0.1
Other arts	136.3	2.0
<i>Total arts</i>	<i>1 854.7</i>	<i>27.4</i>
<i>Total Australian Government</i>	<i>2 584.5</i>	<i>38.2</i>
State and territory government		
Heritage		
Art museums	175.2	2.6
Other museums and cultural heritage	338.3	5.0
Environmental heritage	1 397.0	20.6
Libraries	337.4	5.0
Archives	65.9	1.0
<i>Total heritage</i>	<i>2 313.8</i>	<i>34.2</i>
Arts		
Literature and print media	18.9	0.3
Music performance	58.8	0.9
Drama	30.1	0.4
Dance	18.2	0.3
Music theatre and opera	16.9	0.2
Other performing arts	34.6	0.5
Performing arts venues	241.2	3.6
Music composition and publishing	0.5	—
Visual arts and crafts	41.1	0.6
Design	4.9	0.1
Radio and television services	1.7	—
Film and video production and distribution	122.7	1.8
Multimedia	5.9	0.1
Other arts	124.2	1.8
<i>Total arts</i>	<i>719.9</i>	<i>10.6</i>
<i>Total state and territory government</i>	<i>3 033.7</i>	<i>44.8</i>

— nil or rounded to zero (including null cells)

(a) The Australian Government refers to the federal government. It does not refer to the aggregate of state and territory governments, nor does it include local government.

Source: *Cultural Funding by Government, Australia, 2008–09* (cat. no. 4183.0).

4.1 CULTURAL FUNDING BY LEVEL OF GOVERNMENT—2008–09 *continued*

	<i>Value of funding</i>	<i>Percentage of total</i>
	\$m	%
Local government		
Art museums	55.2	0.8
Other museums and cultural heritage	34.5	0.5
Libraries	727.5	10.7
Performing arts	87.6	1.3
Cultural or arts services n.e.c.	249.5	3.7
<i>Total local government</i>	1 154.2	17.0
Total	6 772.5	100.0

Source: *Cultural Funding by Government, Australia, 2008–09* (cat. no. 4183.0).

AUSTRALIAN GOVERNMENT FUNDING

In 2008–09, the majority (72% or \$1,854.7m) of Australian Government cultural funding supported arts activities. Radio and television services were the main beneficiaries, receiving three quarters of the total arts activities funding provided by the Australian Government (75% or \$1,391.1m).

Funding provided for cultural activities by the Australian Government in 2008–09 increased by \$152.9m (6.3%) from 2007–08, with the majority (\$125.0m or 82%) of this increase being directed to funding heritage activities. This resulted in a 18% increase in the value of funding per-person for heritage activities, while the value of total cultural funding per-person increased slightly by 3.9%.

AUSTRALIAN
GOVERNMENT FUNDING
continued

4.2 CULTURAL FUNDING BY LEVEL OF GOVERNMENT—2007–08 and 2008–09

	2007–08		2008–09	
	Value of funding	Value of funding per person (a)	Value of funding	Value of funding per person (a)
	\$m	\$	\$m	\$
Australian Government(b)				
Total heritage	604.8	28.48	729.8	33.60
Total arts	1 826.8	86.01	1 854.7	85.38
<i>Total cultural funding</i>	<i>2 431.6</i>	<i>114.49</i>	<i>2 584.5</i>	<i>118.98</i>
State and territory government				
Total heritage	2 210.8	104.10	2 313.8	106.52
Total arts	600.0	28.25	719.9	33.14
<i>Total cultural funding</i>	<i>2 810.8</i>	<i>132.35</i>	<i>3 033.7</i>	<i>139.66</i>
Local government				
Total heritage(c)	na	na	na	na
Total arts(c)	na	na	na	na
<i>Total cultural funding</i>	<i>1 038.7</i>	<i>48.91</i>	<i>1 154.2</i>	<i>53.13</i>
Total government funding	6 281.1	295.75	6 772.5	311.77

na not available

- (a) Although the Australian Capital Territory does not have a local government, its population has been included in calculations of per person funding. For more information see the Explanatory notes in *Cultural Funding by Government, Australia, 2008–09* (cat. no. 4183.0).
- (b) The Australian Government refers to the federal government. It does not refer to the aggregate of state and territory governments, nor does it include local government.
- (c) Funding of arts and cultural activities by local government are classified according to the Local Government Purpose Classification (LGPC) and cannot be compared directly to total heritage and total arts funding by the Australian and state and territory governments which are classified according to the Australian Culture and Leisure Classifications (ACLC).

Source: ABS data available on request, *Cultural Funding by Government, Australia, 2008–09*.

STATE AND TERRITORY
GOVERNMENT FUNDING

In 2008–09, funding for cultural activities provided by state and territory governments was \$3,033.7m, which was 45% of total cultural funding provided by all levels of government in Australia. This was an increase of \$222.9m or 7.9% on 2007–08 when state and territory government funding for cultural activities was \$2,810.8m.

The majority of cultural funding provided by state and territory government in 2008–09 was allocated to environmental heritage (\$1,397.0m or 46%), compared with \$1,327.2m (47%) in 2007–08. New South Wales had the highest proportion of state and territory government funding for environmental heritage (55%), followed by Western Australia (54%), Northern Territory (52%), Australian Capital Territory (45%), Queensland (43%), Tasmania (42%) and South Australian and Victoria (35%).

Funding for arts activities increased by 20% in 2008–09 to \$719.9m, compared with \$600.0m in 2007–08. This resulted in the value of funding per-person for arts activities increasing by 17%, from \$28.25 per-person in 2007–08, to \$33.14 per-person in 2008–09.

4.3 CULTURAL FUNDING, By State and territory government—Australia—2007–08 and 2008–09

	NSW	Vic.	Qld	SA	WA	Tas.	NT	ACT	Total
	\$m	\$m	\$m	\$m	\$m	\$m	\$m	\$m	\$m
2007–08									
Heritage									
Art museums	49.9	43.7	36.4	10.9	12.1	5.6	6.6	2.5	167.6
Other museums and cultural heritage	138.3	46.9	37.1	18.0	49.3	9.1	9.8	7.0	315.3
Environmental heritage	413.0	209.9	261.0	90.1	233.9	41.4	44.1	33.8	1 327.2
Libraries	67.3	85.9	48.8	29.6	37.6	19.0	12.0	12.1	312.3
Archives	7.9	15.1	51.9	6.5	2.3	2.5	1.4	0.8	88.5
<i>Total heritage</i>	<i>676.3</i>	<i>401.4</i>	<i>435.2</i>	<i>155.2</i>	<i>335.2</i>	<i>77.5</i>	<i>73.8</i>	<i>56.2</i>	<i>2 210.8</i>
Arts									
Literature and print media	1.4	1.6	1.5	0.7	1.6	0.2	0.9	0.2	8.2
Music performance	10.1	77.1	3.7	5.1	5.1	2.6	0.7	1.2	105.6
Drama	3.9	3.7	3.9	4.8	5.0	0.7	0.5	1.0	23.3
Dance	2.4	2.6	3.1	2.2	2.6	0.7	0.4	0.6	14.7
Music theatre and opera	3.3	4.3	6.3	1.2	1.6	0.2	—	—	16.8
Other performing arts	0.7	11.9	12.2	3.5	6.8	1.3	0.1	0.1	36.7
Performing arts venues	21.8	22.9	32.9	15.0	26.4	0.8	1.9	8.2	129.9
Music composition and publishing	—	—	0.2	0.1	—	—	—	0.7	1.1
Visual arts and crafts	7.7	4.2	5.3	3.1	4.7	0.9	1.1	1.1	28.2
Design	—	1.8	0.1	—	0.5	—	—	1.0	3.4
Radio and television services	0.1	—	—	0.1	—	—	—	0.1	0.3
Film and video production and distribution	10.9	44.6	19.6	9.0	14.5	1.1	0.4	0.2	100.3
Multimedia	0.1	2.2	0.4	1.7	0.6	0.1	0.2	1.1	6.3
Other arts	27.4	30.6	24.2	19.6	16.7	0.9	4.3	1.6	125.2
<i>Total arts</i>	<i>89.8</i>	<i>207.5</i>	<i>113.4</i>	<i>66.1</i>	<i>86.1</i>	<i>9.6</i>	<i>10.6</i>	<i>17.0</i>	<i>600.0</i>
Total	766.1	608.9	548.6	221.2	421.3	87.1	84.4	73.2	2 810.8
2008–09									
Heritage									
Art museums	34.0	49.8	50.5	14.2	12.4	5.3	6.6	2.5	175.2
Other museums and cultural heritage	121.4	68.9	54.3	27.4	39.7	10.2	11.4	5.0	338.3
Environmental heritage	432.9	207.3	289.8	91.8	258.5	39.5	42.5	34.6	1 397.0
Libraries	68.1	81.4	63.8	34.3	43.8	23.2	10.4	12.4	337.4
Archives	7.8	15.4	29.2	6.2	2.1	2.9	1.3	0.9	65.9
<i>Total heritage</i>	<i>664.1</i>	<i>422.8</i>	<i>487.5</i>	<i>174.1</i>	<i>356.5</i>	<i>81.0</i>	<i>72.3</i>	<i>55.5</i>	<i>2 313.8</i>
Arts									
Literature and print media	1.7	12.7	1.4	0.6	1.5	0.6	0.1	0.3	18.9
Music performance	12.9	26.1	4.5	4.3	5.0	3.1	1.0	2.0	58.8
Drama	5.5	4.4	6.3	5.1	6.7	0.6	0.3	1.3	30.1
Dance	2.4	3.6	4.4	1.8	4.8	0.3	0.4	0.7	18.2
Music theatre and opera	2.5	4.8	5.6	1.9	1.9	0.3	—	—	16.9
Other performing arts	2.4	13.0	12.9	1.5	1.9	2.9	0.1	0.1	34.6
Performing arts venues	45.9	21.7	83.7	22.2	55.5	0.4	1.2	10.6	241.2
Music composition and publishing	—	0.1	0.2	—	—	—	—	0.1	0.5
Visual arts and crafts	8.1	4.1	10.6	3.9	8.1	1.9	1.1	3.4	41.1
Design	0.8	3.0	0.2	0.2	0.7	0.1	—	—	4.9
Radio and television services	0.8	0.1	—	0.1	0.6	—	—	0.1	1.7
Film and video production and distribution	11.3	53.6	19.0	21.0	16.5	0.6	0.4	0.3	122.7
Multimedia	0.2	2.4	0.2	1.6	0.3	—	—	1.2	5.9
Other arts	27.1	26.2	17.3	25.1	20.9	1.2	5.5	0.9	124.2
<i>Total arts</i>	<i>121.6</i>	<i>175.6</i>	<i>166.2</i>	<i>89.2</i>	<i>124.2</i>	<i>12.0</i>	<i>10.1</i>	<i>20.9</i>	<i>719.9</i>
Total	785.7	598.4	653.7	263.3	480.7	93.1	82.4	76.4	3 033.7

— nil or rounded to zero (including null cells)

Source: *Cultural Funding by Government, Australia, 2008–09* (cat. no. 4183.0)LOCAL GOVERNMENT
FUNDING

In 2008–09, local government funding for cultural activities was \$1,154.2m, which was 17% of total cultural funding provided by all levels of government. This was an increase of \$115.5m or 11% on 2007–08 when local government funding for cultural activities was \$1,038.7m.

LOCAL GOVERNMENT
FUNDING *continued*

The majority of local government cultural funding was allocated to libraries in 2008–09 (\$727.5m or 63%), compared with \$645.9m (62%) in 2007–08. Most public libraries are funded at the local government level, except in Tasmania, the Northern Territory and the Australian Capital Territory where libraries are mainly or solely funded by the state and territory governments. As such, local governments in most states allocated a majority of their cultural funding to libraries in 2008–09. Of those states where libraries rely on local government funding, South Australia had the highest proportion of local government funding for libraries (77%), followed by Western Australia (71%), New South Wales (64%), Queensland (60%) and Victoria (59%).

The value of cultural funding per-person provided by local government increased by 8.6% to \$53.13 in 2008–09, from \$48.91 in 2007–08.

4.4 LOCAL GOVERNMENT CULTURAL FUNDING (a)(b)—2007–08 and 2008–09

	Art museums	Other museums and cultural heritage	Libraries	Performing arts	Cultural or arts services nec	Total cultural funding	Cultural funding per person (c)	Percentage change from previous year
	\$m	\$m	\$m	\$m	\$m	\$m	\$	%
2007–08								
New South Wales(d)	33.9	10.6	226.2	28.5	61.7	360.9	51.97	23.8
Victoria(e)	na	na	155.0	na	104.6	259.5	49.32	1.1
Queensland(f)	15.0	7.7	117.9	27.3	30.2	198.1	46.70	16.2
South Australia	2.1	4.3	67.8	6.0	10.0	90.2	56.60	5.9
Western Australia	na	na	79.1	na	32.7	111.8	52.27	–0.1
Tasmania	0.4	8.7	—	4.7	2.1	15.9	32.07	111.8
Northern Territory(e)	na	na	na	na	2.4	2.4	10.85	–9.3
Total	51.3	31.3	645.9	66.6	243.6	1 038.7	48.91	12.2
2008–09								
New South Wales	28.9	11.6	255.1	37.2	67.3	400.1	56.54	10.9
Victoria(e)	na	na	168.2	na	116.1	284.3	52.82	9.5
Queensland	20.2	5.5	140.9	35.8	32.2	234.6	53.73	18.4
South Australia	1.9	6.2	79.4	6.1	10.1	103.7	64.29	14.9
Western Australia	3.8	3.9	82.1	5.0	21.1	115.9	52.41	3.7
Tasmania	0.5	7.3	—	3.4	2.4	13.6	27.14	–14.4
Northern Territory(e)	na	na	1.8	na	0.3	2.1	9.32	–12.0
Total	55.2	34.5	727.5	87.6	249.5	1 154.2	53.13	11.1

— nil or rounded to zero (including null cells)

na not available

(a) Local Government Finance data is sourced from state/territory Local Government Grants Commissions, or equivalent.

(b) Care should be taken when comparing categories between states and territories. For further information see paragraphs 11 and 12 in the Explanatory notes of *Cultural Funding by Government, Australia, 2008–09* (cat. no. 4183.0).

(c) Although the Australian Capital Territory does not have a local government, its population has been included in calculations of per person funding. See paragraph 14 in the Explanatory Notes of *Cultural Funding by Government, Australia, 2008–09* (cat. no. 4183.0).

(d) The quality of New South Wales (NSW) data at the Local Government Purpose Classification (LGPC) 4 digit level is being adversely affected by the current structure of the collection instrument, as well as a marked decrease in the number of NSW councils reporting data by the LGPC for 2007–08.

(e) No data was recorded for Victoria and the Northern Territory for grants and subsidies provided by councils to community organisations.

(f) Data quality issues resulting from the local government amalgamations that occurred during the 2007–08 reference period resulted in high imputation rates for Queensland councils. This data should be viewed with caution.

Source: *Cultural Funding by Government, Australia, 2008–09* (cat. no. 4183.0)

EXPENDITURE ON
CULTURE BY BUSINESS

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

For sponsorships or in-kind support, businesses often receive advertising or promotional benefits. Donations on the other hand, are usually made unconditionally. While the donor is not repaid with any benefit or service, businesses and individuals can receive taxation benefits for donations of cash or property to organisations such as those listed on the Australian Government's Register of Cultural Organisations. According to DEWHA's Annual Report for 2008–09, 135,667 donations were made to these organisations during that year with a total value of \$60.0m.

A survey conducted by the Australia Business Arts Foundation (AbaF) found that arts and cultural organisations received \$212 million from the private sector in 2008–09, an increase of 4% on 2007–08 (\$204 million). This funding included cash, in-kind sponsorship, corporate donations and donations from foundations, trusts and individuals. Further information is available from the AbaF website www.abaf.org.au.

Another survey conducted by the Australian Major Performing Arts Group (AMPAG) found that \$48.7m was given to the 29 major opera, music, dance, drama and circus companies in Australia in 2009. Corporate sponsorship accounted for 54% of total sponsorship and donation revenue, donations 41% and fundraising events (net) 5%. Further information is available from the AMPAG website www.ampag.com.au.

SOURCES OF SUPPORT
FOR ARTS AND CULTURAL
ORGANISATIONS

In the years 2002–03, 2003–04, 2006–07 and 2007–08, the ABS collected financial details for selected cultural industries through a series of surveys of businesses and organisations. Care must be taken when interpreting these figures as different industries were surveyed in different years.

Public libraries were the most reliant on government funding, receiving 93% of their total income from government sources in 2003–04. At the other end of the scale, those organisations involved in performing arts venue operation and performing arts operation relied least on public funds, with 34% and 24% of their respective total incomes sourced from government in 2006–07.

Private fundraising involves raising income through sponsorship, donations or bequests. Museums generated \$106.0m through private fundraising (sponsorship, donations and bequests) in 2007–08, up from \$89.0m in 2003–04. Performing arts operation also received a large amount from private fundraising in 2006–07 (\$53.8m), while performing arts venue operation received \$13.9m.

In 2006–07, performing arts operation received a large amount of funding through sponsorship (\$32.0m or 4% of total income). In 2002–03, performing arts festivals received \$21.8m (25% of total income) from sponsorship.

4.5 SUPPORT FOR ARTS AND CULTURAL ORGANISATIONS (a)—Various years

	Sponsorship	Donations, bequests, other	Total	Government funding	Total funding(b)	Total income
VALUE (\$ m)						
2007–08						
Museums	23.1	83.0	106.0	657.8	764.0	998.4
2006–07						
Performing arts operation	32.0	21.8	53.8	173.8	227.6	733.4
Performing arts venue operation	9.1	4.8	13.9	165.7	179.6	494.4
2003–04						
Public libraries	np	np	(c) 7.5	781.2	788.7	839.0
2002–03						
Performing arts festivals	21.8	2.5	24.3	27.0	51.3	88.5
AS A PERCENTAGE OF TOTAL INCOME (%)						
2007–08						
Museums	2.3	8.3	10.6	65.9	76.5	100.0
2006–07						
Performing arts operation	4.3	3.1	7.3	23.7	31.0	100.0
Performing arts venue operation	1.8	1.0	2.8	33.5	36.3	100.0
2003–04						
Public libraries	np	np	0.9	93.1	94.0	100.0
2002–03						
Performing arts festivals	24.6	2.8	27.5	30.5	58.0	100.0
np	not available for publication but included in totals where applicable, unless otherwise indicated		Source: <i>Museums, Australia, 2007–08</i> (cat. no. 8560.0); <i>Performing Arts, Australia, 2006–07</i> (cat. no. 8697.0); <i>Public Libraries, Australia, 2003–04</i> (cat. no. 8561.0); <i>Performing Arts, Australia, 2002–03</i> (cat. no. 8697.0).			
(a)	Excludes funds provided as loans or advances.					
(b)	Refers to total income gained through fundraising and government funding.					
(c)	Includes some other income such as interest.					

INTRODUCTION

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

SOURCES OF DATA

The Census of Population and Housing

The 2006 Census of Population and Housing collected information on a person's main job (the one in which they usually worked the most hours) in the week before the Census. A range of demographic information including sex, age, birthplace, income, hours worked and state or territory of usual residence as well as details on occupation and industry are available from the Census. While this chapter provides some data from the Census on cultural employment, it is by no means exhaustive and substantially more can be found in the ABS publication *Employment in Culture, Australia, 2006* (cat. no. 6273.0).

For the 2006 Census, occupation and industry data were dual coded. This gives users the option to use either *Australian and New Zealand Standard Classification of Occupations (First Edition, 2006)* (ANZSCO) (cat. no. 1220.0) or *Australian Standard Classification of Occupations (Second Edition, 1997)* (ASCO) (cat. no. 1220.0) when analysing occupation data. Users can also choose between *Australian and New Zealand Standard Industrial Classification (ANZSIC) 1993* (cat. no. 1292.0) or *ANZSIC 2006 (Revision 1.0)* when analysing industry data. This is why the figures in table 5.1 for employment in cultural industries differ from table 5.2. Unless comparing data over time, the 2006 occupation figures using ANZSCO and the 2006 industry figures using ANZSIC 2006 should be reported.

The list of cultural occupations shown in this chapter is based on the Occupation Classification of the *Australian Culture and Leisure Classifications 2008 (Second Edition)* (ACLC) (cat. no. 4902.0). Occupations were selected because they require creative participation (e.g. sculptors and actors), or have a role in enabling others to participate in a cultural activity (e.g. librarians).

Survey of Work in Selected Culture and Leisure Activities

The survey of Work in Selected Culture and Leisure Activities has been collected as a supplement to the monthly Labour Force Survey since 1993. There has been slight changes in methodology during this time. Unlike the Census, the surveys covered all cultural work including second jobs and both paid and unpaid involvement. The surveys asked people aged 15 years and over about their involvement in cultural activities over a

Survey of Work in Selected Culture and Leisure Activities continued 12-month period. Data from the 2007 survey appears in *Work in Selected Culture and Leisure Activities, Australia, April 2007* (cat. no. 6281.0).

Voluntary Work Survey The 2006 Voluntary Work Survey collected information about volunteering for a range of organisations, including those relating to arts and heritage. The demographic details of volunteers, their reasons for volunteering and the frequency and duration of their involvement were all collected. Summary results from the 2006 survey are published in *Voluntary Work, Australia, 2006* (cat. no. 4441.0).

Service Industry Surveys Different surveys collect information about different populations. The Census, Work in Selected Culture and Leisure Activities and the Voluntary Work Survey obtain their data from households whereas the Service Industry Surveys collect information from cultural organisations. These organisations are able to provide information on the number of people they employ and the number of volunteers whose services they use.

Survey of Employee Earnings and Hours The August 2008 survey of Employee Earnings and Hours provides information on the composition and distribution of the earnings and hours of wage and salary earners. Data from this survey have been published in *Employee Earnings and Hours, Australia, August 2008* (cat. no. 6306.0).

CHOOSING A DATA SOURCE

Each data source provides a different perspective on employment or voluntary work in the cultural sector. Which source to use is dependent on what one is trying to measure. For example, if seeking a regional breakdown (below state or territory level) or a fine level of detail on the occupation of a person working in a cultural industry, the Census is the most appropriate data source however, it only refers to a person's main job in the week prior to Census Night. If information on the total number of people involved in culture is required and detailed data on the characteristics of those involved is less important, then the 'Work in Culture' Survey data would be the most useful. If trying to compare the number of people who volunteer to work in heritage and arts organisations, with those offering their services elsewhere, the Voluntary Work Survey should be used.

The Service Industry Surveys are the most appropriate source if details on the number of people working in selected industries are required. Unlike the Census, these surveys include people working in the industries in second jobs or in an unpaid capacity. However, many of the Service Industry Surveys cited in this publication only collected information from employing organisations, therefore those organisations which rely solely on the services of volunteers were excluded. Changes in coverage occurred in the 2003–04 Museums and Public Libraries Surveys and the 2006–07 Performing Arts and Television, Film and Video Production and Post-production Services Surveys. These surveys included employing and non-employing organisations.

CENSUS OF POPULATION AND HOUSING

The 2006 Census of Population and Housing found there were approximately 296,183 people whose main job in the week prior to Census night was in a cultural industry (classified by ANZSIC 1993) compared to 299,266 in 2001.

CENSUS OF POPULATION
AND HOUSING *continued*

While industries as a whole reported a 10% increase in employment from 2001 to 2006, employment in cultural industries decreased by 1%. The size of the change over that period differed for individual cultural industries. For example, the largest increase in employment was in the photographic studios industry (45%). This was followed by a 28% increase in the other periodical publishing industry. The largest decrease in employment was 46% in the libraries, museums and the arts undefined industry followed by the libraries industry at 39%.

5.1 PERSONS EMPLOYED IN CULTURAL INDUSTRIES (a)(b)—August 2001 and 2006

	Persons 2001	Persons 2006	Percentage Change
	no.	no.	%
Newspaper printing or publishing	25 737	27 533	7.0
Other periodical publishing	8 716	11 166	28.1
Book and other publishing(c)	11 322	9 094	-19.7
Film and video production	7 702	8 215	6.7
Film and video distribution	1 057	850	-19.6
Motion picture exhibition	10 079	8 852	-12.2
Radio services	5 879	5 230	-11.0
Television services	17 388	15 836	-8.9
Film, video and TV services undefined(d)	1 262	898	-28.8
Music and theatre productions	10 812	8 621	-20.3
Creative arts	9 345	9 325	-0.2
Other services to the arts(e)	5 643	5 582	-1.1
Libraries	11 451	6 986	-39.0
Museums	5 422	6 204	14.4
Libraries, museums and the arts undefined(f)	977	526	-46.2
Parks and gardens(g)	10 322	8 840	-14.4
Photographic studios	4 868	7 059	45.0
Design(h)	67 362	71 936	6.8
Other cultural industries	83 922	83 430	-0.6
Total cultural industries(i)	299 266	296 183	-1.0

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

(b) Industries defined by the *Australian and New Zealand Standard Industrial Classification, 1993* (cat. no. 1292.0).

(c) Includes publishing undefined.

(d) Comprises motion picture, radio and TV services undefined, film and video services undefined and radio and TV services undefined.

(e) Comprises sound recording studios, performing arts venues, services to the arts n.e.c and services to the arts undefined.

(f) Includes arts undefined.

(g) Comprises zoological and botanic gardens, recreational parks and gardens and parks and gardens undefined.

(h) Comprises architectural services, commercial art and display services and advertising services.

(i) Includes persons employed by religious organisations.

Source: *Employment in Culture, Australia, 2006* (cat. no. 6273.0).

As displayed in table 5.2, in the 2006 Census 345,950 people stated that they were employed in the cultural industries (classified by ANZSIC 2006). The major employing industries were printing (37,543 people employed), other cultural industries (32,518), newspaper and book retailing (28,010), newspaper publishing (26,573) and other specialised design services (18,632). The smallest employing industries were music publishing (234 people employed), music and other sound recording activities (814) and motion picture and video distribution (871).

CENSUS OF POPULATION
AND HOUSING *continued*

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

- be female (49% in cultural industries, compared with 46% in all industries)
- work between 1 and 34 hours each week (34% compared with 30% in all industries)
- have a weekly income below \$400 a week (25% compared with 21% in all industries).

About 45% of the people employed in the cultural industries had a cultural occupation (i.e. their work was culturally-orientated such as a writer, painter or curator), with the remainder having non-cultural occupations such as receptionists, sales assistants, clerks, cleaners and security guards.

5.2 PERSONS EMPLOYED IN CULTURAL INDUSTRIES(a)(b)(c), By whether working in cultural occupations(d)—August 2006

Industry	Cultural occupations	Other occupations(e)	Total	Percentage of occupations which are cultural
	no.	no.	no.	%
Libraries and archives	5 249	1 757	7 006	74.9
Museum operation	2 619	3 793	6 412	40.8
Zoological and botanic gardens operation	596	1 975	2 571	23.2
Nature reserves and conservation parks operation	1 385	4 759	6 144	22.5
Printing	17 960	19 583	37 543	47.8
Newspaper publishing	12 386	14 187	26 573	46.6
Magazine and other periodical publishing	3 726	4 852	8 578	43.4
Internet publishing and broadcasting	308	850	1 158	26.6
Book publishing	2 370	4 004	6 374	37.2
Music publishing	36	198	234	15.4
Reproduction of recorded media	298	1 988	2 286	13.0
Music and other sound recording activities	495	319	814	60.8
Book and magazine wholesaling	266	3 357	3 623	7.3
Entertainment media retailing	300	5 332	5 632	5.3
Newspaper and book retailing	233	27 777	28 010	0.8
Architectural services	20 373	9 713	30 086	67.7
Advertising services	8 092	19 555	27 647	29.3
Other specialised design services	12 907	5 725	18 632	69.3
Motion picture and video production	5 381	1 983	7 364	73.1
Post-production services and other motion picture and video activities	515	383	898	57.3
Motion picture and video distribution	114	757	871	13.1
Motion picture exhibition	2 258	6 642	8 900	25.4
Radio broadcasting	2 495	2 731	5 226	47.7
Free-to-air television broadcasting	7 813	4 833	12 646	61.8
Cable and other subscription broadcasting	556	2 372	2 928	19.0
Performing arts operation	2 768	1 552	4 320	64.1
Creative artists, musicians, writers and performers	11 923	2 558	14 481	82.3
Performing arts venue operation	719	1 956	2 675	26.9
Video and other electronic media rental	145	10 832	10 977	1.3
Professional photographic services	5 242	1 875	7 117	73.7
Arts education	12 059	3 647	15 706	76.8
Other cultural industries(f)	15 604	16 914	32 518	48.0
Total cultural industries	157 191	188 759	345 950	45.4

(a) Cells in this table have been randomly adjusted to avoid the release of confidential data.

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

(c) Industries defined by the *Australian and New Zealand Standard Industrial Classification, 2006* (cat. no. 1292.0).

(d) The cultural occupations included are a subset of the ANZSCO First Edition Alternative View Culture and Leisure. For more information see *Australian and New Zealand Standard Classification of Occupations, First Edition, 2006* (cat. no. 1220.0).

(e) Includes not stated or inadequately described.

(f) Comprises religious organisations and funeral, crematorium and cemetery services.

Source: ABS data available on request, Census of Population and Housing, 2006.

CENSUS OF POPULATION AND HOUSING *continued*

The 2006 Census of Population and Housing found that there were 284,791 people whose main job in the week prior to Census night was in a cultural occupation (classified by ANZSCO). Some of the more common cultural occupations included design workers, architects and urban planners and printing workers.

According to the 2006 Census of Population and Housing, more males (55%) than females (45%) worked in cultural occupations. In particular, males dominated the occupations of broadcasting, film and recorded media equipment operator, camera operator, light and sound technician and television equipment operator. Conversely, females greatly outnumbered males in occupations such as library and archive workers

CENSUS OF POPULATION
AND HOUSING *continued*

and other arts support workers. More information can be found in *Employment in Culture, Australia, 2006* (cat. no. 6273.0).

According to the 2006 Census, the median weekly income for all persons working in cultural occupations was \$741, compared with \$718 for all employed persons.

5.3 EMPLOYED PERSONS BY OCCUPATION (a)(b)(c)—August 2006

<i>Occupation</i>	<i>Persons employed</i>
	no.
Built, collectable and environmental heritage workers	9 763
Library and archive workers	25 741
Other heritage workers	68
Writers and print media workers	23 769
Performing artists and music composers	15 412
Performing arts support workers	14 745
Visual arts and crafts professionals	14 153
Architects and urban planners	32 038
Design workers	59 333
Broadcasting, film and recorded media equipment operators	8 125
Printing workers	31 073
Other arts support workers	21 119
Other arts workers	4 271
Other cultural occupations	25 181
<i>Total cultural occupations</i>	<i>284 791</i>
Other occupations(d)	8 819 396
Total employed persons	9 104 187

- (a) Cells in this table have been randomly adjusted to avoid the release of confidential data.
- (b) In their main job in the week before Census Night.
- (c) The cultural occupations included are a subset of the ANZSCO First Edition Alternative View Culture and Leisure. For more information see *Australian and New Zealand Standard Classification of Occupations, First Edition, 2006* (cat. no. 1220.0).
- (d) Includes not stated or inadequately described.

Source: ABS data available on request, Census of Population and Housing, 2006.

WORK IN CULTURE AND
LEISURE ACTIVITIES
SURVEY

Due to the large number of people involved in the cultural sector through second jobs and unpaid work, the Census was unable to fully represent employment within this sector. To account for this, the ABS conducted a survey to collect more information on all the ways in which people could be involved in the sector.

In 2007, the survey of Work in Selected Culture and Leisure Activities found that there were about 3.5 million people (22% of the population aged 15 years and over) in Australia who had worked in a culture or leisure activity in the 12-months before interview. Of these, some 701,800 stated that their involvement was part of their main job.

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

5.4 INVOLVEMENT BY PAYMENT STATUS AND STATE OR TERRITORY(a), By sex—12 months ending April 2007

	Some paid involvement(b)	Unpaid involvement only	Total persons involved(c)	Persons with no involvement	Total persons	Participation rate
	'000	'000	'000	'000	'000	%
MALES						
New South Wales	166.4	325.7	497.9	2 181.7	2 679.7	18.6
Victoria	134.1	242.5	382.4	1 630.7	2 013.1	19.0
Queensland	102.3	188.8	296.1	1 276.7	1 572.8	18.8
South Australia	36.3	88.1	127.1	483.8	610.9	20.8
Western Australia	51.6	95.3	150.3	644.6	794.9	18.9
Tasmania	9.4	32.8	42.6	146.4	189.0	22.5
Northern Territory	*6.3	8.0	14.3	44.2	58.5	24.4
Australian Capital Territory	12.9	19.2	32.5	92.9	125.4	25.9
<i>Australia</i>	519.3	1 000.4	1 543.1	6 501.1	8 044.2	19.2
FEMALES						
New South Wales	177.1	442.6	624.3	2 129.3	2 753.6	22.7
Victoria	144.7	344.5	494.9	1 593.6	2 088.5	23.7
Queensland	103.0	277.5	383.9	1 210.0	1 594.0	24.1
South Australia	38.9	126.3	167.3	462.4	629.7	26.6
Western Australia	48.5	154.3	203.6	600.9	804.6	25.3
Tasmania	10.7	41.4	52.3	144.4	196.7	26.6
Northern Territory	6.6	10.9	17.5	38.0	55.5	31.5
Australian Capital Territory	13.3	30.6	44.0	87.6	131.6	33.5
<i>Australia</i>	542.8	1 428.2	1 987.9	6 266.4	8 254.3	24.1
PERSONS						
New South Wales	343.5	768.3	1 122.2	4 311.1	5 433.3	20.7
Victoria	278.8	587.1	877.3	3 224.3	4 101.6	21.4
Queensland	205.3	466.4	680.1	2 486.7	3 166.8	21.5
South Australia	75.3	214.4	294.3	946.2	1 240.5	23.7
Western Australia	100.0	249.6	353.9	1 245.5	1 599.4	22.1
Tasmania	20.1	74.2	94.9	290.8	385.7	24.6
Northern Territory	12.9	18.9	31.8	82.2	114.0	27.9
Australian Capital Territory	26.2	49.8	76.5	180.5	257.0	29.8
<i>Australia</i>	1 062.1	2 428.6	3 531.0	12 767.4	16 298.5	21.7

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

(a) Involvement is for 12 months prior to interview.

(b) Includes persons who only received goods or services as payment.

(c) Includes persons who did not state whether involvement was paid.

Source: *Work in Selected Culture and Leisure Activities, April 2007*

(cat. no. 6281.0).

WORK IN CULTURE AND LEISURE ACTIVITIES SURVEY *continued*

There were 360,300 people who had some paid involvement in culture and leisure activities in the 12-months before interview who stated that the activity was not related to their main job held in the last week. For example, many people worked as live performers (65,700) writers (56,400) or designers (49,100), in addition to their primary job.

The most common types of cultural activities which formed part of the person's main job were design (230,700 people), writing (184,300 people), creating artworks with a computer (98,400 people) and designing web sites (83,300 people).

5.5 PERSONS WITH PAID INVOLVEMENT(a)(b), Type of activity by whether part of main job(c)—12 months ending April 2007

	Activity part of main job(c)	Activity not part of main job(c)	Total persons with some paid involvement
Heritage			
Museums	8	1	10
Public art galleries	10	5	15
Libraries and archives	29	7	*36
Heritage organisations	4	*6	**10
Botanic gardens	*7	**3	9
National parks and reserves	**8	5	13
Zoos and aquaria	6	2	8
<i>Total heritage(d)</i>	60	23	84
Arts			
Visual art activities			
Drawing	65	28	92
Painting	28	30	58
Sculpture	13	5	18
Photography	53	34	87
Print-making	22	4	26
Creating artworks with a computer	98	39	137
Other visual art activities	11	7	18
<i>Total visual art activities(d)</i>	185	97	282
Craft activities			
Pottery and ceramics	14	3	17
Textiles	23	17	40
Jewellery making	10	23	33
Furniture-making and wood crafts	36	16	52
Glass crafts	5	3	8
Other craft activities	14	11	25
<i>Total craft activities(d)</i>	74	65	139
Writing	184	56	241
Publishing	81	25	106
Performing arts			
Performer	13	26	39
No involvement as performer	23	15	38
<i>Total performing arts(d)</i>	36	41	77
Music			
Live performer	25	66	91
No involvement as live performer	20	9	28
<i>Total music(d)</i>	45	74	119
Radio	11	14	25
Television	20	24	43
Film production	16	19	35
Cinema and video distribution	12	9	21
Designing websites	83	29	112
Designing computer games and other interactive software	34	6	40
Design	231	49	280
Teaching	65	46	111
Festival organising	51	32	83
Art or craft show organising	23	13	36
Government arts departments and agencies	14	6	20
<i>Total arts(d)</i>	669	347	1 016
Total(d)	702	360	1 062

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

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

(a) Involvement is for 12 months prior to interview.

(b) Includes persons who only received goods or services as payment.

(c) Main job held in the week prior to interview. If the person held multiple jobs during this week, it was the respondent's decision as to which was the main job.

(d) Components may not add to totals as some persons were involved in more than one activity.

Source: *Work in Selected Culture and Leisure Activities, 2007* (cat. no. 6281.0).

VOLUNTARY WORK SURVEY

Some cultural industries rely heavily on the activities of volunteers to assist their paid workforce. The 2006 Voluntary Work Survey defined a volunteer as someone who willingly gave unpaid help in the form of time, services or skills, through a club, organisation or association. It found that about 34% of people in Australia aged 18 years and over undertook some sort of voluntary work in the 12-months before interview in 2006. Some 207,200 people (1% of the population) undertook voluntary work for heritage and arts organisations.

5.6 PERSONS UNDERTAKING VOLUNTARY WORK FOR HERITAGE AND ARTS ORGANISATIONS—2006

	<i>Number of volunteers</i>	<i>Per cent of the population</i>
	'000	%
Males	76.1	1.0
Females	131.0	1.7
Persons	207.2	1.4

Source: *Voluntary Work, Australia, 2006* (cat. no. 4441.0).

Some of the people undertaking voluntary work provided assistance to more than one heritage and arts organisation. Consequently, the total number of involvements in heritage and arts organisations (223,700) exceeded the total number of volunteers (207,200).

The most common types of volunteer involvements in heritage and arts was with organisations involved in performing arts (46%) and museums, antiques and collectables (19%).

SERVICE INDUSTRY SURVEYS

The Service Industry Surveys collect information from employers in selected cultural industries. Table 5.7 displays the number of employees in these industries. Care must be taken when interpreting these figures as different industries were surveyed in different years.

Of the selected cultural industries surveyed between 2002–03 and 2007–08, public libraries was the highest employing industry with 12,471 employees in 2003–04. Other cultural industries with large numbers of employees were the film and video production industry (10,873 employees in 2006–07) and art and other museums (7,624 employees in 2003-04).

5.7 PERSONS EMPLOYED IN SELECTED CULTURAL INDUSTRIES, At end June—Various years

	Full-time	Part-time and casual	Working proprietors and partners of unincorporated businesses	Salaried directors of incorporated businesses	Total
	no.	no.	no.	no.	no.
June 2008					
Museums and art galleries	3 608	4 248	na	na	7 856
June 2007					
Performing arts operation	2 658	3 223	291	396	6 569
Performing arts venue operation	1 472	4 367	na	38	5 876
Film and video					
Production services	2 769	5 724	400	1 979	10 873
Post-production services	1 645	734	**155	437	2 971
Television services(a)					
Commercial television broadcasting	5 086	1 894	na	na	6 980
Subscription television broadcasting	na	na	na	na	3 052
June 2004					
Public libraries(b)	5 889	6 583	na	na	12 471
June 2003					
Performing arts festivals	345	927	na	na	1 272

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

na not available

(a) Excludes public television broadcasters and community broadcasters.

(b) Excludes national and state archives, special libraries and libraries located in educational institutions.

Source: *Museums, Australia, 2007–08* (cat. no. 8560.0); *Performing Arts, Australia, 2002–03, 2006–07* (cat. no. 8697.0); *Television, Film and Video Production and Post-production Services, 2006–07* (cat. no. 8679.0); *Public Libraries, Australia, 2003–04* (cat. no. 8561.0).

SERVICE INDUSTRY SURVEYS *continued*

Many cultural industries are run as commercial operations and are exclusively staffed by paid employees. A few industries, however, rely heavily on the assistance of volunteers. The Service Industry Surveys found that 23,426 volunteers helped in the running of museums during June 2008, which is more than three times the number of people with paid employment in the industry at that time. Similarly, 6,582 people undertook voluntary work for performing arts operations during June 2007. This was slightly more than the number of paid employees (6,569).

Some 6,853 people undertook voluntary work for public libraries during June 2004, which is approximately one volunteer for every two paid employees. Performing arts venue operations employed 5,876 people in 2007, with an additional 1,935 people volunteering in this industry.

SERVICE INDUSTRY
SURVEYS *continued*

5.8 VOLUNTEERS IN SELECTED CULTURAL INDUSTRIES—At end June
– Various years

	Volunteers
	no.
June 2008	
Museums	23 426
June 2007	
Performing arts operation	6 582
Performing arts venue operation	1 935
June 2004	
Public libraries(a)	6 853

(a) Excludes libraries operated privately by organisations for internal reference purposes, and libraries located in educational institutions.

Source: *Museums, Australia, 2007–08* (cat. no. 8560.0); *Performing Arts, Australia, 2006–07* (cat. no. 8697.0); *Public Libraries, Australia, 2003–04* (cat. no. 8561.0).

EMPLOYEE EARNINGS
AND HOURS

Earnings of wage and salary earners by occupation is available from *Employee Earning and Hours, Australia, 2008* (cat. no. 6306.0), however the information is not available at the detailed occupation level collected in the 2006 Census of Population and Housing. This survey showed that arts professionals who worked as full-time employees (excluding those who were self-employed) worked an average of 34.2 hours per week and had weekly earnings of \$1,198. Media professionals worked an average of 37.7 hours per week and received weekly earnings of \$1,379. Printing trades workers worked an average of 37.4 hours per week for weekly earnings of \$953. By comparison, all wage and salary earners worked an average of 38.1 hours per week with earnings totalling \$1,130.

5.9 FULL-TIME ADULT NON-MANAGERIAL EMPLOYEES (a), Earnings
and hours(b)—August 2008

	<u>Males</u>		<u>Females</u>		<u>Total</u>	
	\$	hours	\$	hours	\$	hours
Arts professionals	1 454	33.2	967	35.1	1 198	34.2
Media professionals	1 488	38.0	1 205	37.1	1 379	37.7
Printing trades workers	940	37.4	1 055	37.7	953	37.4
All occupations	1 188	38.3	1 042	37.7	1 130	38.1

(a) Selected cultural occupations based on ANZSCO (First edition 2006)
(b) Average weekly total earnings and hours paid for ordinary time. Comprises regular wages and salaries in cash, including amounts salary sacrificed. Excluded are non-cash components of salary packages, over-time payments, retrospective pay, pay in advance, leave loadings, severance pay, and termination and redundancy payments.

Source: *Employee Earnings and Hours, Australia, August 2008* (cat. no. 6306.0).

AUSTRALIAN NATIONAL
ACCOUNTS

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

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

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

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

The latest product data available are for the year 2005–06. These data show that the Australian production of cultural goods and services totalled \$45,907m.

In 2005–06, the value of radio and TV station services was \$9,914m which was 22% of the total value of the cultural goods and services produced that year. Architectural services (11%) was the only other cultural product to account for more than 10%.

The data in table 6.1 show the value of cultural goods and services produced in Australia. This is a gross measure which includes the value of output produced by other industries that are used by the cultural industries in producing their output. For instance, the category radio and TV station services includes the purchase of the rights to broadcast sport events which are the output of another industry (i.e. the sport, recreation and gambling services industry).

6.1 PRODUCTION OF CULTURAL GOODS AND SERVICES (a)(b)—2005–06

<i>Product item</i>	<i>Percentage of total cultural goods and services produced</i>	
	<i>Australian production</i>	<i>%</i>
	<i>\$m</i>	<i>%</i>
Publishing and recorded media		
Newspapers, printing or publishing	2 665	5.8
Newspapers - advertising sales	3 277	7.1
Magazines and bound periodicals publishing	1 037	2.3
Other periodicals - advertising sales	1 025	2.2
Books, sheet music, maps, etc. publishing	1 387	3.0
Books, maps and sheet music - advertising sales	1 639	3.6
Pre-recorded audio and video tapes, disks and records, manufactured or published(c)	1 788	3.9
Royalties income and licence fees	106	0.2
<i>Total(d)</i>	<i>12 924</i>	<i>28.2</i>
Motion picture, radio and television services		
Motion picture production	936	2.0
Film hiring services	150	0.3
Motion picture theatre services	801	1.7
Radio and TV station services	9 914	21.6
Pay TV	3 040	6.6
Royalties income and licence fees	—	—
<i>Total(d)</i>	<i>15 183</i>	<i>33.1</i>
Libraries, museums and the arts		
Library, museum and art gallery services	1 301	2.8
Zoological and botanical gardens	1 200	2.6
Recreational parks and gardens operation	807	1.8
Creative arts	1 104	2.4
Music and theatre production operation	619	1.3
Sound recording studios operation	140	0.3
Performing arts venue operation	1 423	3.1
Casting agency operation	37	0.1
News reporting services	335	0.7
Services to the arts n.e.c.	347	0.8
Royalties income and licence fees	173	0.4
<i>Total(d)</i>	<i>7 922</i>	<i>17.3</i>
Other cultural products		
Television receiving sets	102	0.2
Musical instruments (incl. parts and accessories) production	47	0.1
Architectural services	4 988	10.9
Commercial art and display services	2 322	5.1
Television and video hire	1 568	3.4
Radio and television studio equipment	384	0.8
Record playing	88	0.2
Photography services n.e.c.	379	0.8
<i>Total</i>	<i>9 878</i>	<i>21.5</i>
Total	45 907	100.0

— nil or rounded to zero (including null cells)

- (a) At basic values - the net price received by the producer (after deducting any indirect taxes).
- (b) Excludes products primary to: the recorded media manufacturing and publishing industry; the book and magazine wholesaling industry; the newspaper, book and stationery retailing industry; and the recorded music retailing industry (details for these industries are not available separately).
- (c) Includes computer tapes and compact disks.
- (d) Includes general government consumption of fixed capital and other income.

Note: Input-output tables are a disaggregation of the gross domestic product account showing inter-industry flows of goods and services. They are compiled using a large number of data sources, which are of varying quality and frequency. These processes result in individual components being modelled and adjusted, and this is particularly true for those with relatively small values. Users should therefore be very cautious when considering isolated fragments of the tables, especially details at the product level.

Source: Australian National Accounts: Input-Output Tables (Product details), 2005-06 (cat. no. 5215.0.55.001).

AUSTRALIAN NATIONAL
ACCOUNTS *continued*

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

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

Value added data are only available on an industry basis, and not by individual products. The value of the goods and services produced by the cultural industries for which value added data were available in 2005–06 was \$31,905m. The value added component of these cultural industries was \$12,196m, which indicates that 38% of the value of goods and services produced by the cultural industries was paid to factors of production (labour and capital). The remaining \$19,709m (62%) was paid to other industries for their output which was used in producing the cultural goods and services. These selected cultural industries account for 1.4% of the total value added for all industries.

To put this into context, the value of Australian production for these selected cultural industries was approximately the same as that of electricity supply (\$28,970m) and banking (\$35,444m).

6.2 OUTPUT AND VALUE ADDED (a), Selected Cultural Industries—2005–06

<i>Industry</i>	<i>Australian production(b)</i>	<i>Value added</i>
	\$m	\$m
Motion picture, radio and television services	15 099	4 388
Libraries, museums and the arts	7 922	3 054
Publishing, recorded media, etc.	8 884	4 754
<i>Total for selected cultural industries</i>	31 905	12 196
Total for all industries	1 875 537	887 959

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

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

Source: *Australian National Accounts: Input-Output Tables, 2005-06* (cat. no. 5209.0.55.001).

ECONOMIC AND
FINANCIAL PERFORMANCE

Australian Industry, 2008–09 (cat. no. 8155.0) has more detailed data on selected cultural industries, which is provided in table 6.3, at the sub-division level. Information about industry classifications (such as sub-divisions) can be found in *Australian and New Zealand Standard Industrial Classification (ANZSIC), 2006 edition* (cat. no. 1292.0).

Between 2007-08 and 2008-09, the number of people employed in motion picture, sound and recording activities increased by 13% (4,000 employees). Over the same period, printing (including the reproduction of recorded media) recorded an increase of 4% (2,000 people).

ECONOMIC AND
FINANCIAL PERFORMANCE
continued

The largest percentage increase in total income between 2007–08 and 2008–09 was 20% (\$65m) for library and other information services, followed by creative and performing arts activities (6% or \$189m). The greatest dollar value increase was \$252m (3%) for printing (including the reproduction of recorded material).

Motion picture and sound recording activities had the greatest increase of operating profits before tax in 2008–09, at 58% (\$208m), followed by Internet publishing and broadcasting 39% (\$84m) and library and information services at 7% (\$2m).

Publishing (except Internet and music publishing) had the highest industry value added in 2008–09 at \$7,494m, followed by printing (including the reproduction of recorded media) (\$4,407m) and broadcasting (except Internet) (\$4,010m). Printing (including the reproduction of recorded media) had the highest percentage of businesses making a profit at 75%, closely followed by publishing (except Internet and music publishing) at 73% and motion picture and sound recording activities at 69%.

6.3 INDUSTRY PERFORMANCE, by selected ANZSIC subdivision—2006–07 to 2008–09

ANZSIC subdivision		2006–07	2007–08	2008–09
Printing (including the reproduction of recorded media)				
Employment at end of June(a)	'000	^ 50	48	50
Sales and service income(b)	\$m	9 361	9 429	9 876
Total income	\$m	9 466	9 666	9 918
Total expenses	\$m	8 724	8 827	9 169
Industry value added(c)	\$m	r3 979	r4 072	4 407
Operating profit before tax(c)	\$m	^ 752	*852	^ 821
Industry value added per person employed(d)	\$'000	r79	r84	89
Percentage of businesses that made a profit	%	76	69	75
Percentage of businesses that broke even	%	1	—	—
Percentage of businesses that made a loss	%	23	30	25
Publishing (except Internet and music publishing)				
Employment at end of June(a)	'000	48	r49	48
Sales and service income(b)	\$m	12 665	r13 889	13 819
Total income	\$m	12 782	r14 138	9 579
Total expenses	\$m	9 943	r10 961	11 370
Industry value added(c)	\$m	r6 732	r7 687	7 494
Operating profit before tax(c)	\$m	2 839	3 169	–1 768
Industry value added per person employed(d)	\$'000	r141	r156	157
Percentage of businesses that made a profit	%	72	80	73
Percentage of businesses that broke even	%	—	—	3
Percentage of businesses that made a loss	%	28	20	24
Motion picture and sound recording activities				
Employment at end of June(a)	'000	27	31	35
Sales and service income(b)	\$m	^ 5 024	r5 793	6 087
Total income	\$m	^ 5 222	r6 036	6 189
Total expenses	\$m	^ 4 469	r5 722	5 666
Industry value added(c)	\$m	r1 956	r2 045	^ 2 135
Operating profit before tax(c)	\$m	^ 761	**r357	**565
Industry value added per person employed(d)	\$'000	r71	66	61
Percentage of businesses that made a profit	%	69	65	69
Percentage of businesses that broke even	%	1	3	1
Percentage of businesses that made a loss	%	30	32	31
Broadcasting (except Internet)				
Employment at end of June(a)	'000	19	18	18
Sales and service income(b)	\$m	8 616	r8 503	8 619
Total income	\$m	9 114	r9 017	8 969
Total expenses	\$m	7 821	r7 070	7 635
Industry value added(c)	\$m	r3 659	r3 968	4 010
Operating profit before tax(c)	\$m	^ 1 301	r1 982	1 375
Industry value added per person employed(d)	\$'000	r195	r216	229
Percentage of businesses that made a profit	%	65	69	55
Percentage of businesses that broke even	%	—	—	7
Percentage of businesses that made a loss	%	35	31	39

^ estimate has a relative standard error of 10% to less than 25% and should be used with caution

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

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

— nil or rounded to zero (including null cells)

r revised

(a) Includes working proprietors.

(b) Includes rent, leasing and hiring income.

(c) The size of the RSE may be a misleading indicator of the reliability of some of the estimates for operating profit before tax and industry value added. It is possible for an estimate to legitimately include positive and negative values, reflecting the financial performance of individual businesses. In this case, the aggregated estimate can be small relative to the contribution of individual businesses, resulting in a standard error which is large relative to the estimate.

(d) Calculated using estimates of employment which include working proprietors and partners.

Source: Australian Industry, 2008-09 (cat. no. 8155.0).

6.3 INDUSTRY PERFORMANCE, by selected ANZSIC subdivision—2006–07 to 2008–09 *continued*

ANZSIC subdivision		2006–07	2007–08	2008–09
Internet publishing and broadcasting				
Employment at end of June(a)	'000	3	3	^ 3
Sales and service income(b)	\$m	^ 717	^ r770	^ 773
Total income	\$m	^ 758	^ r787	^ 792
Total expenses	\$m	^ 537	572	492
Industry value added(c)	\$m	^ r426	^ r421	*442
Operating profit before tax(c)	\$m	*225	*r214	*298
Industry value added per person employed(d)	\$'000	r127	r122	148
Percentage of businesses that made a profit	%	64	79	59
Percentage of businesses that broke even	%	1	1	—
Percentage of businesses that made a loss	%	36	20	41
Library and other information services				
Employment at end of June(a)	'000	2	2	^ 2
Sales and service income(b)	\$m	284	^ 295	^ 329
Total income	\$m	315	320	^ 385
Total expenses	\$m	274	291	354
Industry value added(c)	\$m	r121	^ r132	180
Operating profit before tax(c)	\$m	*41	*29	*31
Industry value added per person employed(d)	\$'000	r74	r88	80
Percentage of businesses that made a profit	%	69	64	68
Percentage of businesses that broke even	%	2	1	—
Percentage of businesses that made a loss	%	29	36	32
Heritage activities				
Employment at end of June(a)	'000	6	^ 7	7
Sales and service income(b)	\$m	466	499	513
Total income	\$m	655	722	663
Total expenses	\$m	538	581	597
Industry value added(c)	\$m	r292	r312	296
Operating profit before tax(c)	\$m	^ 120	^ 142	^ 64
Industry value added per person employed(d)	\$'000	r48	r47	44
Percentage of businesses that made a profit	%	66	75	65
Percentage of businesses that broke even	%	2	—	—
Percentage of businesses that made a loss	%	31	25	35
Creative and performing arts activities				
Employment at end of June(a)	'000	35	35	36
Sales and service income(b)	\$m	2 928	2 608	2 600
Total income	\$m	3 381	3 003	3 192
Total expenses	\$m	2 708	2 419	2 619
Industry value added(c)	\$m	r1 448	^ r1 415	1 437
Operating profit before tax(c)	\$m	^ 678	^ 587	^ 577
Industry value added per person employed(d)	\$'000	r42	r41	40
Percentage of businesses that made a profit	%	71	72	67
Percentage of businesses that broke even	%	2	3	4
Percentage of businesses that made a loss	%	27	25	29

^ estimate has a relative standard error of 10% to less than 25% and should be used with caution *Australian Industry, 2008-09* (cat. no. 8155.0).

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

— nil or rounded to zero (including null cells)

r revised

(a) Includes working proprietors.

(b) Includes rent, leasing and hiring income.

(c) The size of the RSE may be a misleading indicator of the reliability of some of the estimates for operating profit before tax and industry value added. It is possible for an estimate to legitimately include positive and negative values, reflecting the financial performance of individual businesses. In this case, the aggregated estimate can be small relative to the contribution of individual businesses,

SERVICE INDUSTRY
SURVEYS

Australian National Accounts (ANA) data are useful for making broad comparisons across industries to illustrate the economic importance of the cultural sector. However, the ANA does not have detailed information on the operations of each of the cultural industries. Such information is available from a series of ABS Service Industry Surveys (SIS) run over various years (2002–03, 2003–04, 2006–07 and 2007–08).

From 2003–04 SIS included employing and non-employing businesses. The earlier SIS included only employing businesses (unlike data for the ANA) and therefore do not reflect the activities of the whole industry. However, even though there are numerous businesses in Australia without employees, their overall contribution to economic activity is relatively small.

The most recent Museums Service Industry Survey found that the museums industry had a total income of \$998m in 2007–08.

According to the 2006–07 Service Industry Surveys, a number of cultural industries had incomes exceeding \$1,000m in 2006–07, including commercial television broadcasting (with an operating income of \$6,813m), subscription television services (\$2,283m) and film and video production and post–production services (\$2,028m).

6.4 INCOME AND VALUE ADDED, Selected cultural industries—2002–03 to 2007–08

	<i>Total income</i>	<i>Value added</i>
	\$m	\$m
2007–08		
Museums	998	na
2006–07		
Performing arts operation	733	282
Performing arts venue operation	494	207
Film and video production and post production services	2 028	886
Television services(a)		
Commercial television broadcasting	6 813	2 151
Subscription television services	2 283	334
2003–04		
Libraries and archives	948	na
2002–03		
Performing arts festivals	89	na

na not available

(a) Excludes public and community broadcasters.

Note: Data from 2003–04 include non-employing units. Data prior to this do not. Care should be taken when comparing data across different times and industries.

Source: *Museums, Australia, 2007–08* (cat. no. 8560.0); *Performing Arts, Australia, 2002–03, 2006–07* (cat. no. 8697.0); *Television, Film and Video Production and Post-Production Services, Australia, 2006–07* (cat. no. 8679.0); *Public Libraries, Australia, 2003–04* (cat. no. 8561.0).

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

SERVICE INDUSTRY
SURVEYS *continued*

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

INTRODUCTION

Overseas trade in goods and services may have an impact on Australian culture that extends well beyond its economic significance. The imports of items such as films, music and books may influence how Australians think and act in a variety of ways.

The range of cultural goods and services included in the following tables is based on the product classification of the *Australian Culture and Leisure Classifications* (ACLC) (cat. no. 4902.0).

This chapter focusses on 2009–10 data for exports and imports of cultural goods and 2008–09 data for exports and imports of cultural and recreational services, as these were the latest figures available at the time of release of this publication.

TRADE IN CULTURAL
GOODS AND SERVICES

Australia continues to import more cultural goods and services than it exports overseas. In 2008–09, Australia earned \$747m through the provision of cultural goods (\$584m) and cultural and recreational services (\$163m) to the rest of the world. By comparison, in the same year Australia imported \$3,259.9m of cultural goods and \$1,329m of cultural and recreational services from overseas.

TRADE IN CULTURAL
GOODS

Exports of cultural goods in 2009–10 totalled \$539.8m, or 0.3% of all goods exported from Australia, while cultural imports totalled \$2,436.6m, or 1.2% of all goods imported into Australia.

7.1 TRADE IN CULTURAL GOODS—2009–10

	<i>Cultural goods</i>	<i>All goods</i>	<i>Cultural goods as a percentage of all goods</i>
	\$m	\$m	%
Exports	539.8	200 068.6	0.3
Imports	2 436.6	203 587.1	1.2

.....
Source: ABS data available on request, International Trade, 2009–10.

COMMODITIES TRADED

In 2009–10, Australia exported \$249.9m of books, magazines, newspapers and other printed matter. This was 46% of Australia's total value of exports of cultural goods (\$539.8m).

The largest cultural product group imported in 2009–10 was radio and television receivers and apparatus for sound or video recording or reproduction which accounted for 41% (\$1003.1m) of cultural goods imported by Australia.

7.2 TRADE IN CULTURAL GOODS, By product group—2009–10

<i>ACLIC product group</i>	<i>Imports</i>	<i>Exports</i>	<i>Excess of</i>
			<i>imports</i> <i>over</i> <i>exports</i>
	<i>\$m</i>	<i>\$m</i>	<i>\$m</i>
Heritage services	43.1	11.9	31.2
Books, magazines, newspapers and other printed matter	907.4	249.9	657.5
Audio and video media	197.4	61.0	136.4
Radio and television receivers and apparatus for sound or video recording or reproduction	1 003.1	124.7	878.4
Exposed photographic and cinematographic media and artistic works	132.0	81.8	50.2
Musical instruments and other performing arts equipment	153.6	10.6	143.0
Total cultural goods	2 436.6	539.8	1 896.8

Source: ABS data available on request, International Trade, 2009–10.

CULTURAL TRADE BY
COUNTRY

During 2009–10, almost half (46%) of Australia's cultural exports went to New Zealand (\$250.3m), with large quantities also going to the United States of America (\$57.6m) and the United Kingdom (\$50.5m).

7.3 EXPORTS OF CULTURAL GOODS, By country and product group—2009–10

ACLIC PRODUCT GROUP(a)

	<i>Heritage services</i>	<i>Books, magazines etc.</i>	<i>Audio and video media</i>	<i>Radio and television receivers etc.</i>	<i>Exposed film media and artistic works</i>	<i>Musical instruments</i>	<i>Total cultural goods</i>
	\$m	\$m	\$m	\$m	\$m	\$m	\$m
Canada	0.1	3.6	0.8	0.9	0.7	0.1	6.2
China	0.2	0.9	4.7	3.1	1.0	0.3	10.2
Fiji	—	1.2	0.5	1.0	0.1	0.1	2.8
Germany	—	0.8	0.9	5.5	2.7	0.8	10.7
Hong Kong (SAR of China)	1.1	4.2	0.8	7.1	5.3	0.2	18.6
Japan	—	0.9	3.0	3.8	3.8	0.4	12.0
Korea, Republic of	0.7	0.8	0.4	1.9	3.2	0.1	7.1
Malaysia	—	2.5	0.4	3.0	0.8	0.1	6.7
Netherlands	—	0.2	0.4	2.5	0.7	0.1	3.9
New Zealand	0.2	180.2	31.6	28.7	5.4	4.2	250.3
Papua New Guinea	—	6.0	0.1	1.4	0.2	0.1	7.8
Singapore	0.1	10.2	2.5	7.7	2.8	0.1	23.4
South Africa	—	3.0	0.3	1.7	0.3	0.3	5.7
Taiwan	0.1	0.3	0.5	0.4	0.8	—	2.1
Thailand	0.1	2.4	0.2	3.9	—	—	6.5
United Kingdom	5.4	9.6	1.0	13.6	20.4	0.5	50.5
United States of America	2.2	11.4	8.0	17.7	16.7	1.6	57.6
Other countries	1.5	11.6	5.0	21.0	17.1	1.5	57.7
Total all countries	11.9	249.9	61.0	124.7	81.8	10.6	539.8

— nil or rounded to zero (including null cells)

(a) The descriptions of the ACLIC product groups shown have been abbreviated for space reasons. See table 7.2 for the full descriptions.

Source: ABS data available on request, International Trade, 2009–10.

CULTURAL TRADE BY
COUNTRY *continued*

Australia imported \$656.4m of cultural goods from China in 2009–10, with the bulk of this (\$425.5m or 65%) comprising radio and television receivers and apparatus for sound or video recording or reproduction. Imports from the United Kingdom totalled \$370.1m, while imports from the United States of America totalled \$355.4m and from Malaysia totalled \$302.5m.

7.4 IMPORTS OF CULTURAL GOODS, By country and product group—2009–10

ACLCL PRODUCT GROUP(a)

	Heritage services	Books, magazines etc.	Audio and video media	Radio and television receivers etc.	Exposed film media and artistic works	Musical instruments etc.	Total cultural goods
	\$m	\$m	\$m	\$m	\$m	\$m	\$m
Austria	0.1	0.4	6.1	0.6	2.0	0.5	9.7
Canada	0.9	2.9	0.6	2.2	0.7	0.7	8.0
China	3.4	148.4	7.0	425.5	25.9	46.3	656.4
Denmark	0.1	2.2	0.1	4.0	0.1	0.3	6.9
France	6.3	4.1	2.2	3.5	5.8	2.3	24.1
Germany	0.5	12.1	14.9	8.3	3.2	7.3	46.3
Hong Kong (SAR of China)	0.4	74.0	2.8	8.2	0.6	0.5	86.6
India	0.2	3.1	0.3	1.0	0.8	0.3	5.8
Indonesia	0.4	2.3	1.3	36.3	3.0	19.4	62.8
Ireland	—	0.3	0.3	0.1	—	—	0.7
Italy	0.4	5.6	4.6	2.8	3.3	1.5	18.1
Japan	0.9	13.5	46.7	20.2	3.7	28.4	113.4
Korea, Republic of	—	3.9	0.1	21.6	2.3	2.1	30.1
Malaysia	—	7.5	0.4	294.5	0.1	—	302.5
Mexico	—	0.5	0.1	22.6	0.1	1.7	25.0
Netherlands	0.5	1.8	2.4	2.1	5.2	0.5	12.5
New Zealand	0.3	16.0	2.0	0.6	2.5	0.5	22.1
Philippines	0.3	0.1	0.1	43.1	0.2	—	43.8
Singapore	0.2	73.0	19.0	3.9	0.4	0.1	96.5
South Africa	0.1	1.5	0.1	0.1	1.9	—	3.6
Spain	0.1	1.6	—	0.5	0.4	0.7	3.3
Sweden	—	1.4	1.2	2.3	0.1	0.6	5.7
Switzerland	1.1	1.4	0.3	0.4	0.8	0.3	4.3
Taiwan	—	3.7	10.0	9.7	1.8	3.6	28.8
Thailand	0.1	3.5	0.7	26.6	6.9	0.2	38.1
Turkey	0.1	0.1	—	0.7	—	0.1	1.1
United Kingdom	16.4	285.4	37.5	8.8	19.1	2.9	370.1
United States of America	4.4	226.5	33.3	41.0	21.2	29.2	355.4
Other countries	6.0	10.4	3.4	11.9	19.8	3.4	54.8
Total all countries	43.1	907.4	197.4	1 003.1	132.0	153.6	2 436.6

— nil or rounded to zero (including null cells)

Source: ABS data available on request, International Trade,
2009–10.(a) The descriptions of the ACLCL product groups shown have
been abbreviated for space reasons. See table 7.2 for the
full descriptions.TRADE IN CULTURAL
GOODS OVER TIME

The value of exports of cultural goods decreased by 7.6% in 2009–10 to \$539.8m from \$584.4m in 2008–09. Exports fell across all product groups, with the value of exposed photographic and cinematographic media and artistic works falling the most (\$13.6m) from 2008–09 to 2009–10, followed by audio and video media exports (\$10.8m).

The value of exports of cultural goods has fluctuated since 2003–04, however the value of exports of heritage services has continued to fall since 2004–05, decreasing by 60% from \$29.9m in 2004–05 to \$11.9m in 2009–10.

7.5 EXPORTS OF CULTURAL GOODS (a), By product group—2003–04 to 2009–10

	2003–04	2004–05	2005–06	2006–07	2007–08	2008–09	2009–10
<i>ACL product group</i>	\$m	\$m	\$m	\$m	\$m	\$m	\$m
Heritage services	27.2	29.9	23.2	17.9	17.4	12.0	11.9
Books, magazines, etc.	248.9	253.2	237.6	278.8	266.8	259.5	249.9
Audio and video media	95.8	101.5	89.0	81.4	60.8	70.8	61.0
Radio and television receivers etc.	126.5	158.6	117.6	125.1	140.1	135.5	124.7
Exposed film media and artistic works	103.2	79.4	117.1	89.8	132.6	95.4	81.8
Musical instruments etc.	9.6	10.4	11.1	10.2	9.9	11.1	10.6
Total cultural goods	611.3	633.0	595.5	603.2	627.5	584.4	539.8

(a) The descriptions of the ACLC product groups shown have been abbreviated for space reasons. See table 7.2 for the full descriptions. *Source:* ABS data available on request, International Trade, 2009–10.

TRADE IN CULTURAL
GOODS OVER TIME
continued

The value of imports of cultural goods decreased by 25% in 2009–10 to \$2,436.6m from \$3,259.9m in 2008–09. The decline was primarily in radio and television receivers and apparatus for sound or video recording or reproduction (down 35% to \$1,003.1m) and in audio and video media (down 26% to \$197.4m).

The value of imports of cultural goods has decreased at an accelerated rate from 2006–07. Between 2006–07 and 2007–08, the value of imports fell 6%; between 2007–08 and 2008–09 by 10% and between 2008–09 and 2009–10 by 25%. This has seen an overall decrease of 37% in the value of imports of cultural goods since 2006–07 from \$3,862.2m to \$2,436.6m in 2009–10.

7.6 IMPORTS OF CULTURAL GOODS (a), By product group—2003–04 to 2009–10

	2003–04	2004–05	2005–06	2006–07	2007–08	2008–09	2009–10
<i>ACL product group</i>	\$m	\$m	\$m	\$m	\$m	\$m	\$m
Heritage services	48.5	59.2	45.6	49.8	59.0	50.5	43.1
Books, magazines, etc.	908.9	932.1	930.4	972.6	984.3	1 054.4	907.4
Audio and video media	292.6	280.9	292.3	255.4	252.8	267.4	197.4
Radio and television receivers etc.	1 840.8	1 927.5	2 230.4	2 226.2	1 976.3	1 549.5	1 003.1
Exposed film media and artistic works	105.4	124.5	190.9	183.2	187.4	170.5	132.0
Musical instruments etc.	140.7	146.8	155.2	175.1	167.1	167.7	153.6
Total cultural goods	3 336.8	3 471.0	3 844.8	3 862.2	3 626.9	3 259.9	2 436.6

(a) The descriptions of the ACLC product groups shown have been abbreviated for space reasons. See table 7.2 for the full descriptions. *Source:* ABS data available on request, International Trade, 2009–10.

TRADE IN SERVICES

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

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

TRADE IN SERVICES

continued

Most of Australia's trade in services relates to international transport, travel, education and business services. However, there are also cultural services such as audio visual and related services, which includes royalties in television, theatrical film, video tapes and music. Australia earned \$163m from cultural services in 2008–09, with \$88m coming from television royalties and \$57m coming from other film, TV and multimedia royalties.

Australia paid \$1,329m to other countries for cultural services in 2008–09, with television royalties accounting for \$837m (63%) and home entertainment royalties a further \$342m (26%). This represented just over 2% of all Australia's total payments for services in that year.

7.7 TRADE IN SELECTED CULTURAL SERVICES—2002–03 to 2008–09

	2002–03	2003–04	2004–05	2005–06	2006–07	2007–08	2008–09
	\$m	\$m	\$m	\$m	\$m	\$m	\$m
Credits							
Audiovisual and related services							
Film royalties	21	13	3	5	4	9	4
Television royalties	89	130	94	131	88	169	88
Home entertainment royalties	8	5	3	1	4	5	7
Other audiovisual related royalties	—	—	—	3	2	3	3
Other film, TV and multimedia royalties	92	57	48	75	71	67	57
Total	210	205	148	215	169	253	159
Audiovisual services n.i.e	24	17	9	12	5	1	4
Total credits	234	222	157	227	174	254	163
Debits							
Audiovisual and related services							
Film royalties	-80	-76	-72	-85	-96	-65	-76
Television royalties	-481	-526	-560	-513	-538	-572	-837
Home entertainment royalties	-158	-170	-157	-237	-234	-270	-342
Other audiovisual related royalties	—	—	—	-18	-36	-51	-33
Other film, TV and multimedia royalties	-12	-4	-78	-16	-20	-25	-17
Total	-731	-776	-867	-869	-924	-983	-1 305
Audiovisual services n.i.e	-4	-4	-39	-18	-17	-39	-24
Total debits	-735	-780	-906	-887	-941	-1 022	-1 329

— nil or rounded to zero (including null cells)

Source: *International Trade in Services by Country, by State and by Detailed Services Category, 2008–09* (cat. no. 5368.0.55.003); ABS data available on request, *International Trade in Services, 2008–09*.

TRADE IN SERVICES BY
COUNTRY

During 2008–09, Australia received \$234m in royalty credits for music, film, television programs and video tapes, from trade with other countries. The majority of credits (87% or \$204m) were from OECD countries, while 13% (\$31m) were from non-OECD countries. Australia received \$67m in royalty credits for music, film, television programs and video tapes from New Zealand, \$65m from the USA and \$34m from the UK.

In the same period, Australia accrued royalty debits worth \$1,593m for selected cultural trades, with the vast majority (97%) paid to OECD countries. This can be attributed to a 61% increase in television programs debits. In 2008–09, Australia paid \$892m to the USA for music, film, television programs and video tape royalties, which equates to more than half (56%) of all cultural debits.

7.8 BALANCE OF PAYMENTS, Selected cultural services—Selected countries—2008–09

	UK	USA	New Zealand	Selected European members of the OECD(a)	Total OECD(b)	Total non-OECD	Total all countries
	\$m	\$m	\$m	\$m	\$m	\$m	\$m
Credits							
Royalties on film, TV programs, video							
Theatrical films	1	3	—	—	4	—	4
Television programs	25	8	25	15	76	12	88
Video tapes	1	5	—	—	6	1	7
Other (not separately identified)(c)	3	13	27	6	49	11	60
Total	30	29	52	21	135	24	159
Music royalties	4	36	15	11	69	7	75
Total credits	34	65	67	32	204	31	234
Debits							
Royalties on film, TV programs, video							
Theatrical films	-1	-54	—	-23	-75	—	-75
Television programs	-114	-417	-3	-338	-886	-33	-919
Video tapes	-2	-227	-1	-91	-314	-1	-315
Other (not separately identified)(c)	-3	-36	-1	-1	-38	-11	-49
Total	-120	-734	-5	-453	-1 313	-45	-1 358
Music royalties	-63	-158	-3	-2	-228	-7	-235
Total debits	-183	-892	-8	-455	-1 541	-52	-1 593

— nil or rounded to zero (including null cells)

(a) Includes the Netherlands, Germany, France, Switzerland, Sweden and Ireland.

(b) Includes Canada and Japan.

(c) Includes multimedia royalties.

Source: ABS data available by request, International Trade in Services by Country, 2008–09.

INTRODUCTION

Museums are generally engaged in the acquisition, conservation and exhibition of culturally significant objects. *Australian Culture and Leisure Classifications, 2008 (Second Edition)* (cat. no. 4902.0) groups museums into two categories: art museums (i.e. public art galleries) and other museums. The latter is a more diverse group which encompasses natural science, applied science, history and transport museums and Indigenous keeping places, amongst others.

This chapter draws together information from the ABS's attendance and industry surveys and from the 2006 Census of Population and Housing to provide some details of the use of museum services and the operations of museums. Supplementary data has been obtained from the National Heritage List.

ATTENDANCE

According to the 2005–06 ABS survey of Attendance at Selected Cultural Venues and Events, a total of 7.2 million people aged 15 years and over (45% of the population) visited art galleries or other museums in the 12-months before being interviewed. Females recorded higher attendance rates than males for both types of institution.

ATTENDANCE *continued***8.1** ATTENDANCE AT MUSEUMS, In previous 12 months—By selected characteristics—2005–06

	NUMBER			ATTENDANCE RATE		
	Art galleries	Other museums	Total(a)	Art galleries	Other museums	Total(a)
	'000	'000	'000	%	%	%
Sex						
Males	1 570.6	1 713.6	3 284.2	19.9	21.7	41.6
Females	2 060.2	1 898.3	3 958.5	25.4	23.4	48.8
Age group (years)						
15–17	188.9	206.5	395.4	23.1	25.2	48.3
18–24	340.2	303.9	644.1	17.6	15.7	33.3
25–34	624.2	656.2	1 280.4	22.5	23.6	46.1
35–44	691.1	804.7	1 495.8	23.4	27.2	50.6
45–54	740.5	698.1	1 438.6	26.6	25.1	51.7
55–64	572.4	552.3	1 124.7	25.8	24.9	50.7
65–74	297.6	265.6	563.2	21.5	19.2	40.7
75 and over	175.8	124.7	300.5	15.6	11.0	26.6
State or Territory						
New South Wales	1 118.6	1 145.0	2 263.6	20.8	21.3	42.1
Victoria	963.9	841.8	1 805.7	23.9	20.9	44.8
Queensland	677.7	670.2	1 347.9	22.0	21.7	43.7
South Australia	293.7	329.0	622.7	24.0	26.9	50.9
Western Australia	355.8	345.7	701.5	22.8	22.2	45.0
Tasmania	91.7	117.9	209.6	24.0	30.8	54.8
Northern Territory	28.8	42.4	71.2	25.9	38.2	64.1
Australian Capital Territory	100.6	120.0	220.6	39.7	47.3	87.0
Total	3 630.7	3 611.9	7 242.6	22.7	22.6	45.3

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

Source: *Attendance at Selected Cultural Venues and Events, 2005–06* (cat. no. 4114.0).

Most people (63%) who attended art galleries had been there once or twice in the 12-months before interview, as had about three-quarters (75%) of those who visited other museums.

8.2 FREQUENCY OF ATTENDANCE AT MUSEUMS, In previous 12 months—2005–06

	NUMBER		ATTENDANCE RATE	
	Art galleries	Other museums	Art galleries	Other museums
	'000	'000	%	%
Once	1 325.5	1 820.2	36.5	50.4
Twice	973.4	892.7	26.8	24.7
3 times	441.3	344.0	12.2	9.5
4 times	258.0	170.6	7.1	4.7
5 times	128.3	87.0	3.5	2.4
6–10 times	291.4	203.8	8.0	5.6
11–20 times	153.3	53.0	4.2	1.5
21 times or more	59.6	40.7	1.6	1.1
Total	3 630.7	3 611.9	100.0	100.0

Source: *Attendance at Selected Cultural Venues and Events, Australia, 2005–06* (cat. no. 4114.0).

ATTENDANCE *continued*

While the survey of Attendance at Selected Cultural Venues and Events provides information on the type of people who attend museums and how often they go, it is unable to give a figure for the total number of admissions. As the survey only obtained information about Australian residents aged 15 years or over, some groups were excluded from the data collection such as tourists from overseas and younger age groups. Further, as respondents were asked to indicate their frequency of attendance from a set of ranges, for example, 6–10 times, 11–20 times, 21 times or more etc. it is not possible to accurately calculate the exact number of visits.

However, the 2007–08 ABS Survey of Museums collected this information and found that there were an estimated 30.7 million admissions during the year, of which about two-thirds (68%) were free of charge. Art galleries accounted for just over two-fifths (42%) of all admissions.

8.3 MUSEUM ADMISSIONS—2007–08

	OTHER MUSEUMS				Total
	Art museums/galleries	Social history museums	Historic properties/sites	Natural, science and other museums	
<i>Admissions</i>	'000	'000	'000	'000	'000
Paid	2 177.7	^ 2 890.2	2 574.1	2 161.2	9 803.2
Free	^ 10 771.9	^ 5 888.5	1 154.0	3 099.9	^ 20 914.3
Total	^ 12 949.6	^ 8 778.7	3 728.1	5 261.1	30 717.5

^ estimate has a relative standard error of 10% to less than 25% and should be used with caution

Source: *Museums, Australia, 2007–08* (cat. no. 8560.0)

ORGANISATIONS

The 2007–08 Survey of Museums defined a museum as an establishment which is involved in acquiring, conserving, researching into, communicating and exhibiting material evidence of people, their culture and environment for the purposes of study, education and enjoyment by the general public. The scope of the 2007–08 Survey of Museums was employing and non-employing businesses and organisations that were mainly engaged in the operation of museums and art galleries. The scope also included other museums/galleries registered as having a collection with Collections Australia Network. The scope excluded organisations mainly engaged in the operation of botanic gardens, herbariums, zoological gardens, aquariums, observatories and planetariums, public libraries and science centres.

The reader should bear in mind that this survey was not designed to support accurate estimates of change over time and should exercise caution when comparing 2007–08 and 2003–04 for several reasons, including changes to coverage and industry classification. For more information, see the technical note of *Museums, Australia, 2007–08* (cat. no. 8560.0).

In June 2008, there were 1,184 museum establishments operating in Australia. Of these, 14% were art galleries and the remaining 86% were classified as other museums. The other museums category included social history museums, historic properties or sites and natural, science and other museums.

ORGANISATIONS

*continued***8.4** NUMBER OF MUSEUM ESTABLISHMENTS—end June 2008

	Museum/gallery organisations	Share of museum/gallery organisations
	no.	%
Art museum/gallery	^ 165	^ 14.0
Other museums		
Social history museum	712	60.2
Historic properties/sites	^ 247	^ 20.9
Natural, science and other	*59	*5.0
Total other museums(a)	1 019	86.0
Total(a)	1 184	100.0

^ estimate has a relative standard error of 10% to less than 25% and should be used with caution

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

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

Source: *Museums, Australia, 2007–08* (cat. no. 8560.0).

MUSEUM ARTEFACTS,
ARTWORKS AND OBJECTS

According to the 2007–08 Survey of Museums, museums held a total of 52.5 million museum objects and artworks. Of these, about 5% were held by art galleries, 1% by historic properties, 11% by social history museums and 82% by natural, science and other museums. Museums which had 100 or more employees held 77% of these 52.5 million objects, with approximately 1.3% of the objects on display.

FINANCIAL DATA

The 2007–08 ABS Survey of Museums found that the total income in the 2007–08 financial year for the 1,184 museums establishments in Australia was \$998.4m. About two-thirds (66%) of this income was provided by government, with the bulk of the balance made up by other income (\$159.0m) and fundraising (\$106.0m).

Labour costs accounted for \$380.7m of museum expenses in 2007–08, which was almost half (44%) of total outgoings. Other expenses (\$433.8m) made up the bulk of the remaining museum costs.

8.5 MUSEUM ESTABLISHMENTS, Income and expenses—2007–08

	OTHER MUSEUMS				
	Art museum/gallery	Social history	Historic properties/sites	Natural, science and other	Total
	\$m	\$m	\$m	\$m	\$m
Income					
Government funding(a)	257.5	155.1	62.8	182.3	657.8
Admissions	19.6	15.4	25.9	14.7	75.6
Fundraising	65.3	18.5	9.9	12.3	106.0
Other	53.6	35.5	36.6	33.4	159.0
Total	396.0	224.5	135.3	242.7	998.4
Expenses					
Labour costs	126.4	77.2	54.6	122.4	380.7
Conservation expenses	^ 2.2	^ 3.0	3.4	1.1	9.8
Exhibition/display development	22.0	6.9	1.7	5.2	35.8
Other	157.1	114.0	58.0	104.7	433.8
Total	307.7	201.1	117.8	233.5	860.1

^ estimate has a relative standard error of 10% to less than 25% and should be used with caution

(a) Includes operational and capital funding and funding for one-off projects.

Source: *Museums, Australia, 2007–08* (cat. no. 8560.0).

FINANCIAL DATA

continued

The Cultural Funding by Government Survey found that in 2008–09 the Australian Government provided \$91.5m to art museums and a further \$266.0m to other museums and cultural heritage, while state and territory governments contributed \$175.2m and \$338.3m respectively. Local government also provided considerable funding to art museums (\$55.2m) and other museums and cultural heritage (\$34.5m).

It should be noted that the Cultural Funding by Government collection and the Survey of Museums have different scope and coverage, therefore data are not directly comparable between these surveys. For more information see *Australian Culture and Leisure Classifications, 2008 (Second Edition)* (cat. no. 4902.0).

8.6 CULTURAL FUNDING BY GOVERNMENT, Museums—2008–09

	Australian Government	State and territory government	Local government	Total
	\$m	\$m	\$m	\$m
Art museums	91.5	175.2	55.2	321.9
Other museums and cultural heritage	266.0	338.3	34.5	638.7
Total	357.5	513.5	89.6	960.6

Source: *Cultural Funding by Government, Australia, 2008–09* (cat. no. 4183.0).

EMPLOYMENT

This section covers employment in the museums sector using information drawn from two sources – the 2007–08 ABS Survey of Museums and the 2006 Census of Population and Housing. When making comparisons between these sources, it is important to take into consideration the different scope and reference periods of each. Further information on how the data sources differ can be found in Chapter 5.

Survey of Museums

According to the 2007–08 Survey of Museums, there were 7,856 people employed in museums during the last pay period in June 2008. Of these, 2,509 (32%) worked for art galleries, 2,050 (26%) worked for natural, science and other museums, 1,886 (24%) worked for social history museums and 1,411 (18%) worked for historic properties.

This survey also found that 23,426 people worked as volunteers for museums during the month of June 2008.

8.7 EMPLOYED PERSONS AND VOLUNTEERS, By museum type—end June 2008

	EMPLOYED PERSONS					VOLUNTEERS (a)	
	Managers, administrators and clerical support workers	Conservators	Curators	Museum or gallery attendants	Security officers and other employed persons	Total(b)	Total(b)
	no.	no.	no.	no.	no.	no.	no.
Art museum/gallery	851	95	347	^ 427	790	2 509	^ 3 741
Other museums							
Social history	720	^ 63	^ 236	^ 389	^ 477	1 886	^ 12 752
Historic properties/sites	389	21	^ 127	497	376	1 411	^ 4 898
Natural, science and other	796	141	351	355	406	2 050	^ 2 035
Total other museums	1 906	225	715	1 241	1 259	5 347	19 685
Total (b)	2 756	320	1 062	1 668	2 050	7 856	23 426

^ estimate has a relative standard error of 10% to less than 25% and should be used with caution

(a) Information on volunteers was collected as an 'end-of-June 2008 snapshot', whereas information about employees was collected during the last pay period in June 2008.

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

Source: *Museums, Australia, 2007–08* (cat. no. 8560.0)

Census of Population and Housing

The 2006 Census of Population and Housing presented a different perspective, with 6,412 people reporting that their main job (i.e. where they worked the most hours) in the week before Census Night was in the museums industry. Of these, 41% were employed in cultural occupations such as museum and gallery attendants, curators, technicians or conservators. The 59% of museum employees not in cultural occupations included specialist managers, project and program administrators, security officers, general clerks, and education officers.

8.8 PERSONS EMPLOYED IN MUSEUMS INDUSTRY (a) (b), By occupation—August 2006

	Number	%
Cultural occupations		
Museum or gallery guides	730	11.4
Museum or gallery curators	589	9.2
Arts administrators or managers	292	4.6
Conservators	171	2.7
Museum or gallery technicians	116	1.8
Other cultural occupations	721	11.2
Total cultural occupations	2 619	40.8
Other occupations	3 793	59.2
Total occupations	6 412	100.0

(a) Cells in this table have been randomly adjusted to avoid the release of confidential data.

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

Source: ABS data available on request, *Census of Population and Housing, 2006*.

*Census of Population and
Housing continued*

The Census identified an additional 1,136 people working in a museum-related occupation, but not in the museums industry (e.g. a conservator working in a library). There were 315 museum or gallery guides, 380 museum or gallery curators, 212 conservators and 129 museum and gallery technicians working in other industries.

HISTORIC AND
INDIGENOUS PLACES

Australia's cultural heritage is not confined to museums and the objects they hold. The Department of the Environment, Water, Heritage and the Arts (DEWHA) compiles and manages the National Heritage List which lists places of outstanding heritage significance to Australia. Each state and territory in Australia also manages their own state/territory registers which list heritage places of particular importance to the people who reside there. In addition, there are also registers focusing on areas such as Australia's Indigenous heritage, movable cultural heritage and overseas places of historic significance to Australia. More information about each of these lists is available from the DEWHA website, www.environment.gov.au.

As of March 2010, there were a total of 88 places included on the National Heritage List. Of these, 48 are of historic importance, 30 of natural importance and 10 of Indigenous importance. Further information about the National Heritage List is available from the DEWHA website.

INTRODUCTION

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

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

Data from *Botanic Gardens, Australia, 1999–2000* (cat. no. 8563.0) and *Zoos, Parks and Garden Industry, Australia, 1996–97* (cat. no. 8699.0) is available through the ABS website.

ATTENDANCE

*Zoological parks and
Botanic gardens*

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

The 2005–06 survey of Attendance at Selected Cultural Venues and Events found that almost 5.4 million Australians aged 15 years and over visited a botanic garden and around 5.7 million visited a zoological park in the twelve months prior to being interviewed.

Residents of Western Australia had the highest attendance rates for zoological parks (43%) while Australian Capital Territory residents recorded the highest attendance rates for botanic gardens (44%).

Zoological parks and
Botanic gardens
continued

9.1 ATTENDANCE AT ZOOLOGICAL PARKS AND BOTANIC GARDENS (a), By state and territory—2005–06(b)

	ZOOLOGICAL PARKS(a)		BOTANIC GARDENS	
	Number	Attendance rate	Number	Attendance rate
	'000	%	'000	%
New South Wales	1 780.0	33.2	1 517.7	28.3
Victoria	1 489.5	37.0	1 479.9	36.7
Queensland	1 023.4	33.2	1 146.7	37.2
South Australia	463.7	37.9	446.8	36.5
Western Australia	677.6	43.4	520.8	33.4
Tasmania	120.9	31.6	123.4	32.3
Northern Territory	39.9	36.0	43.1	38.8
Australian Capital Territory	104.8	41.4	112.4	44.4
Australia	5 699.8	35.6	5 390.9	33.7

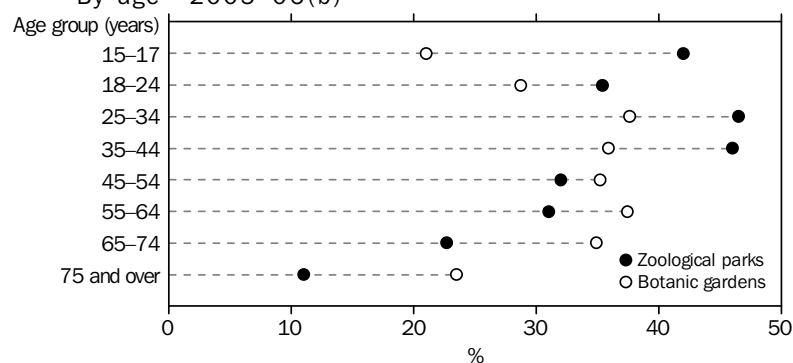
(a) Includes other wildlife parks, aquariums and marine parks.

(b) Twelve months before interview in 2005–06.

Source: Attendance at Selected Cultural Venues and Events, 2005–06 (cat. no. 4114.0).

For zoological parks, those aged 25–44 years were more likely to attend than any other age group. The presence of children in the household was also an important factor for attendance at zoological parks, although it seemed to have little bearing on rates of attendance at botanic gardens.

9.2 ATTENDANCE AT ZOOLOGICAL PARKS AND BOTANIC GARDENS (a), By age—2005–06(b)



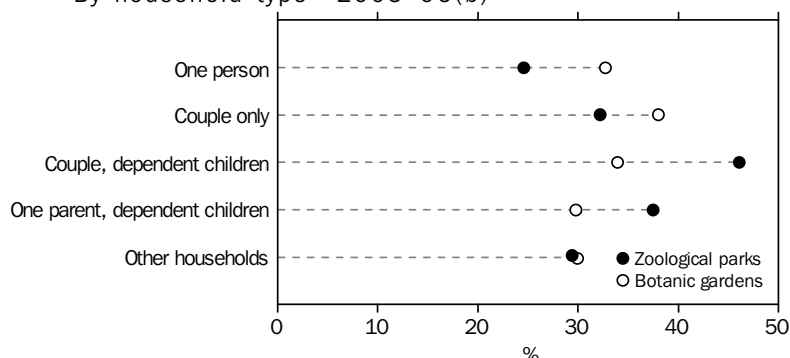
(a) Includes other wildlife parks, aquariums and marine parks.

(b) Twelve months before interview in 2005–06.

Source: Attendance at Selected Cultural Venues and Events, 2005–06 (cat. no. 4114.0).

Zoological parks and
Botanic gardens
continued

9.3 ATTENDANCE AT ZOOLOGICAL PARKS AND BOTANIC GARDENS (a),
By household type—2005–06(b)



(a) Includes other wildlife parks, aquariums and marine parks.
(b) Twelve months before interview in 2005–06.

Source: *Attendance at Selected Cultural Venues and Events, 2005–06* (cat. no. 4114.0).

Nature parks and reserves

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

Australia has 18 World Heritage Areas and over 1,400 national and state parks and reserves which are managed by the Australian Government and each of the state/territory governments. The area covered extends beyond Australia's coastline to include marine protected areas up to three nautical miles out to sea as well as national parks on the Cocos (Keeling), Christmas and Norfolk Islands.

More than 7.8 million Australians (52%) aged 18 years and over visited a World Heritage Area, national or state park in the twelve months prior to March 2004, according to *Environmental Issues: People's Views and Practices, 2004* (cat. no. 4602.0). Residents of the Northern Territory recorded the highest attendance rate (61%) and South Australians the lowest (49%).

9.4 ATTENDANCE AT NATURE PARKS(a), By state and
territory—2004(b)

	Number	Attendance rate
	'000	%
New South Wales	2 498.0	49.6
Victoria	1 937.8	51.0
Queensland	1 538.3	53.9
South Australia	565.0	48.8
Western Australia	893.9	60.3
Tasmania	201.3	56.4
Northern Territory	63.5	60.9
Australian Capital Territory	135.2	57.2
Australia	7 832.9	52.1

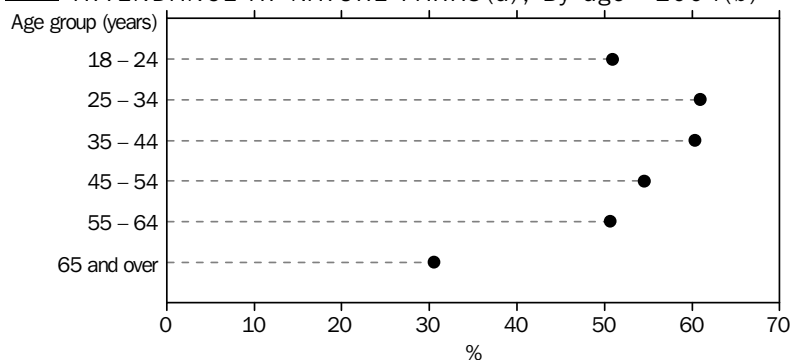
(a) Includes world heritage parks and state parks.
(b) Twelve months before interview in 2004.

Source: *Environmental Issues: People's Views and Practices, March 2004* (cat. no. 4602.0).

Nature parks and reserves
continued

The survey found that Australians aged 25-44 years and couple households with dependent children were the most likely to visit a World Heritage Area, national or state park.

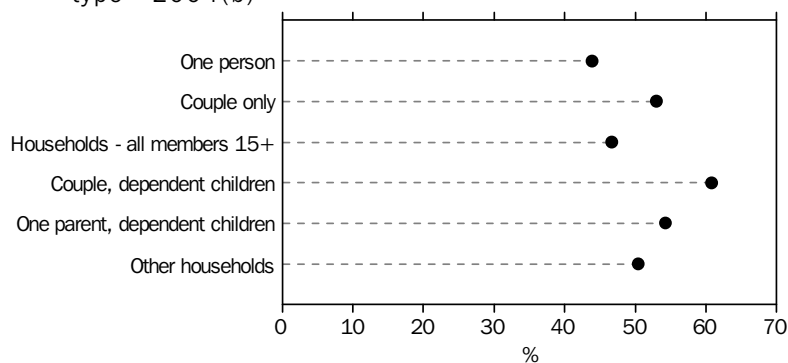
9.5 ATTENDANCE AT NATURE PARKS (a), By age—2004(b)



(a) Includes World Heritage Areas, national and state parks.
(b) Twelve months before interview in 2004.

Source: *Environmental Issues: People's Views and Practices, March 2004* (cat. no. 4602.0).

9.6 ATTENDANCE AT NATURE PARKS (a), By household type—2004(b)



(a) Includes World Heritage Areas, national and state parks.
(b) Twelve months before interview in 2004.

Source: *Environmental Issues: People's Views and Practices, March 2004* (cat. no. 4602.0).

FINANCIAL DATA

According to *Cultural Funding by Government, 2008–09* (cat. no. 4183.0), the majority of funding for environmental heritage in 2008–09 came from state and territory governments (\$1,397.0m), with the Australian Government also contributing \$207.0m. While some funding occurs at the local government level, details are not available for environmental heritage for 2008–09.

FINANCIAL DATA
*continued***9.7** CULTURAL FUNDING BY GOVERNMENT, Environmental heritage—2008–09

	2008–09
	\$m
Australian Government(a)	207.0
State and territory government	
New South Wales	432.9
Victoria	207.3
Queensland	289.8
South Australia	91.8
Western Australia	258.5
Tasmania	39.5
Northern Territory	42.5
Australian Capital Territory	34.6
<i>Total</i>	<i>1 397.0</i>
Total	1 604.0

- (a) The Australian Government refers to the federal government. It does not refer to the aggregate of state and territory governments, nor does it include local government.

Source: *Cultural Funding by Government, Australia, 2008–09* (cat. no. 4183.0).

EMPLOYMENT

Census of Population and Housing

Data from the 2006 Census of Population and Housing, which provides details on people's main job, does not separately identify those working in organisations responsible for nature parks and reserves from those working in other recreational parks and gardens. The broad nature reserves and conservation parks industry employed 6,143 people, of which 1,119 were park rangers, 98 were zookeepers and 41 were urban and regional planners. A majority of people employed in this industry were in non-cultural occupations.

*Census of Population and
Housing continued*

9.8 PERSONS EMPLOYED IN NATURE RESERVES AND CONSERVATION
PARKS INDUSTRY(a)(b), By occupation—August 2006

	Number	%
Cultural occupations		
Park rangers	1 119	18.2
Zookeepers	98	1.6
Urban and regional planners	41	0.7
Environmental managers	27	0.4
Landscape architects	9	0.1
Other cultural occupations	89	1.4
<i>Total cultural occupations</i>	1 383	22.5
Other occupations(c)	4 760	77.5
Total occupations	6 143	100.0

(a) Cells in this table have been randomly adjusted to avoid the release of confidential data.

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

(c) Includes not stated and inadequately described.

Source: ABS data available on request, Census of Population and Housing, 2006.

Using Census data it is not possible to separate those working in zoological gardens from those working in botanic gardens. However, in the combined zoos and botanic gardens industry, zookeepers (483 people) were the most common cultural occupations. The majority of people (77%) working in this industry were employed in non-cultural occupations.

9.9 PERSONS EMPLOYED IN ZOOS AND BOTANIC GARDENS
INDUSTRY(a)(b), By occupation—August 2006

	Number	%
Cultural occupations		
Zookeepers	483	18.8
Park rangers	16	0.6
Landscape architects	6	0.2
Other cultural occupations(c)	90	3.5
<i>Total cultural occupations</i>	595	23.1
Other occupations	1 976	76.9
Total occupations	2 571	100.0

(a) Cells in this table have been randomly adjusted to avoid the release of confidential data.

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

(c) Includes not stated and inadequately described.

Source: ABS data available on request, Census of Population and Housing, 2006.

Work Survey

More information on employment can be obtained from the 2007 survey of *Work in Selected Culture and Leisure Activities* (cat. no. 6281.0) which collected data on all involvement rather than just the paid employment in main job which is obtained from the Census. The survey found that 94,900 people had some involvement in the operations of national parks and reserves although only 14% received some form of

Work Survey continued

payment. A large number of people also reported unpaid involvement with botanic gardens. Of the estimated 28,200 people working in botanic gardens, 33% received some payment for their involvement.

9.10 PERSONS WITH A WORK INVOLVEMENT IN SELECTED ACTIVITIES (a), By whether paid or unpaid—2007

	<i>Some paid involvement</i>	<i>Unpaid involvement only</i>	<i>Total persons involved (b)</i>	<i>Percentage with some paid involvement</i>
	'000	'000	'000	%
National parks and reserves	13.3	81.6	94.9	14.0
Zoological parks and aquariums	*8.1	*5.0	13.1	61.7
Botanic gardens	*9.4	18.0	28.2	33.4

* estimate is subject to sampling variability too high for most practical purposes

(a) In the 12 months before interview in April 2007.

(b) Includes persons who did not state whether involvement was paid.

Source: *Work in Selected Culture and Leisure Activities, April 2007* (cat. no. 6281.0).

INTRODUCTION

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

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

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

This chapter provides a statistical overview of aspects of Australia's public libraries. The data are drawn primarily from three ABS data sources: a survey of public libraries covering the period 2003–04; a household survey which collected attendance figures for a range of cultural venues and events for 2005–06; and the 2006 Census of Population and Housing.

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

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

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

ATTENDANCE

Attendance Survey

According to the 2005–06 survey of Attendance at Selected Culture and Leisure Venues and Events, some 5.5 million people (34% of the population aged 15 years and over) visited a national, state or local library at least once in the 12-months before interview.

While the attendance rates for males and females at state and national libraries were similar, local libraries were more likely to attract females (with an attendance rate of 40%) than males (25%).

Attendance Survey
continued**10.1** ATTENDANCE AT PUBLIC LIBRARIES, By sex—2005–06

	Males	Females	Persons
NUMBER ('000)			
Local libraries	1 990.5	3 228.7	5 219.2
National and state libraries	403.5	497.6	901.1
Total who attended(a)	2 108.7	3 345.8	5 454.5
ATTENDANCE RATE (%)			
Local libraries	25.2	39.8	32.6
National and state libraries	5.1	6.1	5.6
Total who attended(a)	26.7	41.2	34.1

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

Source: ABS data available on request, Survey of Attendance at Selected Cultural Venues and Events, 2005–06.

The attendance rate at national and state libraries was highest for people aged 18–24 years (10%), with the next highest rate being 6% for 45–54 and 55–64 year olds. For local libraries, the survey results showed that the highest attendance rate was for the age group 15–17 years (44%), followed by the 35–44 years age group (36%).

10.2 ATTENDANCE AT PUBLIC LIBRARIES, By age—2005–06

AGE GROUP (YEARS)

	15–17	18–24	25–34	35–44	45–54	55–64	65–74	75 and over	Total
NUMBER ('000)									
Local libraries	361.9	586.3	867.6	1 078.1	889.6	649.0	457.3	329.4	5 219.2
National and state libraries	38.9	193.3	148.4	132.2	168.3	131.0	61.9	27.1	901.1
Total who attended(a)	374.6	656.2	910.0	1 105.3	934.2	671.0	465.8	337.5	5 454.5
ATTENDANCE RATE (%)									
Local libraries	44.2	30.2	31.2	36.4	32.0	29.3	33.0	29.1	32.6
National and state libraries	4.8	10.0	5.3	4.5	6.1	5.9	4.5	2.4	5.6
Total who attended(a)	45.8	33.9	32.7	37.3	33.6	30.3	33.6	29.9	34.1

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

Source: ABS data available on request, Survey of Attendance at Selected Cultural Venues and Events, 2005–06.

Unlike several of the other cultural institutions, public libraries regularly attract repeat visitors. Just 5% of those who visited a library did so on only one occasion. Almost one half (46%) of those who had visited public libraries had been more than 10 times during the 12-month reference period, with over half of those going more than 20 times.

Those in the older age groups were more likely to make multiple return visits. Around one-third (34%) of those aged 75 years and over who visited public libraries went 26 times or more during the 12-month period.

10.3 FREQUENCY OF ATTENDANCE AT PUBLIC LIBRARIES—2005–06

Number of visits in the last 12 months	SEX		AGE GROUP (YEARS)								Total
	Males	Females	15–17	18–24	25–34	35–44	45–54	55–64	65–74	75 and over	
NUMBER ('000)											
Once	149.6	117.2	*18.1	*49.0	56.0	45.0	*33.1	36.4	16.0	*13.3	266.8
Twice	252.0	274.6	*31.9	93.8	116.5	104.4	84.0	59.2	21.2	*15.5	526.5
Three times	175.3	217.3	*12.7	62.2	69.7	93.0	79.1	34.0	25.9	16.1	392.6
Four times	158.1	236.4	*21.5	44.3	67.1	101.1	82.3	44.7	22.3	*11.3	394.5
Five times	135.4	210.4	*31.6	*48.5	92.7	70.5	63.4	*19.4	*10.9	*8.7	345.8
6–10 times	344.7	666.4	77.1	117.9	160.1	224.4	200.8	116.0	75.2	39.4	1 011.1
11–15 times	309.6	570.8	*35.9	67.3	123.4	209.5	146.1	121.8	107.8	68.7	880.4
16–20 times	91.7	172.6	*19.1	30.6	36.6	50.4	48.1	33.7	27.7	*18.1	264.3
21–25 times	116.0	152.8	*24.0	*7.3	50.9	40.1	43.1	41.2	30.7	31.5	268.9
26 times or more	376.3	727.4	102.6	135.3	136.9	166.8	154.2	164.6	128.2	115.1	1 103.7
Total	2 108.7	3 345.8	374.6	656.2	910.0	1 105.3	934.2	671.0	465.8	337.5	5 454.5
PER CENT (%)											
Once	7.1	3.5	*4.8	*7.5	6.2	4.1	*3.5	5.4	3.4	*3.9	4.9
Twice	12.0	8.2	*8.5	14.3	12.8	9.4	9.0	8.8	4.6	*4.6	9.7
Three times	8.3	6.5	*3.4	9.5	7.7	8.4	8.5	5.1	5.6	4.8	7.2
Four times	7.5	7.1	*5.7	6.8	7.4	9.1	8.8	6.7	4.8	*3.3	7.2
Five times	6.4	6.3	*8.4	*7.4	10.2	6.4	6.8	*2.9	*2.3	*2.6	6.3
6–10 times	16.3	19.9	20.6	18.0	17.6	20.3	21.5	17.3	16.1	11.7	18.5
11–15 times	14.7	17.1	*9.6	10.3	13.6	19.0	15.6	18.2	23.1	20.4	16.1
16–20 times	4.3	5.2	*5.1	4.7	4.0	4.6	5.1	5.0	5.9	*5.4	4.8
21–25 times	5.5	4.6	*6.4	*1.1	5.6	3.6	4.6	6.1	6.6	9.3	4.9
26 times or more	17.8	21.7	27.4	20.6	15.0	15.1	16.5	24.5	27.5	34.1	20.2
Total	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0

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

Source: ABS data available on request, Survey of Attendance at Selected Cultural Venues and Events, 2005–06.

Public Libraries Survey

The 2003–04 survey of Public libraries conducted by the ABS found that there were 104.7 million visits to libraries, the vast majority (95%) of which were to local government libraries.

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

The survey also found that national and state archives attracted 137,400 visits to their search rooms and recorded a total of 245,100 archival enquiries during 2003–04.

Public Libraries Survey
continued**10.4** NATIONAL AND STATE ARCHIVES (a), Visits and enquiries—1999–2000 and 2003–04

	1999–00	2003–04
	'000	'000
Visits to search rooms	94.2	137.4
Recorded archival enquiries(b)	218.4	245.1

(a) Excludes national and state library archives.

(b) Figures for archival enquiries are approximations only.
State libraries do not keep separate counts of archival and general enquiries.

Source: *Public Libraries, Australia, 2003–04* (cat. no. 8561.0).

ORGANISATIONS

At the end of June 2004, there were 532 local government libraries and eight national and state libraries operating in Australia. The local government libraries operated from 1,716 locations, while the national and state libraries had a total of 17 locations.

At the end of June 2004, there were eight national and state archives operating in Australia. State specific data on archives are not available for this collection due to confidentiality requirements. Data on the archives operated by universities, local governments, commercial organisations and collecting institutions (e.g. state libraries) are also not available.

10.5 LOCAL GOVERNMENT LIBRARIES, Number of locations—June 2004

	Branches	Mobile services	Deposit stations
	no.	no.	no.
New South Wales	372	32	93
Victoria	247	27	20
Queensland	328	20	*11
South Australia	148	13	55
Western Australia	233	np	np
Tasmania	48	—	—
Northern Territory	33	np	np
Australian Capital Territory	9	2	—
Total Australia	1 418	110	189

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

— nil or rounded to zero (including null cells)

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

Source: *Public Libraries, Australia, 2003–04* (cat. no. 8561.0).

HOLDINGS AND LOANS

In June 2004, public libraries in Australia held a total of 52.8 million books and other library materials such as video and audio tapes and discs. About 39.0 million items were available as lending stock, of which 34.3 million were books. Lending stock is drawn solely from local libraries, which in 2003–04 reported 176.2 million loans, of which 138.2 million were books. There were 10.1 million registered borrowers in that year.

HOLDINGS AND LOANS
*continued***10.6** PUBLIC LIBRARY HOLDINGS—June 2004

	<i>Local libraries</i>	<i>National and state libraries</i>	<i>All public libraries</i>
	'000	'000	'000
Lending stock(a)	38 984.5	. .	38 984.5
Non-lending stock(a)	2 511.8	11 276.3	13 788.2
Total(a)	41 496.3	11 276.3	52 772.7

. . . not applicable

(a) For 2003–04 estimates exclude heritage items.

Source: *Public Libraries, Australia, 2003–04* (cat. no. 8561.0).

The national and state archives that record their holdings in metres of shelf space reported having 629,100 metres of holdings at the end of June 2004, a decrease from 688,000 metres in June 2000.

TECHNOLOGY

Increasingly, libraries are introducing new technologies to ensure the public have access to information. The *Australian Public Libraries Statistical Report, 2008–09* compiled by Public Library Services, State Library of Queensland, reports that in 2008–09, there were 8,652 public access Internet terminals provided within Australian Public Libraries. This is an 11% increase from 2007–08 and a 43% increase in the last 5 years. The most populous states had the largest number of public access Internet terminals in public libraries in 2008–09, with 2,587 in New South Wales, 1,974 in Queensland and 1,723 in Victoria. However, Tasmania had the most public access Internet terminals per 10,000 people in 2008–09 (9.6), followed by South Australia (5.5), Northern Territory (4.6) and Queensland (4.5).

10.7 PUBLIC ACCESS INTERNET TERMINALS PROVIDED IN AUSTRALIAN PUBLIC LIBRARIES (a)—2004–05 to 2008–09

		NSW	Vic.	Qld	SA	WA	NT	Tas.	ACT	Australia
NUMBER										
2004–05	no.	1 963	1 251	1 194	628	630	122	192	77	6 057
2005–06	no.	2 082	1 354	1 388	636	676	133	424	72	6 765
2006–07	no.	2 216	1 476	1 781	685	736	96	462	72	7 524
2007–08	no.	2 414	1 630	1 615	746	811	61	484	60	7 821
2008–09	no.	2 587	1 723	1 974	890	809	103	484	82	8 652
Change over 5 year period	%	32	38	65	42	28	-16	152	6	43
Change to previous year	%	7	6	22	19	—	69	—	37	11
PER 10,000 PEOPLE										
2004–05	no.	2.9	2.5	3.0	4.1	3.1	6.0	4.0	2.4	3.0
2005–06	no.	3.1	2.7	3.4	4.1	3.3	6.4	8.7	2.2	3.3
2006–07	no.	3.2	2.8	4.3	4.3	3.5	4.5	9.4	2.1	3.6
2007–08	no.	3.5	3.1	3.8	4.7	3.8	2.8	9.7	1.7	3.7
2008–09	no.	3.6	3.2	4.5	5.5	3.6	4.6	9.6	2.3	4.0
Change over 5 year period	%	26	27	47	35	16	-24	143	-2	33
Change to previous year	%	5	3	19	18	-3	65	-1	34	8

— nil or rounded to zero (including null cells)

(a) Including mobile libraries.

Source: *Australian Public Libraries Statistical Report, 2008–09*,
Public Library Services, State Library of Queensland,
August 2010.TECHNOLOGY *continued*

According to the ABS publication, *Public Libraries, Australia, 2003–04* (cat. no. 8561.0), local libraries had 4,638 Internet workstations in 2003–04, a 64% increase since 1999–2000. National and state libraries had increased their number of Internet workstations from 173 (or 7 workstations per location) in 1999–2000 to 426 (or 25 workstations per location) in 2003–04.

10.8 INTERNET FACILITIES IN PUBLIC LIBRARIES—1999–2000 and 2003–04

	1999–2000		2003–04	
	Local libraries	National and State libraries	Local libraries	National and state libraries
	no.	no.	no.	no.
Internet workstations	2 832	173	4 638	426
Internet workstations per location(a)	2	7	3	25

(a) Excludes deposit stations as they do not have Internet facilities.

Source: *Public Libraries, Australia, 2003–04* (cat. no. 8561.0).

FINANCIAL DATA

Public Libraries Survey

Public libraries are particularly reliant on government funding for their operation, with 93% of their total income of \$839.0m in 2003–04 coming from this source. The total expenses of public libraries in 2003–04 were \$852.8m, of which \$447.7m (53%) were labour costs. Other major expenses were purchases of library materials, and repairs and maintenance.

Public Libraries Survey
continued

10.9 INCOME AND EXPENSES OF PUBLIC LIBRARIES—2003–04

	Local libraries	National and state libraries	All public libraries
	\$m	\$m	\$m
Income			
Government funding			
Federal and state/territory	106.6	259.4	366.0
Local	415.2	—	415.2
Total	521.9	259.4	781.2
Income from services to clients	18.3	12.0	30.3
Other income(a)	5.0	18.0	23.0
Total income(b)	545.2	293.7	839.0
Expenses			
Labour costs	340.8	106.9	447.7
Telecommunication services	10.9	4.0	15.0
Repair and maintenance expenses	20.6	9.5	30.1
Purchases of library materials	47.8	8.2	56.0
Other expenses(c)	125.1	129.3	254.4
Total expenses(b)	545.2	307.6	852.8

— nil or rounded to zero (including null cells)

(a) Includes other income such as fundraising, sales of goods, etc.

(b) Components may not add to totals as some components include data which is not available for publication but has been included in totals unless otherwise indicated.

(c) Includes other expenses such as subscription payments, freight, etc.

Source: *Public Libraries, Australia, 2003–04* (cat. no. 8561.0).

The eight national and state archives were also highly dependent on government funding with \$97.9m of their total \$109.1m income coming from this source in 2003–04. An additional \$10.4m came from services to clients. The total expenses of these archives was \$107.0m with the greatest expense item being labour costs (\$46.3m).

Cultural Funding Survey

According to *Cultural Funding by Government, Australia, 2008–09* (cat. no. 4183.0), the Australian Government provided \$60.0m towards funding for public libraries in 2008–09, while state and territory government contributed \$337.4m. Archives received \$105.4m from the Australian Government in 2008–09, and a further \$65.9m from state and territory government.

The majority of funding for libraries, however, is from local government, with libraries receiving \$727.5m in 2008–09, an 11% increase from 2007–08 (\$645.9m).

EMPLOYMENT

Census of Population and
Housing

In 2006, the Census of Population and Housing recorded 7,007 people whose main job was in the libraries and archives industry – the ABS definition of this industry includes people working for archives organisations but excludes people working for libraries located in educational institutions (e.g. school libraries) and specialist libraries (e.g. those located in government departments and within business organisations). The most common occupations within the industry were librarians (2,007 people), library assistants (1,431 people) and library technicians (1,378 people).

Census of Population and Housing continued

10.10 PERSONS EMPLOYED IN THE LIBRARIES AND ARCHIVES INDUSTRY(a)(b), By occupation—August 2006

<i>Cultural occupations</i>	Number	%
Librarian	2 007	28.6
Library assistant	1 431	20.4
Library technician	1 378	19.7
Archivist	183	2.6
Other cultural occupations	246	3.5
Total cultural occupations	5 245	74.9
Other occupations(c)	1 762	25.1
Total occupations	7 007	100.0

- (a) Cells in this table have been randomly adjusted to avoid the release of confidential data.
 - (b) In their main job in the week before Census Night.
 - (c) Includes not stated and inadequately described.
- Source: ABS data available on request, Census of Population and Housing, 2006.

Many people working in library-related occupations are not working in the libraries and archives industry. The local government administration industry employed 1,937 librarians, higher education employed 1,885 librarians, and school education (primary and secondary) employed 406 librarians.

The 2006 Census of Population and Housing also counted 898 people whose main job in the week before the Census was as an archivist. This included not only those employed in the national and state archives, but also those working for government organisations, educational institutions, commercial organisations, etc.

10.11 PERSONS WITH LIBRARY-RELATED OCCUPATIONS(a)(b), By industry—August 2006

<i>Industry</i>	<i>Library</i>		<i>Library assistants</i>	<i>Archivists</i>	<i>Total</i>
	<i>Librarians</i>	<i>technicians</i>			
Local government administration	1 937	1 229	1 954	50	5 170
Libraries and archives	2 008	1 378	1 430	182	4 998
Higher education	1 885	967	1 458	67	4 377
Secondary education	209	702	1 000	51	1 962
Primary education	197	716	711	5	1 629
Technical and vocational education and training	671	333	219	7	1 230
Combined primary and secondary education	190	321	485	61	1 057
State government administration	310	174	93	88	665
Legal services	270	48	46	12	376
Hospitals	226	70	27	10	333
Central government administration	221	53	20	34	328
Scientific research services	128	40	13	6	187
Other industries	1 825	477	800	325	3 427
Total all industries	10 077	6 508	8 256	898	25 739

- (a) Cells in this table have been randomly adjusted to avoid the release of confidential data.
 - (b) In their main job in the week before Census Night.
- Source: ABS data available on request, Census of Population and Housing, 2006.

Work Survey

The ABS 2007 survey of Work in Selected Culture and Leisure Activities provides another perspective on employment in libraries and archives. This survey provides information on the number of paid and unpaid workers in library or archive organisations. It also provides the number of people working in these organisations as part of a second job. However, it does not contain information on type of occupation.

The survey found that there were 108,500 people aged 15 years and over who had some work involvement in a library or archive in the 12-months to April 2007, of whom 35,900 (33%) received some payment.

Public Libraries Survey

The 2003–04 ABS survey of Public Libraries found that at the end of June 2004, there were 10,606 staff employed in local government libraries and 1,865 employed in national and state libraries.

Some 42% of those employed in local government libraries were permanent full-time workers while 76% of those employed in national and state libraries were permanent full-time workers.

10.12 NUMBER OF EMPLOYEES IN PUBLIC LIBRARIES—June 2004

	<i>Males</i>	<i>Females</i>	<i>Persons</i>
LOCAL GOVERNMENT LIBRARIES			
Permanent full-time	793	3 678	4 472
Permanent part-time	300	3 144	3 444
Casuals	360	2 330	2 691
Total employees	1 454	9 152	10 606
NATIONAL AND STATE LIBRARIES			
Permanent full-time	480	937	1 417
Permanent part-time	53	242	295
Casuals	60	93	153
Total employees	593	1 272	1 865

Source: *Public Libraries, Australia, 2003–04* (cat. no. 8561.0).

The same survey found that at the end of June 2004, there were 811 persons employed by the eight national and state archives in Australia, of which 471 (or 58%) were female.

The number of volunteers working for local government libraries in June 2004 totalled 6,315 people. The number of volunteers working in national and state libraries was 416 and there were 122 volunteers working in national and state archives.

INTRODUCTION

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

The *Australian Culture and Leisure Classifications, 2008 (Second edition)* (cat. no. 4902.0) define the literature and print media industry as those businesses and organisations whose main activity is creative writing and/or the printing, publishing and selling of literature products.

It includes the following activities in this category:

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

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

ORGANISATIONS

The 2003–04 ABS Book Publishers Survey identified 234 businesses that were predominantly involved in publishing books. There were an additional ten businesses that generated an annual income in excess of \$2.0m from book publishing, although their main business activities were in other fields.

At the other end of the distribution chain, the 2003–04 ABS Book Retailers Survey identified a total of 1,572 businesses in Australia involved in book retailing. This included 561 bookshops, 991 newsagents and 19 other large retailers (i.e. supermarkets, department stores, etc.).

PRODUCTS

In 2003–04, book publishers sold 128.8 million books with a total value of \$1,353.2m to book retailers and directly to the general public. Some \$811.9m (89.2 million books) of these were sales of new Australian titles. Approximately 14% (by value) of all books published were sold overseas, predominantly to the United States and New Zealand.

Educational books accounted for 39% of sales, with general non-fiction accounting for 36%, general fiction 15% and specialised children's books 9%.

PRODUCTS *continued***11.1** DOMESTIC AND EXPORT SALES OF BOOKS, By category—2003–04

	Domestic sales	Export sales(a)	Total
	\$m	\$m	\$m
Printed books			
Education			
Primary	124.0	33.5	157.5
Secondary	98.6	6.3	104.9
Tertiary	143.9	13.5	157.4
Professional and reference	85.4	**20.8	106.2
Total education	452.0	74.1	526.1
General			
Hardback			
Non-fiction	122.7	18.9	141.6
Fiction	55.2	4.4	59.6
Children's	31.8	5.5	37.4
Total hardback	209.8	28.9	238.6
Trade paperback(b)			
Non-fiction	np	np	220.0
Fiction	np	np	49.6
Children's	33.8	4.0	37.7
Total trade paperback	235.4	71.9	307.3
Mass-market paperback(c)			
Non-fiction	117.5	6.2	123.7
Fiction	94.0	4.4	98.4
Children's	46.9	4.8	51.6
Total mass-market paperback	258.3	15.3	273.7
Total general	703.5	116.1	819.6
Total printed books	1 155.5	190.2	1 345.7
Electronic books			
Education	np	np	3.2
General	np	np	4.3
Total electronic	7.2	0.3	7.5
Total books	1 162.6	190.5	1 353.2

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

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

(a) Domestic and export sales of books includes all books whether published by the business or not. Export sales includes re-export sales of \$7.6m and excludes sales of rights which totalled \$7.7m.

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

(c) The conventional form of paperback book.

Source: *Book Publishers, 2003–04* (cat. no. 1363.0).

Book publishers reported selling \$305.9m worth of books to final consumers in 2003–04. By comparison, the 2003–04 Book Retailers Survey reported that 80 million new books valued at \$1,406.5m were sold via retail outlets. Approximately 78% of these were sold by bookshops, 14% by department stores, 6% by newsagents and 2% by supermarkets and other large retailers.

See Chapter 3 for information on household expenditure on literature.

FINANCIAL DATA

The value of operating profit before tax for book publishers increased by 75% between 2002–03 and 2003–04, from \$86.9m to \$152.1m. This led to an increase in profit margin from 6% to 10%.

FINANCIAL DATA

*continued***11.2** BOOK PUBLISHERS(a), Income and expense items—2002–03 and 2003–04

	2002–03	2003–04
	\$m	\$m
Income		
Sale of books		
Australian titles	877.4	811.9
Imported titles	490.4	541.3
Total	1 367.9	1 353.2
Sales of other goods	73.8	68.6
Other sources of income	126.0	138.9
Total income	1 567.7	1 560.6
Expenses		
Wages and salaries	247.9	266.1
Royalties and fees paid	102.0	90.6
Other expenses	1 127.1	1 047.8
Total expenses	1 476.9	1 404.4
Operating profit before tax	86.9	152.1

(a) 'Book publishers' includes only businesses for which the predominant activity is book publishing.

Source: *Book Publishers, 2003–04* (cat. no. 1363.0).

Comparative financial data for the period 2001–02 to 2003–04 is available from the Book Retailers Survey. Bookshops recorded growth in terms of sales over this period, although the operating profit before tax declined, with the profit margin declining from 4% in 2001–02 to 1% in 2003–04.

11.3 BOOKSHOPS(a), Summary of operations—2001–02 to 2003–04

	2001–02	2002–03	2003–04
	\$m	\$m	\$m
Income			
Retail sales of new books(b)	957.4	941.7	1 103.3
Other retail sales	104.6	92.1	131.2
Other income	33.4	26.0	62.5
Total income	1 095.4	1 059.7	1 297.0
Expenses			
Purchase of new books	604.6	587.3	678.4
Wages and salaries	149.0	145.9	180.3
Other	322.9	311.9	428.9
Total expenses	1 076.4	1 045.2	1 287.6
Operating profit before tax	39.0	19.7	16.6

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

(b) Includes electronic and audio books.

Source: *Book Retailers, Australia, 2003–04* (cat. no. 1371.0).

According to *Cultural Funding by Government, 2008–09* (cat. no. 4183.0), the Australian government provided funding of \$31.2m towards literature and print media in 2008–09, with state and territory governments contributing an additional \$18.9m.

FINANCIAL DATA
*continued***11.4** CULTURAL FUNDING BY GOVERNMENT, Literature and print media—2008–09

	2008–09
	\$m
Australian Government(a)	31.2
State and territory government	18.9
Total	50.1

(a) The Australian Government refers to the federal government. It does not refer to the aggregate of state and territory governments, nor does it include local government.

Source: *Cultural Funding by Government, Australia, 2008–09* (cat. no. 4183.0).

EMPLOYMENT

Census of Population and Housing

The 2006 Census of Population and Housing collected employment data relating to the job in which a person worked the most hours during the week before the Census.

A total of 41,525 people were employed in publishing and 37,543 people were employed in the printing of newspapers, periodicals and books. A further 31,633 people were employed in the wholesaling and/or retailing of books, newspapers, magazines and stationery.

Of those working in the printing/publishing sector of the literature and print media industry, 46% were employed in a cultural occupation, compared with only 2% of those employed in the wholesaling and retailing sector. The most common cultural occupations recorded were print journalists (5,006 people employed), printing machinists (4,846) and newspaper or periodical editors (3,033). Of the non-cultural occupations recorded for this industry, sales assistants (15,208) and retail managers (7,896) were the most common.

11.5 PERSONS EMPLOYED IN LITERATURE AND PRINT MEDIA INDUSTRIES (a)(b), By occupation—August 2006

	<i>Printing</i>	<i>Book and magazine wholesaling</i>	<i>Newspaper and book retailing</i>	<i>Newspaper publishing</i>	<i>Magazine and other periodical publishing</i>	<i>Book publishing</i>	<i>Internet publishing and broadcasting</i>
	no.	no.	no.	no.	no.	no.	no.
Authors	9	12	18	40	44	241	4
Book or script editors	6	45	3	10	25	564	20
Classified advertising clerks	10	—	4	430	27	3	—
Copywriters	10	—	3	30	6	7	3
Newspaper or periodical editors	28	14	13	1 700	1 075	141	62
Print journalists	53	—	17	4 161	730	26	19
Proof readers	46	—	3	74	11	43	—
Radio journalists	—	—	—	11	—	—	—
Technical writers	3	3	4	3	5	37	6
Television journalists	—	—	—	19	—	—	—
Binders and finishers	1 513	19	4	24	48	309	3
Screen printers	859	—	—	—	—	—	—
Graphic pre-press trades workers	1 717	6	9	895	126	100	3
Printing machinists	3 186	3	11	1 331	206	106	3
Small offset printers	283	—	—	—	—	7	—
Printer's assistants	1 592	7	5	709	71	76	3
Printing table workers	1 031	—	5	166	42	89	—
Other cultural occupations	7 614	157	134	2 783	1 310	621	182
<i>Total cultural occupations</i>	<i>17 960</i>	<i>266</i>	<i>233</i>	<i>12 386</i>	<i>3 726</i>	<i>2 370</i>	<i>308</i>
Other occupations	19 583	3 357	27 777	14 187	4 852	4 004	850
Total occupations	37 543	3 623	28 010	26 573	8 578	6 374	1 158

— nil or rounded to zero (including null cells)

(a) Cells in this table have been randomly adjusted to avoid the release of confidential data.

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

Source: ABS data available on request, Census of Population and Housing, 2006.

Book Publishers Survey

The 2003–04 ABS Book Publishers Survey reported that there were 5,300 people employed by the 244 businesses involved in book publishing, which was virtually the same as the previous year.

11.6 BOOK PUBLISHERS (a), Employment—2002–03 and 2003–04

	2002–03	2003–04
	no.	no.
Males	1 784	1 848
Females	3 556	3 452
Persons	5 341	5 300

(a) 'Book publishers' includes only businesses for which the predominant activity is book publishing. Employment includes working proprietors.

Source: *Book Publishers, 2003–04* (cat. no. 1363.0).

Book Retailers Survey

The 2003–04 ABS Book Retailers Survey showed that there were 8,717 people employed in the 561 businesses predominantly involved in book retailing. The largest increase in employment in this sector occurred between 2002–03 and 2003–04, with an increase of 19%.

11.7 BOOKSHOPS (a), Employment—2001–02 to 2003–04

	2001–02	2002–03	2003–04
	no.	no.	no.
Males	2 398	2 383	2 855
Females	4 685	4 953	5 862
Persons	7 083	7 336	8 717

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

Source: *Book Retailers, Australia, 2003–04* (cat. no. 1371.0).

Work Survey

Additional information on people's involvement in literature and print media was also collected in the ABS 2007 Work in Selected Culture and Leisure Activities Survey.

According to this survey, some 606,500 people contributed their writing skills in the 12-months before interview, with 40% of these receiving some payment for their contributions.

A further 208,400 people had a work involvement in publishing in the 12-months before interview, with just over one-half (51%) receiving some payment for their efforts.

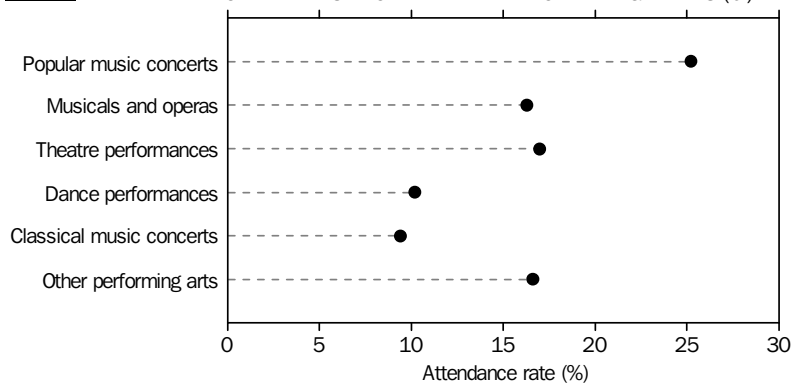
INTRODUCTION

This chapter provides information on music, theatre, dance, opera and a variety of other activities which come under the broad heading of the performing arts. Attendance data from the Attendance at Selected Cultural Venues and Events Survey, 2005–06 and detailed employment data from both the 2006 Census of Population and Housing and the Work in Selected Culture and Leisure Activities Survey, 2007 are the main sources of information about involvement with the performing arts. This is complemented by data from the Performing Arts Operation Survey, 2006–07, the Performing Arts Venue Operation Census, 2006–07 and the 2002–03 Performing Arts Festival Survey, which provide information on the income, expenditure and employment of these organisations.

ATTENDANCE

According to the ABS survey of Attendance at Selected Cultural Venues and Events 2005–06, 50% of the population aged 15 years and over attended at least one type of performing arts performance in the 12-month period prior to interview in 2005–06. One-quarter (25%) of the population had attended popular music concerts, while under one-fifth had seen theatre performances (17%) and musicals and operas (16%).

12.1 ATTENDANCE RATES FOR THE PERFORMING ARTS (a)—2005–06



(a) In the 12 months before interview.

Source: Attendance at Selected Cultural Venues and Events, 2005–06 (cat. no. 4114.0).

The attendance rates for females exceeded those of males for most events, apart from popular music concerts where there was no significant difference. For most events, attendance was correlated with age. The best example of this is popular music concerts, where attendance peaked with the 18–24 year age group (40%) and dropped almost progressively with each older age group, to less than 7% for those aged 75 years and over. Conversely, the highest attendance rates for classical music concerts were in the 55–64 year and 45–54 year age groups with 13% and 12% respectively.

12.2 ATTENDANCE AT PERFORMING ARTS VENUES AND EVENTS(a), By selected characteristics—2005–06

	<i>Classical music concerts</i>	<i>Popular music concerts</i>	<i>Theatre performances</i>	<i>Dance performances</i>	<i>Musicals and operas</i>	<i>Other performing arts</i>
NUMBER ('000)						
Males	643.8	1 955.1	1 033.1	546.5	944.7	1 166.1
Females	864.3	2 080.8	1 690.1	1 078.5	1 669.2	1 488.8
15–17 years	52.0	255.1	200.3	154.2	148.1	163.4
18–24 years	116.7	774.8	306.4	159.4	266.3	312.8
25–34 years	193.4	860.2	428.1	262.1	378.1	529.3
35–44 years	244.7	742.0	459.7	362.9	502.1	572.2
45–54 years	345.3	737.8	565.3	355.8	527.1	482.2
55–64 years	284.8	413.7	445.2	188.8	440.7	353.1
65–74 years	163.1	179.4	232.7	93.4	221.7	162.1
75 years and over	108.1	72.9	85.4	48.3	130.0	79.9
Six state capital cities	1 067.9	2 591.5	1 797.4	1 031.4	1 845.9	1 724.9
Rest of Australia	440.1	1 444.4	925.8	593.5	768.0	930.1
New South Wales	518.8	1 280.2	904.3	584.9	890.3	822.4
Victoria	373.1	949.3	721.7	400.0	740.7	670.8
Queensland	251.4	794.1	467.3	269.5	475.9	505.3
South Australia	118.6	321.2	215.7	137.0	159.4	250.7
Western Australia	168.2	479.9	261.6	152.1	230.4	274.7
Tasmania	35.4	92.0	74.3	28.8	58.5	64.5
Northern Territory	*8.8	32.8	13.5	*10.7	10.4	16.4
Australian Capital Territory	33.7	86.3	64.8	42.1	48.4	50.0
Total	1 508.1	4 035.9	2 723.2	1 625.0	2 613.9	2 655.0
ATTENDANCE RATE (%)						
Males	8.2	24.8	13.1	6.9	12.0	14.8
Females	10.6	25.6	20.8	13.3	20.6	18.3
15–17 years	6.4	31.2	24.5	18.9	18.1	20.0
18–24 years	6.0	40.0	15.8	8.2	13.7	16.1
25–34 years	7.0	30.9	15.4	9.4	13.6	19.0
35–44 years	8.3	25.1	15.5	12.3	17.0	19.3
45–54 years	12.4	26.5	20.3	12.8	19.0	17.3
55–64 years	12.8	18.7	20.1	8.5	19.9	15.9
65–74 years	11.8	12.9	16.8	6.7	16.0	11.7
75 years and over	9.6	6.5	7.6	4.3	11.5	7.1
Six state capital cities	10.6	25.8	17.9	10.3	18.4	17.2
Rest of Australia	7.4	24.2	15.5	10.0	12.9	15.6
New South Wales	9.7	23.9	16.9	10.9	16.6	15.3
Victoria	9.3	23.6	17.9	9.9	18.4	16.7
Queensland	8.2	25.8	15.2	8.7	15.4	16.4
South Australia	9.7	26.2	17.6	11.2	13.0	20.5
Western Australia	10.8	30.8	16.8	9.7	14.8	17.6
Tasmania	9.3	24.1	19.5	7.5	15.3	16.9
Northern Territory	*7.9	29.5	12.1	*9.6	9.4	14.8
Australian Capital Territory	13.3	34.1	25.5	16.6	19.1	19.7
Total	9.4	25.2	17.0	10.2	16.3	16.6

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

Source: *Attendance at Selected Cultural Venues and Events, 2005–06* (cat. no. 4114.0).

(a) In the 12 months before interview.

ATTENDANCE *continued*

Popular music concerts and classical music concerts were the events most likely to attract multiple visits within a 12-month period (65% and 58% respectively). More than one-third (39%) of people attended popular music concerts more than twice in a 12-month period. During the same time period, 34% attended classical music concerts more than twice. Popular music concerts attracted 26% of people more than 3 times in a 12-month period, while classical music concerts attracted 22% (more than 3 times in the same period).

12.3 FREQUENCY OF ATTENDANCE AT PERFORMING ARTS VENUES AND EVENTS (a)—2005–06

	<i>Classical music concerts</i>	<i>Popular music concerts</i>	<i>Theatre performances</i>	<i>Dance performances</i>	<i>Musicals and operas</i>	<i>Other performing arts</i>
NUMBER ('000)						
Once	634.3	1 399.5	1 269.3	883.6	1 428.3	1 692.8
Twice	357.5	1 051.7	730.0	401.4	647.5	524.0
3 times	181.3	528.6	267.1	121.6	256.5	183.1
4 times	95.4	308.6	143.8	78.5	115.5	73.3
5 times	56.0	195.3	80.7	40.3	65.5	46.6
6–10 times	119.4	338.5	171.2	57.2	80.2	93.7
11 times or more	**64.1	213.8	*61.2	**42.4	**20.4	*41.4
<i>Total</i>	<i>1 508.1</i>	<i>4 035.9</i>	<i>2 723.2</i>	<i>1 625.0</i>	<i>2 613.9</i>	<i>2 655.0</i>
ATTENDANCE RATE (%)						
Once	42.1	34.7	46.6	54.4	54.6	63.8
Twice	23.7	26.1	26.8	24.7	24.8	19.7
3 times	12.0	13.1	9.8	7.5	9.8	6.9
4 times	6.3	7.6	5.3	4.8	4.4	2.8
5 times	3.7	4.8	3.0	2.5	2.5	1.8
6–10 times	7.9	8.4	6.3	3.5	3.1	3.5
11 times or more	**4.2	5.3	*2.2	**2.6	**0.7	*1.6
<i>Total</i>	<i>100.0</i>	<i>100.0</i>	<i>100.0</i>	<i>100.0</i>	<i>100.0</i>	<i>100.0</i>

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

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

(a) In the 12 months before interview.

Source: *Attendance at Selected Cultural Venues and Events, 2005–06* (cat. no. 4114.0).

ORGANISATIONS

The 2006–07 ABS Performing Arts Survey found that at the end of June 2007, there were 726 organisations in the performing arts operation industry in Australia. Of these, 180 were mainly engaged in popular music performance, 143 in drama production, 102 in symphony and choral performance, 77 in musical theatre production, 36 in dance production, 34 in circus production, 16 in opera production and 137 in other performance or production such as puppetry, ventriloquism etc.

ORGANISATIONS

*continued***12.4** PERFORMING ARTS OPERATION ORGANISATIONS, By type of production—2006–07

	<i>no.</i>
Popular music performance	180
Symphony and choral performance	102
Drama production	143
Dance production	36
Musical theatre production	77
Opera production	16
Circus production	34
Other performance or production	137

Source: *Performing Arts, Australia, 2006–07* (cat. no. 8697.0).

Not-for-profit organisations represented 48% of the performing arts operation industry. Such organisations put on an estimated 18,711 paid performances and attracted 5.8 million paid attendances. By comparison, the 381 for-profit organisations reported staging 24,749 paid performances with 6.4 million paid attendances.

In 2006–07, there were 14,368 drama productions with 3.1 million paid attendances. Dance productions had the least performances and attendances with 1,398 paid performances attracting 527,600 paid attendances.

12.5 PERFORMING ARTS OPERATION ORGANISATIONS, Performances and attendances—2006–07

	<i>Paid performances(a)</i>	<i>Paid attendances</i>
	<i>no.</i>	<i>'000</i>
Popular music performance	6 813	1 815.3
Symphony and choral performance	4 766	2 219.6
Drama production	14 368	3 146.2
Dance production	1 398	527.6
Musical theatre production	5 799	1 978.4
Opera production	1 519	1 002.9
Circus production	2 428	1 004.9
Other performance or production	6 368	*561.4
Total	43 460	12 256.3

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

(a) Paid performances are related to headline acts only, support acts are excluded.

Source: *Performing Arts, Australia, 2006–07* (cat. no. 8697.0).

Performing Arts, Australia, 2002–03 (cat. no. 8697.0) provided data on the activities of organisations which were involved with performing arts festivals. The survey only included those festivals which lasted more than two consecutive days and which were either multifaceted (i.e. multiple performing arts components and non-performing arts based activities) or had a primary focus in one of the genres of the performing arts, such as music or drama. The survey found that there were 176 performing arts festivals during 2002–03, 91 of which were music festivals, 75 were multifaceted, while the remaining ten were drama, dance or comedy festivals.

ORGANISATIONS

continued

According to *Clubs, Pubs, Taverns and Bars, Australia, 2004–05* (cat. no. 8687.0) there were 194,769 paid live performances in pubs, taverns and bars and 114,082 in clubs in 2004–05.

FINANCIAL DATA

Figures from the 2006–07 survey of Performing Arts indicate that just under half the income received by performing arts operation organisations came from box office takings (49%). Governments were responsible for providing a further 24% of income, 9% came from contract performance fees, while 7% was obtained through fundraising. Governments provided funding of \$170.2m to not-for-profit performing arts operation organisations in 2006–07, or 98% of all government funds to performing arts operation organisations. In contrast, for-profit organisations reported \$29.8m in revenue from sales of goods, or 88% of all revenue from this source.

12.6 PERFORMING ARTS OPERATION ORGANISATIONS, Income received—2006–07

		<i>For-profit</i>	<i>Not-for-profit</i>	<i>Total</i>
Organisations at end June	no.	381	345	726
Box office income	\$m	191.1	164.9	356.0
Contract performance fees received	\$m	41.7	24.5	66.2
Sales of goods	\$m	29.8	4.2	34.0
Royalties	\$m	5.7	1.8	7.4
Rent, leasing and hiring	\$m	1.8	5.6	7.4
Government funding	\$m	3.7	170.2	173.8
Fundraising	\$m	3.1	50.7	53.8
Interest	\$m	1.9	6.7	8.6
Other	\$m	7.2	18.9	26.1
Total income	\$m	286.0	447.5	733.4

Source: *Performing Arts, Australia, 2006–07* (cat. no. 8697.0).

Organisations most reliant on government funding were those involved in symphony and choral performances (47% of total income) and dance production (36%). By contrast, organisations involved in popular music performances received less than 2% of their income from governments. Other music and theatre production and drama production both received more than half of their income from the box office in 2006–07 (61% and 55% respectively).

12.7 PERFORMING ARTS OPERATION ORGANISATIONS, Income by type—2006–07

	<i>Box office income</i>	<i>Government funding</i>	<i>Other</i>	<i>Total income</i>
	\$m	\$m	\$m	\$m
Popular music performance	24.3	0.9	30.5	55.8
Symphony and choral performance	48.3	78.6	41.4	168.2
Drama production	83.8	33.7	34.4	151.8
Dance production	21.0	23.5	20.9	65.4
Other music and theatre production	178.7	37.1	76.4	292.2
Total	356.0	173.8	203.5	733.4

Source: *Performing Arts, Australia, 2006–07* (cat. no. 8697.0).

FINANCIAL DATA

continued

Performing arts operation organisations incurred expenses of \$682.7m in 2006–07. Over a third (37%) of these were labour costs, primarily wages and salaries, with another 11% being rent, leasing and hiring expenses. Labour costs accounted for 22% of expenses for for-profit organisations and 47% for not-for-profit organisations. Of the \$23.1m paid in royalties, 56% was paid to Australian organisations and individuals while 44% went overseas.

12.8 PERFORMING ARTS OPERATION ORGANISATIONS, Expenses—2006–07

		<i>For-profit</i>	<i>Not-for-profit</i>	<i>Total</i>
Organisations at end June	no.	381	345	726
Labour costs	\$m	56.3	198.9	255.2
Contract payments to performers/artists and artistic support	\$m	21.8	35.5	57.3
Contract payments for productions	\$m	2.4	5.0	7.4
Other contract, subcontract and commission expenses	\$m	15.8	15.8	31.6
Rent, leasing and hiring	\$m	33.9	38.9	72.9
Advertising, marketing and promotion	\$m	22.5	32.5	55.0
Travel, accommodation and entertainment	\$m	19.1	26.2	45.2
Purchases	\$m	17.5	13.8	31.3
Royalties paid to businesses/organisations/individuals	\$m	14.6	8.5	23.1
Other	\$m	53.1	50.6	103.5
Total	\$m	257.1	425.6	682.7

Source: *Performing Arts, Australia, 2006–07* (cat. no. 8697.0).

The 2006–07 ABS Performing Arts Survey also provides information on performing arts venue operation organisations. These businesses are mainly engaged in operating venues for the presentation and rehearsal of performing arts. During 2006–07, the 145 organisations in the performing arts venue industry generated income of \$494.4m. The two main sources of income for these businesses were government funding (\$165.7m) and rent, leasing and hiring income (\$117.9m).

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

Results from *Cultural Funding by Government, Australia, 2008–09* (cat. no. 4183.0), showed that Australian Government funding for performing arts in 2008–09 totalled \$140.2m. By comparison, state and territory government funding for performing arts was \$158.7m, with an additional contribution of \$264.2m towards performing arts venues. Local governments provided \$87.6m in funding for the performing arts in 2008–09, a significant 130% increase on 2007–08 (\$38.1m).

FINANCIAL DATA

*continued***12.9** CULTURAL FUNDING BY GOVERNMENT, Performing arts—2008–09

	Australian Government (a)	State and territory government	Local government	Total
	\$m	\$m	\$m	\$m
Performing arts				
Music performance	59.3	58.8	na	118.1
Drama	28.3	30.1	na	58.4
Dance	21.6	18.2	na	39.8
Music theatre and opera	24.0	16.9	na	40.9
Other performing arts	7.0	34.6	na	41.7
Total	140.2	158.7	87.6	386.4
Performing arts venues	—	241.2	na	241.2

— nil or rounded to zero (including null cells)

na not available

(a) The Australian Government refers to the federal government. It does not refer to the aggregate of state and territory governments, nor does it include local government.

Source: *Cultural Funding by Government, Australia, 2008–09* (cat. no. 4183.0).

EMPLOYMENT

*Survey of Performing Arts
Industries*

Putting together a production requires more than just performers. Technicians, producers, directors, stage managers, those involved in marketing and sales, ticket collectors and a variety of others all contribute. According to the 2006–07 ABS survey of Performing Arts, there were 6,569 people employed in the performing arts operation industry in June 2007.

Of these, 49% were performing artists, 23% were in managerial, administrative or clerical roles and 6% provided artistic support (e.g. choreographers, composers and musical directors). The industry employed roughly equal numbers of males and females (51% and 49% respectively). The survey also found that there were 6,582 people working as volunteers in the industry during the month of June 2007.

At the end of June 2007, there were 5,876 people employed in the performing arts venue operation industry. Women represented 55% of these employees. In addition to paid employees, there were 1,935 volunteers during the month of June 2007.

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

*Census of Population and
Housing*

The performing arts surveys do not give information on the occupations in which people work, therefore it is necessary to analyse data from the 2006 Census of Population and Housing for such detail. According to the Census, there were 14,481 people whose main job was in the creative arts, musicians, writers and performers industry in August 2006. Musician was the largest occupation category in this industry with 2,345 people (16%). There were also 412 people who indicated that they worked as singers and 397 as actors in this industry. However, this does not represent all the singers and actors in Australia, with many people reporting having these occupations whilst being employed in other industries.

For example, there were a total of 1,258 people who described their main job as 'actor' in August 2006, but were not within the performing arts industry. The largest

*Census of Population and
Housing continued*

concentrations of actors outside of the performing arts industries were in the free-to-air television broadcasting (130 people), the motion picture and video production (67 people) and the advertising services industries (67 people). There were an additional 66 people who described their main job as 'actor' in 2006, however their industry was inadequately described or not stated.

For many performing arts occupations, there are opportunities for employment in a number of different industries. In a statistical overview publication it is not possible to detail in which industries all performing arts workers are employed, however, such detail is available in *Employment in Culture, Australia, 2006* (cat. no. 6273.0).

12.10 PERSONS EMPLOYED IN SELECTED PERFORMING ARTS
INDUSTRIES (a)(b), By occupation—August 2006

	<i>Number</i>	<i>%</i>
Performing arts operation		
Musician	864	20.0
Singer	206	4.8
Dancer or choreographer	202	4.7
Media producer	185	4.3
Actor	150	3.5
Entertainer or variety artist	133	3.1
Other cultural occupations	1 028	23.8
<i>Total cultural occupations</i>	<i>2 768</i>	<i>64.1</i>
Other occupations	1 552	35.9
<i>Total occupations</i>	<i>4 320</i>	<i>100.0</i>
Creative artists, musicians, writers and performers		
Musician	2 345	16.2
Painter	1 508	10.4
Author	1 143	7.9
Print journalist	605	4.2
Singer	412	2.8
Actor	397	2.7
Other cultural occupations	5 513	38.1
<i>Total cultural occupations</i>	<i>11 923</i>	<i>82.3</i>
Other occupations	2 558	17.7
<i>Total occupations</i>	<i>14 481</i>	<i>100.0</i>
Performing arts venues		
Light technician	100	3.7
Cinema or theatre manager	78	2.9
Sound technician	60	2.2
Arts administrator or manager	59	2.2
Actor	52	1.9
Media producer	44	1.6
Other cultural occupations	326	12.2
<i>Total cultural occupations</i>	<i>719</i>	<i>26.9</i>
Other occupations	1 956	73.1
<i>Total occupations</i>	<i>2 675</i>	<i>100.0</i>

(a) Cells in this table have been randomly adjusted to avoid the release of confidential data.

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

Source: ABS data available on request, Census of Population and Housing, 2006.

Work Survey

According to the 2007 survey of Work in Selected Culture and Leisure Activities, there were 249,700 people who had performed music in front of an audience in the 12-months before interview. Around 36% of these people received payment for at least one of their performances. The same survey found that there were 277,600 people who performed as actors, dancers or in other performing arts roles before an audience. Approximately 14% of these were paid for at least one of their performances.

12.11 PERSONS INVOLVED IN MUSIC AND THE PERFORMING ARTS,
By payment status—12 months ending April 2007

	<i>Some paid involvement</i>	<i>Unpaid involvement only</i>	<i>Total(a)</i>
.....			
NUMBER ('000)			
Music			
As a live performer	90.6	159.1	249.7
No involvement as a live performer	28.3	50.8	79.1
Total(b)	118.8	209.9	328.8
Performing arts			
As a performer	38.9	238.7	277.6
No involvement as a performer	37.9	183.4	221.3
Total	76.8	422.1	499.0
.....			
PERCENT (%)			
Music			
As a live performer	36.3	63.7	100.0
No involvement as a live performer	35.8	64.2	100.0
Total	36.1	63.8	100.0
Performing arts			
As a performer	14.0	86.0	100.0
No involvement as a performer	17.1	82.9	100.0
Total	15.4	84.6	100.0

(a) Includes some people for whom payment details are not known.

(b) Total includes some persons for whom details are unavailable.

Source: ABS data available on request, Survey of Work in Selected Culture and Leisure Activities, 2007.

CHAPTER **13**

MUSIC COMPOSITION, DISTRIBUTION AND PUBLISHING

INTRODUCTION

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

WHOLESALE SALES

Data from the Australian Recording Industry Association Limited (ARIA) for the year ending 31 December 2009 showed that the value of wholesale sales of sound recordings and music videos totalled \$446.1m, up \$20.5m (5%) on the \$425.6m in 2008. Sales of CDs (singles and albums) accounted for 72% of total value of sales, down from 77% in 2008, while music videos and DVDs continued to account for 10% of total value of sales. Digital sales have continued to increase markedly, up 46% from \$54.2m in 2008 to \$79.2m in 2009. Digital sales accounted for 18% by value of total music sales in 2009, up from 13% in 2008. Further information can be found at the ARIA website www.aria.com.au.

WHOLESALE SALES
*continued***13.1** AUSTRALIAN ARIA WHOLESALE SALES (a), Physical and digital—Year ending 31 December 2009

	<i>Number of units</i>	<i>Value(b)</i>
	'000	\$'000
Physical		
CD singles	513	1 314
Vinyl albums	79	1 050
Cassette albums	-1	12
CD albums	39 529	320 900
Music video/DVD	4 353	43 160
Other(c)	33	432
Total	44 506	366 868
Digital		
Digital track	35 966	38 534
Digital album	2 279	21 846
Mobile master ringtones	3 641	6 306
Other(d)	228 628	12 558
Total	270 514	79 244
Total	315 020	446 112

- (a) These figures are based on submissions from reporting ARIA members, estimated to represent approximately 95% of the local wholesale market.
- (b) Figures have been calculated after the application of any volume or other rebates.
- (c) Includes sales of vinyl singles, DVD singles, DVD albums, mini disks and SACD.
- (d) Includes sales of digital music video, mobile ringback tunes, streams, ad-supported income, unearned advances and one-off payments.

Source: Australian Recording Industry Association Limited, www.aria.com.au

See Chapter 3 for information on household expenditure on music.

ORGANISATIONS

The table below shows the number of actively trading businesses in selected music industries in June 2007. These counts exclude: entities which had an active Australian Business Number (ABN) but which did not have a goods and services tax (GST) role; and businesses with a GST role which had not returned a Business Activity Statement (BAS) for more than five quarters or had returned a BAS reporting zero dollar amounts. These figures are not comparable to Business Register Counts presented in previous editions of this publication due to differences in scope.

In June 2007 there were 8,349 actively trading businesses in one of four selected music industries. A majority of these businesses were non-employed (71%). Around two-thirds of these businesses (68%) were in the music and theatre productions industry.

ORGANISATIONS

*continued***13.2** COUNTS OF AUSTRALIAN BUSINESSES, Selected music industries—June 2007

	<i>Non Employing</i>	<i>Employing</i>	<i>Total</i>
	no.	no.	no.
Recorded media manufacturing and publishing	321	357	678
Recorded music retailing	462	681	1 143
Music and theatre production	4 620	1 053	5 673
Sound recording studios	561	294	855
Total	5 964	2 385	8 349

Source: ABS data available on request, Counts of Australian Businesses, Including Entries and Exits, June 2003 to June 2007.

EMPLOYMENT

*Census of Population and
Housing*

The 2006 Census of Population and Housing found that there were 234 people employed in the music publishing industry, 2,286 people employed in the reproduction of recorded media industry, and 814 people employed in the music and other sound recording activities industry. The majority of people employed in this industry worked in cultural occupations (61%) compared to only 15% of those employed in music publishing and 13% of those employed in reproduction of recorded media.

Census employment figures relate only to the main job a person was doing in the week before Census night. This means that people involved in the industry as part of a second job are excluded. Another indicator of the number of people employed in the industry can be drawn from the ABS Manufacturing Industry survey which found 2,249 people working in the reproduction of recorded media industry in June 2007.

*Census of Population and
Housing continued*

13.3 PERSONS EMPLOYED IN SELECTED MUSIC-RELATED
INDUSTRIES(a)(b), By selected occupations—August 2006

	Number	%
Music publishing		
Total cultural occupations	36	15.4
Other occupations	198	84.6
<i>Total occupations</i>	234	100.0
Reproduction of recorded media		
Printers nfd	40	1.7
Screen printer	29	1.3
Graphic designer	29	1.3
Sound technician	22	1.0
Technical writer	20	0.9
Video producer	16	0.7
Other cultural occupations	142	6.2
<i>Total cultural occupations</i>	298	13.0
Other occupations	1 988	87.0
<i>Total occupations</i>	2 286	100.0
Music and other sound recording activities		
Sound technician	304	37.3
Media producer	45	5.5
Musician	29	3.6
Composer	11	1.4
Film, television, radio and stage directors, nec	13	1.6
Graphic designer	11	1.4
Other cultural occupations	82	10.1
<i>Total cultural occupations</i>	495	60.8
Other occupations	319	39.2
<i>Total occupations</i>	814	100.0

(a) Cells in this table have been randomly adjusted to avoid the release of confidential data.

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

Source: ABS data available on request, Census of Population and Housing, 2006.

INTRODUCTION

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

BUYING ART AND CRAFT

The 2003–04 Household Expenditure Survey found that total annual expenditure on visual arts and crafts was \$668m. This was equivalent to an average household expenditure of \$1.66 per week. Total annual expenditure on paintings, carvings and sculptures was \$282m, while \$203m was spent on studio and other professional photography and \$184m on art and craft materials. See Chapter 3 for more information on household expenditure.

ORGANISATIONS

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

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

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

EMPLOYMENT

Visual artists and craft workers

The 2006 Census of Population and Housing and the 2007 Work in Selected Culture and Leisure Activities Survey provide some information on the number of people involved in the creation of visual arts and crafts.

Census of Population and Housing

The 2006 Census of Population and Housing does not separately identify a visual arts and crafts industry, treating it as a subset of the broader creative arts industry. The creative arts industry comprises those who are self employed and includes writers, composers and a variety of occupations which rely on creative expression. Selecting specific occupations gives an indication of the number of people undertaking visual art and craft activity as their main job in the week before the Census.

Census of Population and Housing continued

Some of the more common visual arts and crafts occupations in the creative arts industry in 2006 were painters (1,508 people) and visual arts and craft professionals (516 people).

The data indicates that other industries also employed creative artists. Details of the total number of people working in visual art and craft occupations in all industries are provided in Chapter 5.

14.1 PERSONS EMPLOYED IN THE VISUAL ARTS AND CRAFTS INDUSTRY(a)(b), By selected cultural occupations —August 2006

<i>Selected cultural occupations</i>	<i>Number of persons</i>
Painters (visual arts)	1 508
Visual arts and craft professionals, n.e.c or n.f.d.	516
Sculptors	325
Potters and ceramic artists	104
Photographers	50
Total selected cultural occupations	2 503

- (a) Cells in this table have been randomly adjusted to prevent the release of confidential data.
 - (b) In their main job in the week before Census Night.
- Source: ABS data available on request, Census of Population and Housing, 2006.

Work Survey

The Census only collects information on a person's main job during a one-week period in August 2006. However, the 2007 survey of Work in Selected Culture and Leisure Activities shows that less than a quarter of artists and craft workers received payment for their creations in the 12-months before interview.

The Work survey is perhaps a better indicator of the Australian level of involvement in visual art and craft, as it includes both paid and unpaid involvement over a 12-month period.

During the 12-months prior to interview in April 2007, an estimated 1.4 million people aged 15 years and over were involved in visual arts, while 953,500 were involved in craft. Female involvement was higher for virtually all types of art and craft work, the exception being furniture-making and woodcraft.

People most likely to be paid for their visual arts and craft work were those involved in print-making, although the number undertaking this activity was relatively small. It should be noted that hobby activity is excluded from these figures – that is, only those people involved in the production of works that are available for sale or public display are included.

Work Survey continued

14.2 PERSONS INVOLVED, By type of activity and payment status(a)—2007

	Some paid involvement	Unpaid involvement only	Total	Percentage with some paid involvement
	'000	'000	'000	%
Visual art activities				
Drawing	92.1	458.5	550.7	16.7
Painting	58.3	396.2	454.5	12.8
Sculpture	17.9	74.5	92.5	19.4
Photography	86.6	545.4	632.0	13.7
Printmaking	26.1	69.2	95.3	27.4
Computer art	137.1	411.5	548.7	25.0
Other visual art	18.0	26.2	44.2	40.7
<i>Total visual art activities(b)</i>	281.9	1 228.0	1 405.8	20.1
Craft activities				
Pottery or ceramics	17.0	62.9	79.9	21.3
Textiles	40.2	240.1	280.3	14.3
Jewellery making	32.6	157.1	189.6	17.2
Furniture making and wood crafts	51.6	262.8	314.4	16.4
Glass crafts	*7.9	26.2	34.1	23.2
Other craft activities	25.1	234.0	259.2	9.7
<i>Total craft activities(b)</i>	139.1	829.4	953.5	14.6

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

(a) Total includes some persons for whom payment details are not known.

(b) Components may not add to total as some persons were involved in more than one activity.

Source: *Work in Selected Culture and Leisure Activities, Australia, April 2007* (cat. no. 6281.0).

INTRODUCTION

The *Australian Culture and Leisure Classifications (ACLC), 2008 (Second Edition)* (cat. no. 4902.0) define the design industry as those businesses and organisations whose main activity is the creative, artistic and aesthetic design of objects, environments and services. The classifications focus on several distinct areas of design:

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

ORGANISATIONS

The following table shows the number of actively trading businesses in these industries in June 2007. These counts exclude entities that had an active Australian Business Number (ABN) but did not have a goods and services tax (GST) role, and businesses with a GST role which had not returned a Business Activity Statement (BAS) for more than five quarters or had returned a BAS reporting zero dollar amounts. These figures are not comparable to Business Register Counts presented prior to the 2008 release of this publication due to this change in scope.

There were 13,110 actively trading businesses classified as being predominantly involved in architectural services, with a further 10,314 involved in advertising services, and 10,128 involved in commercial art and display services. It is not possible to separately identify other design industries.

ORGANISATIONS

*continued***15.1** COUNTS OF AUSTRALIAN BUSINESSES(a), Selected design industries(b)—June 2007

	<i>Architectural services</i>	<i>Advertising Services</i>	<i>Commercial art and display services</i>
	no.	no.	no.
New South Wales	4 488	4 083	3 750
Victoria	3 513	2 739	2 934
Queensland	2 370	1 878	1 650
South Australia	612	558	717
Western Australia	1 632	738	738
Tasmania	225	147	153
Northern Territory	84	54	45
Australian Capital Territory	186	117	141
Total(c)	13 110	10 314	10 128

(a) After accounting for entries and exits from register.

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

(c) Includes businesses for which state or territory is not recorded.

Source: ABS data available on request, Counts of Australian Businesses, Including Entries and Exits, June 2003 to June 2007.

The majority of the design businesses actively trading in June 2007 were non–employing (55%). Of the businesses that did have employees, 94% employed less than 20 people.

15.2 COUNT OF AUSTRALIAN BUSINESSES IN SELECTED DESIGN INDUSTRIES(a), By employment size and type(b)—June 2007

	<i>Architectural services</i>	<i>Advertising Services</i>	<i>Commercial art and display services</i>
	no.	no.	no.
Employment size			
1–19 employees	6 435	4 215	3 429
20–199 employees	240	390	165
200 employees or more	12	42	6
Type of employer			
Employing	6 687	4 647	3 600
Non employing	6 423	5 667	6 528
Total	13 110	10 314	10 128

(a) After accounting for entries and exits from the register.

(b) All businesses registered and active for GST purposes in only one state or territory (i.e. it excludes businesses operating in two or more states).

Source: ABS data available on request, Counts of Australian Businesses, Including Entries and Exits, June 2003 to June 2007.

EMPLOYMENT

*Census of Population and
Housing*

Data on the number of people involved in design can be obtained from several sources.

Census of Population and Housing continued

The 2006 Census of Population and Housing found that there were 30,086 people whose main job in the week prior to Census Night 2006 was in the architectural services industry. The Census also found that over half of those in the industry worked as either architects (10,854 people) or architectural draftspersons (5,142 people).

Advertising services employed 27,647 people, with the majority (71%) in non-cultural occupations. Graphic designers were less than 7% of employees.

Nearly half (48%) of those employed in other specialised design services were graphic designers (6,919 people) or signwriters (2,012 people). The remaining employees were distributed amongst a large number of both cultural and non-cultural occupations.

15.3 PERSONS EMPLOYED IN SELECTED DESIGN INDUSTRIES (a)(b),
By occupation—2006

	<i>Number</i>	<i>%</i>
Architectural services		
Architects	10 854	36.1
Architectural draftspersons	5 142	17.1
Urban and regional planners	1 417	4.7
Landscape architects	1 392	4.6
Interior designers	1 133	3.8
Graphic designers	150	0.5
Other cultural occupations	285	0.9
<i>Total cultural occupations</i>	<i>20 373</i>	<i>67.7</i>
Other occupations	9 713	32.3
<i>Total occupations</i>	<i>30 086</i>	<i>100.0</i>
Advertising services		
Advertising specialists	2 328	8.4
Graphic designers	1 881	6.8
Media producers (excluding video)	973	3.5
Copywriters	510	1.8
Photographers	354	1.3
Graphic pre-press trades workers	223	0.8
Other cultural occupations	1 823	6.6
<i>Total cultural occupations</i>	<i>8 092</i>	<i>29.3</i>
Other occupations	19 555	70.7
<i>Total occupations</i>	<i>27 647</i>	<i>100.0</i>
Other specialised design services		
Graphic designers	6 919	37.1
Signwriters	2 012	10.8
Interior designers	1 851	9.9
Graphic pre-press trades workers	218	1.2
Media producers (excluding video)	197	1.1
Illustrators	192	1.0
Other cultural occupations	1 518	8.1
<i>Total cultural occupations</i>	<i>12 907</i>	<i>69.3</i>
Other occupations	5 725	30.7
<i>Total occupations</i>	<i>18 632</i>	<i>100.0</i>

(a) Cells in this table have been randomly adjusted to avoid the release of confidential data.

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

Source: ABS data available on request, Census of Population and Housing, 2006.

Work Survey

The 2007 survey of Work in Selected Culture and Leisure Activities, which collected data on the design activities of architecture, graphic, fashion, advertising and other design activities, found that there were 459,200 people who had worked in design activities in the 12-months to April 2007. Of these, about two-thirds (61%) received some payment for their involvement.

The most common design activities undertaken were advertising (192,000 people) and graphic design (184,700 people). Both fashion design and advertising design activities involved more females than males.

15.4 PERSONS INVOLVED IN DESIGN, By selected characteristics—12 months ending April 2007

	Male	Female	Persons
	'000	'000	'000
Involvement part of main job held last week(a)	157.3	123.8	281.1
Involvement not part of main job held last week(b)	84.9	93.2	178.1
Annual income from design activity(c)			
Goods and services only	**4.2	**3.9	*8.0
Less than \$5,000	37.5	49.6	87.1
\$5,000 to \$39, 999	44.5	45.0	89.5
\$40,000 or more	79.6	41.9	121.5
Type of design activity undertaken			
Graphic design	99.6	85.1	184.7
Fashion design	*5.3	32.2	37.5
Architecture	47.2	18.8	66.0
Advertising	93.8	98.2	192.0
Other design activities	73.8	53.6	127.3
Total(d)	242.3	217.0	459.2

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

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

(a) Main job held in the week prior to interview. If the person held multiple jobs during this week, main job refers to the job in which the most hours were worked.

(b) Excludes persons who were unemployed or not in the labour force.

(c) Excludes persons who did not state the amount of payment they received.

(d) Components may not add up to the total number of people undertaking design activities as some may have undertaken more than one design activity.

Source: ABS data available on request, Survey of Work in Selected Culture and Leisure Activities, 2007.

INTRODUCTION

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

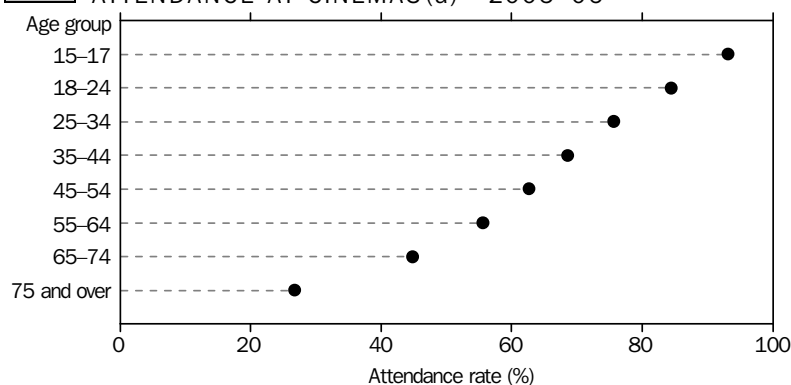
The *Australian Culture and Leisure Classifications (ACLC), 2008 (Second Edition)* (cat. no. 4902.0) define film and video production as businesses and organisations whose main activity is the production of films, video tapes, or other media containing moving images. The industry includes production of feature films, documentaries and drama series, as well as videos for advertising and corporate training. It also includes businesses providing post-production services such as casting, film editing and titling.

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

Data for this chapter have largely been sourced from ABS surveys. Screen Australia also provides substantial detail on many different aspects of the film, television and video industries through their *National Survey of Feature Film and Television Drama Production* and *Get the Picture* publication. Further information on these sources of data is available on the Screen Australia website www.screenaustralia.gov.au.

ATTENDANCE

The 2005–06 ABS survey of Attendance at Selected Cultural Venues and Events showed that 10.4 million people (65% of the population aged 15 years and over) attended cinemas in the 12-months before interview in 2006. The attendance rate decreased successively with age from 93% for 15–17 year olds to 27% for people aged 75 years and over.

ATTENDANCE *continued***16.1** ATTENDANCE AT CINEMAS (a)—2005–06

(a) In the 12 months before the interview.

Source: *Attendance at Selected Cultural Venues and Events, 2005–06* (cat. no. 4114.0).

The frequency of attendance was also greater for people aged 15–17 years than for other age groups. Almost 70% of 15–17 year olds who attended a cinema in the 12-month period visited more than 5 times compared with about 40% for most other age groups.

16.2 PERSONS ATTENDING CINEMAS, By age and frequency of attendance(a)—2005–06

AGE GROUP (YEARS)

15–17 18–24 25–34 35–44 45–54 55–64 65–74 75 and over Total

NUMBER ('000)

1–5 times	239.9	630.1	1 123.2	1 292.4	1 038.4	723.8	408.1	201.2	5 657.1
6–10 times	223.8	398.2	519.4	450.5	420.4	260.0	97.2	49.8	2 419.1
11–20 times	196.8	401.5	306.0	224.8	225.7	177.0	72.9	31.8	1 636.6
21 times or more	101.3	207.8	154.1	62.6	59.2	72.5	42.5	18.6	718.6
Total	761.7	1 637.6	2 102.7	2 030.3	1 743.8	1 233.2	620.7	301.4	10 431.4

ATTENDANCE RATE (%)

1–5 times	31.5	38.5	53.4	63.7	59.5	58.7	65.7	66.8	54.2
6–10 times	29.4	24.3	24.7	22.2	24.1	21.1	15.7	16.5	23.2
11–20 times	25.8	24.5	14.6	11.1	12.9	14.4	11.7	10.6	15.7
21 times or more	13.3	12.7	7.3	3.1	3.4	5.9	6.8	6.2	6.9
Total	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0

(a) In the 12 months before the interview.

Source: ABS data available on request, Survey of Attendance at Selected Cultural Venues and Events, 2005–06.

ORGANISATIONS

Television, film and video

The ABS survey of Television, Film and Video Production and Post-Production Services conducted in respect of the 2006–07 financial year found that at the end of June 2007 there were:

- 2,492 film and video production and post-production services businesses operating in Australia employing 13,844 people
- 13 subscription television broadcasting businesses employing 3,052 people
- 24 commercial free-to-air television broadcasting businesses (excluding public television broadcasting) employing 6,980 people.

Cultural Funding by Government, Australia, 2008–09 (cat. no. 4183.0) reported that the Australian Government provided total funding of \$115.5m for film and video production and distribution, while state and territory governments contributed \$122.7m.

Film and video production services businesses generated \$1,584.2m in income during 2006–07. The majority of this income (71% or \$1,131.2m) was earned from the production of television programs (\$549.7m), commercials (\$245.4m), feature films (\$213.7m) and other media content (\$122.4m). Income from the provision of production services to other businesses accounted for 21% (\$332.3m) of total income.

Post-production services businesses generated \$444.0m in income during 2006–07. The majority of this income (91% or \$402.3m) was earned from the provision of post-production services to other businesses, such as visual editing services (58% or \$255.1m) and duplication services (12% or \$51.1m).

Television, film and video
continued

16.3 SOURCES OF INCOME, Film and video production and post-production services—2006–07

	Proportion of total income	
	Income	%
	\$m	%
Film and video production services		
Production income from		
Feature films	213.7	13.5
Television programs	549.7	34.7
Commercials	*245.4	15.5
Corporate, marketing and training media	*89.6	5.7
Educational media	*10.2	0.6
Music media	*2.1	0.1
Other	20.5	1.3
Total	1 131.2	71.4
Provision of production services to other businesses	332.3	21.0
Provision of post-production services to other businesses	*25.3	1.6
Sale of program format rights	3.3	0.2
Rent, leasing and hiring	*7.6	0.5
Interest	11.0	0.7
Other income	73.4	4.6
Total income	1 584.2	100.0
Post-production services		
Production income	**1.2	0.3
Provision of production service to other businesses	**11.4	2.6
Provision of post-production services to other businesses		
Visual editing	255.1	57.5
Sound editing	20.0	4.5
Duplication	51.1	11.5
Transferring	5.0	1.1
Film laboratory services	—	—
Other post-production services	—	—
Total	402.3	90.6
Sale of program format rights	—	—
Rent, leasing and hiring	3.7	0.8
Interest	2.5	0.6
Other	23.0	5.2
Total income	444.0	100.0

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

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

— nil or rounded to zero (including null cells)

Source: *Television, Film and Video Production and Post-Production Services, Australia, 2006–07* (cat. no. 8679.0).

Film and video production services businesses incurred \$1,461.8m in expenses during 2006–07. Labour costs accounted for just under a third (31% or \$453.2m) of total expenses, followed by payments to other businesses for production services (24% or \$345.6m), purchases (6% or \$87.7m) and rent, leasing and hiring expenses (6% or \$79.9m).

16.4 SOURCES OF EXPENSES, Film and video production and post-production services 2006-07

	FILM AND VIDEO PRODUCTION SERVICES		POST-PRODUCTION SERVICES	
	Expenses	Proportion of total expenses	Expenses	Proportion of total expenses
	\$m	%	\$m	%
Labour costs				
Wages and salaries	386.2	26.4	143.3	36.2
Other	67.0	4.6	23.6	6.0
Total	453.2	31.0	166.9	42.2
Payments to other businesses/contractors				
For production services	345.6	23.6	*10.6	2.7
For post-production services	78.0	5.3	26.1	6.6
Total	423.6	28.9	36.7	9.3
Other contract, subcontract and commission expenses	63.1	4.3	21.2	5.4
Purchases	87.7	6.0	39.1	9.9
Rent, leasing and hiring expenses	79.9	5.5	23.8	6.0
Depreciation and amortisation	45.6	3.1	31.9	8.1
Travelling, accommodation and entertainment	52.6	3.6	6.5	1.7
Royalties	38.4	2.6	0.6	0.1
Other	217.7	15.0	68.9	17.3
Total expenses	1 461.8	100.0	395.6	100.0

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

*Television, film and video
continued*

Post-production services businesses incurred \$395.6m in expenses during 2006–07. Labour costs accounted for 42% (\$166.9m) of total expenses, followed by purchases (10% or \$39.1m) and depreciation and amortisation (8% or \$31.9m).

PRODUCTION ACTIVITY - NOT FOR TELEVISION

Film and video production and post-production businesses work on a range of outputs. These can broadly be divided into productions made specifically for television and those made other than for television. Productions made other than for television include outputs such as feature films, documentaries and educational media. The 2006–07 ABS survey of Television, Film and Video Production and Post-Production Services reports that during 2006–07, there were 14,269 productions created which were not specifically made for television, at a total production cost of \$273.2m. While the majority of these (75%) were educational media, around 67% of total production costs were devoted to the production of 85 feature films.

Television, film and video
continued

PRODUCTION ACTIVITY - NOT FOR TELEVISION *continued*

16.5 PRODUCTIONS MADE OTHER THAN FOR TELEVISION (a)—2006–07

	Businesses at end June 2007(b)	Productions	Total cost of production	Average cost per production(c)
	no.	no.	\$m	\$'000
Feature films	78	85	183.8	2 174.3
Short films	**46	*79	4.8	*61.2
Documentaries	33	46	1.4	31.1
Corporate, marketing and training media	*107	*353	*6.0	*16.9
Educational media(d)	454	*10 672	*71.7	*6.7
Music media	*27	**313	1.3	**4.2
Other	*74	2 722	4.1	1.5
Total	652	*14 269	273.2	19.1

- * estimate has a relative standard error of 25% to 50% and should be used with caution
 ** estimate has a relative standard error greater than 50% and is considered too unreliable for general use
 (a) Includes businesses whose primary activity was film and video production or post-production services.
 (b) As businesses may have been involved in more than one type of production, the counts of businesses do not sum to the total.
 (c) As data for 'total cost of production' have been rounded to \$m, discrepancies may occur in the 'average cost per production'.
 (d) Includes media produced for schools, tertiary and other educational institutions.

Source: *Television, Film and Video Production and Post-Production Services, Australia, 2006–07* (cat. no. 8679.0).

Screen Australia's 2008–09 National Survey of Feature Film and Television Drama Production provides further information on Australian production of feature films. It shows that 32 Australian and co-production feature films began principal photography (the period of major and ongoing shooting) in Australia in 2008–09, down from the upwardly revised 38 in 2007–08, but was equal to the 5-year average of 32 films.

The value of total production activity (as measured by budget expenditure in Australia) in 2008–09 rose to \$358m, well above the 2007–08 figure of \$170m and well above the five-year average of \$194 million. Of the 32 feature films produced, \$341m was spent on the production of 29 Australian feature films. This is well above the five-year average of \$169 million.

Television, film and video
continued

PRODUCTION ACTIVITY - NOT FOR TELEVISION *continued*

16.6 AUSTRALIAN AND CO-PRODUCTION FEATURE FILMS, Production activity—2004–05 to 2008–09(a)

Year of production	Australian production(b).....		Co-production(c).....		Total	
	No.	Spend in Aust. (\$M)	No.	Spend in Aust. (\$M)	No.	Spend in Aust. (\$M)
2004–05	26	66	3	27	29	93
2005–06	29	100	3	13	32	112
2006–07	27	214	3	19	30	234
2007–08	33	121	5	49	38	170
2008–09	29	341	3	17	32	358
5-year average	29	169	3	25	32	194

- (a) Year of production is the year in which principal photography commenced.
 (b) Projects under Australian creative control where the key elements are predominantly Australian and the project was originated and developed by Australians.
 (c) Projects where creative control is shared between Australian and foreign partners and there is a mix of Australian and foreign elements in the key creative positions.

Source: Screen Australia, *National Survey of Film and Television Drama Production, 2008–09*.

Foreign investors accounted for a total of \$224m (57%) of funding for Australian and co-production feature films in 2008–09. This figure included \$205m (56%) for Australian only feature films. The foreign investment contribution went towards a total of 14 films, of which 11 were Australian only productions. It is important to note that foreign investment fluctuates from year to year, depending on production schedules.

Government sources were also a significant source of funds in 2008–09, investing a total of \$35m in 24 Australian and co-production titles. This accounted for 9% of total funding for Australian and co-production features, and 9% of the funding for the 21 Australian-only feature films.

Television, film and video
continued

PRODUCTION ACTIVITY - NOT FOR TELEVISION *continued*

16.7 AUSTRALIAN AND CO-PRODUCTION FEATURE FILMS, Sources of Finance—2004–05 to 2008–09

	AUSTRALIAN ONLY (a)			TOTAL AUSTRALIAN AND CO-PRODUCTION (b)		
	Contribution	Proportion of total finance	No. of films invested in	Contribution	Proportion of total finance	No. of films invested in
	\$m	%	no.	\$m	%	no.
AUSTRALIAN GOVERNMENT SOURCES						
2004–05	25	38	11	33	r29	14
2005–06	46	46	19	51	42	22
2006–07	r32	15	15	45	17	18
2007–08	r39	r30	r17	r43	r19	r20
2008–09	32	9	21	35	9	24
5-yr average	35	28	17	41	23	20
AUSTRALIAN PRIVATE INVESTORS						
2004–05	r21	r32	r18	r21	r19	r18
2005–06	9	9	14	9	7	15
2006–07	r15	r7	r16	r15	r5	r16
2007–08	r40	r31	r20	r40	r18	r21
2008–09	5	1	12	5	1	r12
5-yr average	18	16	16	18	10	16
AUSTRALIAN FILM/TV INDUSTRY						
2004–05	9	13	14	11	10	16
2005–06	17	17	21	20	16	22
2006–07	9	4	21	14	5	22
2007–08	r30	r23	r23	r37	r16	r23
2008–09	124	34	26	130	33	28
5-yr average	38	18	21	42	16	22
FOREIGN INVESTORS						
2004–05	12	18	5	47	42	8
2005–06	28	28	9	43	35	12
2006–07	164	75	10	198	73	13
2007–08	21	r16	6	103	r46	11
2008–09	205	56	11	224	57	14
5-yr average	86	39	8	123	50	12

r revised

(a) Projects under Australian creative control where the key elements are Australian and the project was originated and developed by Australians.

(b) A co-production is a project where creative control is shared between Australian and foreign partners and there is a mix of Australian and foreign elements in the key creative positions.

Source: Screen Australia, *National Survey of Feature Film and Television Drama Production, 2008–09*

*Television, film and video
continued*

PRODUCTION ACTIVITY - TELEVISION

Productions made primarily for television refers to outputs such as news, current affairs, light entertainment, variety and drama programs. In addition to film and video production and post-production businesses, businesses in the television industry also spend substantial amounts on such productions. In 2006–07, \$1,366.2m was spent on productions made specifically for television, 65% by television broadcasters.

16.8 PRODUCTIONS MADE PRIMARILY FOR TELEVISION—2006–07

	<i>Businesses at end June 2007(a)</i>	<i>Commercial broadcast hours(b)</i>	<i>Total cost of production</i>	<i>Average cost per hour(c)</i>
	no.	no.	\$m	\$'000
Type of production				
Drama(d)	22	448	152.9	341.5
Documentaries	67	283	39.8	140.9
Situation and sketch comedy	8	146	15.1	103.6
Light entertainment and variety	*84	5 165	306.1	59.3
News and current affairs	*63	20 556	411.5	20.0
Sport	*50	22 181	268.4	12.1
Quiz, panel and game shows	8	np	74.8	np
Children's drama	12	147	33.8	229.2
Other children's programs	*23	935	*30.7	32.9
Total	*33	1 083	64.5	59.6
Other types of productions	10	np	33.0	np
Total	272	55 546	1 366.2	24.6
Productions made by television broadcasters(e)	20	29 064	889.3	30.6
Productions made by other businesses(f)	252	26 482	476.8	18.0

- * estimate has a relative standard error of 25% to 50% and should be used with caution
- np not available for publication but included in totals where applicable, unless otherwise indicated
- (a) As businesses may have been involved in more than one type of production, the counts of businesses do not sum to the total.
- (b) Relates to first release productions only.
- (c) As data for 'total cost of production' have been rounded to \$m, discrepancies may occur in the 'average cost per hour'.
- (d) Excludes children's programs.
- (e) Includes commercial free-to-air, subscription and public television broadcasters. Excludes community television broadcasters. Also excludes co-productions between television broadcasters and other businesses.
- (f) Includes two types of businesses: those whose primary activity was film and video production or post-production services and those whose primary activity was subscription television channel provision with in-house production. Includes co-productions between television broadcasters and other businesses.
- Source: *Television, Film and Video Production and Post-Production Services, Australia, 2006–07* (cat. no. 8679.0).

Further insight into the production of television drama programs can be gained from Screen Australia's National Survey of Feature Film and Television Drama Production. This survey reveals that the value of Australian and co-production TV drama as measured by budget expenditure in Australia, increased in 2008–09 to \$308m. This is up on the \$257m in 2007–08 and above the five-year average of \$245m. Total hours produced fell to 646 hours in 2008–09, down on the 691 hours produced in 2007–08. However, total hours produced in 2008–09 was above the five-year average of 631 hours.

Television, film and video
continued

PRODUCTION ACTIVITY - TELEVISION *continued*

16.9 AUSTRALIAN AND CO-PRODUCTION TV DRAMA, Production activity—2004–05 to 2008–09(a)

Year of production	Australia (b)			Co-production (c)			Total		
	No.	Hours produced (d)	Spend in Aust. (\$m)	No.	Hours produced (d)	Spend in Aust. (\$m)	No.	Hours produced (d)	Spend in Aust. (\$m)
2004–05	29	588	189	4	32	13	33	620	202
2005–06	35	516	182	7	67	23	42	583	205
2006–07	41	581	242	4	34	11	45	615	253
2007–08	36	606	229	7	85	27	43	691	257
2008–09	39	614	294	3	33	13	42	646	308
5-year average	36	581	227	5	50	18	41	631	245

- (a) Year of production is the year in which principal photography commenced.
 (b) Projects under Australian creative control where the key elements are Australian and the project was originated and developed by Australians.
 (c) Projects where creative control is shared between Australian and foreign partners and there is a mix of Australian and foreign elements in the key creative positions.
 (d) Duration is rounded to 15, 30 or 60 minutes as appropriate. 'Hours produced' therefore refers to 'commercial broadcast hours' rather than actual running time.

Source: Screen Australia, *National Survey of Feature Film and Television Drama Production, 2008-09*.

More information about the National Survey of Feature Film and Television Drama Production is available from the Screen Australia website, www.screenaustralia.gov.au.

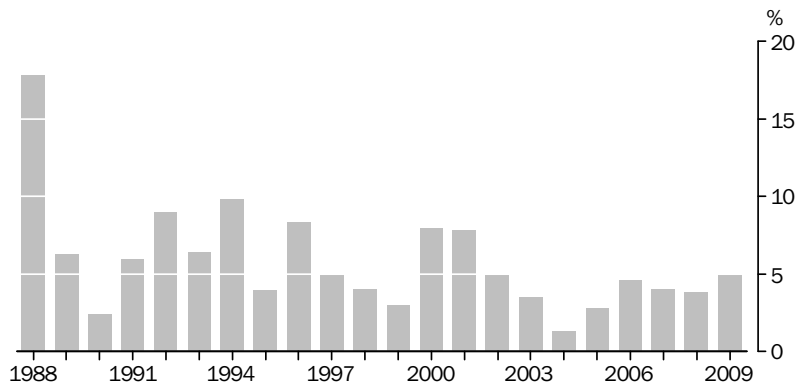
Motion picture exhibition

Screen Australia's analysis of data from the Motion Picture Distributors Association of Australia shows that in 2009, 13% of the films screened in Australian cinemas were of Australian origin. By comparison, 50% of the films screened originated in the United States of America. This is the fifth consecutive year it has been below 60% and the third fall in a row. Nevertheless, those films earned 85% (\$847.7m) of the total box office for all films released in Australia during 2009.

Australian films accounted for only 5.0% (\$54.8m) of the total box office receipts of Australian cinemas in 2009, up slightly from 3.8% in 2008 (\$35.5m). As the following graph shows, this percentage has fluctuated over time.

*Motion picture exhibition
continued*

16.10 AUSTRALIAN FILMS' SHARE OF THE AUSTRALIAN BOX OFFICE—1988 to 2009



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

EMPLOYMENT

When making comparisons between the various sources of employment data for this sector it is important to take into consideration the differing scope and reference periods of the respective surveys.

Census of Population and Housing

The 2006 Census of Population and Housing collected employment data relating to the job in which a person worked the most hours during the week before the Census.

According to the Census, there were 8,900 people whose main job was in the motion picture exhibition industry in August 2006. The Census also found that there were 7,364 people whose main job was in the motion picture and video production industry, 898 people in post-production services and other motion picture and video activities and 871 people in motion picture and video distribution. Table 16.11 shows the top eight cultural occupations per industry. There are many other occupations involved in the film and video industry and these are grouped under other cultural occupations and other occupations.

Census of Population and
Housing *continued*

16.11 PERSONS EMPLOYED IN FILM AND VIDEO INDUSTRIES (a)(b),
By occupation—August 2006

	Number	%
Motion picture and video production		
Media producer	1 424	19.3
Director	557	7.6
Film and video editor	539	7.3
Video producer	374	5.1
Production assistant	341	4.6
Camera operator	338	4.6
Other cultural occupations	1 808	24.6
<i>Total cultural occupations</i>	5 381	73.1
Other occupations	1 983	26.9
Total occupations	7 364	100.0
Post-production services and other motion picture and video activities		
Film and video editor	136	15.1
Illustrator	91	10.1
Media producer	36	4.0
Graphic designer	24	2.7
Performing arts technicians	23	2.6
Sound technician	17	1.9
Other cultural occupations	188	20.9
<i>Total cultural occupations</i>	515	57.3
Other occupations	383	42.7
Total occupations	898	100.0
Motion picture and video distribution		
Media producer	22	2.5
Graphic designer	11	1.3
Director	12	1.4
Visual merchandiser	10	1.1
Production assistant	5	—
Librarian	7	0.8
Other cultural occupations	47	5.4
<i>Total cultural occupations</i>	114	13.1
Other occupations	757	86.9
Total occupations	871	100.0
Motion picture exhibition		
Motion picture projectionist	869	9.8
Cinema or theatre manager	868	9.8
Director	59	0.7
Actor	38	0.4
Light technician	40	0.4
Sound technician	35	0.4
Other cultural occupations	349	3.9
<i>Total cultural occupations</i>	2 258	25.4
Other occupations	6 642	74.6
Total occupations	8 900	100.0

— nil or rounded to zero (including null cells)

(a) Cells in this table have been randomly adjusted to avoid the release of confidential data.

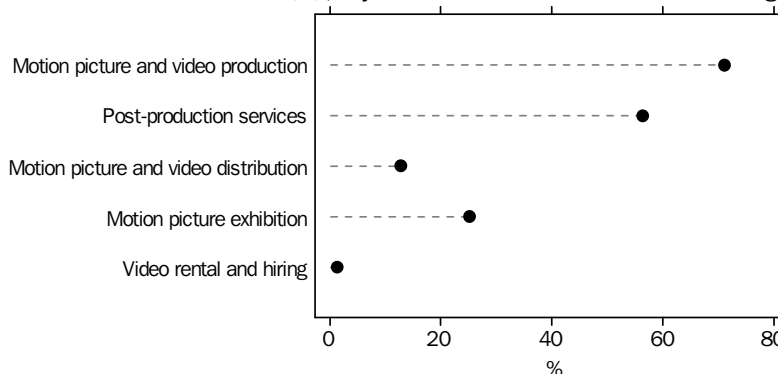
(b) In their main job in the week before Census Night.

Source: ABS data available on request, Census of Population and Housing, 2006.

Census of Population and Housing continued

Over half of those employed in the film and video industries (54%) worked in non-cultural occupations. The percentage of persons employed in cultural occupations varied considerably amongst the film and video industries – from 2% in the video rental and hire industry to 66% in the motion picture and video production industry.

16.12 PERCENTAGE OF PERSONS EMPLOYED IN CULTURAL OCCUPATIONS (a), By film and video industries—August 2006



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

Source: ABS data available on request, *Census of Population and Housing, 2006*.

Work Survey

The 2007 survey of Work in Selected Culture and Leisure Activities reported that 117,700 people had a work involvement in either film production or cinema and video distribution in the 12-months to April 2007. Nearly two-thirds of those involved in cinema and video distribution (64%) were paid for their work, as were just over one-third (35%) of those involved in film production. Unlike the Census of Population and Housing, this survey collects more than just 'main job' activity. See Chapter 5 for more details on the differences between the data collections.

Service Industry Surveys

According to the 2006–07 ABS survey of Television, Film and Video Production and Post-Production Services, there were 10,873 people employed by film and video production services businesses at the end of June 2007. For the same period, there were 2,971 people employed by post-production services businesses, and the commercial free-to-air and subscription television broadcasters collectively employed 10,032 people.

INTRODUCTION

This chapter focuses on the activities of radio and television organisations in Australia. It firstly provides information on the amount of time adults and children spend listening to the radio and watching television. It then gives details on some key economic indicators of radio and television broadcasters such as income earned, expenses and employment.

AUDIENCE

Invariably, when a survey is conducted on how people spend their time, television viewing and to a lesser extent, listening to the radio feature prominently. The most recent ABS Time Use Survey conducted in 2006, showed that the most common recreation and leisure activity for people aged 15 years and over was watching television.

Viewers spent almost three hours a day (179 minutes), on average, watching television with males spending about 7 minutes more than females. By comparison, radio listeners spent an average of 123 minutes a day tuned in to the radio. As with television, males listened for longer periods on average than females (136 minutes compared with 111 minutes respectively).

An ABS survey of Children's Participation in Cultural and Leisure Activities conducted in 2009 found that in a two week period almost all (97%) children in Australia aged 5–14 years watched TV or videos outside of school hours and did so for an average of 17 hours a fortnight.

Extensive audience research is undertaken for the TV services by Australian Television Audience Measurement (OzTAM) and data is available online at www.oztam.com.au.

ORGANISATIONS

In Australia, free-to-air television and radio broadcasting is provided by commercial organisations, a number of community groups and the Australian Government. Subscriber or pay TV is also an option for most Australians.

The ABS has conducted several surveys relating to various aspects of broadcasting over the years. The most recent is the 2006–07 Television, Film and Video Production and Post-Production Services survey, which surveyed all 24 commercial free-to-air and 13 subscription television broadcasting businesses operating in Australia in 2006–07.

Businesses owned and controlled by the public and mainly engaged in community broadcasting were excluded.

FINANCIAL DATA

Commercial free-to-air television services received income of \$4,530.1m in 2006–07. Almost 80% (\$3,610.9m) of this income was gross income from the sale of airtime. Commercial free-to-air broadcasters reported an operating profit before tax of \$834.3m or an operating profit margin of 19% in 2006–07.

FINANCIAL DATA

continued

Subscription television broadcasters, with a total income of \$2,282.6m, earned around 87% (\$1,974.9m) from subscription fees. This income was still not enough for these businesses to record a profit in 2006–07. The operating deficit before tax was \$163.0m which meant an operating profit margin of –8%.

17.1 INCOME AND EXPENSES OF TELEVISION BROADCASTERS—2006–07

	<i>Income /expenses</i>
	\$m
COMMERCIAL FREE-TO-AIR^(a)	
Income	
Gross income from the sale of airtime	3 610.9
Other	919.2
<i>Total income</i>	4 530.1
Expenses	
Labour costs	682.1
Program rights expensed	725.0
Depreciation and amortisation	390.7
Other	1 905.8
<i>Total expenses</i>	3 703.6
SUBSCRIPTION	
Income	
Subscription fees	1 974.9
Other ^(b)	307.6
<i>Total income</i>	2 282.6
Expenses	
Labour costs	204.1
Payments to subscription television channel providers	843.6
Depreciation and amortisation	336.9
Rent, leasing and hiring	36.3
Other contract, subcontract and commission expenses	252.8
Other	775.8
<i>Total expenses</i>	2 449.5

(a) Excludes public television broadcasting.

(b) Includes gross income from the sale of airtime.

Source: *Television, Film and Video Production and Post-Production Services, Australia, 2006–07* (cat. no. 8679.0).

The 2006–07 Television, Film and Video Production and Post-Production Services survey did not collect data from public broadcasters, however, financial data on the activities of the Australian Broadcasting Corporation (ABC) and the Special Broadcasting Service (SBS) can be obtained from their annual reports which are available from their websites www.abc.net.au and www.sbs.com.au respectively.

Information about commercial radio stations is available from the Australian Communications and Media Authority (www.acma.gov.au).

According to the ABS survey of Cultural Funding by Government, in 2008–09 the Australian Government provided \$2,584.5m for arts and heritage activities, 54% (\$1,391.1m) of which was for radio and television services.

EMPLOYMENT

Service Industry Surveys

The 2006–07 Television, Film and Video Production and Post-production Services survey found that businesses involved in commercial free-to-air television services in Australia employed a total of 6,980 people in June 2007. A further 3,052 people were employed by subscription television broadcasters.

Census of Population and Housing

Neither the Television, Film and Video Production and Post-Production Services survey nor the ABC and SBS annual reports provide detailed breakdowns of the type of occupations in which people are involved in the radio and television industries. The 2006 Census of Population and Housing is the most detailed source of occupation information, although the data it collects relates only to a person's main job (the job in which they worked the most hours in the week before Census Night). In August 2006, there were 12,646 people whose main job was in the free-to-air television broadcasting industry and 2,928 people in the cable and other subscription broadcasting industry. This includes people working in community television.

Over half the people employed in the free-to-air television broadcasting industry (62%) worked in cultural occupations as defined by the Australian Culture and Leisure Classifications. This is quite different to cable and other subscription broadcasting industry where just 19% were employed in cultural occupations.

17.2 PERSONS EMPLOYED IN TELEVISION BROADCASTING INDUSTRIES (a)(b), By occupation—August 2006

	<i>Number</i>	<i>%</i>
Free-to-air television broadcasting		
Media producers (excluding video)	1 236	9.8
Television journalists	928	7.3
Camera operators (film, TV and radio)	628	5.0
Film and video editors	592	4.7
Program directors (TV or radio)	388	3.1
Production assistants (film, TV, radio or stage)	361	2.9
Other cultural occupations	3 680	29.1
<i>Total cultural occupations</i>	<i>7 813</i>	<i>61.8</i>
Other occupations	4 833	38.2
<i>Total occupations</i>	<i>12 646</i>	<i>100.0</i>
Cable and other subscription broadcasting		
Media producers (excluding video)	123	4.2
Film and video editors	51	1.7
Broadcast transmitter operators	43	1.5
Program directors (TV or radio)	38	1.3
Television journalists	32	1.1
Directors (film, TV, radio or stage)	31	1.1
Other cultural occupations	238	8.1
<i>Total cultural occupations</i>	<i>556</i>	<i>19.0</i>
Other occupations	2 372	81.0
<i>Total occupations</i>	<i>2 928</i>	<i>100.0</i>

(a) Cells in this table have been randomly adjusted to avoid the release of confidential data.

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

Source: ABS data available on request, Census of Population and Housing, 2006.

Census of Population and Housing continued

The 2006 Census of Population and Housing found that there were 5,226 people whose main job was in the radio broadcasting industry. Unlike the free-to-air television broadcasting industry, just over half (52%) of people working in the radio broadcasting industry in their main job worked in a non-cultural occupation.

17.3 PERSONS EMPLOYED IN RADIO BROADCASTING (a)(b), By occupation—August 2006

	<i>Number</i>	<i>%</i>
Cultural occupations		
Radio presenters	974	18.6
Program directors (TV or radio)	439	8.4
Radio journalists	365	7.0
Advertising specialists	81	1.5
Sound technicians	69	1.3
Copywriters	58	1.1
Other cultural occupations	509	9.7
<i>Total cultural occupations</i>	<i>2 495</i>	<i>47.7</i>
Other occupations	2 731	52.3
Total occupations	5 226	100.0

(a) Cells in this table have been randomly adjusted to avoid the release of confidential data.

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

Source: ABS data available on request, Census of Population and Housing, 2006.

Work Survey

As data from the 2006 Census of Population and Housing relates only to a person's main job during a one week period in August, it may not capture those people who are involved in a less regular or voluntary capacity. The 2007 survey of Work in Selected Culture and Leisure Activities provides some indication of total involvement over a 12-month period. The survey found that 77,000 people were involved in television broadcasting and 105,500 were involved in radio broadcasting over a 12-month period to April 2007. The majority of those involved in radio (76%) were unpaid while fewer were unpaid in television (44%).

Work Survey *continued***17.4** PERSONS INVOLVED IN BROADCASTING, By payment status—12 months ending April 2007

	Television	Radio	Total(a)
NUMBER ('000)			
Some paid involvement	43.4	24.8	63.4
Unpaid involvement only	33.6	80.6	101.2
Total(b)	77.0	105.5	162.9
PER CENT (%)			
Some paid involvement	56.4	23.5	38.9
Unpaid involvement	43.6	76.4	62.1
Total	100.0	100.0	100.0

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

(b) Excludes some people whose payment details are not known.

Source: ABS data available on request, Survey of Work in Selected Culture and Leisure Activities, April 2007.

INTRODUCTION

Arts education covers the teaching of skills specific to the fields of literature, television, radio, film, visual arts and crafts, design, music, performing arts and other arts. Skills taught include creative writing, acting, dancing, singing, music composition, music playing, visual design, radio, television and film production, post-production and direction, photography, and sound engineering and recording.

TRAINING IN THE ARTS

The 2007 survey of Work in Selected Culture and Leisure Activities collected information about whether the people involved in selected arts or cultural activities had qualifications relevant to those selected activities. Some 912,300 people aged 15 years and over in Australia had completed a course or qualification at some time in their lives related to one of the selected arts or culture activities in which they were involved. Of the selected activities, visual arts (336,000 people) and crafts (185,500 people) were the most common relevant qualifications obtained.

TRAINING IN THE ARTS

*continued***18.1** PERSONS INVOLVED IN SELECTED ACTIVITIES WITH A RELEVANT QUALIFICATION(a), By sex—April 2007

	Males	Females	Persons
	'000	'000	'000
Visual art activities			
Drawing	62.6	78.4	141.0
Painting	21.6	65.1	86.7
Sculpture	*8.5	*14.4	23.0
Photography	55.1	61.2	116.3
Print making	*4.1	17.3	21.4
Creating artwork with a computer	47.4	66.4	113.8
Other visual art activities	**2.4	*2.5	*4.9
Total visual art activities	138.7	197.3	336.0
Craft activities			
Pottery or ceramics	*3.6	16.6	20.2
Textiles	**1.6	52.3	53.8
Jewellery making	*5.5	23.7	29.2
Furniture making or wood crafts	56.6	*4.1	60.7
Glass crafts	**0.6	*8.2	*8.8
Other craft activities	*8.0	25.0	33.0
Total craft activities	72.4	113.1	185.5
Writing	69.5	80.7	150.2
Publishing	17.8	19.8	37.6
Designing websites	36.5	19.9	56.4
Design	91.3	94.5	185.8
Designing computer games, or other interactive software	24.3	*6.0	30.3
Music			
Live performer	43.5	54.8	98.3
No involvement as a live performer	*7.2	*12.2	*19.3
Total music	50.6	66.9	117.6
Performing arts			
Performer	25.1	52.2	77.3
No involvement as a performer	11.9	25.0	36.9
Total performing arts	37.0	77.2	114.2
Total(b)	405.6	506.6	912.3

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

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

(a) It was the respondents decision whether their course or qualification was related to a particular activity.

(b) Components may not add up to total as some persons may have been involved in more than one activity.

Source: ABS data available on request, Survey of Work in Selected Culture and Leisure Activities, April 2007.

TRAINING IN THE ARTS

continued

Tertiary arts education data are available from the Australian Government Department of Education, Employment and Workplace Relations (DEEWR). According to DEEWR, there were 71,875 students undertaking a course in the field of creative arts at higher educational institutions (excluding TAFE) in Australia in 2008. The data shows a 5.4% increase in creative arts tertiary students between 2007 and 2008, compared with a 3.5% increase in the number of all higher education students during the same period.

18.2 NUMBER OF STUDENTS UNDERTAKING HIGHER EDUCATION (a),
In the field of creative arts(b)—2008

		<i>Creative arts students</i>	<i>All students</i>
2008			
New South Wales	'000	23.1	332.5
Victoria	'000	17.9	278.8
Queensland	'000	14.2	193.3
South Australia	'000	4.8	76.0
Western Australia	'000	8.3	111.8
Tasmania	'000	1.4	20.2
Northern Territory	'000	0.2	7.0
Australian Capital Territory	'000	1.8	27.8
Multi-State	'000	0.3	18.8
Total	'000	71.9	1 066.1
2007			
Total	'000	68.2	1 029.8
Change between 2007 and 2008	%	5.4	3.5

- (a) Students enrolled in higher education courses in each Australian Higher Education Provider.
- (b) Creative arts comprises of the following educational fields:
Performing arts, Visual arts and crafts, Graphic and design studies,
Communication and media studies and Other performing arts.

Source: Department of Education, Employment and Workplace Relations, *Students 2008 (full year): Selected Higher Education Statistics*.

TRAINING IN THE ARTS

continued

Data on vocational education can be obtained from the National Centre for Vocational Education Research (NCVER). According to NCVER data, vocational training organisations, such as TAFE institutes, reported 49,400 students enrolled in courses in the field of creative arts in 2009, up from 43,600 students in 2008.

18.3 STUDENTS IN VOCATIONAL EDUCATION AND TRAINING COURSES (a), In the field of creative arts (b) (c)—2009

	Percentage of all creative arts students	
	Students '000	%
New South Wales	17.5	35.4
Victoria	13.2	26.7
Queensland	6.8	13.8
South Australia	2.2	4.5
Western Australia	6.8	13.8
Tasmania	0.7	1.4
Northern Territory	1.2	2.4
Australian Capital Territory	1.0	2.0
Australia	49.4	100.0

- (a) Excludes VET delivered in schools, where the delivery has been undertaken by schools.
- (b) Whose major field of education was the creative arts.
- (c) Creative arts comprises the following fields of education: performing arts; visual arts and crafts; graphic and design studies; communication and media studies; and other creative arts.

Source: National Centre for Vocational Education Research, *Students and Courses 2009*.

According to the 2009 survey of Education and Work, the most common qualification in cultural industries was graphic arts and design studies with 69,600 people holding qualifications. Other common qualifications within cultural industries were architecture with 38,200 people and music with 37,100 people holding qualifications. Graphic arts and design studies was the most common qualification for both males and females.

TRAINING IN THE ARTS

*continued***18.4** PERSONS WITH A NON-SCHOOL QUALIFICATION(a), Main field of study for highest non-school qualification—By sex—2009

	Males	Females	Persons
	'000	'000	'000
Architecture and urban design			
Architecture	26.7	11.6	38.2
Urban design and regional planning	11.0	*5.6	16.6
Landscape architecture/interior and environmental design	*4.5	18.8	23.3
Total(b)	42.1	36.1	78.2
Studies in human society			
Sociology	*3.4	10.2	13.6
Anthropology	**1.1	*2.8	*3.9
History	10.0	19.3	29.3
Other studies in human society	10.2	15.6	25.8
Total(c)	24.7	47.9	72.6
Librarianship and information management and curatorial studies			
Librarianship and information management	*5.1	21.0	26.1
Total(d)	*5.1	21.0	26.1
Performing arts			
Music	20.3	16.8	37.1
Drama and theatre studies/dance	*4.5	12.0	16.5
Total(e)	28.2	34.8	62.9
Visual arts and crafts			
Fine arts	*4.2	23.8	28.0
Photography	8.3	*7.8	16.1
Crafts/jewellery making/floristry	*6.4	9.3	15.7
Visual arts and crafts n.f.d./n.e.c.	*4.3	12.7	17.1
Total	23.3	53.7	76.9
Graphic and design studies			
Graphic arts and design studies	30.6	38.9	69.6
Fashion design/textile design	*2.5	23.4	25.9
Graphic and design studies n.f.d./n.e.c.	**0.2	—	**0.2
Total	33.4	62.3	95.6
Journalism	*7.7	11.5	19.2
Religious studies	16.9	*7.1	24.1

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

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

— nil or rounded to zero (including null cells)

(a) Non-school qualification refers to educational attainments other than those of pre-primary, primary or secondary education.

(b) Includes architecture and urban environment n.f.d./n.e.c.

(c) Includes studies in human society n.f.d./n.e.c., archaeology, human geography, Indigenous studies and gender specific studies.

(d) Includes librarianship and information management and curatorial studies n.f.d.

(e) Includes performing arts n.f.d./n.e.c.

Source: ABS data available on request, Survey of Education and Work, 2009.

ABBREVIATIONS

'000	thousand
\$m	million dollars
AbaF	Australia Business Arts Foundation
ABC	Australian Broadcasting Corporation
ABN	Australian Business Number
ABS	Australian Bureau of Statistics
ACLC	Australian Culture and Leisure Classifications
ACMA	Australian Communications and Media Authority
ACT	Australian Capital Territory
AMOL	Australian Museums and Galleries OnLine
AMPAG	Australian Major Performing Arts Group
ANA	Australian National Accounts
ANZSCO	Australian and New Zealand Standard Classification of Occupations
ANZSIC	Australian and New Zealand Standard Industrial Classification
ARIA	Australian Recording Industry Association
ASCO	Australian Standard Classification of Occupations
Aust.	Australia
BAS	Business Activity Statement
cat. no.	Catalogue number
CMC	Cultural Ministers Council
CMC SWG	Cultural Ministers Council Statistics Working Group
DEEWR	Australian Government Department of Education, Employment and Workplace Relations
DVD	digital versatile disc
GST	goods and services tax
IVA	industry value added
n.e.c.	not elsewhere classified
n.f.d.	not further defined
no.	number
NCCRS	National Centre for Culture and Recreation Statistics
NCVER	National Centre for Vocational Education Research
NSW	New South Wales
NT	Northern Territory
OECD	Organisation for Economic Co-operation and Development
OPBT	operating profit before tax
OzTAM	Australian Television Audience Measurement
SA	South Australia
SAR	Special Administrative Region
SBS	Special Broadcasting Service
SIS	Service Industry Survey
Tas.	Tasmania

ABBREVIATIONS

TAFE	Technical and Further Education
TRA	Tourism Research Australia
UK	United Kingdom
USA	United States of America
Vic.	Victoria
WA	Western Australia

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