



FILM AND VIDEO PRODUCTION AND DISTRIBUTION AUSTRALIA

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- For further information about these and related statistics, contact Graham Boxsell on Canberra 02 6252 5633, or any ABS office shown on the back cover of this publication.

NOTES

ABOUT THIS PUBLICATION

This publication presents results, in respect of the 1996–97 financial year, from an Australian Bureau of Statistics (ABS) survey of the film and video production and distribution industries. This is the second ABS survey of these industries, with the previous collection being conducted in respect of 1993–94.

The scope of the survey was all employing businesses classified to Class 9111, Film and Video Production and Class 9112, Film and Video Distribution of the Australian and New Zealand Standard Industrial Classification (ANZSIC).

This publication has two parts, the first part presents data about the film and video production industry and the second about the film and video distribution industry.

This publication is one of a series issued in respect of 1996–97 covering cultural industries, which were partially funded by the Cultural Ministers' Council. Other publications in this series are:

- *Commercial Art Galleries, Australia, 1996–97* (Cat. no. 8651.0)
- *Libraries and Museums, Australia, 1996–97* (Cat. no. 8649.0)
- *Motion Picture Exhibition, Australia, 1996–97* (Cat. no. 8654.0)
- *Performing Arts Industries, Australia, 1996–97* (Cat. no. 8697.0)
- *Radio and Television Services, Australia, 1996–97* (Cat. no. 8680.0)
- *Sound Recording Studios, Australia, 1996–97* (Cat. no. 8555.0)
- *Zoos, Parks and Gardens Industry, Australia, 1996–97* (Cat. no. 8699.0)

COMMENTS ON THIS PUBLICATION

The ABS welcomes comments and suggestions from users recommending industries and data items for inclusion in future service industries surveys. These comments should be addressed to the Director, Service Industries Surveys, PO Box 10, Belconnen, ACT, 2616.

SYMBOLS AND OTHER USAGES

ABS	Australian Bureau of Statistics
ANZSIC	Australian and New Zealand Standard Industrial Classification
n.a.	not available
n.p.	not available for publication but included in totals where applicable
RSE	relative standard error
*	subject to sampling variability too high for most practical purposes
**	subject to sampling variability too high for practical purposes
..	not applicable
—	nil or rounded to zero

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

W. McLennan
Australian Statistician

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SECTION 1

FILM AND VIDEO PRODUCTION INDUSTRY ...

INTRODUCTION

This section of the publication presents information about the film and video production industry. The information relates to employing businesses mainly engaged in production of motion pictures on film or video tape for theatre or television projection. Also included are businesses mainly providing production services such as casting, film editing and titling. These businesses are classified to Class 9111 (Film and Video Production) of the Australian and New Zealand Standard Industrial Classification.

In addition, information on total film and video production activity of businesses in the television services industry, film and video distribution industry and the film and video production industry are shown in this part of the publication.

Tables 1.1 to 1.7 contain detailed information in respect of the film and video production industry and tables 1.8 to 1.12 contain information about total film and video production activity.

SIZE OF INDUSTRY

There were 2,003 businesses in the film and video production industry at the end of June 1997, which was a 70% increase on the 1,179 businesses in the industry at the end of June 1994.

Based on main activity, the 2,003 businesses consisted of 795 businesses supplying freelance production services, 313 businesses involved in television program production, 286 businesses producing corporate and training films and videos, 252 businesses producing commercials, 153 post-production businesses and 132 businesses producing feature films.

SOURCES OF INCOME

During 1996-97, the film and video production industry generated \$1,129 million in total income. Income from the production of commissioned works (\$681 million) accounted for 60% of the total income. A further 15% of total income accrued from the sale of rights for completed works. In 1993-94, 39% of total income was derived from the production of commissioned works and 20% from the sale of rights for completed works.

Businesses in the film and video production industry received 33% (\$375 million) of its income from the production of television programs (26% from commissioned works and 7% from the sale of rights). Income from the production of commercials accounted for \$258 million (23% of total income) and the production of feature films accounted for \$120 million (11% of total income).

Income from the provision of production services to other businesses generated \$122 million in income, comprising \$45 million from producers' fees, line production and directors' fees and \$28 million from cinematography. A further \$101 million was generated from the provision of post-production/film laboratory services, the main component of which was editing (\$64 million).

EXPENDITURE

Total expenses incurred by the industry were \$1,196 million. Labour costs of \$352 million were the largest expenses, representing 29% of total expenses, which was a similar proportion to 1993–94. Labour costs per employee for 1996–97 were \$38,400.

Payments to other businesses for production services was \$186 million during 1996–97, which represented 16% of total expenses. Payments to other businesses for post-production/film laboratory services amounted to \$73 million (6% of total expenses) compared to \$63 million in 1993–94.

Other major expense items for businesses in the industry were amortisation (\$136 million) and rent, leasing and hiring expenses (\$61 million).

PROFITABILITY

The industry recorded an operating loss of \$67 million for the 1996–97 financial year which represented an operating profit margin of –6.1% compared to an operating profit margin of –21.0% in 1993–94.

The most profitable businesses were those employing from 5 to 9 persons, which had an operating profit before tax of \$15 million.

EMPLOYMENT

At the end of June 1997, there were 9,438 persons employed in the film and video production industry, compared to 5,998 persons employed at the end of June 1994. Males accounted for 58% (5,440) of the persons employed in the industry at the end of June 1997, the same proportion as at June 1994.

While 62% of persons worked on a full-time basis and 38% worked on a part-time basis, the proportion of males to females in both categories were similar.

BUSINESS SIZE

At the end of June 1997, 83% of businesses (1,668) employed four persons or less. These 'micro' businesses accounted for 28% of employment (2,679 persons), 35% of industry income (\$396 million), and recorded an operating profit before tax of \$14 million.

In contrast, the 153 businesses that employed between 10 and 49 persons, accounted for similar proportions of income and employment but recorded an operating profit before tax of –\$75 million.

There were 7 businesses with 100 or more persons employed at the end of June 1997. These businesses accounted for 18% of industry employment, 8% of total income and had an operating profit margin of 2.6%.

STATE DIMENSION

During 1996–97, businesses in New South Wales dominated the industry, accounting for 1,189 businesses, 57% of the industry employment and 55% of total industry income. The proportion of industry income has decreased from 59% in 1993–94. Similarly, businesses in Victoria had a decrease in their proportion of industry employment from 28% in 1993–94 to 25% in 1996–97 and industry income from 28% in 1993–94 to 25% in 1996–97. However, the Queensland proportion of industry income doubled, from 7% in 1993–94 to 14% in 1996–97, despite a decrease in the proportion of employment from 7% in June 1994 to 5% in June 1997.

All other States' and Territories' contributions to industry employment and income were less than their respective proportions of the Australian population.

FILM AND VIDEO PRODUCTION ACTIVITY

Film and video production activity is not only undertaken by businesses in the film and video production industry. Such activity is also undertaken by businesses in the television services industry and the film and video distribution industry.

During 1996–97, businesses in the television services industry, film and video production industry and film and video distribution industry incurred total film and video production costs of \$1,577 million. Of these total production costs, \$1,095 million was spent on productions specifically for television, \$234 million on the production of commercials and advertisements and \$248 million was spent on productions other than for television.

Production costs by television broadcasters were \$563 million, which was mainly concentrated on news and current affairs programs (\$270 million) and sport programs (\$132 million). In contrast, the production costs by non-television businesses on productions for television, which totalled \$533 million, was mainly (\$324 million) in respect of the production of drama, situation comedy and sketch comedy programs.

Drama, situation comedy and sketch comedy programs were the most expensive productions of all programs made specifically for television and cost an average of \$182,500 per hour. Documentaries cost an average of \$84,400 per hour to produce, while sport programs were relatively inexpensive, averaging \$7,400 per hour to produce.

Of the total production costs of \$248 million expended on productions other than for television during 1996–97, 78% (\$192 million) were production costs for feature films. These production costs related to 59 feature films representing an average of \$3.2 million per film.

A total of 316 businesses were involved in the production of 4,560 individual productions of corporate, marketing and training videos during 1996–97. The production costs of these videos totalled \$41 million, which represented an average production cost of \$8,900 per production.

1.1 KEY AGGREGATES, Historical Comparisons

	1993-94	1996-97	% change
Businesses at end June			
Feature film production (no.)	n.a.	132	n.a.
Commercials production (no.)	n.a.	252	n.a.
Television program production (no.)	n.a.	313	n.a.
Corporate/training film/video production (no.)	n.a.	286	n.a.
Post-production services (no.)	n.a.	153	n.a.
Freelance production services to other businesses (no.)	n.a.	795	n.a.
Other (no.)	n.a.	72	n.a.
Total (no.)	1 179	2 003	69.9
Employment at end June			
Full-time (no.)	n.a.	5 857	n.a.
Part-time (no.)	n.a.	3 581	n.a.
Total (no.)	5 998	9 438	57.4
Income			
Income from the production of commissioned works (\$m)	239.8	681.3	184.1
Income from the provision of production and post-production services (\$m)	184.0	222.6	21.0
Other income (\$m)	183.9	224.6	22.1
Total (\$m)	607.7	1 128.5	85.7
Expenses			
Labour costs (\$m)	203.6	351.7	72.8
Payments to other businesses for post-production/film laboratory services (\$m)	62.5	73.0	16.8
Other expenses (\$m)	439.8	770.7	75.2
Total (\$m)	705.8	1 195.5	69.4
Operating profit/loss before tax (\$m)	-98.1	** -66.9	31.8
Operating profit margin (%)	-21.0	** -6.1	n.a.
Industry gross product (\$m)	150.9	440.4	191.8

1.2 SOURCES OF INCOME

	<i>Businesses at end June</i>	<i>Value</i>	<i>Proportion of total income</i>
	no.	\$m	%
Sales of goods and services			
Production of commissioned works			
Television programs	273	*290.9	25.8
Feature films	57	50.1	4.4
Commercials	359	258.1	22.9
Corporate/training/marketing videos	385	65.9	5.8
Other commissioned works	172	16.5	1.5
<i>Total</i>	<i>923</i>	<i>681.3</i>	<i>60.4</i>
Sale of rights for completed works			
Television programs	106	84.3	7.5
Feature films	49	70.1	6.2
Corporate/training/marketing videos	*25	6.9	0.6
Other completed works	*45	*3.5	0.3
<i>Total</i>	<i>184</i>	<i>164.8</i>	<i>14.6</i>
Other royalties income	131	12.1	1.1
Provision of production services to other businesses			
Producers' fees, line production and directors' fees	419	44.8	4.0
Cinematography	298	27.7	2.5
Other production services	421	49.6	4.4
<i>Total</i>	<i>975</i>	<i>122.1</i>	<i>10.8</i>
Provision of post-production/film laboratory services to other businesses			
Dubbing and sub-titling	60	4.7	0.4
Editing	240	63.6	5.6
Duplication	103	7.3	0.6
Other post-production services	81	25.0	2.2
<i>Total</i>	<i>325</i>	<i>100.6</i>	<i>8.9</i>
Rent, leasing and hiring income	280	9.5	0.8
Other operating income	395	13.7	1.2
<i>Total</i>	<i>1 953</i>	<i>1 104.1</i>	<i>97.8</i>
Other sources of income			
Management fees/charges from related and unrelated businesses	69	4.9	0.4
Funding from government	119	9.7	0.9
Interest income	801	6.8	0.6
Net profit (loss) on the sale of capitalised productions	45	*0.8	0.1
Other non-operating income	39	*2.2	0.2
<i>Total</i>	<i>913</i>	<i>24.4</i>	<i>2.2</i>
Total	1 964	1 128.5	100.0

1.3 ITEMS OF EXPENDITURE

	Value	Proportion of total expenses
	\$m	%
Labour costs		
Wages and salaries	328.1	27.4
Employer contributions to superannuation funds	21.3	1.8
Workers' compensation costs	2.3	0.2
<i>Total</i>	351.7	29.4
Selected expenses		
Payroll tax	9.6	0.8
Payments to other businesses for production services	186.1	15.6
Payments to other businesses for post-production/film laboratory services	73.0	6.1
Repair and maintenance expenses	8.7	0.7
Royalties expenses	19.4	1.6
Telecommunications services	11.7	1.0
Rent, leasing and hiring expenses	60.5	5.1
Travelling, accommodation and entertainment expenses	31.5	2.6
Other operating expenses	201.0	16.8
<i>Total</i>	601.5	50.3
Other costs		
Purchases of film stock and video tape stock	23.6	2.0
Other non-capitalised purchases	23.1	1.9
Insurance premiums	10.4	0.9
Interest expenses	15.0	1.3
Depreciation	33.2	2.8
Amortisation	*135.5	11.3
Bad and doubtful debts	1.5	0.1
<i>Total</i>	242.3	20.3
Total	1 195.5	100.0

1.4 CHARACTERISTICS OF EMPLOYMENT

	FULL-TIME.....			PART-TIME.....			TOTAL.....		
	Males	Females	Persons	Males	Females	Persons	Males	Females	Persons
Working proprietors and partners (no.)	143	*52	195	47	34	81	190	85	276
Employees (no.)(a)	3 196	2 466	5 662	2 054	1 446	3 500	5 250	3 912	9 162
Total employment end June 1997 (no.)	3 339	2 518	5 857	2 101	1 479	3 581	5 440	3 998	9 438
Proportion of total (%)	35.4	26.7	62.1	22.3	15.7	37.9	57.6	42.4	100.0
Total employment end June 1994 (no.)	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	3 428	2 570	5 998
Proportion of total (%)	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	57.2	42.8	100.0

(a) Excludes freelancers for whom PAYE tax is not deducted.

1.5 BUSINESS SIZE

	Businesses at	Employment at		Total income.....		Operating
	end June	end June.....		%	\$m	%
	no.	no.	%	\$m	%	before tax
						\$m
0-4 persons	1 668	2 679	28.4	395.5	35.0	**14.2
5-9 persons	159	1 028	10.9	191.4	17.0	14.8
10-19 persons	95	1 282	13.6	160.8	14.2	**59.2
Total	1 921	4 990	52.9	747.7	66.3	**30.2
20-49 persons	58	1 762	18.7	233.1	20.7	-15.6
50-99 persons	16	1 030	10.9	59.1	5.2	-23.4
100 persons or more	7	1 655	17.5	88.6	7.9	**2.3
Total	2 003	9 438	100.0	1 128.5	100.0	**66.9

1.6 STATES AND TERRITORIES

	<i>Businesses at end June(a)</i>	<i>Employment at end June.....</i>		<i>Wages and salaries.....</i>		<i>Total income.....</i>	
	no.	no.	%	\$m	%	\$m	%
New South Wales	1 189	5 350	56.7	184.0	56.1	623.7	55.3
Victoria	521	2 309	24.5	75.1	22.9	277.8	24.6
Queensland	149	447	4.7	**52.6	16.0	**155.0	13.7
South Australia	80	704	7.5	7.6	2.3	39.0	3.5
Western Australia	78	537	5.7	6.9	2.1	27.0	2.4
Tasmania	10	26	0.3	0.2	0.1	0.9	0.1
Northern Territory	7	29	0.3	0.9	0.3	2.4	0.2
Australian Capital Territory	18	36	0.4	0.8	0.2	2.6	0.2
Australia	2 003	9 438	100.0	328.1	100.0	1 128.5	100.0

(a) Multi-State businesses are counted in each State and Territory in which they operate. Hence the counts of businesses for States and Territories do not sum to the total for Australia.

1.7 PERFORMANCE RATIOS

	EMPLOYMENT SIZE CATEGORY.....			<i>Total</i>
	<i>0-19 persons</i>	<i>20-99 persons</i>	<i>100 or more persons</i>	
Labour costs per employee (\$000)	48.9	31.6	19.6	38.4
Labour costs to total expenses (%)	29.8	26.5	37.6	29.4
Total income per person employed (\$000)	149.8	104.7	53.6	119.6
Total expenses per person employed (\$000)	155.9	118.6	52.2	126.7
Operating profit margin (%)	** -4.1	-13.8	** 2.6	** -6.1
Income from the production of commissioned works to total income (%)	57.2	64.9	72.5	60.4
Income from the sale of rights for completed works to total income (%)	14.7	14.3	14.4	14.6
Income from post-production services to total income (%)	7.7	n.p.	n.p.	8.9
Payments to other businesses for production and post-production services to total expenses (%)	21.1	23.4	20.3	21.7

1.8 SUMMARY OF FILM AND VIDEO PRODUCTION ACTIVITY

	<i>Total costs of production</i>
	\$m
Productions made specifically for television	
By television industry businesses	562.8
By other businesses (a)(b)	532.6
<i>Total</i>	<i>1 095.4</i>
Production of commercials and advertisements	
By television industry businesses	37.0
By other businesses	196.8
<i>Total</i>	<i>233.7</i>
Other productions	247.7
Total	1 576.9

(a) Includes businesses in the film and video production industry and pay television channel providers in the film and video distribution industry.

(b) Includes all costs associated with co-productions between television businesses and other businesses.

1.9 PRODUCTION COSTS OF PROGRAMS MADE SPECIFICALLY FOR TELEVISION

<i>Type of production</i>	PRODUCTIONS MADE BY TELEVISION INDUSTRY BUSINESSES.....		PRODUCTIONS MADE BY OTHER BUSINESSES.....		TOTAL.....		
	<i>Businesses at end June</i> no.	<i>Value</i> \$m	<i>Businesses at end June(a)</i> no.	<i>Value</i> \$m	<i>Businesses at end June</i> no.	<i>Value</i> \$m	<i>Proportion of total</i> %
Drama, situation comedy and sketch comedy	5	42.2	*46	*323.5	50	*365.7	33.4
News and current affairs	35	269.7	*33	8.2	69	277.8	25.4
Documentaries	11	8.9	123	44.4	134	53.3	4.9
Sport	26	131.8	40	70.3	64	202.1	18.5
Quiz, panel and game shows, light entertainment and infotainment	24	93.3	59	42.9	81	136.2	12.4
Other	15	17.0	61	43.3	74	60.3	5.5
Total	41	562.8	284	532.6	321	1 095.4	100.0
Productions specifically for children	10	10.5	21	34.5	30	45.0	4.1

(a) Businesses involved in co-productions may have been counted more than once.

1.10 AVERAGE PRODUCTION COST PER COMMERCIAL BROADCAST HOUR(a)

<i>Type of production</i>	<i>Commercial broadcast hours</i>	<i>Total costs of production</i>	<i>Average cost per hour</i>
	no.	\$m	\$'000
Drama, situation comedy and sketch comedy	2 003	*365.7	182.5
News and current affairs	20 279	277.8	13.7
Documentaries	631	53.3	84.4
Sport	27 302	202.1	7.4
Quiz, panel and game shows, light entertainment and infotainment	6 898	136.2	19.7
Other	3 199	60.3	18.8
Total	60 313	1 095.4	18.2
Productions specifically for children	1 129	45.0	39.9

(a) These data include all productions made for television.

1.11 SELECTED STATISTICS FOR PRODUCTIONS MADE OTHER THAN FOR TELEVISION

<i>Type of production</i>	<i>Businesses at end June</i>		<i>Total costs of production</i>	<i>Average cost per production</i>
	<i>no.</i>	<i>Productions</i>	<i>\$m</i>	<i>\$'000</i>
Feature films	*47	59	192.4	3 246.5
Short films	12	33	0.7	20.3
Documentaries	*23	*59	2.9	*50.2
Corporate/marketing/training videos	316	4 560	40.7	8.9
Educational	*30	*200	*1.5	7.4
Music/video clips	*39	**146	**1.8	*12.4
Other	65	**1 586	**7.7	4.9
Total	431	6 644	247.7	37.3
Expenditure on multimedia presentations	72	n.a.	**7.4	n.a.

1.12 SOURCES OF FUNDS AND FINANCE, Feature Films

	<i>Equity</i>	<i>Other(a)</i>	<i>Total</i>	<i>Proportion of total</i>
	<i>\$m</i>	<i>\$m</i>	<i>\$m</i>	<i>%</i>
Government				
Film Finance Corporation	n.p.	n.p.	*58.6	28.0
Other Commonwealth government	n.p.	n.p.	**4.7	2.3
State/Territory government	*4.8	1.9	6.7	3.2
Total	*67.1	2.9	70.0	33.5
Non-government				
Australia	28.9	5.7	34.6	16.5
Overseas	*51.7	52.8	104.4	50.0
Total	*80.5	58.5	139.0	66.5
Total	*147.6	61.4	209.0	100.0

(a) Includes loans, borrowings, distributors' advances and pre-sales.

SECTION 2

FILM AND VIDEO DISTRIBUTION INDUSTRY

INTRODUCTION

This section of the publication presents information about the film and video distribution industry. The information relates to employing businesses mainly engaged in leasing or wholesaling motion pictures on film or video tape to organisations for exhibition or sale. These businesses are classified to Class 9112 (Film and Video Distribution) of the Australian and New Zealand Standard Industrial Classification.

SIZE OF INDUSTRY

There were 66 businesses in the film and video distribution industry at the end of June 1997, which was a slight reduction from the 69 businesses in the industry at the end of June 1994.

The 66 businesses in the industry comprised 13 businesses mainly distributing films, 24 businesses distributing videos, 7 Australian-based pay television channel providers and 22 other businesses (mainly television program distributors). The composition of the film and video distribution industry has changed since 1994 with the emergence of pay television channel providers.

Industry gross product for the industry in 1996–97 was \$211 million compared to \$170 million in 1993–94.

SOURCES OF INCOME

Businesses in the film and video distribution industry generated \$974 million in total income during 1996–97, which represented a 52% increase since 1993–94. The main sources of this income were from the rental or lease of pre-recorded video tapes, disks, films and interactive software (\$434 million), which accounted for 45% of total income, and sales of pre-recorded video tapes, disks, films and interactive software (\$253 million), which was 26% of total income.

Subscriber income from the provision of channels to pay television broadcasters accounted for \$156 million (16% of total income).

EXPENDITURE

Businesses in the industry incurred total expenses of \$971 million during 1996–97. The major components of this expenditure were licensing and royalties, with amortisation of program rights and licence fees being \$135 million, licensing costs of \$69 million, program rights/licence fees used of \$136 million and other royalties of \$125 million.

Unlike many other service industries, labour costs (\$67 million) for the industry were relatively low, accounting for 7% of total expenses.

PROFITABILITY

The industry recorded an operating profit before tax of \$3 million for the 1996–97 financial year which represented an operating profit margin of 0.3%, compared to an operating profit margin of 6.9% in 1993–94. This low profit margin in 1996–97 was influenced by the operating loss of \$21 million recorded by pay television channel providers.

EMPLOYMENT

At the end of June 1997, there were 1,341 persons employed in the film and video distribution industry, an increase of 37% on the 981 persons working in the industry at the end of June 1994. At the end of June 1997, 83% of persons worked on a full-time basis and 56% of persons working were females, a similar distribution to that occurring at the end of June 1994.

BUSINESS SIZE

During 1996–97, there were 14 businesses in the industry with employment of 20 or more persons. These 14 businesses dominated the industry in that they accounted for 80% of the persons employed (1,070) and 73% of industry income (\$713 million). However, the operating profit margin of these 14 businesses was only 0.6%. In contrast, the 29 businesses with four persons or less accounted for 4% of employment and 10% of industry income, but recorded an average operating profit margin of 10.1%.

STATE DIMENSION

The film and video distribution industry was concentrated in New South Wales during 1996–97. There were 45 businesses operating in New South Wales which accounted for 69% of the employment and 61% of industry income. Both these proportions for New South Wales were an increase on the respective 55% of employment and 46% of industry income during 1993–94.

2.1 KEY AGGREGATES

	Film distribution	Video distribution	Pay television channel providers(a)	Other	Total
Businesses at end June (no.)	13	24	7	22	66
Employment at end June					
Full-time (no.)	134	601	265	107	1 107
Part-time (no.)	42	89	96	7	234
Total (no.)	176	690	361	114	1 341
Income					
Income from the rental/lease of pre-recorded video tapes, disks, films and interactive software (\$m)	136.5	164.5	—	133.1	434.1
Income from the sale of pre-recorded video tapes, disks, films and interactive software (\$m)	11.5	241.6	—	—	253.2
Subscriber income from pay television stations (\$m)	—	n.p.	130.7	n.p.	156.0
Other income (\$m)	27.2	n.p.	2.4	n.p.	130.6
Total (\$m)	175.3	454.5	133.2	211.0	973.9
Expenses					
Wages and salaries (\$m)	5.4	28.9	18.9	9.0	62.1
Payments to other businesses for dubbing, duplication and film print costs (\$m)	2.9	48.1	2.7	5.5	59.2
Program rights/licence fees used (\$m)	3.4	n.p.	n.p.	36.3	136.1
Other operating expenses (\$m)	153.3	n.p.	n.p.	129.8	713.4
Total (\$m)	165.0	471.3	153.9	180.6	970.8
Operating profit/loss before tax (\$m)	10.3	-16.9	-20.7	30.4	3.1
Operating profit margin (%)	5.9	-3.8	-15.7	14.5	0.3
Industry gross product (\$m)	15.5	52.7	39.1	103.8	211.0

(a) Includes only those Australian resident businesses whose main activity is as a pay television channel provider.

2.2 KEY AGGREGATES, Historical Comparisons

	1993-94	1996-97	% change
Businesses at end June (no.)	69	66	-4.3
Employment at end June			
Full-time (no.)	808	1 107	37.0
Part-time (no.)	173	234	35.3
Total (no.)	981	1 341	36.7
Income			
Income from the rental/lease of pre-recorded video tapes, disks, films and interactive software (\$m)	324.5	434.1	33.8
Income from the sale of pre-recorded video tapes, disks, films and interactive software (\$m)	227.1	253.2	11.5
Subscriber income from pay television stations (\$m)	n.a.	156.0	n.a.
Other income (\$m)	89.1	130.6	46.6
Total (\$m)	640.7	973.9	52.0
Expenses			
Wages and salaries (\$m)	34.2	62.1	81.6
Payments to other businesses for dubbing, duplication and film print costs (\$m)	46.4	59.2	27.6
Program rights/licence fees used (\$m)	n.a.	136.1	n.a.
Other expenses (\$m)	520.5	713.4	37.1
Total (\$m)	601.1	970.8	61.5
Operating profit before tax (\$m)	39.6	3.1	-92.2
Operating profit margin (%)	6.9	0.3	n.a.
Industry gross product (\$m)	169.5	211.0	24.5

2.3 SOURCES OF INCOME

	<i>Businesses at end June</i>	<i>Value</i>	<i>Proportion of total income</i>
	no.	\$m	%
Sales of goods and services			
Sales of pre-recorded video tapes, disks and interactive software to			
Video hire stores	14	101.5	10.4
Retail outlets	13	146.3	15.0
Other businesses	15	5.4	0.6
<i>Total</i>	30	253.2	26.0
Rentals/lease of pre-recorded video tapes, disks, films and interactive software to			
Motion picture exhibitors	13	195.7	20.1
Television	26	162.8	16.7
Video hire stores	6	n.p.	n.p.
Other businesses	7	n.p.	n.p.
<i>Total</i>	40	434.1	44.6
Income from sub-licensing	15	40.7	4.2
Other royalties income	14	49.7	5.1
Subscriber income from pay television stations	11	156.0	16.0
Other operating income	40	29.7	3.0
<i>Total</i>	66	963.4	98.9
Other non-operating income	48	10.5	1.1
Total	66	973.9	100.0

2.4 ITEMS OF EXPENDITURE

	Proportion of total expenses	
	Value \$m	%
Labour costs		
Wages and salaries	62.1	6.4
Employer contributions to superannuation funds	3.8	0.4
Workers' compensation costs	1.0	0.1
<i>Total</i>	66.9	6.9
Selected expenses		
Payments to other businesses for dubbing, duplication and film print costs	59.2	6.1
Advertising expenses	90.1	9.3
Marketing, promotion and sponsorship expenses	69.2	7.1
Licensing costs	68.7	7.1
Program rights/licence fees used	136.1	14.0
Other royalties expenses	124.9	12.9
Rent, leasing and hiring expenses	24.8	2.6
Other operating expenses	120.8	12.4
<i>Total</i>	693.7	71.5
Other costs		
Purchases of goods and materials	58.6	6.0
Amortisation of program rights/licence fees	135.1	13.9
Depreciation and other amortisation	10.1	1.0
Other	6.3	0.6
<i>Total</i>	210.1	21.6
Total	970.8	100.0

2.5 CHARACTERISTICS OF EMPLOYMENT

	FULL-TIME.....			PART-TIME.....			TOTAL.....		
	Males	Females	Persons	Males	Females	Persons	Males	Females	Persons
Total employment end June 1997 (no.)	472	634	1 107	117	117	234	589	752	1 341
Contribution to total (%)	35.2	47.3	82.6	8.7	8.7	17.4	43.9	56.1	100.0
Total employment end June 1994 (no.)	328	480	808	75	98	173	403	578	981
Contribution to total (%)	33.4	48.9	82.4	7.6	10.0	17.6	41.1	58.9	100.0

2.6 BUSINESS SIZE

	<i>Businesses at end June</i>	<i>Employment at end June.....</i>		<i>Wages and salaries.....</i>		<i>Total income....</i>		<i>Operating profit margin</i>
	no.	no.	%	\$m	%	\$m	%	%
0-4 persons	29	51	3.8	3.1	5.0	92.5	9.5	10.1
5-9 persons	14	92	6.9	3.7	6.0	95.8	9.8	10.7
10-19 persons	9	127	9.5	8.6	13.8	72.5	7.4	-29.0
20 or more persons	14	1 070	79.8	46.8	75.4	713.2	73.2	0.6
Total	66	1 341	100.0	62.1	100.0	973.9	100.0	**0.3

2.7 STATES AND TERRITORIES

	<i>Businesses at end June(a)</i>	<i>Employment at end June.....</i>		<i>Wages and salaries.....</i>		<i>Total income.....</i>	
	no.	no.	%	\$m	%	\$m	%
New South Wales	45	918	68.5	46.1	74.2	590.5	60.6
Victoria	25	281	21.0	12.0	19.3	212.8	21.9
Queensland	10	55	4.1	1.6	2.6	88.1	9.0
South Australia	9	23	1.7	0.8	1.3	29.1	3.0
Western Australia	8	n.p.	n.p.	n.p.	n.p.	n.p.	n.p.
Tasmania	—	—	..	—	..	—	..
Northern Territory	—	—	..	—	..	—	..
Australian Capital Territory	1	n.p.	n.p.	n.p.	n.p.	n.p.	n.p.
Australia	66	1 341	100.0	62.1	100.0	973.9	100.0

(a) Multi-State businesses are counted in each State and Territory in which they operate. Hence the counts of businesses for States and Territories do not sum to the total for Australia.

EXPLANATORY NOTES

INTRODUCTION

1 This publication presents results, in respect of the 1996–97 financial year, from an Australian Bureau of Statistics (ABS) survey of the film and video production and distribution industries.

SCOPE

2 The survey included employing businesses classified to the following two ANZSIC classes.

- Film and Video Production (ANZSIC Class 9111) consists of businesses mainly engaged in the production of motion pictures on film or video tape for theatre or television projection. The class also includes businesses mainly providing production services such as casting, film editing and titling.
- Film and Video Distribution (ANZSIC class 9112) consists of businesses mainly engaged in leasing or wholesaling motion picture on film or video tape to organisations for exhibition or sale.

IMPROVEMENTS TO COVERAGE

3 Data in this publication have been adjusted to allow for lags in processing new businesses to the ABS business register, and the omission of some businesses from the business register. The majority of businesses affected and to which the adjustments apply are small in size.

4 Adjustments have been made to include new businesses in the estimates in the periods in which they commenced operations, rather than when they were processed to the business register. Adjustments of this type will continue to be applied in future periods.

5 Further adjustments have been made for businesses which had been in existence for several years, but, for various reasons, were not previously added to the ABS register. The ABS is remedying these omissions.

6 For more information on these adjustments, please refer to the ABS publication *Information Paper: Improvements to ABS Economic Statistics, 1997* (Cat. no. 1357.0).

STATISTICAL UNIT

7 The unit for which statistics were reported in the survey was the management unit. The management unit is the highest-level accounting unit within a business or organisation, having regard for industry homogeneity, for which accounts are maintained. In nearly all cases it coincides with the legal entity owning the business (i.e. company, partnership, trust, sole operator, etc.). In the case of large diversified businesses, however, there may be more than one management unit, each coinciding with a 'division' or 'line of business'. A division or line of business is recognised where separate and comprehensive accounts are compiled for it.

STATE AND TERRITORY DATA

8 Data were collected from the Australia-wide operations of each business. Businesses which operated in more than one State or Territory were asked to provide a dissection of employment, wages and salaries and total income to enable State and Territory statistics to be compiled and comparisons undertaken.

REFERENCE PERIOD

9 Data contained in the tables of this publication relate to all businesses which operated in Australia at any time during the year ended 30 June 1997. Counts of businesses include only those businesses that were operating at 30 June 1997.

BUSINESSES CEASED DURING THE YEAR

10 A very small number of businesses ceased operations during the 1996–97 reference period. It is normal ABS procedure to include the contributions of these businesses in the survey output.

RELIABILITY OF ESTIMATES

11 The estimates presented in this publication are subject to sampling and non-sampling error.

SAMPLING ERRORS

12 Since the estimates in this publication include information obtained from a sample drawn from units in the surveyed population, the estimates are subject to sampling variability, that is, they may differ from figures that would have been obtained if all units had been included in the survey. One measure of the likely difference is given by the standard error, which indicates the extent to which an estimate might have varied by chance because only a sample of units was included.

13 There are about two chances in three that a sample estimate will differ by less than one standard error from the figure that would have been obtained if a census had been conducted, and approximately 19 chances in 20 that the difference will be less than two standard errors.

14 Sampling variability can be measured by the relative standard error (RSE) which is obtained by expressing the standard error as a percentage of the estimate to which it refers. The RSE is a useful measure in that it provides an immediate indication of the percentage errors likely to have occurred due to sampling, and this avoids the need to refer also to the size of the estimate.

15 The following table contains estimates of RSEs for a selection of the statistics presented in this publication.

RELATIVE STANDARD ERRORS, Key Aggregates

	<i>Film and video production</i>	<i>Film and video distribution</i>
	%	%
Businesses at end June	3	4
Employment at end June		
Full-time	3	2
Part-time	9	1
Total	4	2
Income		
Income from the production of commissioned works	14	..
Income from the provision of production and post-production services	6	..
Income from the rental/lease of pre-recorded video tapes, disks, films and interactive software	..	2
Income from the sale of pre-recorded video tapes, disks, films and interactive software	..	1
Subscriber income from pay television stations	..	1
Other income	4	7
Total	9	1
Expenses		
Labour costs	10	1
Payments to other businesses for post-production/film laboratory services	9	..
Payments to other businesses for dubbing, duplication and film print costs	..	2
Other expenses	8	2
Total	8	1

16 As an example of the above, an estimate of full-time employment in the film and video production industry is 5,857 and the RSE is 3%, giving a standard error of 176. Therefore, there would be two chances in three that, if all units had been included in the survey, a figure in the range of 5,681 to 6,033 would have been obtained, and 19 chances in 20 that the figure would have been within the range of 5,506 to 6,208 (a confidence interval of 95%).

17 Where the RSE of an estimate included in this publication exceeds 25%, it has been annotated with an asterisk (*) as a warning to users. Where the RSE of an estimate exceeds 50%, it has been annotated with a double asterisk (**).

NON-SAMPLING ERROR

18 Errors other than those due to sampling may occur because of deficiencies in the register of units from which the sample was selected, non-response, and imperfections in reporting by respondents. Inaccuracies of this kind are referred to as non-sampling errors and they may occur in any collection, whether it be a census or a sample. Every effort has been made to reduce non-sampling error to a minimum by careful design and testing of questionnaires and efficient operating procedures and systems used to compile the statistics.

GLOSSARY

Advertising expenses	This item includes payments to advertising agencies, commissions to accredited advertising agencies and the cost of advertising via television, print media, outdoor advertising, or a stand at a film festival, etc. Advertising expenses do not include the wages and salaries paid to employees of the distributor who is engaged in advertising activities.
Amortisation (production)	The financial charges made to the accounts to reflect that part of the value of productions or other intangible assets which have been used up in producing revenue in a particular accounting period.
Amortisation of program rights/licence fees	The financial charges made to the accounts to reflect that part of the value of the program rights which have been used up in producing revenue in a particular accounting period.
Bad and doubtful debts	This is the amount of accounts receivable that are either written off, or estimated to be uncollectable during an accounting period, that are expensed in a period's profit calculations.
Businesses at end June	The number of management units operating at the end of June. A management unit is the highest-level accounting unit within a business, having regard for industry homogeneity, for which accounts are maintained.
Commercial broadcast hours	This is the length of a completed program produced, including time taken for advertisements (i.e. airtime for a completed program). Programs are counted only once, regardless of the number of times they may be aired.
Depreciation	The financial charges made to the accounts to reflect that part of the value of the asset which may be regarded as having been used up in producing revenue in a particular accounting period.
Employees	This includes working directors, and other employees working for a business during the last pay period in June. Employees absent on paid or prepaid leave are included. Excludes working proprietors and partners of unincorporated businesses.
Employer contributions to superannuation funds	Includes all employer contributions to superannuation schemes (including the employer productivity contribution).
Employment at end June	Includes working proprietors and partners, working directors, and other employees (including freelancers paid directly via the payroll) working for a business during the last pay period in June. Employees absent on paid or prepaid leave are included. Freelancers paid via an incorporated company are excluded.
Full-time employees	Persons who work 35 hours per week or more.
Funding from government	This item includes all forms of government. It includes appropriations from government, bounties, subsidies and export grants, and wages and salaries payments reimbursed under a government program such as trainee and apprenticeship schemes. It excludes equity investments by government agencies.

Income from film rental to total income	The ratio of income from film rental to total income as a percentage, i.e. (income from film rental times 100) divided by total income.
Income from sub-licensing	A distributor may sell the rights to exhibit a film directly to an exhibitor or they may on-sell the distribution and exhibition rights to another distributor. A distributor who negotiates to purchase all the distribution rights may then on-sell the rights to a sub-distributor who specialises in one of these markets. This is known as sub-licensing.
Income from the production of commissioned works	Producers of commercials and corporate/training/marketing videos derive their income from being commissioned, i.e. a fee to undertake a production within a set timetable. Unlike other types of productions, e.g. feature films, ownership of the final product does not reside with the production company, but passes to the organisation commissioning the work.
Income from the production of commissioned works to total income	The ratio of income from the production of commissioned works to total income as a percentage, i.e. (income from the production of commissioned works times 100) divided by total income.
Income from the provision of post-production/film laboratory services	The final stage in the production cycle is post-production. This is where a film is drawn together. Certain businesses specialise in providing post-production services to production businesses. These services include dubbing, duplication, sub-titling, editing, film printing, film processing, film/video conversions, post-production sound services, fees received by incorporated freelancers, and rental of facilities and/or equipment with crew.
Income from the provision of post-production/film laboratory services to total income	The ratio of income from the provision of post-production/film laboratory services to total income as a percentage, i.e. (income from the provision of post-production/film laboratory services times 100) divided by total income.
Income from the provision of production services to other businesses	Relates to businesses that provide services to production houses and businesses in the television services industry. Income from these services include producers' fees, directors' fees, lighting services, cinematography and other production services, fees received by incorporated freelancers, and rental of facilities and/or equipment with crew.
Income from the rental/lease of pre-recorded video tapes, disks, films and interactive software	The income derived by the distributor from the rental/lease of pre-recorded video tapes, disks, films and interactive software to motion picture exhibitors, television broadcasters, video hire stores, etc.
Income from the sale of pre-recorded video tapes, disks, films and interactive software	The income derived by the distributor from the sale of pre-recorded video tapes, disks, films and interactive software to video hire stores, direct marketing businesses, retail outlets, etc.

Income from the sale of rights for completed works	Refers to the sale of the right to distribute/exhibit a production via a licence arrangement and not to the outright sale of a production. Includes income from: <i>advances</i> i.e. a sum of money given by a distributor to the producer for all or part of the minimum guarantee prior to the production of the film. This is then deducted from future receipts of the film; <i>minimum guarantee payments</i> i.e. the guarantee given to the producer by a distributor stating that the producer's share from the exploitation of the rights will reach the guaranteed amount; <i>program licence fees</i> i.e. the owner of the production will receive income from selling the 'right to broadcast the production' to a television station; and <i>pre-sales</i> i.e. the production company may be able to secure a sale, usually by way of exclusive licence of certain rights to the film (such as theatrical exhibition or television), prior to the production commencing.
Income from the sale of rights for completed works to total income	The ratio of income from the sale of rights for completed works to total income as a percentage, i.e. (income from the sale of rights for completed works times 100) divided by total income.
Industry gross product	A measure of the value of unduplicated gross product of businesses. It is defined as sales of goods and services plus government subsidies plus capital work done by own employees for own use or for rental or lease minus purchases and selected expenses.
Insurance premiums	Payments made by a business in respect of different types of insurance policies but excluding workers' compensation and compulsory third party motor vehicle insurance.
Interest expenses	Includes interest on bank loans, loans from partners, and loans from government funding bodies, interest in respect of finance leases, interest equivalents such as hedging costs, and expenses associated with discounted bills.
Interest income	Includes interest from loans, finance leases, deposits in banks and non-bank financial institutions.
Labour costs	Includes wages and salaries (including monies paid directly to freelancers via the payroll), employer contributions to superannuation funds, and workers' compensation costs. Payments to freelancers who are paid via an incorporated company are excluded.
Labour costs per employee	Labour costs divided by number of employees.
Labour costs to total expenses	The total expenditure on labour costs as a proportion of all expenses.
Licensing costs	Licensing costs are a royalty paid by the distributor to the film copyright owners for the rights to reproduce and distribute the production. Other royalties include payments made under music rights, literacy rights and options. Withholding tax is not deducted.
Management fees/charges from related and unrelated businesses	This is income for management services provided, revenue sharing arrangements and other income treated as management-related by the business in its profit and loss statement.
Marketing, promotion and sponsorship expenses	These expenses relate to the marketing and promotion of the business. Sponsorship expenses are the actual funds paid for the sponsorship of sporting, arts or cultural organisations and/or their activities. It does not include wages and salaries of employees who are engaged in promotional activities.

Net profit/loss on the sale of capitalised productions	This is the net amount of income received/lost after selling productions for which the production costs have been capitalised. The sale of capitalised productions is an infrequent occurrence in the industry, but is more likely to occur with feature films than with any other type of production.
Operating profit before tax	A measure of profit before extraordinary items are brought to account and prior to the deduction of income tax and appropriations to owners (e.g. dividends paid).
Operating profit margin	The percentage of sales of goods and services available as operating profit, i.e. operating profit before tax times 100 divided by sales of goods and services.
Other non-capitalised purchases	For the film and video production industry, these purchases include purchases of materials, components, containers, packaging materials and other production consumables. It excludes purchases of film stock and video tape stock.
Other non-operating income	Other non-operating income includes dividends received, income from net profit/loss on sale of fixed tangible assets, and net profit/loss on foreign loans as a result of variations in foreign exchange rates/transactions. Does not include extraordinary profit/loss or government subsidies.
Other operating expenses	Includes freight and cartage expenses; telecommunication services; waste management and environmental protection expenses; and other business expenses.
Other operating income	This item is used as a residual item for all other operating income items not separately included in the tables.
Other royalties expenses	Other royalties include payments made under music rights, literacy rights and options. Withholding tax is not deducted.
Other royalties income	Includes revenue under licensing arrangements, sale of ancillary rights, soundtrack and literary rights. Excludes sale of rights resulting in a change of ownership of assets.
Other selected expenses	These expenses include contract, sub-contract and commission expenses; cleaning and security services provided by other businesses; motor vehicle running expenses; legal, audit and other accounting expenses; office supplies; travelling, accommodation and entertainment expenses; and waste management and environmental protection expenses.
Part-time employees	Persons who work less than 35 hours per week.
Payments to other businesses for dubbing, duplication and film print costs	Costs involved in reproducing sufficient quantities of a film to maximise its distribution and hence potential returns from exhibition.
Payments to other businesses for post-production/film laboratory services	The final stage in the production cycle is post-production. This is where a film is drawn together. Certain businesses specialise in providing post-production services to production businesses. This item measures the payments to those businesses.
Payments to other businesses for production services	These include payments to freelancers/contractors from whom PAYE tax is not deducted (e.g. producers, on-air talent, etc). It also includes rental of facilities and/or equipment with crew.

Payments to other businesses for production and post-production services to total expenses	The ratio of payments to other businesses for production and post-production services to total expenses as a percentage, i.e. (payments to other businesses for production and post-production services times 100) divided by total expenses.
Payroll tax	Payroll tax is a tax levied by State and Territory governments upon the amount of wages and salaries paid by a business. It becomes payable when the annual salaries and wages bill exceeds a set amount.
Pay television channel providers	These businesses provide programs as blocks or channels for pay television broadcasters.
Program rights/licence fees used	This is a royalties expense for the rights to a program for a specified period and/or number of showings. An alternative accounting procedure adopted by some businesses is to capitalise these rights and then amortise them over a period of time.
Purchases of film stock and video tape stock	This item is a component of total purchases of goods and services used in the production of the final output of a business.
Purchases of goods and materials	Purchases expenses are the costs of goods and services used in the production of the final output of a business. The item excludes office supplies, motor vehicle running expenses etc., and capitalised purchases of materials.
Rent, leasing and hiring expenses	Rent, leasing and hiring expenses include operating lease expenses (e.g. fleet leasing), rental of facilities and/or equipment <i>without</i> crew, i.e. dry hire, and all expenses paid/payable to landlords. Expenses related to the rental of facilities and/or equipment <i>with</i> crew are included in payments to freelancers who are paid via an incorporated company.
Rent, leasing and hiring income	This item includes income derived from renting, leasing or hiring of assets such as land, buildings, vehicles, or equipment to other businesses or individuals.
Repair and maintenance expenses	This item includes costs associated with work undertaken on plant and machinery etc. to maintain normal business operations.
Royalties expenses	Royalties are payments made by one company/person for the use of rights owned by another company/person. Includes payments under licensing arrangements, music rights, literary rights and options, and payments for the right to use motion picture or television films or video tapes. Withholding tax is not deducted.
Sales of goods and services	For the film and video production industry, sales of goods and services includes income from the production of commissioned works, income from the sale of rights for completed works, other royalties income, income from the provision of production services to other businesses, income from the provision of post-production/film laboratory services to other businesses, rent, leasing and hiring, and other operating income. For the film and video distribution industry, sales of goods and services includes income derived from distribution (sales and rental/lease) of pre-recorded video cassettes and disks, sales and rental/lease of interactive software, income from sub-licensing, other royalties income, rent, leasing and hiring income, subscriber income from pay television stations and other operating income.

Selected expenses	For the film and video production industry, selected expenses includes payments to other businesses for production and post-production services, repair and maintenance expenses, royalties expenses, telecommunication services costs, rent, leasing and hiring expenses, travelling, accommodation and entertainment expenses, waste management and environmental protection costs, and other selected expenses. For the film and video distribution industry, selected expenses includes dubbing, duplication, film print costs, advertising expenses, marketing, promotion and sponsorship costs, licensing costs, program rights/licence fees used, rent, leasing and hiring expenses, and other business expenses.
Subscriber income from pay television stations	This is income received by distributors of television programs and/or channels from pay television stations. It is based on the number of subscribers to a given channel, or is a negotiated fixed sum.
Telecommunications services	These are the payments (of a non-capital nature) for telecommunication services which engage wire, cable or radio transmission. It includes fixed and mobile phones, facsimile, Internet services, leased lines for computers etc.
Total costs of production	These costs include projects completed during 1996–97, projects still in production at 30 June 1997, and unofficial co-productions with television stations for which the business had prime responsibility. Excludes projects that have not progressed past the development of pre-production stages, and projects for which the business provided freelance production services, or post-production services, or film laboratory services to other production houses.
Total expenses per person employed	The sum of all expense items divided by the total number of persons employed.
Total income per person employed	The sum of all income items divided by the total number of persons employed.
Travelling, accommodation and entertainment expenses	This item includes reimbursement or allowances to employees for travel, entertainment etc. It excludes motor vehicle running expenses.
Wages and salaries	Are gross earnings of all employees before taxation and other deductions. Drawings of working proprietors and working partners of unincorporated businesses are excluded.
Workers' compensation costs	This is a compulsory insurance cover to be taken out by all employers, except self-insured workers, according to legislative schemes to cover employees suffering injury or disease in the course of or arising out of employment.

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