

CULTURAL MINISTERS COUNCIL
Statistics Working Group

Selected
Cultural
Industries
1999-2000

Prepared by the National Centre for
Culture and Recreation Statistics,
Australian Bureau of Statistics

INTRODUCTION

This brochure presents a summary of a number of key findings from the 1999–2000 series of ABS surveys of selected cultural industries. It builds on data collected by the ABS in 1996–97—see Australia’s Culture No. 8, Cultural Industries. While the surveys do not represent all cultural industries (as defined by the Australian Culture and Leisure Classifications, ABS Cat. no. 4902.0), those represented provide a significant contribution to the Australian economy. Specifically, in 1999–2000, the selected industries generated almost \$12b in income and at the end of June 2000 employed 85,000 people.

Additional data from these surveys can be found in the relevant ABS publications (see ‘Further Information’ for details). A range of other data on the cultural sector can also be obtained from the ABS.

Cultural Industries: Employment and Income in 1999–2000

<i>Cultural industry</i>	<i>Employment at end of June 2000</i>	<i>Income in 1999– 2000</i>
	<i>no.</i>	<i>\$m</i>
Art museums	1 741	197
Other museums	5 215	519
Public libraries	11 840	705
Archives	756	87
Performing arts venues	5 149	316
Music and theatre productions	7 060	505
Performing arts festivals	374	103
Services to the arts	3 846	710
Commercial art galleries	1 409	132
Television services(a)	10 668	4 182
Film and video production	15 195	1 474
Film and video distribution	1 426	1 142
Motion picture exhibition	9 282	1 046
Video hire	11 034	595

(a) Excludes public broadcasters and community broadcasters.

Museums

	<i>Art museums(a)</i>	<i>Other museums(b)</i>
Number of organisations at end of June 2000 (no.)	249	1 800
Admissions ('000)	6 528	21 004
Employment at end of June 2000 (no.)	1 741	5 215
Working proprietors (no.)	*16	151
Employees (no.)		
Full-time	1 134	2 880
Part-time	591	2 184
Income (\$m)	197	519
Government funding	124	363
Expenditure (\$m)	164	478
Wages and salaries (\$m)	57	154

* Subject to high sampling variability and should be used with caution.

(a) Excludes commercial art galleries.

(b) Includes 411 historic properties.

Museums were defined as enclosed areas that stored artefacts, artworks and museum objects and were open to the general public. They included art museums, historic properties, social history museums, natural history museums and science museums.

At the end of June 2000, the 2,049 museum establishments contained an estimated 62 million artefacts, artworks and museum objects, of which 16% were on display.

During 1999–2000, there were 28 million admissions to museums of which 11 million were paid and 17 million were free. For paid admissions, the average price charged by museums was \$4.80.

At the end of June 2000, there were 6,956 people employed by museums. A further 484 people worked in museums but were paid by another organisation. During June, a total of 29,963 volunteers assisted in running the museums in roles such as guides and front-of-house staff.

Museums accrued a total of \$716m in income during 1999–2000. The 78 museum organisations with 100 or more employees received 76% (\$368m) of the total funding provided by government.

Public libraries and archives

	<i>Libraries</i>	<i>Archives</i>
Number of organisations at end of June 2000 (no.)	513	8
Visits ('000)	99 399	(a)94
Employment at end of June 2000 (no.)	11 840	756
Permanent full-time	5 915	n.a.
Permanent part-time	3 282	n.a.
Casual	2 643	n.a.
Income (\$m)	705	87
Government funding	647	78
Expenditure (\$m)	689	78
Labour costs	367	34

n.a. not available

(a) Visits to search rooms.

Public libraries included local government libraries and National and State libraries but excluded libraries with restricted access such as those operated by educational institutions (e.g. universities and schools).

The primary function of archives is the permanent preservation of unique records, selected because of their administrative, financial, legal, evidential or other information value.

At the end of June 2000, there were: 505 local government library organisations with 1,510 library locations; 8 National and State library organisations with 26 locations; and 8 National and State archive organisations with 27 locations.

Public libraries held 54 million books and other library materials of which 36 million were available for loan.

In total, 12,596 employees worked for libraries and archives at the end of June 2000. There were 5,150 volunteers working for libraries and archives during the month of June 2000.

Libraries and archives are heavily reliant on government funding for their operation. This provided 91% (\$725m) of their total income.

Local government libraries contained 2,832 Internet workstations at the end of June 2000—an increase of 242% since June 1997.

During 1999–2000, there were 94,200 visits to search rooms of the National and State archives and 218,400 recorded archival enquiries.

Performing arts venues

Number of businesses at end of June 2000 (no.)	125
Employment at end of June 2000 (no.)	5 149
Permanent full-time	1 451
Permanent part-time and casual	3 698
Income (\$m)	316
Government funding	94
Venue hire	58
Expenditure (\$m)	309
Labour costs	111
Operating profit before tax (\$m)	7
Industry value added (\$m)	86

The performing arts venues industry consists of organisations which operate venues such as concert halls, playhouses, music halls and entertainment centres.

The 5,149 people employed in this industry included: 1,600 (31%) front-of-house staff (e.g. ticket sellers, ushers); 1,269 (25%) technical and performing arts support staff; 1,032 (20%) managers and administrative staff; and 731 (14%) sales and catering staff.

Sources of income included government funding (\$94m), rent, leasing and hiring (\$84m), sales of goods (\$45m) and income from box office (\$41m).

Music and theatre productions

Number of businesses at end of June 2000 (no.)	705
Admissions ('000)	13 269
Employment at end of June 2000 (no.)	7 060
Working proprietors (no.)	144
Employees (no.)	
Permanent full-time	2 904
Permanent part-time and casual	4 012
Income (\$m)	505
Box office takings	233
Expenditure (\$m)	478
Labour costs	193
Operating profit before tax (\$m)	28
Industry value added (\$m)	207

Of the 705 organisations in the music and theatre production industry, 251 derived their main income from popular music productions, 103 from drama productions, 76 from musical theatre productions, 48 from symphony and choral productions, 37 from dance productions, 18 from opera productions and 173 from other productions (e.g. puppetry, circuses).

Employment in the industry totalled 7,060 people which included 4,045 (57%) performing artists, 736 (10%) front-of-house staff (e.g. ticket sellers) and 352 (5%) artistic support staff (e.g. choreographers). Box office takings contributed \$233m (46%) to total income, while government funding totalled \$117m (23%) and contract performance fees netted \$71m (14%).

Performing arts festivals

Number of festivals during 1999–2000 (no.)	152
Admissions ('000)	9 854
Employment at end June 2000 (no.)	374
Permanent full-time	189
Permanent part-time	98
Casual	86
Income (\$m)	103
Box office takings	42
Expenditure (\$m)	99
Labour costs	14
Industry value added (\$m)	14

Festivals included in the survey had performing arts as their main focus and were conducted for a duration of at least three days.

Of the 152 performing arts festivals which were held during 1999–2000, 71 were multifaceted performing arts festivals, 72 were music festivals, and 9 focused on drama, comedy or dance.

Income from ticket sales contributed 41% (\$42m) of total income while government funding contributed a further 26% (\$27m).

There were an estimated 26,577 performances staged at these festivals. The attendance at these performances was estimated at 10 million people, with 8 million being free admissions and 2 million being paid admissions.

While 374 employees worked for festivals at the end of June 2000, there were 19,859 people working for the 152 festivals during their conduct, of whom 2,141 were employees and 17,718 were volunteers.

Services to the arts

Number of businesses at end of June 2000 (no.)	454
Employment at end of June 2000 (no.)	3 846
Working proprietors (no.)	77
Employees (no.)	
Permanent full-time	1 726
Permanent part-time and casual	2 043
Income (\$m)	710
Government funding	233
Expenditure (\$m)	698
Labour costs	94
Industry value added (\$m)	51

At the end of June 2000, there were 454 businesses in the services to the arts industry. These businesses undertook activities such as costume design, set design, ticket agency operation, casting agency operation and arts administration.

At the end of June 2000, the total employment in the industry was 3,846 persons with 45% being employees working on a permanent full-time basis.

The total income of \$710m for businesses in the industry included government funding of \$233m (primarily for State arts councils), royalties of \$158m and box office takings of \$144m.

Commercial art galleries

Number of businesses at end of June 2000 (no.)	514
Employment at end of June 2000 (no.)	1 409
Working proprietors (no.)	435
Employees (no.)	
Permanent full-time	389
Permanent part-time and casual	586
Income (\$m)	132
Sales of artworks	116
Expenditure (\$m)	122
Purchases of artworks for resale	44
Labour costs	24
Operating profit before tax (\$m)	9

Commercial art galleries were defined as businesses whose primary activity was the display and sale of artworks. Auction houses and businesses where artists sold artwork directly to the consumer were not included.

In 1999–2000, commercial art galleries sold \$218m worth of artworks from which they received \$116m in income. Of the \$218m of artworks sold, 17% were produced by Aboriginal and Torres Strait Islander artists.

Television services(a)

Number of businesses at end of June 2000 (no.)	41
Employment at end of June 2000 (no.)	10 668
Permanent full-time	8 771
Permanent part-time and casual	1 897
Income (\$m)	4 182
Sale of air time	2 821
Expenditure (\$m)	4 083
Program rights and payments to channel providers	1 334
Wages and salaries	462
Operating profit before tax (\$m)	128

(a) Excludes public broadcasters and community broadcasters.

At the end of June 2000, there were 41 private sector television broadcasters, consisting of 34 commercial free-to-air businesses and 7 pay television broadcasting businesses.

There were 7,807 persons employed by commercial free-to-air broadcasters and 2,861 employed by pay television broadcasters.

Private sector television broadcasters had a total income of \$4,182m in 1999–2000, which represented a 38% increase since 1996–97. The three main networks accounted for 98% (\$3,206m) of the income of the commercial free-to-air broadcasters.

The 41 private sector television broadcasters derived 67% (\$2,821m) of their income through the sale of air time and 19% (\$789m) from subscription and membership fees.

Total expenses of the private sector television broadcasters were \$4,083m, of which \$2,468m was incurred by commercial free-to-air broadcasters and \$1,616m by pay television broadcasters.

During 1999–2000, the private sector television broadcasters recorded an operating profit before tax of \$128m, with commercial free-to-air broadcasters recording an operating profit of \$804m and pay television broadcasters recording an operating loss of \$676m.

Film and video production and distribution

	<i>Film and video production</i>	<i>Film and video distribution</i>
Number of businesses at end of June 2000 (no.)	1 975	58
Employment at end June 2000 (no.)	15 195	1 426
Working proprietors (no.)	86	—
Employees (no.)		
Permanent full-time	7 234	1 059
Permanent part-time and casual	7 875	366
Income (\$m)	1 474	1 142
Expenditure (\$m)	1 398	1 038
Labour costs	427	79
Operating profit before tax (\$m)	77	104
Industry value added (\$m)	607	281

Employing film and video production businesses derived 32% (\$472m) of their income (\$1,474m) in 1999–2000 from the production of television programs, 13% (\$186m) from commercials and 5% (\$74m) from feature films. Total income for film and video production businesses was 24% higher than in 1996–97.

The main sources of income for film and video distribution businesses were the rental and lease (\$581m) or sales (\$260m) of pre-recorded video tapes, DVDs and films.

Of the 2,033 film and video businesses in 1999–2000, 235 produced programs specifically for television, incurring costs of \$516m. There were also 36 businesses in the television services industry that produced TV programs for their own use at a cost of \$799m.

Motion picture exhibition

Number of businesses at end of June 2000 (no.)	173
Admissions ('000)	79 384
Employment at end of June 2000 (no.)	9 282
Working proprietors (no.)	60
Employees (no.)	
Permanent full-time	1 196
Permanent part-time	534
Casual	7 492
Income (\$m)	1 046
Gross box office receipts	679
Expenditure (\$m)	934
Film hire and rental	268
Labour costs	149
Operating profit before tax (\$m)	113
Industry value added (\$m)	348

At the end of June 2000, there were 173 businesses in the motion picture exhibition industry which was a reduction from the 188 businesses at the end of June 1997. The decrease in the number of businesses was mostly related to a reduction in the number of drive-in sites, which fell from 28 in June 1997 to 17 in June 2000.

During 1999–2000, there were 79 million paid cinema admissions which represented an average of 4.1 visits per person in Australia in the year, compared with 4.0 visits per person in 1996–97.

The total number of cinema sites at the end of June 2000 was 326, which was virtually unchanged since 1997. However, the average number of cinema screens per site increased from 3.2 in June 1997 to 4.6 in June 2000, with multiplex and megaplex sites becoming more widespread.

Video hire

Number of businesses at end of June 2000 (no.)	1 166
Employment at end of June 2000 (no.)	11 034
Working proprietors (no.)	741
Employees (no.)	
Permanent full-time	2 026
Permanent part-time	988
Casual	7 279
Income (\$m)	595
Rental of videos	444
Expenditure (\$m)	559
Labour costs	129
Operating profit before tax (\$m)	42
Industry value added (\$m)	282

The 1,166 businesses in the video hire industry at the end of June 2000 operated 1,615 outlets, with 76% of the outlets located in capital cities and 24% in country areas.

During 1999–2000, there were 152 million video rental transactions made by businesses in the video hire industry. In addition, businesses in the industry had 1.3 million rentals of DVDs and 7.6 million rentals of video games.

The average rental income per video transaction was \$2.90, with new releases being \$4.60 and other videos being \$1.60. In comparison, the average rental income of DVDs was \$4.60 and video games was \$5.00.

GLOSSARY OF MAIN ECONOMIC TERMS

Number of businesses and organisations	This is a count of the number of employing businesses and organisations whose main activity was primary to that industry.
Employment	This includes working proprietors and partners, working directors and employees working for a business during the last pay period in June, and absent employees on paid or prepaid leave.
Operating profit before tax	This is a measure of profit (or loss) before extraordinary items are brought to account and prior to the deduction of income tax and appropriations to owners (e.g. dividends paid). It is derived as total income minus total expenses, plus closing inventories minus opening inventories.
Industry value added	This is a measure of the contribution of the industry to the economy. It is calculated as the sales of goods and services, plus government subsidies and changes in levels of trading inventories, minus purchases of goods and selected expenses.
Labour costs	This item includes wages, salaries, employer contributions to superannuation funds, workers' compensation costs, fringe benefits tax and payroll tax.

CULTURAL MINISTERS COUNCIL

The Cultural Ministers Council was established in 1984 to provide a forum for the exchange of views on issues affecting cultural activities in Australia. It comprises Australian Commonwealth, State and Territory Government Ministers responsible for arts and cultural heritage, as well as the corresponding New Zealand Government Minister. The relevant Minister from Papua New Guinea participates with observer status.

CULTURAL MINISTERS COUNCIL STATISTICS WORKING GROUP (CMC SWG)

The Cultural Ministers Council established the Statistical Advisory Group, now known as the Statistics Working Group, in November 1985. The group: liaises with the ABS on cultural statistics; monitors the need for the development, collection and dissemination of culture and leisure statistics; commissions studies; and provides advice to the Cultural Ministers Council on statistical matters.

FURTHER INFORMATION

This brochure contains data extracted from the 1999–2000 Service Industries Surveys (SIS) conducted by the ABS. Except for the museums and commercial art galleries surveys, only businesses with employees are included in SIS.

Information on SIS concepts and methods, definitions, interpretation and reliability of results as well as more comprehensive data are included in the ABS publications listed below:

Museums, Australia, 1999–2000 (Cat. no. 8560.0);

Public Libraries, Australia, 1999–2000 (Cat. no. 8561.0);

Performing Arts Industries, Australia, 1999–2000 (Cat. no. 8697.0);

Commercial Art Galleries, Australia, 1999–2000 (Cat. no. 8651.0);

Television Services, Australia, 1999–2000 (Cat. no. 8559.0);

Film and Video Production and Distribution, Australia, 1999–2000 (Cat. no. 8679.0);

Motion Picture Exhibition, Australia, 1999–2000 (Cat. no. 8654.0); and

Video Hire Industry, Australia, 1999–2000 (Cat. no. 8562.0).

The ABS' National Information and Referral Service can provide further detail on ABS publications—telephone 1300 135 070. Additional information on a range of culture and leisure statistics can be obtained by contacting the ABS' National Centre for Culture and Recreation Statistics on (08) 8237 7449 or email to NCCRS@abs.gov.au.

This brochure is also available on the following web site: www.dcita.gov.au/swg

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