



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 mainly Australian Bureau of Statistics (ABS) data sources which are presented, wherever possible, to align with the *Australian Culture and Leisure Classifications* (cat. no. 4902.0).

This ABS publication is the fifth statistical overview on culture and the arts produced by the National Centre for Culture and Recreation Statistics (NCCRS). Data have been updated where new data were available at the time of release. Please refer to the table below for an indication of new data to be published from June 2008. These upcoming data sources will be used to update future editions of this publication.

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

ROUNDING

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

MORE INFORMATION ON ABS CULTURE AND RECREATION STATISTICS

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

Brian Pink
Australian Statistician

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PREFACE

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

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

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

Most of the information presented in this publication was collected by the ABS, but data collected by other organisations have also been used so that a more complete picture of the cultural industries can be provided. Care must be taken in comparing data from different sources presented in this publication due to differences in survey methodology, definitions and reference periods. For ABS sources, information on data quality is available (e.g. standard errors), but this is not always available for non-ABS sources.

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

Brian Pink
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ABBREVIATIONS

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

INTRODUCTION

Australians' involvement in heritage and the arts can take many forms. Involvement can include 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 such as seeing a movie, or visiting a museum or art gallery.

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

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

TIME SPENT ON
CULTURAL ACTIVITIES

How people spend their time was the subject of an ABS survey conducted in 2006. People aged 15 years and over were asked to record what they did during a two-day period. 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 below shows the time spent by participants on each activity, regardless of whether it was the main activity being undertaken at the time or whether it was a secondary activity being undertaken simultaneously.

It is perhaps not too surprising that watching TV was found to be the activity which took up most people's leisure time. On a daily basis 87% of Australians watched 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 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 nec(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: ABS, *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 CDs, records and tapes (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 Patterns of Australians at Cultural Venues and Events* (cat. no. 4114.0). The survey has been repeated several times since then, most recently in 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 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

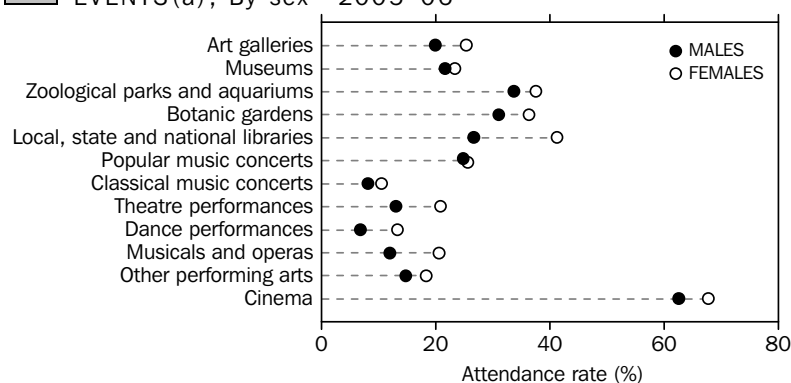
Venue or activity	Number of people attending '000	Attendance rate (b) %
Art galleries	3 630.7	22.7
Museums	3 611.9	22.6
Zoological parks and aquariums	5 699.8	35.6
Botanic gardens	5 390.9	33.7
Local, state and national libraries	5 454.5	34.1
Popular music concerts	4 035.9	25.2
Classical music concerts	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: ABS, *Attendance at Selected Cultural Venues and Events, 2005–06* (cat. no. 4114.0).*Characteristics of
attendees*

Apart from Popular music concerts, a higher proportion of females than males attended each venue or event. 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: ABS, *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
	NUMBER ('000)								
Total population	818.1	1 938.3	2 779.3	2 959.6	2 779.5	2 217.3	1 386.2	1 130.2	16 008.6

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

Source: ABS, *Attendance at Selected Cultural Venues and Events, 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 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	'000
	Once only	2–4 times	5 times or more			
	%	%	%	%		
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: ABS, *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: ABS, *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 61% of people aged over 15 years of age considered reading as a favourite activity, with females more likely (73%) than males (50%) to consider reading a favourite pastime.

Of those surveyed, 77% read newspapers, 58% read magazines and 48% read books at least once a week. People more likely to read 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 prior to survey.

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

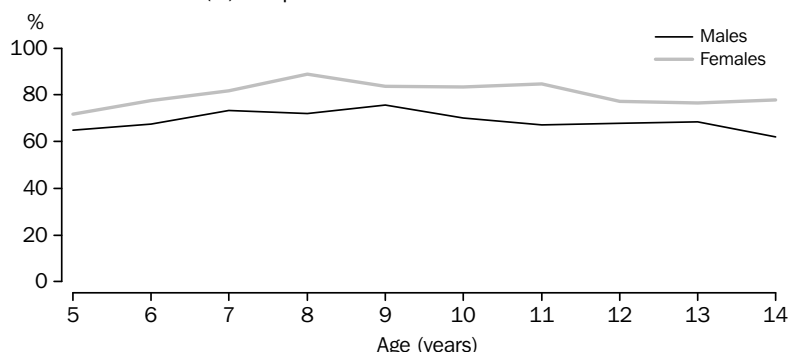
A survey conducted by ACNielsen for the government book promotion, *Books Alive*, in June 2001, found that 78% of people aged 18 years and over in Australia read for pleasure everyday or on most days of the week. The survey also found that the most popular reading material was newspapers, with 91% of people having read a newspaper for pleasure in the week before interview. This compares with 72% of people who had read books for pleasure and 63% who had read magazines in the same period.

Care must be taken in comparing data from the Time Use and Adult Literacy and Life Skills Surveys with data from the ACNielsen survey due to differences in survey methodology, definitions and reference periods.

The 2006 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 69% 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 7.9 hours, compared with 6.6 hours for boys.

READING *continued*

1.8 CHILDREN AGED 5–14 YEARS WHO READ FOR PLEASURE (a)—April 2006



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

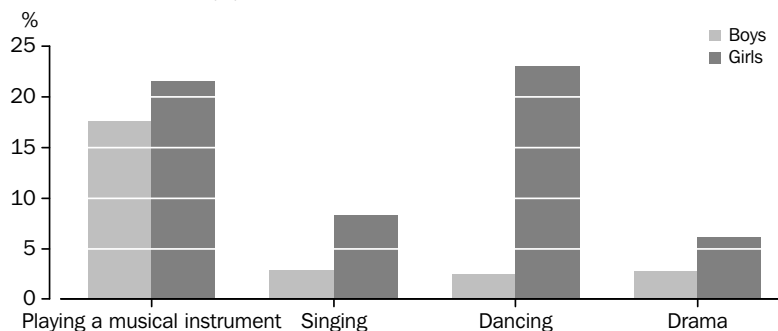
Source: ABS, *Children's Participation in Cultural and Leisure Activities, Australia, April 2006* (cat. no. 4901.0).

CHILDREN'S INVOLVEMENT IN CULTURAL ACTIVITIES

Many children take part in cultural activities during school hours often as part of compulsory lessons. Some children also choose to undertake cultural activities in their own time. The ABS survey of Children's Participation in Cultural and Leisure Activities showed that approximately one-third (33%) 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 2006. Twice as many girls as boys (44% compared with 22%) participated in at least one of these activities.

Playing a musical instrument was the most popular of the selected cultural activities (520,500 children), followed by dancing (332,600), singing (147,000) and drama (119,100).

1.9 CHILDREN'S PARTICIPATION IN ORGANISED CULTURAL ACTIVITIES (a)—2006



(a) Children aged 5 to 14 years who participated outside of school hours during the 12 months prior to interview in April 2006.

Source: ABS, *Children's Participation in Cultural and Leisure Activities, Australia, April 2006* (cat. no. 4901.0).

HOBBY ACTIVITIES

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

For the survey a hobby was defined as an activity that was undertaken only for oneself or for 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 there were 2.8 million people aged 15 years and over in Australia who were not involved in producing art and craft for the public but created items for their own, family or friends use in the 12 months before interview. This is up 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.

MOTIVATION FOR TRAVEL

Tourism may be motivated by the desire to visit friends and relatives or to experience the character and culture of a destination. In 2006, Tourism Research Australia (TRA, formerly Bureau of Tourism Research, BTR) investigated the characteristics and motivations of international visitors to Australia aged 15 years and over. The survey found that half (51%) of all overseas visitors saw at least one cultural attraction while in Australia. Of the 2.6 million international cultural and heritage visitors in 2006, 17% were from the UK, 16% from Other Europe (Europe excluding the UK) and 14% from New Zealand. The most popular destination for both international and domestic cultural heritage visitors was New South Wales.

INTERNATIONAL CULTURAL TOURISM

Most overseas cultural and Heritage visitors visited historical or heritage buildings, sites or monuments (61% of the 2.6 million international cultural and heritage visitors who travelled to Australia in 2006) or museums or art galleries (56%).

2.1 OVERSEAS CULTURAL AND HERITAGE VISITORS, By activity type—2006

<i>Percentage of overseas cultural and heritage visitors</i>	
<i>Type of cultural and heritage tourism activity</i>	<i>%</i>
Attend theatre, concerts or other performing arts	26
Visit museums or art galleries	56
Visit art/craft workshops/studios	19
Attend festivals/fairs or cultural events	17
Experience Aboriginal art/craft and cultural displays	25
Visit an Aboriginal site/community	13
Visit historical/heritage buildings, sites or monuments	61

Source: Tourism Research Australia, *Cultural and Heritage Tourism in Australia, 2006*.

DOMESTIC CULTURAL TOURISM

The majority of Australians spent some time away from home in 2006, with most going on a holiday or to visit friends and relatives. Data from the TRA 2006 survey of *Cultural and Heritage Tourism in Australia* show that in 2006, there was a total of 73.6 million trips taken by persons aged 15 years and over that were of at least one night's duration. Holiday or leisure was the most common reason for people's trip to stay overnight (44%) or for the day (52%).

During 2006, there were also 134 million day trips taken within Australia by persons aged 15 years and over. A day trip is defined as being a round trip distance of at least 50 kilometres, with the traveller being away from home for at least four hours although not overnight. Routine travel such as commuting between work and home is excluded.

DOMESTIC CULTURAL
TOURISM *continued*

In 2006, 13% of domestic overnight visitors and 7% of domestic day visitors participated in at least one cultural and heritage activity. There were 9.8 million domestic overnight visitors, compared to 9.1 million domestic day visitors.

The most common cultural activity undertaken by domestic visitors was visiting museums or art galleries (43% of overnight cultural and Heritage visitors and 36% of day cultural and Heritage visitors).

2.2 DOMESTIC CULTURAL AND HERITAGE VISITORS, By activity type—2006

<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		21		19
Visit museums or art galleries		43		36
Visit art/craft workshops/studios		9		12
Attend festivals/fairs or cultural events		17		17
Experience Aboriginal art/craft and cultural displays		6		3
Visit an Aboriginal site/community		3		np
Visit historical/heritage buildings, sites or monuments		31		27

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

Source: TRA, *Cultural and Heritage Tourism in Australia*, 2006.

INTRODUCTION

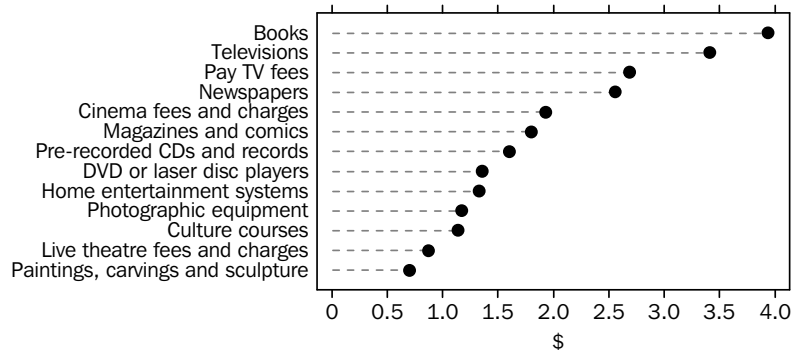
According to the most recent ABS Household Expenditure Survey (2003–04) there were an estimated 7.7 million households in Australia, each spending an average of \$36.40 per week on culture – equivalent to a total annual expenditure of \$14,694m by all households. The ABS Household Expenditure Survey 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 (6535.0.55.001).

In 2003–04, Australian households spent 4.1% 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: ABS, *Household Expenditure Survey, Australia: Detailed Expenditure Items, 2003–04* (cat. no. 6535.0.55.001) and data available on request.

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. During the 5 years between the surveys, the prices of goods and services, as measured by the Consumer Price Index, rose by 18%.

3.3 AVERAGE WEEKLY HOUSEHOLD EXPENDITURE ON CULTURE AT CURRENT PRICES (a)

	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: ABS, *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 2005–06, government funding for cultural activities totalled \$5,449.7m, with state and territory governments providing almost half (48% or \$2,598.1m), the Australian Government contributing 35% (\$1,878.4m), and local government making up the balance of 18% (\$973.2m).

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

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

According to the Department of Communications, Information Technology and the Arts (DCITA) Annual Report for 2005–06, 615 donations were made to the program in that year with a total value of \$28.9m.

In 2005–06, the majority of Australian Government cultural funding supported Arts activities (\$1,406.2m or 75% of total Australian Government funding). Broadcasting and film was the main beneficiary receiving over half of the total funding provided (\$1,141.3m or 61%).

In contrast, state and territory governments directed the majority of their funding to Heritage activities (\$2,142.1m or 82%) in 2005–06. Nature parks and reserves received \$1,016.3m representing 39% of the total state and territory government funding for cultural activities.

GOVERNMENT FUNDING
*continued***4.1** CULTURAL FUNDING BY LEVEL OF GOVERNMENT—2005–06

	Value of funding	Percentage of total
	\$m	%
<i>Australian Government</i>		
Heritage		
Art museums and galleries	54.7	1.0
Other museums	199.6	3.7
Nature parks and reserves(a)	75.2	1.4
Zoological parks, aquaria and botanic gardens	8.6	0.2
Libraries and archives	134.1	2.5
<i>Total</i>	472.2	8.7
Arts		
Literature and print media	29.5	0.5
Performing arts	111.0	2.0
Performing arts venues	—	—
Visual arts and crafts	17.3	0.3
Broadcasting and film	1 141.3	20.9
Community cultural centres and activities	10.0	0.2
Administration of culture	49.3	0.9
Other arts n.e.c.	47.8	0.9
<i>Total</i>	1 406.2	25.8
<i>Total</i>	1 878.4	34.5
<i>State and territory governments</i>		
Heritage		
Art museums and galleries	214.0	3.9
Other museums	306.6	5.6
Nature parks and reserves	1 016.3	18.6
Zoological parks, aquaria and botanic gardens	163.6	3.0
Libraries and archives	441.7	8.1
<i>Total</i>	2 142.1	39.3
Arts		
Literature and print media	4.2	0.1
Performing arts	80.2	1.5
Performing arts venues	183.7	3.4
Visual arts and crafts	17.1	0.3
Broadcasting and film	76.4	1.4
Community cultural centres and activities	15.0	0.3
Administration of culture	37.6	0.7
Other arts n.e.c.	41.7	0.8
<i>Total</i>	456.0	8.4
<i>Total</i>	2 598.1	47.7
<i>Local government</i>	973.2	17.9
Total funding by all levels of government	5 449.7	100.0

— nil or rounded to zero (including null cells)

(a) Data for this category has been estimated based on previous year's data and should be used with caution.

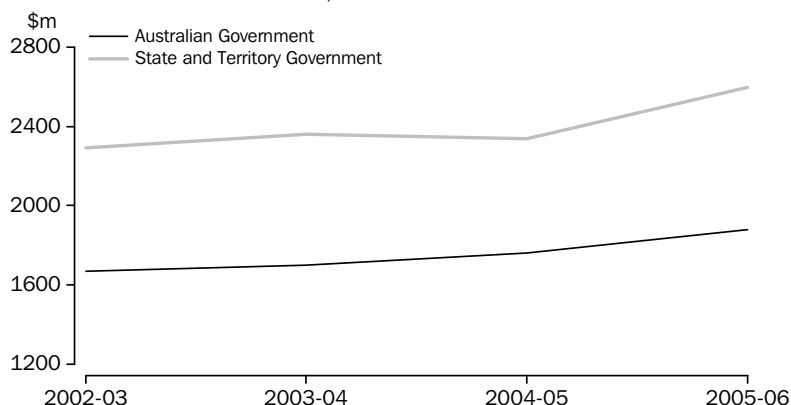
Source: ABS, *Cultural Funding by Government, 2005–06* (cat. no. 4183.0).

The Australian Government and state and territory governments increased their funding of cultural activities over the period 2002–03 to 2005–06. Australian Government funding increased by 12.4% and state and territory government funding increased by 13.3%. Local government funding of cultural activities increased by 8.4% over the period 2004–05 to 2005–06.

GOVERNMENT FUNDING

continued

4.2 CULTURAL FUNDING, 2002–03 to 2005–06



Source: ABS, *Cultural Funding by Government, 2004–05 and 2005–06* (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, with the recipient determining the purpose for which the donation is used. While the donor is not repaid with any benefit or service, businesses and individuals can receive taxation benefits for donations of cash or property to organisations such as those listed on the DCITA Register of Cultural Organisations. In 2005–06 there were 63,328 donations and total donations amounted to \$32.7m.

The Australian Major Performing Arts Group (AMPAG) reported that the performing arts received \$21.5m in corporate sponsorship in 2002, compared to \$25.8m in 2006. In 2006, corporate sponsorship made up 63% of total sponsorship and donation revenue.

4.3 MAJOR PERFORMING ARTS COMPANIES TOTAL SPONSORSHIP AND DONATIONS REVENUE—2002 to 2006

	2002	2003	2004	2005	2006
	\$m	\$m	\$m	\$m	\$m
Corporate sponsorship	21.5	24.0	25.6	26.1	25.8
Personal giving	7.2	8.3	9.1	13.0	12.4
Events (net)	1.5	1.6	3.0	2.9	2.8
Total	30.2	34.0	37.8	42.1	40.9

Source: AMPAG, *Tracking Changes in Corporate Sponsorship and Private Donations, 2007*.

SOURCES OF SUPPORT
FOR ARTS AND CULTURAL
ORGANISATIONS

In various years including 1999–2000, 2002–03 and 2003–04, 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.

SOURCES OF SUPPORT
FOR ARTS AND CULTURAL
ORGANISATIONS
continued

Public libraries were the most reliant on government funding (93% of their total income in 2003–04), with Botanic gardens running a close second (80% in 1999–2000). At the other end of the scale, those organisations involved in Music and theatre production relied least on public funds, with only 22% of their total income sourced from government in 2002–03.

Sponsorship was highest for performing arts festivals which received \$20.9m in financial and in-kind support in 1999–2000.

Museums received the largest amount of private funds overall (\$89m in 2003–04). Music and theatre production also received a large amount of private funding (\$45.5m in 2002–03).

4.4 SUPPORT FOR ARTS AND CULTURAL ORGANISATIONS (a)—1999–2000 to 2003–04

FUNDRAISING INCOME

	Sponsorship	Donations, bequests, etc.	Total	Government funding	Total funding	Total income
VALUE (\$ m)						
2003–04						
Museums	np	np	89.0	628.0	717.1	919.4
Public libraries	np	np	(b) 7.5	781.2	788.7	839.0
2002–03						
Music and theatre production	np	np	45.5	134.4	179.9	622.1
1999–2000						
Botanic gardens	2.2	2.4	4.6	73.4	78.0	91.8
Performing arts venues	7.0	3.0	10.0	93.5	103.5	315.9
Performing arts festivals	20.9	1.2	22.2	27.1	49.3	102.7

AS A PERCENTAGE OF TOTAL INCOME (%)

2003–04						
Museums	np	np	9.7	68.3	78.0	100.0
Public libraries	np	np	0.9	93.1	94.0	100.0
2002–03						
Music and theatre production	np	np	7.3	21.6	28.9	100.0
1999–2000						
Botanic gardens	2.4	2.6	5.0	80.0	85.0	100.0
Performing arts venues	2.2	0.9	3.2	29.6	32.8	100.0
Performing arts festivals	20.4	1.2	21.6	26.4	48.0	100.0

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

(a) Excludes funds provided as loans or advances.

(b) Includes some other income such as interest.

Source: ABS, *Service Industries Surveys, 1999–2000, 2002–03, 2003–04* (cat. nos. 8560.0, 8561.0, 8563.0 and 8697.0).

INTRODUCTION

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

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 gives some data from the Census on cultural employment, it is by no means exhaustive and substantially more can be found in the ABS publication *Employment in Culture, Australia, 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* (ANZSCO) (cat. no. 1221.0) or *Australian Standard Classification of Occupations* (ASCO) (cat. no. 1220.0) when analysing occupation, and *Australian and New Zealand Standard Industrial Classification* (ANZSIC) 1993 (cat. no. 1292.0) or ANZSIC 2006 when analysing industry data. This is why the figures in table 5.1 for employment in cultural industries differ to 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* (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 was conducted in 1993, 1997, 2001, 2004 and 2007 as part of the Monthly Population Survey. Unlike the Census, the surveys covered all cultural work including second jobs and both paid and unpaid involvement. The surveys asked people aged 15 years and over about their involvement in cultural activity over a 12-month period. Data for 2007 appear in *Work in Selected Culture and Leisure Activities, Australia, April 2007* (cat. no. 6281.0).

*Survey of Work in Selected
Culture and Leisure
Activities continued*

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). More in-depth analysis of cultural volunteers is presented in the feature article *Cultural Encounters — Australia's Arts and Heritage Volunteers* available from www.abs.gov.au.

SERVICE INDUSTRIES SURVEYS

While the Census, the survey of Work in Selected Cultural and Leisure Activities, and the Voluntary Work Survey obtained their data from the general population, the Service Industries Surveys collected information from employing cultural organisations. These organisations were able to provide information on the number of people they employed and the number of volunteers whose services they used.

SURVEY OF EMPLOYEE EARNINGS AND HOURS

The May 2006 Survey of Employee Earnings and Hours provides information on the composition and distribution of the earnings and hours of wage and salary earners. Data from this survey have been published in *Employee Earnings and Hours, Australia, May 2006* (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 although it suffers from only referring to a person's main job. If information on the total number of people involved in culture is required and detailed data on the characteristics of those involved is 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 of the number of people working in selected industries are required. Unlike the Census, these surveys include people working in the industries in second jobs or in an unpaid capacity. However, the majority of Service Industry Surveys cited in this publication only collected information from employing organisations, therefore those organisations which rely solely on the services of volunteers are excluded. Recent changes in coverage have occurred in the 2003–04 Museums Survey and the 2003–04 Public Libraries Survey. These surveys now include 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 the 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 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 (a), IN CULTURAL INDUSTRIES (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 edition* (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: ABS, *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), 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), 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

<i>Industry</i>	<i>Cultural occupations</i>	<i>Other occupations(e)</i>	<i>Total</i>	<i>Percentage of occupations which are cultural</i>
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
Postproduction 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, *2006 Census of Population and Housing*, data available on request.

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 Broadcasting, film and recorded media equipment operators, Camera operators, Light and Sound technicians and Television equipment operators. Conversely, females greatly outnumbered males in occupations such as Library and archive workers and Other arts support workers. More information can be found in *Employment in Culture, Australia* (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>
<i>Occupation</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
Total cultural occupations	284 791
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, 2006 Census of Population and Housing, data available on request.

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.

WORK IN CULTURE AND
LEISURE ACTIVITIES
SURVEY *continued*

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 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: ABS, *Work in Selected Culture and Leisure Activities, 2007*

(cat. no. 6281.0).

WORK IN CULTURE AND LEISURE ACTIVITIES SURVEY *continued*

There were 1.6 million people who worked 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.

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
	'000	'000	'000
Heritage			
Museums	8.4	1.4	9.8
Public art galleries	10.3	4.6	14.9
Libraries and archives	29.3	6.6	*35.9
Heritage organisations	4.1	*5.7	**9.8
Botanic gardens	*6.8	**2.6	9.4
National parks and reserves	**8.4	4.9	13.3
Zoos and aquaria	5.8	2.3	8.1
<i>Total heritage(d)</i>	60.3	23.4	83.7
Arts			
Visual art activities			
Drawing	64.6	27.5	92.1
Painting	28.4	29.8	58.3
Sculpture	13.2	4.8	17.9
Photography	52.8	33.9	86.6
Print-making	21.8	4.3	26.1
Creating artworks with a computer	98.4	38.8	137.1
Other visual art activities	11.4	6.6	18.0
<i>Total visual art activities(d)</i>	185.3	96.6	281.9
Craft activities			
Pottery and ceramics	14.4	2.5	17.0
Textiles	23.3	17.0	40.2
Jewellery making	10.0	22.5	32.6
Furniture-making and wood crafts	35.5	16.0	51.6
Glass crafts	4.8	3.1	7.9
Other craft activities	13.8	11.3	25.1
<i>Total craft activities(d)</i>	73.7	65.4	139.1
Writing			
Publishing	184.3	56.4	240.7
Performing arts			
Performer	81.3	24.9	106.1
No involvement as performer	13.2	25.7	38.9
<i>Total performing arts(d)</i>	22.5	15.4	37.9
	35.7	41.1	76.8
Music			
Live performer	24.9	65.7	90.6
No involvement as live performer	19.6	8.7	28.3
<i>Total music(d)</i>	44.5	74.4	118.8
Radio	10.6	14.2	24.8
Television	19.6	23.9	43.4
Film production	16.1	18.6	34.6
Cinema and video distribution	12.1	8.8	20.9
Designing websites	83.3	29.2	112.4
Designing computer games and other interactive software	33.5	6.3	39.8
Design	230.7	49.1	279.8
Teaching	65.1	46.3	111.3
Festival organising	51.3	32.0	83.4
Art or craft show organising	22.9	13.0	35.9
Government arts departments and agencies	14.0	5.8	19.9
<i>Total arts(d)</i>	669.0	347.4	1 016.4
<i>Total(d)</i>	701.8	360.3	1 062.1

* 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) Involvement is for 12 months prior to interview in April 2007.

(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: ABS, *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 (1.4% 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
Female	131.0	1.7
Persons	207.2	1.4

Source: ABS, *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 collectibles (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.

In 2003-04, Public libraries employed 12,471 people, while in 2002-03, 16,427 people were employed by the film and video production industry. Data from 1999–2000 show that the Video hire and Motion picture exhibition industries also employed large numbers of people, although they predominantly worked part-time or as casuals.

SERVICE INDUSTRY
SURVEYS *continued***5.7** PERSONS EMPLOYED IN SELECTED CULTURAL
INDUSTRIES—1999–2000 to 2003–04

	<i>Full-time</i>	<i>Part-time and casual</i>	<i>Total</i>
2003–04			
Public libraries(a)	5 889	6 583	12 471
Art and other museums	4 291	3 252	(b)7 543
2002–03			
Film and video production	6 785	9 531	(b)16 427
Television services(c)			
Commercial free-to-air	na	na	6 577
Pay Television	na	na	2 517
Music and theatre productions	3 101	4 460	(b)7 842
Festivals	345	927	1 272
1999–00			
Film and video distribution	1 059	366	1 426
Motion picture exhibition	1 196	8 026	(b)9 282
Video hire	2 026	8 267	(b)11 034
Performing arts venues	1 451	3 698	5 149
Commercial art galleries	389	586	1 409
Botanic gardens	971	279	1 250

na not available

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

(b) Includes working proprietors and partners.

(c) Excludes public television broadcasters and community broadcasters.

Source: ABS, *Service Industries Surveys*, various publications, 1999–2000, 2002–03, 2003–04 (cat. nos. 8559.0, 8560.0, 8561.0, 8562.0, 8563.0, 8651.0, 8654.0, 8679.0, 8697.0).

Many cultural industries are run as commercial operations and are exclusively staffed by paid employees. A few industries, however, rely heavily on the assistance of volunteers. The Service Industries Surveys found that 20,443 volunteers helped in the running of museums during June 2004 which was almost three times the number of people with paid employment in the industry at that time. Similarly, 6,853 people undertook voluntary work for Public libraries during June 2004, or more than one volunteer for every two people employed.

Some 2,548 people worked as volunteers in Music and theatre productions in June 2003 which was around one-third of the number employed (7,842). The 1,272 paid staff working on 176 performing arts festivals (of 2 days or more duration) during 2002–03 received assistance from 15,728 volunteers.

SERVICE INDUSTRY
SURVEYS *continued*

5.8 VOLUNTEERS IN SELECTED CULTURAL INDUSTRIES—June 2003
and June 2004

Music and theatre productions	
2002–03	2 548
Festivals	
2002–03	15 728
Public libraries(a)	
2003–04	6 853
Art and other museums	
2003–04	20 443

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

Source: ABS, *Service Industry Surveys*, various publications, 2002–03 (cat. no. 8697.0) and 2003–04 (cat. nos. 8560.0 and 8561.0).

EMPLOYEE EARNINGS
AND HOURS

Earnings of wage and salary earners by occupation is available from *Employee Earning and Hours, Australia, 2006* (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 Artists and related professionals who worked as full-time employees (excluding those who were self-employed) worked an average of 38 hours per week and had weekly earnings of \$1,038. Printing tradesperson's also worked an average of 38 hours per week but had weekly earnings of \$948. By comparison, all wage and salary earners worked an average of 38 hours per week with earnings totalling \$989.

5.9 FULL-TIME ADULT NON-MANAGERIAL EMPLOYEES, Earnings and hours(a)—May 2006

	Males		Females		Persons	
	\$	hours	\$	hours	\$	hours
Artists and related professionals	1 051	38	1 016	38	1 038	38
Printing tradespersons	977	38	763	38	948	38
All occupations	1 036	38	915	38	989	38

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

Source: ABS, *Employee Earning and Hours, Australia*, May 2006 (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) provides a summary of the economic activity of the nation allowing such comparisons to be made. The ANA includes expenditure in Australia by businesses, governments and people from overseas.

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

The industries in the ANA are defined using the 2006 *Australian and New Zealand Standard Industrial Classification (ANZSIC)* (cat. no. 1292.0). The Classification combines industries into economically significant classes which are then the basis for statistical output.

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 2001–02. These data show that the Australian production of cultural goods and services totalled \$48,557m.

In 2001–02, the value of Advertising services totalled \$11,512m, which was 24% of the total value of cultural goods and services produced in that year. Printing and services to printing accounted for 21% of the total value of output of cultural goods and services. Radio and TV station services was the only other cultural product which accounted 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)—2001–02

<i>Product item</i>	<i>Australian</i>	<i>Percentage of total</i>
	<i>production</i>	<i>cultural goods and</i> <i>services produced</i>
	\$m	%
Publishing, recorded media and publishing		
Newspapers, printing or publishing	1 603	3.3
Magazines and bound periodicals publishing	720	1.5
Books, sheet music, maps, etc. publishing	938	1.9
Pre-recorded audio, video tapes, computer tapes or disks, compact disks and records, manufactured or published	1 210	2.5
Other income	154	0.3
<i>Total</i>	<i>4 625</i>	<i>9.5</i>
Motion picture, radio and television services		
Motion picture production	688	1.4
Film hiring services	75	0.2
Motion picture theatre services	820	1.7
Radio and TV station services	6 236	12.8
Pay TV services	2 187	4.5
<i>Total</i>	<i>10 006</i>	<i>20.6</i>
Libraries, museums and the arts		
Library, museum and art gallery services	1 061	2.2
Zoological and botanical gardens operation	920	1.9
Recreational parks and gardens operation	614	1.3
Music and theatre production operation	478	1.0
Creative arts services	1 095	2.3
Sound recording studios operation	106	0.2
Performing arts venue operation	1 103	2.3
Other services to the arts(c)	288	0.6
<i>Total</i>	<i>5 665</i>	<i>11.7</i>
Other cultural products		
Printing and services to printing	9 932	20.5
Television receiving sets production	27	0.1
Musical instruments (incl. parts and accessories) production	59	0.1
Architectural services	3 317	6.8
Advertising services	11 512	23.7
Commercial art and display services	2 044	4.2
Video hire	1 040	2.1
Photography services n.e.c.	330	0.7
<i>Total</i>	<i>28 261</i>	<i>58.2</i>
Total	48 557	100.0

- (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 casting agency operation and services to the arts n.e.c.

Source: ABS, *Australian National Accounts: Input-Output Tables (Product Details), 2001–02* (cat. no. 5215.0.55.001).

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.

AUSTRALIAN NATIONAL
ACCOUNTS *continued*

Value added data are only available on an industry wide 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 2001–02 was \$25,796m. The value added component of these cultural industries was \$10,225m, which indicates that 40% of the value of goods and services produced by the cultural industries was paid to factors of production (labour and capital). The remaining amount (\$15,571m or 60%) was paid to other industries for their output which was used in producing the cultural goods and services. These selected cultural industries account for 1.5% of the total value added for all industries.

The value of Australian production for these selected cultural industries was approximately the same as that of Road transport (\$25,821m), Electricity supply (\$20,910m) and Banking (\$29,115m).

6.2 OUTPUT AND VALUE ADDED, Selected cultural industries(a)—2001–02

<i>Industry</i>	<i>Australian production(b)</i>	<i>Value added</i>
	\$m	\$m
Motion picture, radio and television services	10 043	3 229
Libraries, museums and the arts	5 874	2 498
Publishing, recorded media, etc.	9 879	4 498
<i>Total for selected cultural industries(a)</i>	25 796	10 225
Total for all industries	1 417 756	671 872

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

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

Source: ABS, *Australian National Accounts: Input-Output Tables, 2001–02* (cat. no. 5209.0.55.001).

SERVICE INDUSTRIES
SURVEYS

Australian National Accounts (ANA) data are useful for making broad comparisons across industries to enable a picture to be drawn of the economic importance of the cultural sector. However, the ANA does not have detailed information on the operations of each of the cultural industries. Such information is available from a series of Service Industries Surveys (SIS) run over various years (1999–2000, 2002–03 and 2003–04).

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

In 2002–03, businesses mainly engaged in Television services had an operating income of \$5,158.8m. Other cultural industries included in the Service Industries Surveys where income exceeded \$1,000m were Film and video production and Film and video distribution.

SERVICE INDUSTRIES
SURVEYS *continued***6.3** SELECTED CULTURAL INDUSTRIES (a), Income and value added

	<i>Operating income</i>	<i>Value added</i>
	\$m	\$m
2003-04		
Libraries and archives	839.0	na
Museums	919.4	na
2002-03		
Film and video production	1 596.6	668.2
Television services	5 158.8	1 460.2
Music and theatre productions	622.1	na
Performing arts festivals	88.5	na
1999-00		
Film and video distribution	1 141.8	281.1
Motion picture exhibition(b)	678.9	347.7
Video hire industry	595.2	281.9
Botanic gardens	91.8	na
Performing arts venues	315.9	86.0
Commercial art galleries	131.8	na
Other services to the arts	709.8	50.5

na not available

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

(b) Includes non-operating income.

Source: ABS, *Service Industry Surveys*, (various publications), Australia, 1999-2000, 2002-03, 2003-03, (cat. nos. 8559.0, 8560.0, 8562.0, 8651.0, 8654.0, 8679.0, 8697.0).

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

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.

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

INTRODUCTION

Overseas trade in goods and services may have an impact on Australian culture that extends well beyond its economic significance, as the imports of items such as films, music and books may how influence 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 culture and recreation product classification of the Australian Culture and Leisure Classifications (ACLC).

More detailed information about the ACLC and what items have been included is available in the CMC SWG publication *Australia's Trade in Culture 2000–01*, Appendix 1.

TRADE IN CULTURAL GOODS AND SERVICES

Australia continues to import more cultural goods and services than it exports overseas. In 2006–07, Australia earned \$965m through the provision of cultural goods (\$534.1m) and cultural and recreational services to the rest of the world, around a fifth of the value of cultural goods (\$3,229.m) and services (\$1,221m) it received from overseas (\$5,048m).

TRADE IN CULTURAL GOODS

Exports of cultural goods in 2006–07 totalled \$534m, or 0.3% of all goods exported out of Australia, while cultural imports totalled \$3,229m, or 1.8% of all goods imported into Australia.

7.1 TRADE IN CULTURAL GOODS—2006–07

	Cultural goods	All goods	Cultural goods as a percentage of all goods
	\$m	\$m	%
Exports	534.1	168 116.9	0.3
Imports	3 229.0	180 805.9	1.8

Source: ABS, *International Trade, Australia: FASTTRACCS Service - Electronic Delivery*, 2007 (cat. no. 5466.0).

COMMODITIES TRADED

In 2006–07, just over half (52%) of Australia's exports of cultural goods consisted of Books, magazines, newspapers and other printed matter (\$279m).

The largest cultural product group imported in 2006–07 was Radio and television receivers and apparatus for sound or video recording or reproduction which accounted for 53% (\$1,716m) of cultural goods imported by Australia.

COMMODITIES TRADED

*continued***7.2** TRADE IN CULTURAL GOODS, By product group—2006–07

	Imports	Exports	Excess of imports over exports
ACL product group	\$m	\$m	\$m
Heritage services	49.8	17.9	31.8
Books, magazines, newspapers and other printed matter	966.3	278.8	687.5
Audio and video media	143.4	53.3	90.1
Radio and television receivers and apparatus for sound or video recording or reproduction	1 716.0	84.5	1 631.5
Exposed photographic and cinematographic media, and artistic works	182.9	89.8	93.2
Musical instruments and other performing arts equipment	170.6	9.9	160.7
Total	3 229.0	534.1	2 694.9

Source: ABS, *International Trade, Australia: FASTTRACCS Service - Electronic Delivery, 2007* (cat. no. 5466.0).

CULTURAL TRADE BY COUNTRY

Almost half (49%) of Australia's cultural exports went to New Zealand (\$260m), with significant quantities also going to the United States of America (\$65m) and the United Kingdom (\$58m).

7.3 EXPORTS OF CULTURAL GOODS, By country and product group—2006–07

ACL PRODUCT GROUP(a)

	Heritage services	Books, magazines, etc.	Audio and video media	Radios, TVs, etc.	Exposed film and artistic works	Musical instruments etc.	Total
	\$m	\$m	\$m	\$m	\$m	\$m	\$m
Canada	—	2.7	0.2	0.3	2.3	0.3	5.8
China	0.1	2.1	0.1	4.2	1.8	0.4	8.7
Fiji	—	1.6	0.1	1.0	0.1	—	2.9
Germany	0.1	0.8	0.1	1.7	2.8	0.3	5.8
Hong Kong	1.1	3.2	3.3	6.9	3.4	0.3	18.3
Japan	0.2	2.8	0.9	2.1	5.5	0.3	11.9
Korea, Republic of	—	0.7	0.3	1.8	3.3	0.1	6.1
Malaysia	—	2.0	0.1	1.0	0.8	—	4.0
Netherlands	—	0.4	0.4	0.2	1.9	0.1	3.0
New Zealand	1.5	193.4	32.8	21.2	6.5	4.8	260.3
Papua New Guinea	—	4.4	—	1.0	—	—	5.6
Singapore	0.9	13.0	1.4	3.0	2.6	—	21.1
South Africa	0.4	6.5	0.5	0.6	0.6	0.2	8.8
Taiwan	—	0.5	0.5	1.7	1.3	—	4.0
Thailand	—	1.0	0.1	0.5	0.1	—	1.8
United Kingdom	7.4	15.4	2.5	7.8	23.8	0.7	57.5
United States of America	5.0	17.2	7.5	12.5	21.5	1.3	65.0
Other countries	1.2	10.9	2.3	16.9	11.3	1.0	43.6
Total	17.9	278.8	53.3	84.5	89.8	9.9	534.1

— nil or rounded to zero (including null cells)

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

Source: ABS, *International Trade, Australia: FASTTRACCS Service - Electronic delivery, 2007* (cat. no. 5466.0).

CULTURAL TRADE BY
COUNTRY *continued*

Australia imported \$823m of cultural goods from China in 2006–07, with the bulk of this (75%) comprising Radio and television receivers and audio and video equipment such as CD players. Imports from the United States of America totalled \$480m while imports from the United Kingdom totalled \$433m.

7.4 IMPORTS OF CULTURAL GOODS, By country and product group—2006–07

ACLCL PRODUCT GROUP(a)

	Heritage services	Books, magazines, etc.	Audio and video media	Radios, TVs, etc.	Exposed film and artistic works	Musical instruments etc.	Total
	\$m	\$m	\$m	\$m	\$m	\$m	\$m
Austria	0.1	0.6	15.6	0.2	0.4	0.8	17.8
Canada	0.4	4.2	0.8	2.5	1.9	2.0	11.8
China	3.9	127.5	3.5	(b)614.5	20.8	53.2	(b)823.3
Denmark	—	2.7	0.1	18.3	0.1	0.2	21.4
France	7.6	3.7	1.1	3.1	14.9	3.4	33.8
Germany	0.7	13.0	8.4	11.6	1.5	9.2	44.3
Hong Kong	1.1	56.6	6.5	18.0	0.7	0.3	83.3
India	2.6	2.3	0.3	2.4	2.2	0.2	9.9
Indonesia	0.5	2.6	1.7	87.8	1.8	15.9	110.3
Ireland	—	0.5	1.3	0.1	0.1	—	2.0
Italy	0.9	6.5	2.1	3.4	11.7	3.2	27.6
Japan	1.6	6.9	3.7	196.1	2.5	32.1	243.0
Korea, Republic of	0.2	4.7	0.1	234.2	2.2	4.5	245.9
Malaysia	—	8.1	0.8	(b)140.5	0.1	0.1	(b)149.6
Mexico	—	0.1	0.4	17.9	0.1	1.4	19.9
Netherlands	0.9	6.0	3.3	1.5	2.7	1.1	15.4
New Zealand	0.3	18.2	1.7	0.8	3.7	0.4	25.2
Philippines	0.1	0.3	0.1	39.3	—	—	39.8
Singapore	0.6	64.2	18.9	(b)22.2	0.5	0.2	(b)106.5
South Africa	0.1	2.0	0.1	1.2	0.8	—	4.2
Spain	0.1	3.1	0.1	0.4	0.6	0.9	5.2
Sweden	0.1	2.2	0.7	1.5	0.1	0.5	5.2
Switzerland	0.8	1.6	0.9	4.2	1.6	0.3	9.3
Taiwan	—	3.5	8.8	34.3	0.5	5.7	52.9
Thailand	0.1	6.7	1.7	(b)123.0	4.3	0.3	(b)136.1
Turkey	—	0.1	—	1.7	—	0.1	1.9
United Kingdom	18.8	338.0	29.1	14.3	30.6	2.2	433.0
United States of America	3.3	266.5	26.4	103.2	51.3	29.9	480.4
Other countries	4.9	13.5	5.4	17.9	25.3	2.8	69.8
Total	49.8	966.3	143.4	1 716.0	182.9	170.6	3 229.0

— nil or rounded to zero (including null cells)

(a) The descriptions of the ACLCL groups shown have been abbreviated for space reasons.

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

Source: ABS, *International Trade, Australia: FASTTRACCS Service - Electronic Delivery*, 2007 (cat. no. 5466.0).

Exports of cultural goods have increased since 2000–01, with the value of exports in 2006–07 (\$534m) being 11% higher than in 2000–01. The product group showing the largest increase over this time was Books, magazines etc. which increased from \$175m in 2000–01 to \$279m in 2006–07. Some of this increase may be due to inflation rather than increases in production. The value of Heritage services exports decreased over this time from \$34m in 2000–01 to \$18m in 2006–07.

CULTURAL TRADE BY
COUNTRY *continued***7.5** EXPORTS OF CULTURAL GOODS, By product group(a)—2000–01 to 2006–07

	2000-01	2001-02	2002-03	2003-04	2004-05	2005-06	2006-07
<i>ACL product group</i>	\$m	\$m	\$m	\$m	\$m	\$m	\$m
Heritage services	33.5	32.6	18.8	27.2	29.9	23.2	17.9
Books, magazines etc.	174.8	214.7	244.6	248.9	253.2	237.6	278.8
Audio and video media	67.1	85.2	100.2	95.8	101.5	89.0	53.3
Radios, TVs, etc.	100.6	107.2	101.9	126.5	158.6	117.6	84.5
Exposed film and artistic works	98.9	95.3	100.2	103.2	79.4	117.1	89.8
Musical instruments etc.	7.7	8.7	10.4	9.6	10.4	11.1	9.9
Total	482.8	543.8	576.2	611.3	633.0	595.5	534.1

(a) The descriptions of the ACLC groups shown have been abbreviated for space reasons - see table 7.2 for full descriptions.

Source: ABS, *International Trade, Australia: FASTTRACCS Service - Electronic Delivery, 2007* (cat. no. 5466.0).

The value of imports of cultural goods increased by 3% between 2000–01 and 2006–07. The growth, however, varied by commodity. For example, Musical instruments, etc. increased by 65% over this period while the value of commodities in the product group Audio and video media declined by 32%.

7.6 IMPORTS OF CULTURAL GOODS, By product group(a)—2000–01 to 2006–07

	2000-01	2001-02	2002-03	2003-04	2004-05	2005-06	2006-07
<i>ACL product group</i>	\$m	\$m	\$m	\$m	\$m	\$m	\$m
Heritage services	46.5	44.3	46.4	48.5	59.2	45.6	49.8
Books, magazines etc.	925.8	946.2	938.3	908.6	931.5	930.0	966.3
Audio and video media	210.3	221.2	326.9	292.6	280.9	292.3	143.4
Radios, TVs etc.	1 717.6	1 719.7	1 790.8	1 840.8	1 927.5	2 230.4	1 717.0
Exposed film and artistic works	126.6	91.7	115.8	105.4	124.5	190.9	182.9
Musical instruments etc.	103.5	123.5	127.2	140.7	146.8	155.2	170.6
Total	3 130.3	3 146.6	3 345.4	3 336.6	3 470.4	3 844.5	3 230.0

(a) The descriptions of the ACLC groups shown have been abbreviated for space reasons - see table 7.2 for full descriptions.

Source: ABS, *International Trade, Australia: FASTTRACCS Service - Electronic Delivery, 2007* (cat. no. 5466.0).

TRADE IN SERVICES

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

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

TRADE IN SERVICES

continued

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

Australia earned \$298m from cultural and recreational services in 2006–07, approximately 0.6% of its total earnings from services in that year. This figure has remained relatively constant over recent years, with the exception of 2000–01 when the inclusion of television rights to the Sydney 2000 Olympic and Paralympic Games boosted it to about 4.6%.

Australia paid \$1,221m to other countries for cultural and recreational services in 2006–07, with Audiovisual and related services accounting for 75% of that total, and music royalties a further 17%. This represented 2.8% of all Australia's total payments for services in that year.

7.7 TRADE IN CULTURAL AND RECREATIONAL SERVICES—2000–01 to 2006–07

	2000-01	2001-02	2002-03	2003-04	2004-05	2005-06	2006-07
	\$m	\$m	\$m	\$m	\$m	\$m	\$m
Service Credits (earnings)							
Audiovisual and related services	(a) 1 460	127	211	205	149	214	169
Music Royalties	74	58	70	42	48	41	52
Other cultural and recreational services(b)	109	159	146	110	63	115	77
Total services provided	1 643	344	427	357	260	370	298
Service Debits (payments)							
Audiovisual and related services	674	777	732	776	867	869	918
Music Royalties	262	266	244	209	255	213	209
Other cultural and recreational services(b)	97	93	120	130	183	122	94
Total services provided	1 033	1 136	1 096	1 115	1 305	1 204	1 221

r revised

Source: ABS, *International Trade in Services* (cat. no.(a) Includes \$1,025m associated with the broadcast rights for the Sydney 2000 Olympic and Paralympic Games. 5368.0.55.003) and *Balance of Payments and International Investment Position, Australia* (cat. no. 5302.0).

(b) Includes health and medical services.

For Audiovisual and related services, Australia's largest earnings came from the sale of television programs. In 2006–07, television program sales totalled \$87m, down from \$129m in 2005–06.

Television programs also accounted for the bulk of the \$918m of payments Australia made for Audiovisual and related services, amounting to \$538m in 2006–07. Payments for the right to use videotapes totalled \$235m.

7.8 AUDIOVISUAL AND RELATED SERVICES, By type—2000–01 to 2006–07

	2000–01	2001–02	2002–03	2003–04	2004–05	2005–06	2006–07
	\$m	\$m	\$m	\$m	\$m	\$m	\$m
Credits (earnings)							
Theatrical films	9	np	22	13	3	6	5
Television programs—Sydney Olympic Games	1 025	—	—	—	—	—	—
Television programs—other	81	93	89	130	94	129	87
Video tapes	6	2	8	6	3	1	3
<i>Total credits(a)</i>	1 460	127	211	205	149	r214	169
Debits (payments)							
Theatrical Films	85	90	80	76	78	85	96
Television Programs	456	532	481	526	610	539	538
Video Tapes	111	146	159	170	170	225	235
<i>Total debits(a)</i>	674	777	732	776	867	869	918

— nil or rounded to zero (including null cells)

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

r revised

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

Source: ABS, *Balance of Payments and International Trade* (cat. no. 5368.0.55.003).

CHAPTER 8

MUSEUMS

INTRODUCTION

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

This chapter draws together information from the ABS' attendance and industry surveys and from 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: ABS, *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: ABS, *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 2003–04 survey of Museums collected this information and found that there were an estimated 31.2 million admissions during the year, of which about two thirds (66%) were free of charge. Art galleries accounted for almost two fifths (37%) of all admissions.

8.3 MUSEUM ADMISSIONS, During the year ended 30 June 2004

OTHER MUSEUMS					
	Art galleries	Social history museums	Historic properties/sites	Natural, science and other museums	Total
	'000	'000	'000	'000	'000
Paid	1 546.3	4 025.5	2 798.9	2 188.9	10 559.5
Free	*9 934.6	5 801.0	*1 988.3	*2 906.7	20 630.6
Total	*11 480.9	9 826.5	4 787.1	5 095.6	31 190.1

* estimate has a relative standard error of 25% to 50% and should be used with caution
 Source: ABS, *Museums, Australia, 2003–04* (cat. no. 8560.0).

ORGANISATIONS

The 2003–04 ABS 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 2003–04 Museums Survey 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 Australian Museums and Galleries OnLine (AMOL). The scope excluded organisations mainly engaged in the operation of botanic gardens; herbariums; zoological gardens; aquariums; observatories and planetariums; public libraries; and science centres.

In June 2004, there were 1,329 museum establishments operating in Australia. Of these, 12% were Art galleries, and the remaining 88% were classified as Other museums. The Other museums category included social history museums, historic properties or sites, natural, science and other museums.

ORGANISATIONS

*continued***8.4** NUMBER OF MUSEUM ESTABLISHMENTS—June 2004

	<i>Number</i>	<i>Per cent</i>
	no.	%
Art galleries	160	12.0
Other museums		
Social history museums	673	50.6
Historic properties or sites	381	28.7
Natural, science and other museums	116	8.7
<i>Total</i>	1 169	88.0
Total	1 329	100.0

Source: ABS, *Museums, Australia, 2003–04* (cat. no. 8560.0).

MUSEUM ARTEFACTS,
ARTWORKS AND OBJECTS

According to the 2003–04 survey of Museums, museums held a total of 55 million museum objects and artworks. Of these, about 5% were held by art galleries, 3% by historic properties, 18% by social history museums and 74% by natural, science and other museums. Museums which had 20 or more employees held 84% of these 55 million objects, with approximately 3% of the objects on display.

FINANCIAL DATA

The 2003–04 ABS survey of Museums found that the total income in the 2003–04 financial year for the 1,329 museums establishments in Australia was \$919.4m. About two-thirds (68%) of this income was provided by government, with the bulk of the balance made up by fundraising (\$89m) and admissions (\$56m).

Wages and salaries accounted for \$320.4m of museum expenses in 2003–04, which was two fifths (40%) of total outgoings. Other expenses (\$489.9m) made up the remaining 60% of museum costs.

8.5 MUSEUM ESTABLISHMENTS, Income and expenses—2003–04

	OTHER MUSEUMS				
	<i>Art galleries</i>	<i>Social history museums</i>	<i>Historic properties/sites</i>	<i>Natural, science and other museums</i>	<i>Total</i>
	\$m	\$m	\$m	\$m	\$m
Income					
Government funding	200.4	193.0	47.9	186.7	628.0
Admissions income	8.8	20.2	18.1	8.9	55.9
Fund raising	62.0	12.5	6.8	7.7	89.0
Other income	53.7	33.7	24.6	34.3	146.5
<i>Total</i>	324.9	259.4	97.5	237.6	919.4
Expenses					
Wages and salaries	99.1	91.5	39.6	90.1	320.4
Other expenses	166.4	138.3	41.0	144.2	489.9
<i>Total</i>	265.5	229.7	80.6	234.4	810.3

Source: ABS, *Museums, Australia, 2003–04* (cat. no. 8560.0).

FINANCIAL DATA

continued

A more recent data collection which focuses solely on government funding for cultural activities, found that the Australian Government provided \$54.7m to art galleries and a further \$199.6m to other museums in 2005–06. State and territory governments contributed a total of \$520.6m to art galleries and other museums.

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

It should be noted that the government funding collection adopted a broader definition of art galleries and other museums, therefore its data are not directly comparable to those obtained from the Survey of Museums.

8.6 CULTURAL FUNDING BY GOVERNMENT, Museums—2005–06

	Australian Government	State and Territory Governments	Total
	\$m	\$m	\$m
Art galleries	54.7	214.0	268.7
Other museums	199.6	306.6	506.1
Total	254.3	520.6	774.9

Source: ABS, *Cultural Funding by Government, Australia, 2005–06* (cat. no. 4183.0).

EMPLOYMENT

This section covers employment in the museums sector using information drawn from two sources – the 2003–04 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 2003–04 survey of Museums, there were 7,624 people employed in museums during the last pay period in June 2004. Of these, 2,081 (27%) worked for art galleries, 1,298 (17%) worked for historic properties, 2,434 (32%) worked for social history museums and 1,811 (24%) worked for natural, science and other museums.

This survey also found that 20,443 people worked as volunteers for museums during the month of June 2004. Over half the volunteers (56%) were involved as museum or gallery attendants and security officers. They were less likely to be involved in managerial, administrative, research, collection management and conservation activities.

Information on volunteers was collected as an 'end-of-June 2004 snapshot', whereas information about employees was collected during the last pay period in June 2004.

Survey of Museums
continued

8.7 MAIN TYPE OF WORK UNDERTAKEN IN MUSEUMS, By whether employed or a volunteer—June 2004



(a) Includes people paid by related organisations.

Source: ABS, *Museums, Australia, 2003–04* (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.

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.

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

	Number	%
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
<i>Total cultural occupations</i>	<i>2 619</i>	<i>40.8</i>
Other occupations	3 793	59.2
<i>Total occupations</i>	<i>6 412</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, *Census of Population and Housing, 2006*, data available on request.

**HISTORIC AND
INDIGENOUS PLACES**

Australia's cultural heritage is not confined to museums and the objects they hold. Prior to 2003, the Commonwealth government maintained the *Register of the National Estate* which recorded all locations of cultural and historical value within Australia. This Register is no longer maintained and has been replaced by the *National Heritage List*. Where the *Register of the National Estate* recorded all places of interest to either the State and Commonwealth governments, the *National Heritage List* only records places of value to the Commonwealth government. Each state and territory government is now responsible for maintaining their own register of significant locations and this data is not presented here.

As of March 2008, the Commonwealth had a total of 70 places included on the National Heritage List. Of the 70, 38 are of historic importance, 25 of natural importance and seven of Indigenous. More information about the National Heritage List is available from the website of the Department of the Environment, Water, Heritage and the Arts www.environment.gov.au.

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.

Some data from the 1999–2000 botanic gardens survey is presented here, while data from the *Zoos, Parks and Garden Industry, 1996–97* (cat. no. 8699.0) is available through the ABS website.

ATTENDANCE

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

More than 7.8 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 a survey conducted by the ABS. Residents of the Northern Territory recorded the highest attendance rate (61%) and South Australians the lowest (49%).

Nature parks and reserves
continued

9.1 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

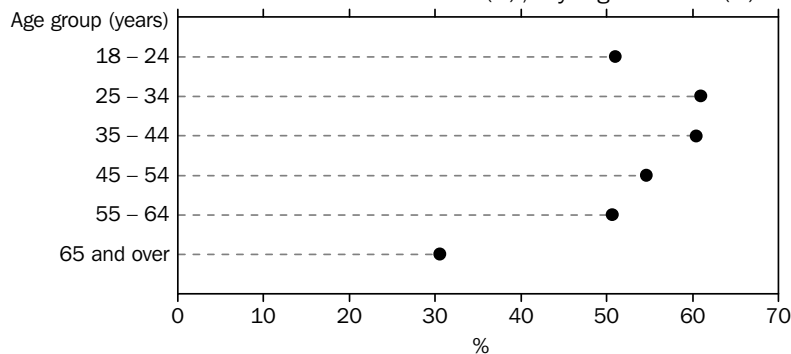
(a) Includes world heritage parks and state parks.

(b) Twelve months before interview in 2004.

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

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.

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



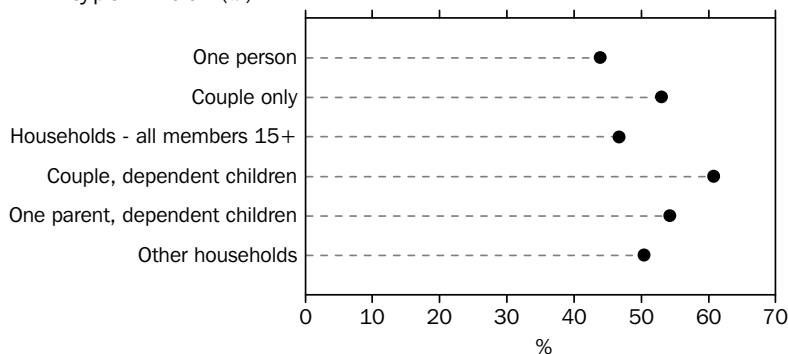
(a) Includes World Heritage Areas, national and state parks.

(b) Twelve months before interview in 2004.

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

Nature parks and reserves
continued

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

Zoological parks and Botanic gardens

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

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

9.4 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

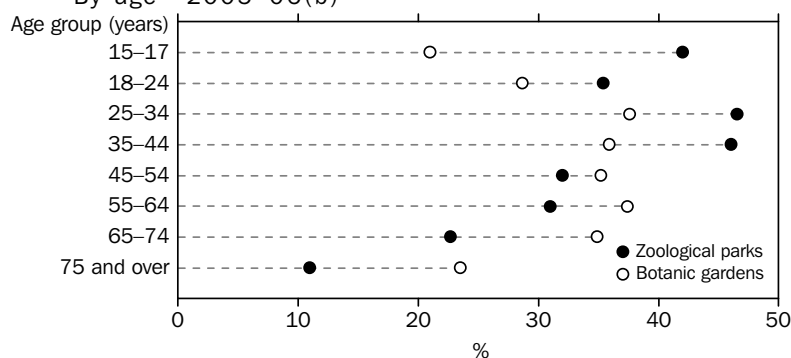
(a) Includes other wildlife parks, aquariums and marine parks.

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

Source: ABS, *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.

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



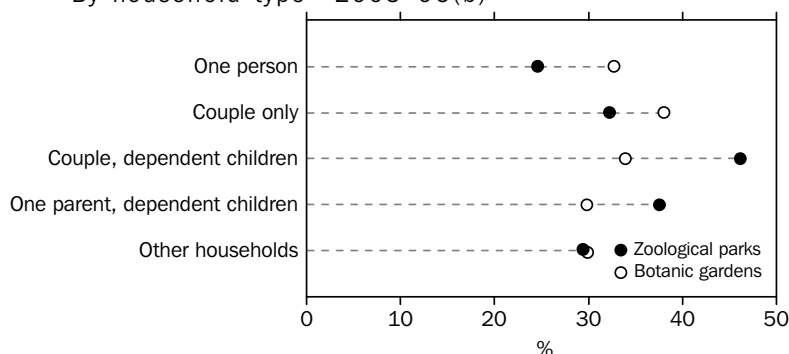
(a) Includes other wildlife parks, aquariums and marine parks.

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

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

Zoological parks and
Botanic gardens
continued

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

FINANCIAL DATA

In 2005–06, the ABS found that state and territory governments contributed \$1,179.8m and the Australian Government \$84m for environmental heritage. The vast majority of funding (86%) was for nature parks and reserves.

While some funding occurs at the local government level, details are not available for 2005–06.

9.7 CULTURAL FUNDING BY GOVERNMENT, Environmental
heritage—2005–06

	Australian Government	State and Territory Government	Total
	\$m	\$m	\$m
Nature parks and reserves	75.2	1 016.3	1 091.5
Zoological parks, aquaria	—	88.0	88.0
Botanic gardens	8.6	75.6	84.2
Total	83.9	1 179.8	1 263.7

— nil or rounded to zero (including null cells)

Source: ABS, *Cultural Funding by Government, Australia, 2005–06* (cat. no. 4183.0).

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

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

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

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

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

9.9 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, *Census of Population and Housing, 2006*, data available on request.

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.

9.10 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.

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

Work Survey

More information on employment can be obtained from the 2007 survey of Work in Selected Culture and Leisure Activities which collected data on all involvement rather than just the paid employment in main job which is obtained from the Census. The survey found that 94,900 people had some involvement in the operations of national parks and reserves although only 29% received some form of payment. A large number

Work Survey continued

of people also reported volunteering their time to work in botanic gardens. Of the estimated 28,200 people working in botanic gardens, 64% were paid for their involvement.

9.11 PERSONS WITH A WORK INVOLVEMENT IN NATIONAL PARKS, ZOOS AND BOTANIC GARDENS (a), By whether paid or unpaid—2007

	<i>Some paid involvement</i>	<i>Unpaid involvement only</i>	<i>Total</i>	<i>Percentage with some paid involvement</i>
	'000	'000	'000	%
National parks and reserves	27.0	86.0	94.9	28.5
Zoological parks and aquariums	*8.9	*9.1	13.1	*67.9
Botanic gardens	*18.1	22.7	28.2	*64.2

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

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

Source: ABS, *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 2005–06 household survey which collected attendance figures for a range of cultural venues and events; 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, Survey of Attendance at Selected Cultural Venues and Events, 2005–06, data available on request.

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

Unlike several of the other cultural institutions, public libraries regularly attract repeat visitors. Only 5% of those who visited a library did so on 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, Survey of Attendance at Selected Cultural Venues and Events, 2005–06, data available on request.

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

	1999-2000	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: ABS, *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 also eight national and state archives operating in Australia. State specific data on archives are not available for this collection due to confidentiality requirements nor are data on the archives operated by universities, local governments, commercial organisations and collecting institutions (e.g. state libraries).

10.5 LOCAL GOVERNMENT LIBRARIES, Number of locations—June 2004

	Branches	Mobile services	Deposit stations	Total locations
	no.	no.	no.	
LOCAL GOVERNMENT LIBRARIES				
2003–04				
AUSTRALIA	1 418	110	^ 189	1 716
New South Wales	372	^ 32	^ 93	497
Victoria	247	27	20	295
Queensland	328	^ 20	*11	359
South Australia	148	^ 13	^ 55	216
Western Australia	233	np	np	233
Tasmania	48	—	—	48
Northern Territory	33	np	np	33
Australian Capital Territory	9	2	—	11

^ 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

— nil or rounded to zero (including null cells)

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

Source: ABS, *Public Libraries, 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 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, 138.2 million of which 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: ABS, *Public Libraries, Australia, 2003–04* (cat. no. 8561.0).

The national and state archives which 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. In 2003–04, local libraries had 4,638 Internet workstations, 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.

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

	1999-2000		2003-04	
	<i>Local libraries</i>	<i>National and State libraries</i>	<i>Local libraries</i>	<i>National and state libraries</i>
	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: ABS, *Public Libraries, Australia 2003–04* (cat. no. 8561.0).

FINANCIAL DATA

Public libraries are particularly reliant on government funding for their operation, with 93% of their total income of \$839m 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. The eight national and state archives were also highly dependent on government funding with \$97.9m of their total \$109.1m coming from this source.

FINANCIAL DATA
*continued***10.8** INCOME AND EXPENSES OF PUBLIC LIBRARIES—2003–04

	<i>Local libraries</i>	<i>National and state libraries</i>	<i>All public libraries</i>
	\$m	\$m	\$m
Income			
Government funding			
Australia 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
Total income(a)	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	20.6	9.5	30.1
Purchases of library materials	47.8	8.2	56.0
Total expenses(b)	545.2	307.6	852.8

— nil or rounded to zero (including null cells)

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

(b) Total includes other expenses such as subscription payments, freight, etc.

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

According to *Cultural Funding by Government, 2005–06* (cat. no. 4183.0), the Australian Government increased funding for public libraries from \$54.9m in 2004–05 to \$66.7m in 2005–06, an increase of 21.5%. State and territory government funding of libraries increased by 16.9% over the same period, from \$337.1m to \$394.0m.

Australian Government funding for archives also increased, from \$65.2m in 2004–05 to \$67.4m in 2005–06. By comparison, state and territory government funding for archives fell by 22.3% over the same period, from \$61.4m to \$47.7m.

Substantial funding of libraries and archives also occurs at the local government level, but these data were not available for 2005–06.

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

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

	Number	%
Cultural Occupations		
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
<i>Total cultural occupations</i>	<i>5 245</i>	<i>74.9</i>
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, 2006 Census of Population and Housing, data available on request.

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.

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

Industry	Library		Archivists	Total	
	Librarians	technicians			assistants
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, Census of Population and Housing, 2006, data available on request.

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 (33.1%) received some payment.

Public Libraries Survey

The 2003–04 ABS survey of Public Libraries Survey 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.

This survey also found that at the end of June 2004, there were 811 persons employed by the eight national and state archives in Australia.

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

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* (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 \$2m 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: ABS, *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. The figures suggest that some readers are by-passing book retailers with approximately 15% of the income from sales to final consumers being earned by book publishers, often selling by subscription or straight to public and private organisations and schools.

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 to 2003–04, from \$86.9m to \$152.1m. This led to an increase in profit margin from 5.5% to 9.7%.

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. The largest 20 book publishers is ranked in terms of total income. 'Other major contributors' includes only the book publishing employment of businesses for which the predominant activity is not book publishing, but book publishing income is \$2m or more. Employment includes working proprietors.

Source: ABS, *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 3.6% in 2001–02 to 1.3% in 2003–04.

FINANCIAL DATA
*continued***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: ABS, *Book Retailers, Australia, 2003–04* (cat. no. 1371.0).

According to *Cultural Funding by Government, 2005–06* (cat. no. 4183.0), collection reported that the Australian, state and territory governments contributed a total of \$34m towards Literature and print media in 2005–06, which was an increase of 4% from the 2003–04 financial year.

11.4 CULTURAL FUNDING BY GOVERNMENT, Literature and print media—2003–04 to 2005–06

	2003-04	2004-05	2005-06
	\$m	\$m	\$m
Australian Government	27.9	27.6	29.5
State and Territory Government	4.5	4.7	4.2
Total	32.4	32.4	33.7

Source: ABS, *Cultural Funding by Government, Australia, 2005–06* (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

*Census of Population and
Housing continued*

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

	Printing	Book and magazine wholesaling	Newspaper and book retailing	Newspaper publishing	Magazine and other periodical publishing	Book publishing	Internet publishing and broadcasting
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, *Census of Population and Housing, 2006*, data available on request.

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 to 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. 'Other major contributors' includes only the book publishing employment of businesses for which the predominant activity is not book publishing, but book publishing income is \$2m or more.

Source: ABS, *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 (19%), with numbers increasing by 4% between 2001–02 and 2002–03.

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: ABS, *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 survey of Work in Selected Culture and Leisure Activities.

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.

Work Survey continued

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.

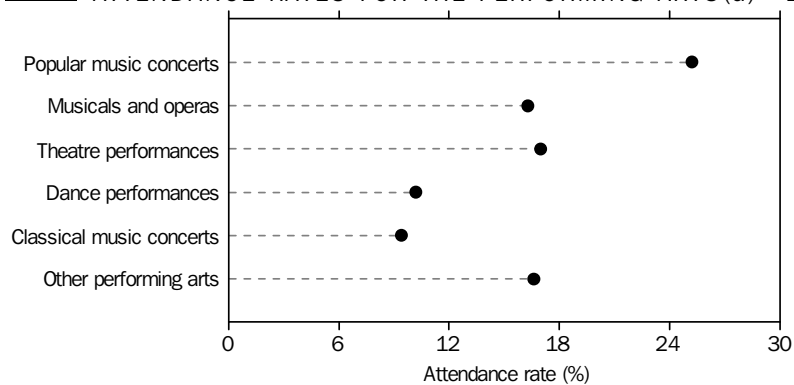
INTRODUCTION

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 a 2005–06 ABS survey and detailed employment data from both the 2006 Census of Population and Housing and an ABS survey on work in selected culture and leisure activities are the main sources of information about involvement with the performing arts. This is complemented by data from a 2002–03 survey of businesses operating in Australia which gives information on the income, expenditure and employment of selected music and theatre production and performing arts festival organisations.

ATTENDANCE

According to the ABS survey of Attendance at Selected Cultural Venues and Events 2005–06, 44% 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 Musicals and operas (16%) and Theatre performances (17%).

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



(a) In the 12 months before interview.

Source: ABS, *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 6.5% for those aged 75 years and over.

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
NSW	518.8	1 280.2	904.3	584.9	890.3	822.4
Vic.	373.1	949.3	721.7	400.0	740.7	670.8
Qld	251.4	794.1	467.3	269.5	475.9	505.3
SA	118.6	321.2	215.7	137.0	159.4	250.7
WA	168.2	479.9	261.6	152.1	230.4	274.7
Tas.	35.4	92.0	74.3	28.8	58.5	64.5
NT	*8.8	32.8	13.5	*10.7	10.4	16.4
ACT	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
NSW	9.7	23.9	16.9	10.9	16.6	15.3
Vic.	9.3	23.6	17.9	9.9	18.4	16.7
Qld	8.2	25.8	15.2	8.7	15.4	16.4
SA	9.7	26.2	17.6	11.2	13.0	20.5
WA	10.8	30.8	16.8	9.7	14.8	17.6
Tas.	9.3	24.1	19.5	7.5	15.3	16.9
NT	*7.9	29.5	12.1	*9.6	9.4	14.8
ACT	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: ABS, *Attendance at Selected Cultural Venues and Events, 2005–06* (cat. no. 4114.0).

(a) In the 12 months before interview.

ATTENDANCE *continued*

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

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

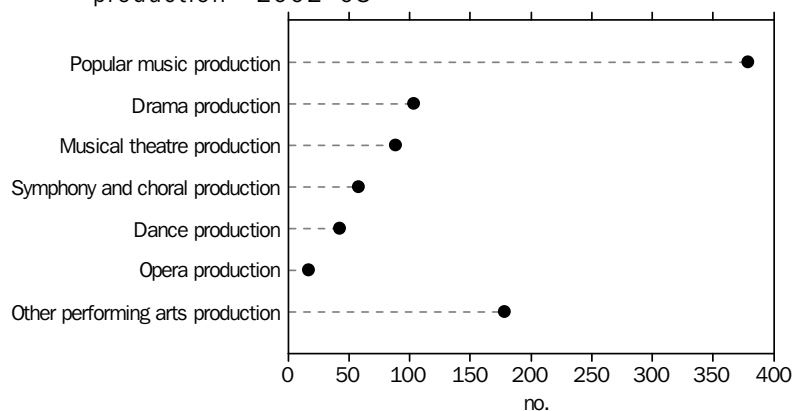
ORGANISATIONS

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

ORGANISATIONS

continued

12.4 MUSIC AND THEATRE PRODUCTION ORGANISATIONS, By type of production—2002–03



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

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

In 2002–03, there were 15,917 Popular music performances with 4.0 million paid attendees, making it the most attended type of music and theatre production. The least attended type of music and theatre production were Opera productions with 1,013 paid performances attracting 471,000 paid attendances.

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

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

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

(b) Includes overseas attendances.

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

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

The 2004–05 survey of Pubs, Taverns, Bars and Hospitality club services found that 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 ABS survey of Performing Arts indicate that just over half the income received by Music and theatre production organisations in 2002–03 came from box office takings (53%). Governments were responsible for providing a further 22% of income while 7% was obtained through fundraising. Governments provided funding of \$132.2m to 150 of the 208 not-for-profit music and theatre production organisations in 2002–03. A further \$2.2m in government funding was distributed amongst 53 of the 657 for-profit organisations in the industry.

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

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

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

Organisations most reliant on government funding were those involved in Symphony and choral performances (50% of total income) and Opera production (38%). By contrast, organisations involved in Popular music performances received 1% of their income from governments.

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

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

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

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

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

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

FINANCIAL DATA

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

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

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

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

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

Australian Government funding for Performing arts in 2005–06 totalled \$111m. By comparison, state and territory government funding of Performing arts was \$80.2m, and their contribution toward Performing arts venues was \$183.7m. While local governments also provide funding for the performing arts, data are not available on their level of contribution.

12.9 CULTURAL FUNDING BY GOVERNMENT, Performing arts—2005–06

	<i>Australian Government</i>	<i>State and Territory Governments</i>
	\$m	\$m
Performing arts		
Music	72.7	29.4
Drama	17.7	20.8
Dance	11.5	11.5
Music theatre and opera	0.7	11.2
Other performing arts	8.3	7.4
<i>Total</i>	<i>111.0</i>	<i>80.2</i>
Performing arts venues	—	183.7

— nil or rounded to zero (including null cells)

Source: ABS, *Cultural Funding by Government, Australia, 2005–06* (cat. no. 4183.0).

EMPLOYMENT

Survey of Performing Arts Industries

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

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

Organisations involved in running performing arts festivals of more than 2 days duration during 2002–03, reported employing a total of 1,272 people. While the 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, and 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 in various Australian industries who described their main job as "actor" in August 2006, with the largest concentrations outside of the performing arts industries in the Free-to-air television broadcasting (130 people), the Motion picture and video production (67 people) and the Advertising services industries (67 people).

The same is also true of many performing arts occupations, with opportunities for employment existing in many different industries. In a statistical overview publication it is not possible to 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).

Census of Population and
Housing *continued*

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

	Number	%
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>	2 768	64.1
Other occupations	1 552	35.9
<i>Total occupations</i>	4 320	100.0
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>	11 923	82.3
Other occupations	2 558	17.7
<i>Total occupations</i>	14 481	100.0
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>	719	26.9
Other occupations	1 956	73.1
<i>Total occupations</i>	2 675	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, 2006 Census of Population and Housing, data available on request.

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 roles before an audience. Approximately 14% of these were paid for at least one of their performances.

Work Survey *continued*
12.11 PERSONS INVOLVED IN MUSIC AND THE PERFORMING ARTS,
By payment status—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
.....			
PER CENT (%)			
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, Survey of Work in Selected Culture and Leisure Activities, 2007, data available on request.

CHAPTER 13

MUSIC COMPOSITION, DISTRIBUTION AND PUBLISHING

INTRODUCTION

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

WHOLESALE SALES

Data from the Australian Recording Industry Association Ltd. (ARIA) for the year ending December 2007 showed that the value of wholesale sales of sound recordings and music videos totalled \$462.2m. Sales of CDs accounted for 79.8% of total sales, down from 82% in 2006 and music videos and DVDs accounted for a further 11.5%, up from 9.6% in 2006. Digital sales have increased markedly since 2006, up by 43.5%. This in addition to an increase from 2005 to 2006 of 250%. Digital sales accounted for 8.6% of total music sales in 2007, up from 5.4% in 2006.

13.1 NET WHOLESALE SALES OF SOUND RECORDINGS AND MUSIC VIDEOS (a)—Year ending Dec 2007

	<i>Number</i>	<i>Value</i>
<i>Music format</i>	000	\$'000
Vinyl singles	3	23
Cassette singles	—	—
CD singles	2 498	6 711
DVD singles/other(b)	9	70
Vinyl	18	199
Cassette	11	54
CD	44 045	362 061
DVD albums/other(b)	7	99
Music video/DVD	5 275	53 020
Digital	47 267	39 964
Total	99 133	462 201

(a) These figures are based on submissions from reporting ARIA members, and is estimate to represent 95% of the local market.

(b) 'Other' includes sales of Mini Disks and SACD.

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

See Chapter 3 for information on household expenditure on music.

ORGANISATIONS

This section provides some information collected in the 1998-99 ABS Retail Census about the music retailing industry. There has been considerable change in the music retailing industry since 1998-99 with more music being sold on CDs and DVDs and with the ability of people to download music over the Internet. Consequently, the 1998-99 data presented in this chapter should be interpreted with these changes in mind. There has

ORGANISATIONS

continued

been a more recent ABS Retail and Wholesale Industry Survey (2005-06), however, the results are not available at the same level as the 1998-99 survey due to changes in the survey design.

The 1998–99 Retail Industry Survey found that there were 358 businesses involved in recorded music retailing in June 1999, and these operated a total of 661 stores.

The table below shows the number of actively trading businesses in these industries in June 2007. These counts exclude: entities which had an active ABN but which did not have a 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 this change 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-employing (71%). Around two-thirds of these businesses (68%) were in the Music and theatre productions industry.

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 & Publishing	321	357	678
Recorded Music Retailing	462	681	1 143
Music & Theatre Production	4 620	1 053	5 673
Sound Recording Studios	561	294	855
Total	5 964	2 385	8 349

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

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 sound recording industry. The majority of people employed the 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 is the ABS Manufacturing Industry Survey which found 3,800 people working in the recorded media manufacturing and publishing industry in June 2001.

*Census of Population and
Housing continued*

13.3 PERSONS EMPLOYED IN MUSIC PUBLISHING, REPRODUCTION
AND SOUND RECORDING INDUSTRIES (a)(b), By selected
occupations—August 2006

	<i>Number</i>	<i>%</i>
Music publishing		
Total cultural occupations	36	15.4
Other occupations	198	84.6
<i>Total occupations</i>	<i>234</i>	<i>100.0</i>
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>	<i>298</i>	<i>13.0</i>
Other occupations	1 988	87.0
<i>Total occupations</i>	<i>2 286</i>	<i>100.0</i>
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>	<i>495</i>	<i>60.8</i>
Other occupations	319	39.2
<i>Total occupations</i>	<i>814</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, 2006 *Census of Population and Housing*, data available on request.

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 \$670m. This is equivalent to an average household expenditure of \$1.66 per week. Total annual expenditure on paintings, carvings and sculptures was \$282m, while \$202m was spent on studio and other professional photography and \$186m on art and craft materials. See Chapter 3 for more information on the 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.

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

FINANCIAL DATA

The 1999–2000 ABS survey of Commercial Art Galleries found that commercial art gallery businesses in Australia sold works of art valued at \$116.2m in the 12 months to June 2000. Businesses predominantly selling crafts were excluded from the survey. Sales of art by non-Indigenous artists were valued at \$79.2m, while sales of art by Indigenous artists were valued at \$27.4m. Items by overseas artists were sold for a further \$9.6m. From these sales and other activities, commercial art galleries derived an income of \$131.8m.

COMMERCIAL ART GALLERIES, Sources of Income—1999–2000

14.1

	Value	Percentage contribution
	\$m	%
Income from the sale of artworks		
By Aboriginal and Torres Strait Islander artists	27.4	20.8
By other artists	79.2	60.1
By overseas artists	*9.6	*7.3
Total	116.2	88.2
Income from the sale of craftworks		
By Aboriginal and Torres Strait Islander artists	1.2	0.9
By other artists	1.5	1.1
Total	2.7	2.0
Other income	13.1	9.9
Total	131.8	100.0

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

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

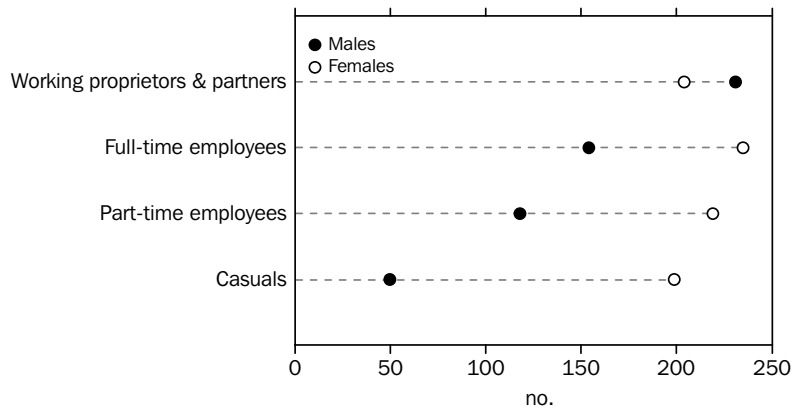
EMPLOYMENT

Commercial art galleries

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

Commercial art galleries
continued

14.2 PERSONS EMPLOYED IN COMMERCIAL ART GALLERIES—June 2000



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

Visual artists and craft workers

Two data sources; the 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.

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.

*Census of Population and
Housing continued*

14.3 SELECTED CULTURAL OCCUPATIONS IN THE VISUAL ARTS AND CRAFTS INDUSTRY(a)(b)—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, *Census of Population and Housing, 2006*, data available on request.

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 craftworkers 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 wood craft.

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

Work Survey continued

14.4 PERSONS INVOLVED(a), 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: ABS, *Work in Selected Culture and Leisure Activities, Australia, April 2007* (cat. no. 6281.0).

INTRODUCTION

The *Australian Culture and Leisure Classifications (ACLC)* (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 table below shows the number of actively trading businesses in these industries in June 2007. These counts exclude: entities which had an active ABN but which did not have a 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 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

	Architectural services	Advertising Services	Commercial art and display services
	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, Counts of Australian Businesses, Including Entries and Exits, Jun 2003 to June 2007, data available on request.

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 COUNTS OF AUSTRALIAN BUSINESSES(a), Selected Design Industries(b)—By employment size and type—June 2007

	Architectural services	Advertising Services	Commercial art and display services
	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, Counts of Australian Businesses, Including Entries and Exits, Jun 2003 to June 2007, data available on request.

EMPLOYMENT

*Census of Population and
Housing*

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

The 2006 Census of Population and Housing found that there were 30,086 people whose main job in August 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).

Census of Population and Housing continued

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

	Number	%
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>	20 373	67.7
Other occupations	9 713	32.3
<i>Total occupations</i>	30 086	100.0
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>	8 092	29.3
Other occupations	19 555	70.7
<i>Total occupations</i>	27 647	100.0
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>	12 907	69.3
Other occupations	5 725	30.7
<i>Total occupations</i>	18 632	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, *Census of Population and Housing, 2006*, data available on request.

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.

Work Survey continued

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, Work in Selected Culture and Leisure Activities, 2007, data available on request.

INTRODUCTION

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

The *Australian Culture and Leisure Classifications (ACLC)* (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 for theatre or television projection. The industry includes production of feature films, documentaries and drama series, as well as videos for advertising and corporate training. It also includes businesses providing post-production services such as casting, film editing and titling.

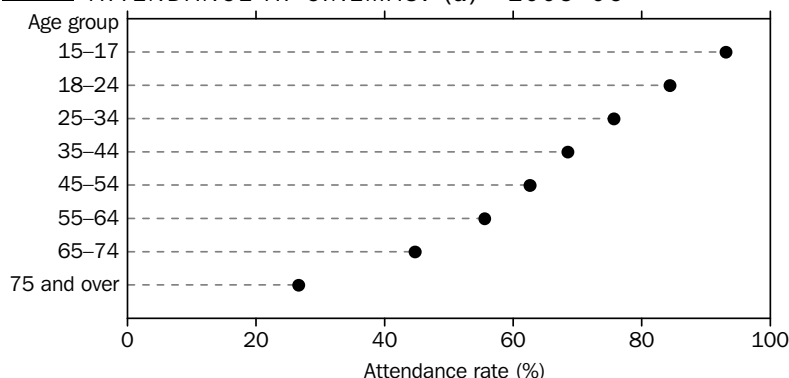
Film and video distribution is defined as businesses or organisations mainly engaged in leasing or wholesaling motion pictures on film, video tape and DVD to organisations for exhibition or sale. Motion picture exhibition is defined as businesses and organisations whose main activity is the screening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

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

ATTENDANCE

The 2005–06 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.

16.1 ATTENDANCE AT CINEMAS: (a)—2005–06



(a) In the 12 months before the interview.

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

ATTENDANCE *continued*

The frequency of attendance was also greater for people aged 15–17 years than for other age groups. Approximately 69% 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)								Total
	15–17	18–24	25–34	35–44	45–54	55–64	65–74	75 and over	
	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
	PER CENT (%)								
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, Survey of Attendance at Selected Cultural Venues and Events, 2005–06, data available on request.

ORGANISATIONS

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

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

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

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

ORGANISATIONS

continued

Data from the Australian Film Commission show that in 2006, 9% of the films screened in Australian cinemas were of Australian origin. By comparison, 55% of the films screened originated in the United States of America.

FINANCIAL DATA

The 2005–06 ABS Cultural Funding by Government collection reported that the Australian Government provided total funding of \$140.0 million for Film and video, while state and territory governments contributed \$75.4m.

Data from *Get the Picture: What Australians are Making — Production Industry*, conducted by the Australian Film Commission, show that overseas investors accounted for 75% of total funding for Australian features in 2006-07. They contributed \$164m to ten titles, with one high-budget local film 'Australia' accounting for the bulk of their investment.

Government sources were also a significant source of funds in 2006-07, contributing 15% of total funding for Australian features in 2006–07. The majority of these funds came via the Film Finance Corporation, which invested \$37m in Australian features and co-productions.

16.3 AUSTRALIAN FEATURE FILMS, Sources of Finance—2003–04 to 2006–07

	Contribution	Proportion of total budget	No. of films invested in
	\$m	%	no.
Australian government sources(a)			
2003–04	30.6	14	11
2004–05	25.4	38	11
2005–06	46.4	46	19
2006–07	32.5	15	15
5-yr average	30.8	31	13
Australian private institutions(b)			
2003–04	11.2	5	11
2004–05	20.3	31	15
2005–06	8.6	9	14
2006–07	13.3	6	13
5-yr average	14.9	19	13
Australian film/TV industry(c)			
2003–04	68.3	31	11
2004–05	8.6	13	14
2005–06	17.4	17	21
2006–07	8.6	4	21
5-yr average	21.5	15	15
Foreign sources			
2003–04	107.5	49	6
2004–05	12.1	18	5
2005–06	27.8	28	9
2006–07	163.6	75	10
5-yr average	63.1	36	7

(a) Includes Australian state and federal agencies and funding bodies, and SBS. Comprises equity investments only - distribution guarantees, loans and underwriting are not included.

(b) Private investment sources including Film Licensed Investment Companies (FLICs), 10BA and 10B certified projects (Film tax incentives).

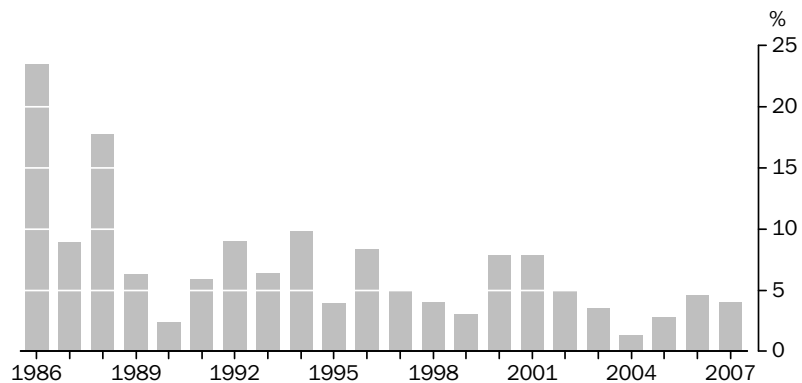
(c) Includes Australian-based film and TV production companies, distribution companies, commercial free-to-air broadcasters and pay TV channels.

Source: Australian Film Commission, *National Survey of Feature Film and TV Drama Production, 2006-07*, www.afc.gov.au

FINANCIAL DATA
continued

In 2007, Australian films accounted for only 4% (\$36m) of the total box office receipts of Australian cinemas, down from 4.6% in 2006 (\$40m). As graph 16.4 shows, this percentage has fluctuated over time.

16.4 AUSTRALIAN FILMS' SHARE OF THE AUSTRALIAN BOX OFFICE: 1986 to 2007



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

An ABS survey of businesses in the film and video production industry showed that while the income derived from the production of commercials increased by 23% between 1999–2000 and 2002–03, the income from all other types of film and video production decreased. This meant overall production income was 8% lower in 2002–03 than in 1999–2000. However, increases in income from other sources, particularly post-production and other production services meant the total income for film and video production businesses was greater in 2002–03 than the previous period.

16.5 INCOME AND EXPENSES OF BUSINESSES IN THE FILM AND VIDEO PRODUCTION INDUSTRY, 1999–2000 and 2002–03

	1999-2000		2002-03	
	Value	Percentage contribution	Value	Percentage contribution
	\$m	%	\$m	%
Income				
Income from the production of:				
Feature films	74.0	5.0	59.2	3.7
Television programs	472.2	32.0	393.6	24.7
Commercials	186.2	12.6	228.4	14.3
Corporate, training and marketing media	72.0	4.9	70.6	4.4
Other	45.5	3.1	26.9	1.7
Total	849.9	57.7	(a) 778.6	48.8
Income from the provision of production services to other businesses	233.1	15.8	350.9	22.0
Income from the provision of post-production/film laboratory services to other businesses	262.6	17.8	360.5	22.6
Other income	128.2	8.7	106.5	6.7
Total income	1 473.8	100.0	1 596.6	100.0
Expenses				
Labour costs				
Wages and salaries	373.5	26.7	402.4	26.7
Other	53.2	3.8	64.0	4.3
Total	426.6	30.5	466.3	31.0
Payments to other businesses for production services	250.8	17.9	215.8	14.3
Payments to other businesses for post-production/film laboratory services	88.3	6.3	89.5	6.0
Rent, leasing and hiring expenses	65.5	4.7	85.4	5.7
Travelling, accommodation and entertainment expenses	34.8	2.5	38.5	2.6
Purchases of film stock and video tape stock	50.6	3.6	62.4	4.1
Other purchases	45.8	3.3	63.1	4.2
Amortisation of productions	61.1	4.4	*38.7	2.6
Other	374.4	26.8	445.0	29.6
Total expenses	1 397.9	100.0	1 504.8	100.0

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

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

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

Film and video production industry

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

*Film and video production
industry continued*

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

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

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

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

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

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

(c) Includes childrens' programs.

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

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

16.7 PRODUCTIONS MADE OTHER THAN FOR TELEVISION —2002–03

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

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

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

*Film and video distribution
industry*

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

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

	Value	Percentage contribution
	\$m	%
Income		
Sales of pre-recorded video tapes and DVDs to:		
Video hire stores	100.4	8.8
Retail outlets	157.0	13.8
Direct marketing and other businesses	2.9	0.3
Total	260.3	22.8
Income from the rental/lease of pre-recorded video tapes, DVDs and films to:		
Motion picture exhibitors	289.4	25.3
Television businesses	172.5	15.1
Video hire stores	94.9	8.3
Other businesses	24.0	2.1
Total	580.8	50.9
Other income		
Income from the provision of channels to pay TV stations	169.2	14.8
Other	131.4	11.5
Total	300.6	26.3
Total Income	1 141.8	100.0
Expenses		
Labour costs		
Wages and salaries	66.8	6.4
Other	12.4	1.2
Total	79.2	7.6
Selected expenses		
Payments to other businesses for dubbing, duplication and film print costs	77.7	7.5
Program rights/licence fees used	124.4	12.0
Copyright fees/licences for film and video distribution	235.6	22.7
Advertising expenses	127.1	12.2
Other operating expenses	236.1	22.7
Total	800.8	77.1
Other costs	158.2	15.2
Total expenses	1 038.4	100.0

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

Motion picture exhibition industry

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

Motion picture exhibition
industry continued

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

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

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

Video hire

In 1999–2000, video hire outlets earned about three-quarters (76%) of their income through rental of videos and DVDs. Labour costs accounted for about one-quarter (23%) of total expenses, with the other main expense items being purchases of videos and related goods (18%) and rent, leasing and hiring expenses (17%).

16.10 INCOME AND EXPENSES OF BUSINESSES IN THE VIDEO HIRE OUTLET INDUSTRY—1999–2000

	Value	Percentage contribution
	\$m	%
Income		
Income from the rental of videos and DVDs	449.7	75.6
Income from the rental of video games	38.3	6.4
Income from the sale of videos and video related goods	36.3	6.1
Income from the sales of food and beverages	40.0	6.7
Other	30.9	5.2
Total income	595.2	100.0
Expenses		
Labour costs	128.9	23.1
Rent, leasing and hiring expenses	93.5	16.7
Other selected expenses	87.7	15.7
Purchases		
Videos and related goods	99.9	17.9
Food and beverages	27.9	5.0
Other costs	120.8	21.6
Total expenses	558.7	100.0

Source: ABS, *Video Hire Industry, 1999–2000* (cat. no. 8562.0).

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.

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

	<i>Number</i>	<i>%</i>
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>	<i>5 381</i>	<i>73.1</i>
Other occupations	1 983	26.9
Total occupations	7 364	100.0
Postproduction 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>	<i>515</i>	<i>57.3</i>
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>	<i>114</i>	<i>13.1</i>
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>	<i>2 258</i>	<i>25.4</i>
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.

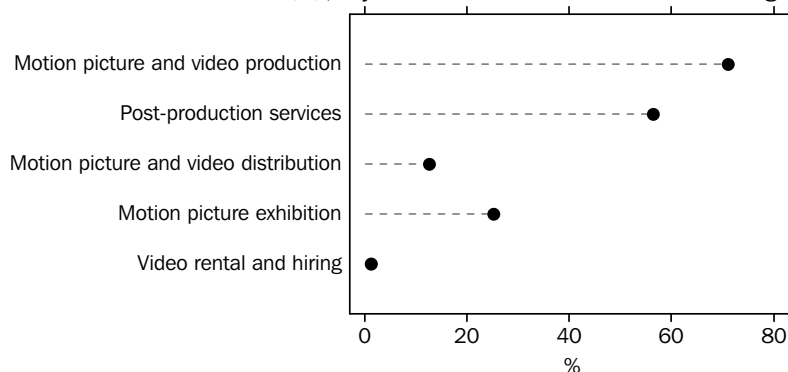
(b) In their main job in the week before Census Night.

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

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 1.8% in the video rental and hire industry to 66.3% 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, *Census of Population and Housing, 2006*, data available on request.

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 2002–03 ABS survey of Television Film and Video production, the number of employees in the film and video production business increased by an annual average of 2.6%, from 15,195 in June 2000 to 16,427 in June 2003.

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

FILM AND TELEVISION PRODUCTION

According to the AFC National Survey of Feature Films and Television Production there were 27 Australian and co-production feature films produced in Australia in 2006–07. This was just above the five year average of 25 films.

The value of production activity (as measured by budget expenditure in Australia) in 2006–07 increased significantly to \$231 million, well above the 2005–06 figure of \$112 million and the five-year average of \$140 million. This increase was due principally to high-budget Australian feature films.

There were 24 Australian features with total budgets of \$218 million in 2006–07, significantly higher than the five-year average of \$130 million but similar to 2003–04.

FILM AND TELEVISION
PRODUCTION *continued***16.13** AUSTRALIAN AND CO-PRODUCTION: FEATURE FILMS,
Production activity—2002–03 to 2006–07

	AUSTRALIA(a)		CO-PRODUCTION(b)		TOTAL	
	No.	Spend in Aust. \$m	No.	Spend in Aust. \$m	No.	Spend in Aust. \$m
2002–03	17	49	np	14	19	63
2003–04	21	196	np	5	22	201
2004–05	24	66	3	27	27	93
2005–06	29	100	3	13	32	112
2006–07	24	212	3	19	27	231
5-year average	23	124	2	16	25	140

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

(a) Productions under Australian creative control.

(b) Official co-productions and other productions involving shared creative control. i.e. with a mix of Australians and foreigners in key creative positions.

Source: Australian Film Commission, *National Survey of Feature Film and Television Production, 2006–07*, www.afc.gov.au

According to the AFC National Survey of Feature Films and Television Production, the value of Australian and co-production TV drama as measured by budget expenditure in Australia, increased in 2006–07 to \$253 million, up on \$205 million in 2005–06 and above the five-year average of \$217 million. Hours produced also increased to 615 hours in 2006–07 on the 583 hours produced in 2005–06 and just below the five-year average of 623 hours.

The overall increase was due to Australian adult TV drama, specifically series and mini-series.

16.14 AUSTRALIAN AND CO-PRODUCTION OF TV DRAMA—2002–03
to 2006–07(a)

	AUSTRALIA(b)			CO-PRODUCTION(c)			TOTAL		
	No.	Hours prod- uced(d)	Spend in Aust. \$m	No.	Hours prod- uced(d)	Spend in Aust. \$m	No.	Hours prod- uced(d)	Spend in Aust. \$m
2002–03	38	639	214	4	35	12	42	673	225
2003–04	36	583	189	3	39	10	39	622	199
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
5-year average	36	581	203	4	41	14	40	623	217

(a) The year of production is the year in which principal photography commenced.

(b) Productions under Australian creative control.

(c) Official co-productions and other productions involving shared creative control, ie with a mix of Australians and foreigners in key creative positions.

(d) Duration has been rounded to 15, 30 or 60 minutes as appropriate, eg 13 x 60 mins (including commercial breaks). 'Hours' therefore refers to 'commercial broadcast hours' rather than actual running time.

Source: Australian Film Commission, *National Survey of Feature Film and Television Drama Production, 2006–07*, www.afc.gov.au

FILM AND TELEVISION
PRODUCTION *continued*

More information is available from the Australian Film Commission website
www.afc.gov.au.

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).

A survey of Children's participation in Culture and Leisure Activities conducted in 2006 by the ABS 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 20 hours a fortnight.

Extensive audience research is undertaken for the TV services by Australian Television Audience Management (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 2002–03 Television, Film and Video Production Survey, which surveyed all 27 commercial free-to-air and six subscription television broadcasting businesses operating in Australia in 2002–03.

Businesses owned and controlled by the public and mainly engaged in community broadcasting were excluded.

FINANCIAL DATA

Commercial free-to-air television services received income of \$3,810.6m in 2002–03. Almost three-quarters (\$2,817.8m) of this income was from the sale of airtime. Commercial free-to-air broadcasters reported an operating profit before tax of \$658.9m or an operating profit margin of 17.7% in 2002–03.

FINANCIAL DATA

continued

Subscription television broadcasters, with a total income of \$1,348.2m, earned over four-fifths (\$1,158.7m) from subscriptions and membership fees. This income was still not enough for these businesses to record a profit in 2002–03. The operating deficit before tax was \$451.5m which meant an operating profit margin of –33.6%.

17.1 INCOME AND EXPENSES OF TELEVISION BROADCASTERS—2002–03

	<i>Commercial free-to-air</i>	<i>Subscription</i>
	\$m	\$m
Income		
Gross income from the sale of airtime	2 817.8	na
Subscription and membership fees	. .	1 158.7
Other(a)	992.8	189.5
Total income	3 810.6	1 348.2
Expenses		
Labour costs	587.4	168.0
Program rights used/payments to channel providers	494.8	784.5
Depreciation and amortisation	387.2	278.6
Other	1 684.5	606.2
Total expenses	3 154.0	1 837.3

. . not applicable

na not available

(a) For subscription broadcasters, other income included gross income from the sale of airtime.

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

The 2002–03 Television, Film and Video Production Survey did not collect data from public broadcasters, however financial data on the activities of the Australian Broadcasting Commission (ABC) and the Special Broadcasting Service (SBS) can be obtained from their Annual Reports.

Whilst Radio and television broadcasting costs are not detailed separately, the ABC 2006–07 Annual Report recorded that income totalled \$994.7m and expenses \$972.5m. The SBS 2006–07 Annual Report showed that its income totalled \$240.5m and its expenses \$240.4m.

Information for commercial radio stations is available from the Australian Communications and Media Authority which reported that in 2006–07 274 commercial radio licenses generated revenue of \$21.3m (www.acma.gov.au).

According to the ABS survey of Cultural Funding by Government in 2005–06 the Australian Government provided \$1,878.4m for cultural activity, 53% (\$1,000.6m) of which was for radio and television services – primarily the ABC and SBS.

EMPLOYMENT

Service Industry Surveys

The 2002–03 Television, Film and Video Production Survey found that businesses involved in commercial free-to-air television services in Australia employed a total of 6,577 people in June 2003. A further 2,517 people were employed by subscription television broadcasters.

*Service Industry Surveys
continued*

Public broadcasters also employed a large number of people in radio and television. The ABC and SBS Annual Reports for 2006–07 indicated that in June 2007 the networks employed just under 4,500 people and 842 people respectively.

*Census of Population and
Housing*

Neither the Television, Film and Video Production 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, *Census of Population and Housing, 2006*, data available on request.

*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 occupations—August 2006

	<i>Number</i>	<i>%</i>
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
<i>Total occupations</i>	<i>5 226</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, *Census of Population and Housing, 2006*, data available on request.

Work Survey

As data from the Census of Population and Housing relates only to a person's main job during a one week period in August, it may not capture those people who are involved in a less regular or voluntary capacity. The 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 (76.4%) were unpaid while fewer were unpaid in television (43.6%).

*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, Work in Selected Culture and Leisure Activities, April 2007, data available on request.

INTRODUCTION

Cultural education involves teaching students skills in an art or cultural field. While these skills can be obtained at schools and tertiary institutions, there are a variety of other organisations involved in teaching the arts, such as: TAFE colleges; community learning centres; and adult education centres.

Arts education covers the teaching of skills specific to the fields of literature, television, radio, film, visual arts and crafts, design, music, performing arts and other arts. Skills taught include creative writing; acting; dancing; singing; music composition; music playing; visual design; radio, television and film production, post-production and direction; photography; and sound engineering and recording.

TRAINING IN THE ARTS

The 2007 survey of Work in Selected Culture and Leisure Activities collected information about whether the people involved in selected 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
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
<i>Total visual arts</i>	<i>138.7</i>	<i>197.3</i>	<i>336.0</i>
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
<i>Total craft activities</i>	<i>72.4</i>	<i>113.1</i>	<i>185.5</i>
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
Live performer	43.5	54.8	98.3
No involvement as a live performer	*7.2	*12.2	*19.3
<i>Total music</i>	<i>50.6</i>	<i>66.9</i>	<i>117.6</i>
Performer	25.1	52.2	77.3
No involvement as a performer	11.9	25.0	36.9
<i>Total performing arts</i>	<i>37.0</i>	<i>77.2</i>	<i>114.2</i>
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, Work in Selected Culture and Leisure Activities, April 2007, data available on request.

Tertiary arts education data are available from the Australian Government Department of Education, Science and Training (DEST). Information is available on student enrolments in tertiary institutions by field of study and level of course. There were 63,600 students studying creative arts at higher educational institutions in Australia in 2006 (this figure excludes TAFE courses) according to DEST data.

TRAINING IN THE ARTS

*continued***18.2** NUMBER OF STUDENTS UNDERTAKING HIGHER EDUCATION IN THE FIELD OF CREATIVE ARTS (a)—2006

	Students	Per cent of all creative arts students
	'000	%
New South Wales	18.8	29.6
Victoria	16.1	25.3
Queensland	14.0	22.0
South Australia	3.9	6.1
Western Australia	7.6	11.9
Tasmania	1.1	1.7
Northern Territory	0.2	0.3
Australian Capital Territory	1.8	2.8
Australia (b)	63.6	100.0

(a) 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.

(b) Includes students undertaking courses in multi-state institutions.

Source: Department of Education, Science & Training, *Students 2006: Selected Higher Education Statistics*

Data on vocational education can be obtained from the National Centre for Vocational Education Research. It found that in 2006 vocational training organisations such as TAFE institutes reported 44,400 students enrolled in the creative arts.

18.3 SUBJECT ENROLMENTS IN VOCATIONAL EDUCATION AND TRAINING COURSES (a), In the field of creative arts (b)—2006

	Subject enrolments	Students (c)	Percent of all creative arts students
	'000	'000	%
New South Wales	153.6	15.9	35.8
Victoria	115.3	12.3	27.7
Queensland	54.3	5.3	11.9
South Australia	32.4	2.1	4.7
Western Australia	50.3	5.6	12.6
Tasmania	7.6	0.9	2.0
Northern Territory	6.9	1.4	3.2
Australian Capital Territory	6.1	0.9	2.0
Australia	426.5	44.4	100.0

(a) Excludes vocational education and training courses which are part of a secondary school program.

(b) Creative arts comprises the following fields of education: performing arts; Visual arts and crafts; Graphic and design studies; Communication and media studies; and Other creative arts.

(c) Whose major field of education was the Creative arts.

Source: National Centre for Vocational Education Research Ltd., *Students and Courses 2006: In detail.*

TRAINING IN THE ARTS
continued

According to the 2007 survey of Education and work, the most common qualifications in the Cultural industry were Graphic and arts design with 65,700 people holding qualifications in it, followed by Architecture with 36,100 people and Music with 31,100 people holding qualifications. Graphic arts and design was the most common qualification for both males and females.

18.4 MAIN FIELD OF HIGHEST NON-SCHOOL QUALIFICATION, By sex—2007

	Males	Females	Persons
	'000	'000	'000
Architecture	24.3	11.8	36.1
Urban Design and Regional Planning	7.6	*2.7	10.3
Landscape Architecture/ Interior and Environmental Design	*2.8	11.5	14.3
Total(a)	35.6	26.4	61.9
Sociology	*3.7	7.8	11.4
Anthropology	*2.3	7.5	9.8
History	10.8	13.2	24.0
Other Studies in Human Society	7.8	9.8	17.5
Total	24.5	38.3	62.8
Librarianship and Information Management	*4.0	21.7	25.7
Total(b)	*4.1	22.5	26.6
Music	13.9	17.3	31.1
Drama and Theatre Studies/Dance	6.4	7.0	13.4
Total(c)	22.4	25.4	47.8
Fine Arts	11.3	18.2	29.5
Photography	5.4	*5.1	10.5
Crafts/Jewellery Making/Floristry	*3.9	11.3	15.2
Visual Arts and Crafts nfd/nec	5.4	10.4	15.8
Total	26.0	45.1	71.1
Graphic Arts and Design Studies	32.0	33.7	65.7
Fashion Design/Textile Design	**1.8	18.0	19.8
Total(d)	34.8	51.7	86.5
Journalism	6.4	10.5	16.9
Religious Studies	17.5	11.5	29.0
Total	6 802.8	6 827.1	13 629.9

* 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 Architecture and Urban Environment nfd/ nec.

(b) Includes Curatorial Studies.

(c) Includes Performing Arts nfd/ nec.

(d) Includes Graphic and Design studies nfd/nec.

Source: ABS, Survey of Education and Work, 2007, data available on request.

SOURCES

In addition to data obtained from the references listed below, this publication includes a variety of data available on request from a wide range of ABS sources.

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Australian Broadcasting Commission, *Annual Report*, 2006–07, viewed 9 April 2008, www.abc.net.au

Australian Bureau of Statistics, *Adult Literacy and Life Skills Survey, Australia*, 2006, cat. no. 4228.0

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