

**PERFORMING ARTS INDUSTRIES** AUSTRALIA

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- For further information about these and related statistics, contact the National Information and Referral Service on 1300 135 070 or Garry Whittaker on Canberra 02 6252 5728.

INTRODUCTION

This publication presents results, in respect of the 1999–2000 financial year, from an Australian Bureau of Statistics (ABS) survey of businesses and organisations in the performing arts industries. It is the second ABS collection of the industries with the previous collection being conducted in respect of 1996–97.

This publication is one of a series to be issued in respect of 1999–2000 for a range of cultural services industries. Other publications in this series, are:

Botanic Gardens, Australia, 1999–2000 (Cat. no. 8563.0) — issued April 2001

Motion Picture Exhibition, Australia, 1999–2000 (Cat. no. 8654.0) — issued May 2001

Video Hire Industry, Australia, 1999–2000 (Cat. no. 8562.0) — issued May 2001

Public Libraries, Australia, 1999–2000 (Cat. no. 8561.0) — issued June 2001

Museums, Australia, 1999–2000 (Cat. no. 8560.0) — issued July 2001

Television Services, Australia, 1999–2000 (Cat. no. 8559.0) — issued July 2001

Commercial Art Galleries, Australia, 1999–2000 (Cat. no. 8651.0) — issued August 2001

Film and Video Production and Distribution, Australia, 1999–2000 (Cat. no. 8679.0) — issued August 2001

COMMENTS ON THIS PUBLICATION

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

ROUNDING

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

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ABBREVIATIONS

ABS	Australian Bureau of Statistics
ANZSIC	Australian and New Zealand Standard Industrial Classification
i.e.	that is
n.e.c.	not elsewhere classified
RSE	Relative standard error
SE	Standard error

R.W. Edwards
Acting Australian Statistician

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INTRODUCTION

This publication presents results, in respect of the 1999–2000 financial year, from an Australian Bureau of Statistics (ABS) survey of employing businesses and organisations involved in the performing arts industries.

Performing arts industries comprise both public and private sector businesses and organisations classified to the following classes of the Australian and New Zealand Standard Industrial Classification (ANZSIC):

- 9241, Music and Theatre Production, which consists of businesses and organisations mainly engaged in providing live theatrical or musical presentations (including concerts, opera, ballet and drama);
- 9252, Performing Arts Venues, which consists of businesses and organisations mainly engaged in operating performing arts venues such as concert halls, playhouses, music halls (except theatre restaurants) and entertainment centres; and
- 9259, Service to the Arts n.e.c., which consists of businesses and organisations mainly engaged in providing services such as casting agency operation, costume design, set designing, theatre ticket agency operation, theatre lighting and festival operation.

The survey did not include businesses classified to ANZSIC 9242 (Creative Arts). This industry mainly consists of individuals engaged in musical compositions, literary arts and visual arts such as painting, drawing sculpture and pottery.

Table 1.1 of this publication provides summary information about these industries, in total. The remainder of this publication is divided into Chapters with Chapters 2 and 3 containing tables on the music and theatre production industry and performing arts industry respectively. Chapters 4 and 5 contain tables on the Services to the arts n.e.c. industry. As a result of interest in festivals, separate data is shown in Chapter 4 for performing arts festivals with a duration of greater than 2 days. Chapter 5 contains tables on the remainder of the Services to the arts n.e.c. industry.

It should be noted that there are some differences in scope and coverage between the 1996–97 and 1999–2000 ABS surveys on the performing arts industries. As such, users making comparisons of these data, should do so with care.

SIZE OF THE INDUSTRIES

At the end of June 2000, there were 1,437 employing organisations in the performing arts industries. There were 705 organisations in the music and theatre production industry and 125 organisations in the performing arts venue industry. The remaining 606 organisations were in the other services to the arts industry, with 152 organisations operating performing arts festivals with a duration of more than two days, and 454 other organisations providing other services to the arts.

In total, these industries employed 16,429 persons at the end of June 2000. A further 20,752 persons worked as volunteers, comprising 3,034 volunteers who worked during

SIZE OF THE INDUSTRIES

continued

June 2000 for organisations in the music and theatre production industry, and 17,718 volunteers who worked for festivals during their operation.

During 1999–2000, the total income for the performing arts industries was \$1,634m of which government funding accounted for \$470m and box office takings accounted for \$461m.

The industry value added of the performing arts industries in 1999–2000 was \$384m.

1.1**SUMMARY OF OPERATIONS**

		<i>Music and theatre production industry</i>	<i>Performing arts venues industry</i>	<i>Festivals</i>	<i>Other services to the arts industry</i>	<i>Total</i>
Businesses/organisations at end						
June	no.	705	125	152	454	1 437
Performing art spaces	no.	68	260	—	—	328
Maximum seating capacity	'000	—	216.1	—	—	216.1
Productions with paid performances						
Paid performances	no.	47 083	21 136	19 896	—	na
Paid attendances	'000	13 268.6	na	1 890.7	—	15 159.3
Employment at end June						
Working proprietors and partners	no.	144	—	—	77	221
Permanent full-time employees	no.	2 904	1 451	189	1 726	6 270
Permanent part-time and casual employees	no.	4 012	3 698	184	2 043	9 938
<i>Total</i>	no.	7 060	5 149	374	3 846	16 429
Volunteers	no.	(a)3 034	—	(b)17 718	—	20 752
Income						
Income from box office	\$m	233.1	40.8	42.2	144.3	460.5
Government funding	\$m	116.7	93.5	27.1	232.7	470.0
Other income	\$m	155.5	181.6	33.3	332.8	703.3
<i>Total</i>	\$m	505.4	315.9	102.7	709.8	1 633.8
Expenses						
Wages and salaries	\$m	171.6	97.1	12.5	82.8	364.0
Contract payments to performers/artists	\$m	46.8	16.1	24.9	78.6	166.4
Venue hire	\$m	33.2	—	4.1	11.0	48.3
Other expenses	\$m	225.9	195.5	57.5	526.0	1 004.9
<i>Total</i>	\$m	477.6	308.7	99.1	698.4	1 583.7
Operating profit/surplus before tax	\$m	27.8	7.2	..	11.7	50.4
Operating profit margin	%	8.0	3.7	..	2.5	4.8
Industry value added	\$m	206.9	86.0	14.1	50.5	383.8

— nil or rounded to zero (including null cells)

na not available

.. not applicable

(a) Volunteers during the month of June 2000.

(b) Volunteers during the operation of the festivals.

CHAPTER 2

MUSIC AND THEATRE PRODUCTION INDUSTRY

INTRODUCTION

At the end of June 2000, there were 705 employing organisations in the music and theatre production industry comprising 251 employing popular music production organisations, 103 drama production organisations, 76 organisations in musical theatre production, 48 symphony and choral production organisations, 37 dance production organisations, 18 opera production organisations and 173 other production organisations such as puppetry, circuses, etc.

SOURCES OF INCOME

During 1999–2000, organisations in the music and theatre production industry generated total income of \$505m. The main income item was box office takings (\$233m) which represented 46% of total income. However, only 329 organisations (47% of organisations in the industry) received income from this source.

Other major sources of income included government funding of \$117m, contract performance fees of \$71m, fundraising income of \$34m and royalties of \$18m. Fundraising income of \$34m comprised \$18m of financial sponsorships, \$7m of in-kind sponsorships, \$6m of donations and \$2m from other fundraising (including bequests).

Of the 705 organisations in the music and theatre production industry, 194 organisations (28%) received some form of government funding during 1999–2000. The most reliant on government funding were symphony and choral production organisations and dance organisations whose income from government funding was 53% and 35% respectively of their total income. In contrast, musical theatre productions received 2% of their income from government funding.

EXPENDITURE

The total expenditure of the industry during 1999–2000 was \$478m. Over half these expenses were accounted for by personnel costs with labour costs of employees being \$193m and contract payments to performers and artists being \$47m. Of the \$47m in contract payments to performers and artists, \$32m was paid to Australian artists and \$15m to overseas artists.

Other major expenses included rent, leasing and hiring expenses of \$47m (of which venue hire was \$33m), purchases of \$14m (of which costume and set purchases were \$10m), travelling, accommodation and entertainment expenses of \$28m and advertising expenses of \$25m.

PROFITABILITY

During 1999–2000, the operating profit before tax of the music and theatre production industry was \$28m, which represented an operating profit margin of 8.0%. Organisations with employment of 4 or less persons contributed most to the profitability of the industry, recording an operating profit before tax of \$18m (66% of the industry operating profit before tax). This translated into an operating profit margin for these small organisations of 20.2%. In comparison, organisations with 100 or more persons

PROFITABILITY *continued*

employed recorded an operating profit before tax of \$7m which represented an operating profit margin of 5.9% during 1999–2000.

However, the profit level of small organisations is affected by the number of working proprietors and partners in this segment of the industry, as drawings of working proprietors and partners are not included in the organisations' expenses in the profit calculation.

PERSONS WORKING

At the end of June 2000, the total employment of the industry was 7,060 persons. In addition, a further 3,034 persons worked as volunteers during June 2000. The employment comprised 144 working proprietors and partners, 2,904 permanent full-time employees, 825 part-time employees and 3,188 casual employees. The average labour cost per employee was \$27,900.

Most of the persons employed worked as performing artists (4,045 persons) or managerial and administrative staff (1,270 persons). Other broad occupation categories included 736 front-of-house staff, 352 artistic support staff and 308 technical support staff.

While most (52%) of persons employed were male, males accounted for 58% of all performing artists. In contrast, 66% of managerial and administrative staff were females. The only performing arts categories in which females had a higher representation were in dance and musical theatre organisations, where females represented 56% and 51% respectively of the employment.

ORGANISATION SIZE

In terms of number of organisations, the industry was dominated by small organisations with employment of four or less persons. There were 471 of these organisations which represented 67% of all organisations, but accounted for only 12% of employment and 20% of industry income.

In comparison, the 17 large organisations with employment of 100 or more persons accounted for 39% of both employment and industry income.

**STATE AND TERRITORY
DIMENSION**

Organisations in the music and theatre production industry were heavily concentrated in New South Wales. The 324 organisations located in New South Wales accounted for 46% of all organisations in the industry, 49% of employment, 56% of industry income and 59% of paid attendances. The New South Wales share of the Australian population was 34%.

Victoria and Queensland accounted for 25% and 14% respectively of the number of organisations in the industry. These figures compare to their shares of the Australian population of 25% and 19% respectively. The Victorian organisations accounted for 26% of employment, 22% of industry income, and 19% of paid attendances. While Queensland organisations accounted for 13% of paid attendances, they accounted for only 9% of both industry employment and income.

**PERFORMANCES AND
ATTENDANCES**

Of the 705 organisations in the music and theatre production industry, 472 organisations had prime responsibility for productions with paid performances during 1999–2000. These organisations had 13.3 million paid attendances and 47,083 paid performances during the year. On average, there were 282 attendees at each paid performance of organisations in the music and theatre production industry.

PERFORMANCES AND
ATTENDANCES *continued*

Popular music organisations and drama organisations each had 25% of paid performances, while musical theatre production organisations had 15% of paid performances. Symphony and choral organisations contributed 7% (1 million) of paid attendances, but only 2% (1,130 performances) of all performances, with an average attendances per performance of 878 persons. Major contributors to paid attendances were popular music businesses (28%), musical theatre production organisations (21%), and drama businesses (19%).

2.1**SOURCES OF INCOME**

	<i>Organisations(a)</i>	<i>Value</i>	<i>Percentage contribution</i>
	no.	\$m	%
Sales of goods and services			
Income from box office	329	233.1	46.1
Contract performance fees received	508	70.7	14.0
Sales of goods	215	9.0	1.8
Royalties income	155	17.7	3.5
Rent, leasing and hiring income	127	5.9	1.2
Other operating income	273	12.7	2.5
<i>Total</i>	<i>701</i>	<i>349.2</i>	<i>69.1</i>
Other sources of income			
Government funding	194	116.7	23.1
Fund-raising income			
Financial sponsorships	129	18.3	3.6
In-kind sponsorships	51	6.7	1.3
Donations	120	6.4	1.3
Other	55	2.4	0.5
<i>Total</i>	<i>191</i>	<i>33.9</i>	<i>6.7</i>
Interest income	327	3.6	0.7
Other non-operating income	45	2.0	0.4
<i>Total</i>	<i>378</i>	<i>156.2</i>	<i>30.9</i>
Total	705	(b)505.4	100.0

(a) Organisations often have more than one source of income. Hence, the total number of organisations does not equal the sum of components.

(b) Of the total income of \$505.4m, \$11.5m was derived from performances at festivals.

2.2**INCOME BY TYPE OF ORGANISATION**

	<i>Organisations at end June</i>	<i>Income from box office</i>	<i>Government funding</i>	<i>Fund- raising income</i>	<i>Other income</i>	<i>Total income</i>
	no.	\$m	\$m	\$m	\$m	\$m
GOVERNMENT SUBSIDISED						
Popular music production	12	0.1	0.8	0.1	0.3	1.4
Symphony and choral production	29	25.2	51.4	7.1	10.7	94.4
Dance production	21	14.1	15.2	5.2	7.5	42.1
Drama production	67	30.8	22.0	5.9	12.7	71.4
Opera production	7	np	16.9	np	2.5	58.3
Musical theatre production	14	np	1.8	1.1	np	16.7
Other performing arts production	43	7.9	8.5	np	np	23.5
Total	194	120.4	116.7	29.8	40.9	307.8
OTHER						
Popular music production	239	22.8	..	1.2	39.9	63.9
Symphony and choral production	19	0.4	..	0.4	1.3	2.1
Dance production	17	0.5	..	—	1.1	1.5
Drama production	35	14.5	..	0.2	4.2	18.9
Opera production	11	np	..	np	1.2	1.3
Musical theatre production	62	np	..	1.5	np	81.0
Other performing arts production	129	7.2	..	np	np	28.9
Total	511	112.8	..	4.0	80.8	197.6
TOTAL						
Popular music production	251	22.9	0.8	1.2	40.3	65.3
Symphony and choral production	48	25.5	51.4	7.5	12.0	96.5
Dance production	37	14.6	15.2	5.2	8.6	43.6
Drama production	103	45.3	22.0	6.1	16.9	90.3
Opera production	18	np	16.9	np	3.8	59.6
Musical theatre production	76	np	1.8	2.5	np	97.7
Other performing arts production	173	15.1	8.5	np	np	52.5
Total	705	233.1	116.7	33.9	121.7	505.4

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

.. not applicable

— nil or rounded to zero (including null cells)

2.3

ITEMS OF EXPENDITURE

	Value	Percentage contribution
	\$m	%
Labour costs		
Wages and salaries	171.6	35.9
Employer contribution to superannuation funds	16.2	3.4
Workers' compensation costs	2.9	0.6
Fringe benefits tax	0.4	0.1
Payroll tax	1.7	0.4
<i>Total</i>	<i>192.9</i>	<i>40.4</i>
Selected expenses		
Contract payments to performers/artists		
Australian artists/artistic support	31.8	6.7
Overseas artists/artistic support	15.0	3.1
<i>Total</i>	<i>46.8</i>	<i>9.8</i>
Repair and maintenance expenses	2.6	0.5
Royalties expenses	13.4	2.8
Telecommunication services	4.1	0.9
Rent, leasing and hiring expenses		
Venue hire	33.2	7.0
Motor vehicles	1.1	0.2
Sets, costumes and other equipment	7.3	1.5
Other	5.7	1.2
<i>Total</i>	<i>47.2</i>	<i>9.9</i>
Motor vehicle running expenses	2.6	0.5
Audit and other accounting expenses	2.1	0.4
Advertising expenses	24.9	5.2
Marketing and promotional expenses	16.6	3.5
Travelling, accommodation and entertainment expenses	28.1	5.9
Other contract, sub-contract and commission expenses	16.4	3.4
Land tax and land rates	0.1	—
Other operating expenses	52.8	11.1
<i>Total</i>	<i>257.7</i>	<i>54.0</i>
Other costs		
Insurance premiums	2.4	0.5
Interest expenses	1.8	0.4
Depreciation and amortisation	8.6	1.8
Purchases		
Goods for resale	3.8	0.8
Costumes and sets	10.3	2.2
<i>Total</i>	<i>14.1</i>	<i>3.0</i>
<i>Total</i>	<i>26.9</i>	<i>5.6</i>
Total	477.6	100.0

— nil or rounded to zero (including null cells)

2.4**MAIN ACTIVITY OF PERSONS EMPLOYED**

	<i>Males</i>		<i>Females</i>		<i>Total</i>	
	no.	%	no.	%	no.	%
Managerial/administrative	430	11.6	840	25.0	1 270	18.0
Performing artists	2 327	63.0	1 719	51.1	4 045	57.3
Other artistic support	183	5.0	168	5.0	352	5.0
Technical/performing arts support	171	4.6	137	4.1	308	4.4
Front-of-house	402	10.9	335	10.0	736	10.4
Other staff	181	4.9	166	4.9	347	4.9
Total	3 695	100.0	3 365	100.0	7 060	100.0

2.5**STATES AND TERRITORIES**

		<i>NSW</i>	<i>Vic.</i>	<i>Qld</i>	<i>SA</i>	<i>WA</i>	<i>Tas.</i>	<i>NT</i>	<i>ACT</i>	<i>Aust.</i>
Organisations(a)	no.	324	179	99	36	38	9	6	14	705
	%	46.0	25.4	14.0	5.1	5.4	1.3	0.9	2.0	100.0
Paid performances(b)	no.	25 142	9 006	6 241	1 339	1 865	370	756	338	45 057
	%	55.8	20.0	13.9	3.0	4.1	0.8	1.7	0.8	100.0
Paid attendances(b)	'000	6 954.3	2 234.1	1 520.5	307.3	437.5	114.2	77.2	65.4	11 710.6
	%	59.4	19.1	13.0	2.6	3.7	1.0	0.7	0.6	100.0
Employment at end June	no.	3 429	1 845	603	526	401	127	34	94	7 060
	%	48.6	26.1	8.5	7.5	5.7	1.8	0.5	1.3	100.0
Wages and salaries	\$m	87.2	38.3	14.2	15.1	11.8	3.1	0.8	1.1	171.6
	%	50.8	22.3	8.3	8.8	6.9	1.8	0.5	0.6	100.0
Total income	\$m	281.9	113.4	44.2	28.9	25.6	6.9	1.8	2.8	505.4
	%	55.8	22.4	8.7	5.7	5.1	1.4	0.4	0.6	100.0

- (a) Multi-State organisations are counted in each State in which they operate. Hence, the counts of businesses for States and Territories do not sum to the total for Australia.
- (b) Number of paid performances and paid attendances excludes overseas performances and attendances.

2.6**CHARACTERISTICS OF ORGANISATIONS, By employment size****EMPLOYMENT SIZE**

		0-4 persons	5-19 persons	20-99 persons	100 or more persons	Total
Organisations	no.	471	166	51	17	705
	%	66.8	23.5	7.2	2.4	100.0
Employment	no.	819	1 446	2 067	2 727	7 060
	%	11.6	20.5	29.3	38.6	100.0
Wages and salaries	\$m	23.9	24.8	41.6	81.4	171.6
	%	13.9	14.5	24.2	47.4	100.0
Total income	\$m	100.4	69.9	137.0	198.1	505.4
	%	19.9	13.8	27.1	39.2	100.0
Operating profit before tax	\$m	18.2	1.7	*0.9	6.9	27.8
	%	65.5	6.1	3.2	24.8	100.0
Operating profit margin	%	20.2	3.6	*1.0	5.9	8.0

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

2.7**PERFORMANCES AND ATTENDANCES**

		Popular music	Symphony and choral	Dance	Drama	Opera	Musical theatre	Other performing arts	Total
Organisations with prime responsibility for productions during 1999-2000	no.	145	38	29	85	12	51	112	472
Paid performances(a)	no.	11 822	1 130	2 601	11 749	680	7 112	11 988	47 083
Paid attendances	'000	3 779.0	991.8	634.6	2 533.4	418.2	2 792.6	2 119.1	13 268.6

(a) Of these paid performances, there were 1,120 performed at performing art festivals.

CHAPTER 3

PERFORMING ARTS VENUE INDUSTRY

INTRODUCTION

At the end of June 2000, there were 125 employing businesses in the performing arts venues industry. These businesses operated 260 performing art spaces. Businesses operating venues where performing arts is not the main activity (e.g. theatre restaurants and sporting grounds) were excluded from this industry.

SOURCES OF INCOME

During 1999–2000, businesses in the performing arts venues industry generated total income of \$316m. The two major sources of income were government funding (\$94m) and rent, leasing and hiring income (\$84m) which represented 30% and 27% respectively of total income.

Other sources of income included income from the sales of goods of \$45m, box office income of \$41m, and fundraising income of \$10m.

EXPENDITURE

The total industry expenditure during 1999–2000 was \$309m. Labour costs of \$111m accounted for 36% of total expenses and represented \$21,600 per person employed.

Other major expenses included repair and maintenance expenses (\$32m), which accounted for 11% of total expenses, purchase of goods (\$27m), depreciation and amortisation (\$21m), contract payments for productions (\$16m), rent, leasing and hiring expenses (\$10m), advertising expenses (\$8m), electricity and gas expenses (\$7m), marketing and promotional expenses (\$5m) and travelling, accommodation and entertainment expenses (\$3m).

PROFITABILITY

Businesses in the performing arts venue industry recorded an operating profit before tax of \$7m, which represented an operating profit margin of 3.7%.

There were 12 businesses in the industry with employment of 100 or more persons and the operating profit margin of these large businesses was 7.7%.

EMPLOYMENT

At the end of June 2000, there were 5,149 persons employed in the performing arts venue industry. These staff worked in a diverse range of activities with 31% (1,600 persons) working as front-of-house staff, 25% (1,269 persons) as technical performing arts staff, 20% (1,032 persons) as managers and administrative staff and 14% (731 persons) as sales and catering staff.

While there was a relatively even distribution of males (2,507) and females (2,642) employed in the industry, the distribution varied by type of activity. Of the technical performing arts staff, 80% were male, compared to 67% of front-of-house staff being females and 63% of sales and catering staff being females.

Only 28% of employees in the industry worked on a permanent full-time basis. The average labour cost per employee of \$21,600, reflects the fact that 72% of employees worked either on a permanent part-time or casual employee basis.

BUSINESS SIZE

Most (63%) businesses in the industry were small with employment of less than 20 persons. However, these small businesses accounted for only 12% of employment, 10% of industry income and recorded a negative operating profit margin of -7.7%. In contrast, there were 12 businesses with employment of 100 or more persons (10% of all businesses), which accounted for 60% of employment, 69% of industry income and recorded an operating profit margin of 7.7%. On average, these 12 large businesses each generated \$18.1m in income.

STATE AND TERRITORY
DIMENSION

There were 38 businesses in the industry located in New South Wales, which was 30% of all businesses. While these businesses accounted for 25% of performing arts spaces, they accounted for 33% of employment and 36% of industry income. The New South Wales share of the Australian population is 34%.

Other States and Territories contribution to industry income was below their respective proportion of the Australian population except for South Australia. Businesses in South Australia accounted for 16% of industry income compared to their population share of 8%.

PAID PERFORMANCES

There were 21,136 paid performances held in venues operated by businesses in the performing arts venues industry during 1999–2000. In Chapter 2 of this publication, it shows that businesses in the music and theatre production industry had 47,083 paid performances. However, some of the paid performances of businesses in the music and theatre production industry were held overseas, some in non-performing arts venues and some in their own venues.

Large businesses (i.e. those with employment of 100 or more persons) in the performing arts venues industry accounted for 41% of the paid performances (8,563 performances). There were 2,426 drama performances and 2,801 other performing arts performances in venues of these large businesses.

There were 3,070 paid performances of musical theatre productions held in venues of the performing arts venues industry. Medium sized businesses (i.e. those with employment between 20–99 persons) accounted for 42% of these musical and theatre production performances.

3.1**SOURCES OF INCOME**

	<i>Businesses(a)</i>	<i>Value</i>	<i>Percentage contribution</i>
	no.	\$m	%
Sales of goods and services			
Rent, leasing and hiring income			
Venue hire	120	57.5	18.2
Other rent, leasing and hiring income	73	26.2	8.3
<i>Total</i>	<i>122</i>	<i>83.6</i>	<i>26.5</i>
Income from box office	108	40.8	12.9
Sales of goods			
Commissions	60	9.3	2.9
Other sales	78	35.2	11.1
<i>Total</i>	<i>95</i>	<i>44.5</i>	<i>14.1</i>
Other operating income	68	29.2	9.2
<i>Total</i>	<i>124</i>	<i>198.2</i>	<i>62.7</i>
Other sources of income			
Government funding	94	93.5	29.6
Fund-raising income			
Financial sponsorships	47	6.0	1.9
In-kind sponsorships	15	1.0	0.3
Other fund-raising	24	3.0	0.9
<i>Total</i>	<i>59</i>	<i>10.0</i>	<i>3.2</i>
Other non-operating income	67	14.3	4.5
<i>Total</i>	<i>114</i>	<i>117.7</i>	<i>37.3</i>
Total	125	315.9	100.0

(a) Businesses often have more than one source of income. Hence, the total number of businesses does not equal the sum of components.

3.2**ITEMS OF EXPENDITURE**

	<i>Value</i>	<i>Percentage contribution</i>
	<i>\$m</i>	<i>%</i>
.....		
Labour costs		
Wages and salaries	97.1	31.5
Employer contribution to superannuation funds	7.2	2.3
Workers' compensation costs	1.8	0.6
Fringe benefits tax	0.8	0.3
Payroll tax	4.5	1.5
<i>Total</i>	<i>111.4</i>	<i>36.1</i>
Selected expenses		
Contract payments for productions	16.1	5.2
Repair and maintenance expenses	32.3	10.5
Electricity and gas charges	7.2	2.3
Land tax and land rates	1.1	0.4
Telecommunication services	3.1	1.0
Rent, leasing and hiring expenses		
Land buildings and other structures	6.2	2.0
Sets, costumes and other equipment	2.0	0.6
Other	1.6	0.5
<i>Total</i>	<i>9.7</i>	<i>3.1</i>
Audit and other accounting expenses	1.0	0.3
Advertising expenses	8.2	2.7
Marketing and promotional expenses	4.5	1.5
Travelling, accommodation and entertainment expenses	3.0	1.0
Payments to employment agencies for staff	2.4	0.8
Cleaning services provided by other businesses	4.5	1.5
Other contract, sub-contract and commission expenses	5.7	1.8
Other operating expenses	41.1	13.3
<i>Total</i>	<i>139.8</i>	<i>45.3</i>
Other costs		
Insurance premiums	3.1	1.0
Interest expenses	6.7	2.2
Depreciation and amortisation	21.3	6.9
Purchases		
Goods for resale	21.9	7.1
Other	4.7	1.5
<i>Total</i>	<i>26.5</i>	<i>8.6</i>
<i>Total</i>	<i>57.5</i>	<i>18.6</i>
Total	308.7	100.0
.....		

3.3**MAIN ACTIVITY OF PERSONS EMPLOYED**

	<i>Males</i>		<i>Females</i>		<i>Total</i>	
	no.	%	no.	%	no.	%
Managerial/administrative	412	16.4	619	23.4	1 032	20.0
Front of house	533	21.3	1 067	40.4	1 600	31.1
Sales and catering staff	274	10.9	457	17.3	731	14.2
Performing artists and artistic support	92	3.7	103	3.9	195	3.8
Technical/performing arts support	1 011	40.3	258	9.8	1 269	24.6
Other	185	7.4	137	5.2	322	6.3
Total	2 507	100.0	2 642	100.0	5 149	100.0

3.4**STATES AND TERRITORIES**

	<i>Businesses at end June(a)</i>	<i>Performing arts spaces at end June</i>		<i>Employment at end June</i>		<i>Wages and salaries</i>		<i>Total income</i>	
	no.	no.	%	no.	%	\$m	%	\$m	%
New South Wales	38	64	24.6	1 671	32.5	30.6	31.5	113.9	36.1
Victoria	36	73	28.1	1 212	23.5	23.6	24.3	69.6	22.0
Queensland	20	46	17.7	924	17.9	20.6	21.2	56.7	17.9
South Australia	11	26	10.0	611	11.9	13.3	13.7	50.8	16.1
Western Australia	14	35	13.5	565	11.0	5.6	5.8	15.3	4.8
Tasmania	np	np	np	np	np	np	np	np	np
Northern Territory	np	np	np	np	np	np	np	np	np
Australian Capital Territory	4	10	3.8	103	2.0	2.2	2.3	6.5	2.1
Australia	125	260	100.0	5 149	100.0	97.1	100.0	315.9	100.0

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

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

3.5**CHARACTERISTICS OF BUSINESSES, By employment size****EMPLOYMENT SIZE**

		0–19 persons	20–99 persons	100 or more persons	Total
Businesses/organisations at end June	no.	79	34	12	125
	%	63.2	27.2	9.6	100.0
Employment at end June	no.	605	1 463	3 081	5 149
	%	11.7	28.4	59.8	100.0
Wages and salaries	\$m	10.2	19.9	67.0	97.1
	%	10.5	20.5	69.0	100.0
Total income	\$m	30.8	67.5	217.6	315.9
	%	9.7	21.4	68.9	100.0
Operating profit/surplus before tax	\$m	–1.5	*–1.3	10.0	7.2
	%	–20.8	–18.1	138.9	100.0
Operating profit margin	%	–7.7	*–2.7	7.7	3.7

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

3.6**PAID PERFORMANCES, By employment size****EMPLOYMENT SIZE**

	0–19 persons	20–99 persons	100 or more persons	Total
Type of performance	no.	no.	no.	no.
Popular music performances	1 051	706	321	2 078
Symphony and choral performances	270	430	528	1 228
Dance productions	509	510	653	1 672
Drama productions	1 290	867	2 426	4 583
Opera productions	46	np	np	381
Musical theatre performances and productions	959	1 284	827	3 070
Other performing arts events	1 295	1 284	2 801	5 381
Sporting events	30	np	np	129
Other	887	1 050	678	2 614
Total	6 337	6 236	8 563	21 136

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

CHAPTER 4

PERFORMING ARTS FESTIVALS

INTRODUCTION

As part of the performing arts industry survey, the ABS conducted a survey of performing arts festivals to obtain information about their contribution to the industry. Festivals included in this survey had to have performing arts as their main focus and be conducted for a duration longer than two days. Therefore, festivals such as film and flower festivals and many one and two day festivals were excluded from this part of the survey.

During 1999–2000, there were 152 performing arts festivals of more than two days duration. Of the 152 festivals, there were 71 multi-faceted performing arts festivals, 72 music festivals, and the remaining 9 festivals focussed on drama, comedy or dance. There were 32 festivals with duration greater than two weeks, 33 festivals of 8–14 days duration, 22 festivals of 5–7 days duration and 66 festivals of 3–4 days duration.

It is estimated that there were 26,577 performing arts performances at these festivals. Total attendances were estimated at 9.9 million persons, with 8.0 million being free admissions and 1.9 million being paid admissions.

SOURCES OF INCOME

The total income of these festivals was \$103m for 1999–2000. The three main sources of income were ticket sales of \$42m (41% of total income), government funding of \$27m (26% of total income) and fundraising income of \$22m (22% of total income).

The majority (72%) of government funding was received from State and Territory governments, with 115 of the 152 festivals receiving government funding. The main components of fundraising income of \$22m were financial sponsorships of \$15m, in-kind sponsorships of \$6m and donations of \$1m.

EXPENDITURE

The total expenses of these 152 festivals during 1999–2000 was \$99m. The major expense item was contract payments to performers and artists of \$25m, which accounted for 25% of total expenses. Of these contract payments, \$11m was paid to Australian performers and \$14m to overseas performers.

Other major expense items included rent, leasing and hiring expenses of \$14m, labour costs of \$14m, advertising, marketing and promotional expenses of \$12m and travelling, accommodation and entertainment expenses of \$7m. The main components of rent, leasing and hiring expenses of \$14m were hiring of staging, sound and other related equipment (\$7m) and venue hire (\$4m).

Other operating expenses of \$20m, which was not separately itemised, included production and distribution costs, set costs and graphic art costs.

EMPLOYMENT

There were 19,859 persons working for the 152 festivals during their conduct, comprising 2,141 employees and 17,718 volunteers.

EMPLOYMENT *continued*

It is estimated that these 17,718 volunteers worked a total of 622,200 hours representing 35 hours per volunteer.

Of the 2,141 employees during festivals, there were 302 permanent full-time employees, 132 permanent part-time employees and 1,706 casual employees. In comparison, there were only 374 employees working for festivals at the end of June 2000.

STATE AND TERRITORY
DIMENSION

Of the 152 festivals, 54 were held in New South Wales and 44 were held in Victoria. The 54 festivals (36% of the total number of festivals) in New South Wales attracted 44% of the festival attendances to 26% of the performances. These festivals accounted for 25% of the volunteers and accrued 24% of the festival income. By comparison, the 44 festivals in Victoria attracted 35% of the attendances to 31% of the performances. The Victorian festivals were worked by 24% of the volunteers and accrued 38% of the festivals' income.

While 81% of all attendances at festivals were admitted free of charge, this proportion varied by State and Territory. A larger proportion of attendances were free to festivals in New South Wales (91%) and Victoria (77%), than Queensland (38%) and Western Australia (54%).

FESTIVALS BY DURATION

Of the 152 festivals, 32 festivals had a duration of greater than two weeks. These festivals accounted for 76% of the attendances, 49% of the performances, 68% of the employment during festivals, 29% of the volunteers and 79% of the income. A large proportion (75%) of performances by overseas artists occurred in these longer duration festivals.

There were 66 festivals of 3–4 days duration, 22 festivals of 5–7 days duration and 33 festivals of 8–14 days duration. Festivals of 3–4 days duration and 5–7 days duration were more reliant on volunteer labour, with volunteers making up 93% and 98% of their respective workforces during the conduct of the festival. By comparison, volunteers comprised 78% of the workforce of festivals of 15 or more days duration.

The average attendances at these festivals varied by festival duration with 3–4 day festivals averaging 22,800 attendees, 5–7 day festivals averaging 12,000 attendees and 8–14 day festivals averaging 16,900 attendees. By comparison, the 32 festivals running for two weeks or more averaged 235,200 attendees.

4.1

KEY FIGURES BY TYPE OF FESTIVAL

TYPE OF FESTIVAL

		<i>Multi- faceted performing arts festival</i>	<i>Music festival</i>	<i>Drama festival</i>	<i>Comedy and dance festival</i>	<i>Total</i>
Number of festivals	no.	71	72	6	3	152
Average duration	no. of days	14.6	5.9	8.5	11.0	10.1
Attendances						
Free	'000	7 084.6	699.3	np	np	7 963.2
Paid	'000	1 394.0	272.2	np	np	1 890.7
<i>Total</i>	'000	8 478.5	971.5	np	np	9 853.9
Performances(a)						
By Australian artists	no.	11 989	9 274	np	np	23 724
By overseas artists	no.	2 058	484	np	np	2 853
Total	no.	14 047	9 758	np	np	26 577

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

(a) Of which 6,680 performances were free of charge.

4.2**SOURCES OF INCOME**

	<i>Festivals(a)</i>	<i>Value</i>	<i>Percentage contribution</i>
	no.	\$m	%
Sales of goods and services			
Income from ticket sales	130	42.2	41.1
Fund-raising income			
Financial sponsorships	109	14.8	14.4
In-kind sponsorships	62	6.1	5.9
Donations	69	0.7	0.7
Other fund-raising	29	0.5	0.5
<i>Total</i>	<i>139</i>	<i>22.2</i>	<i>21.6</i>
Income from advertising	40	0.7	0.7
Concession income from food and beverage and merchandise outlets	51	1.3	1.3
Rent, leasing and hiring income	17	0.5	0.5
Royalties income	11	0.5	0.5
Other sales	89	3.4	3.3
Other operating income	69	4.2	4.1
<i>Total</i>	<i>151</i>	<i>75.0</i>	<i>73.0</i>
Other sources of income			
Government funding			
Federal government	35	1.0	1.0
State/Territory government	78	19.4	18.9
Local government	87	6.1	5.9
Foreign government	10	0.6	0.6
<i>Total</i>	<i>115</i>	<i>27.1</i>	<i>26.4</i>
Other income	74	0.5	0.5
<i>Total</i>	<i>132</i>	<i>27.6</i>	<i>26.9</i>
Total	152	102.7	100.0

(a) Festivals often have more than one source of income. Hence, the total number of festivals does not equal the sum of components.

4.3

ITEMS OF EXPENDITURE

	Value	Percentage contribution
	\$m	%
Labour costs		
Wages and salaries	12.5	12.6
Employer contribution to superannuation funds	0.8	0.8
Workers' compensation costs	0.2	0.2
Fringe benefits tax	0.1	0.1
Payroll tax	0.4	0.4
<i>Total</i>	<i>13.9</i>	<i>14.0</i>
Selected expenses		
Contract payments to performers/artists		
Australian artists/artistic support	11.3	11.4
Overseas artists/artistic support	13.6	13.7
<i>Total</i>	<i>24.9</i>	<i>25.1</i>
Rent, leasing and hiring expenses		
Venue hire	4.1	4.1
Motor vehicles	0.2	0.2
Staging, sound and other equipment	7.1	7.2
Other	2.4	2.4
<i>Total</i>	<i>13.9</i>	<i>14.0</i>
Royalties expenses	0.9	0.9
Telecommunication services	1.1	1.1
Advertising, marketing and promotional expenses	11.8	11.9
Travelling, accommodation and entertainment expenses	7.0	7.1
Other contract, sub-contract and commission expenses	3.5	3.5
Permit fees paid to government authorities	0.2	0.2
Other operating expenses	19.8	20.0
<i>Total</i>	<i>83.1</i>	<i>83.9</i>
Other costs		
Insurance premiums	0.6	0.6
Interest expenses	0.1	0.1
Purchases of goods for resale	1.4	1.4
<i>Total</i>	<i>2.0</i>	<i>2.0</i>
Total	99.1	100.0

4.4

CHARACTERISTICS OF PERSONS WORKING FOR FESTIVALS

	<i>Persons working at end June</i>		<i>Persons working during the festival</i>	
	no.	%	no.	%
Employees				
Permanent full-time	189	50.5	302	1.5
Permanent part-time	98	26.2	132	0.7
Casual	86	23.0	1 706	8.6
<i>Total</i>	<i>374</i>	<i>100.0</i>	<i>2 141</i>	<i>10.8</i>
Volunteers(a)	na	na	17 718	89.2
Total persons	374	100.0	19 859	100.0

na not available

(a) These volunteers worked a total of 622,235 hours during the conduct of the festivals (i.e. an average of 35 hours per volunteer).

4.5

STATES AND TERRITORIES

		NSW	Vic.	Qld	SA	WA	Tas.	NT	ACT	Aust.
Performing arts festivals conducted during year ended June 2000	no.	54	44	18	9	14	3	5	6	152
Attendances										
Paid	'000	394.9	769.7	165.6	np	135.1	np	np	37.2	1 890.7
Free	'000	3 987.8	2 641.8	100.0	np	156.6	np	np	np	7 963.2
<i>Total</i>	<i>'000</i>	<i>4 382.6</i>	<i>3 411.5</i>	<i>265.6</i>	<i>757.4</i>	<i>291.7</i>	<i>np</i>	<i>56.6</i>	<i>np</i>	<i>9 853.9</i>
Performances during festivals										
By Australian artists	no.	6 615	7 491	2 420	2 398	2 356	np	181	np	23 724
By overseas artists	no.	264	681	209	1 301	269	np	18	np	2 853
<i>Total</i>	<i>no.</i>	<i>6 879</i>	<i>8 172</i>	<i>2 629</i>	<i>3 699</i>	<i>2 625</i>	<i>np</i>	<i>199</i>	<i>np</i>	<i>26 577</i>
Free performances during festivals	no.	2 986	2 171	478	248	218	np	np	np	6 680
Employment during the festival	no.	329	1 080	137	168	338	np	np	56	2 141
Volunteers during festivals	no.	4 502	4 219	4 334	1 575	1 276	np	219	np	17 718
Total income	\$m	24.7	38.6	7.1	15.9	*12.0	np	np	2.2	102.7
Total expenses	\$m	19.9	35.0	7.9	17.4	*14.7	np	np	2.2	99.1

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

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

4.6

KEY FIGURES BY DURATION OF FESTIVAL

		3-4 days	5-7 days	8-14 days	15 days or more	Total
Performing arts festivals conducted during year ended June 2000	no.	66	22	33	32	152
Attendances						
Paid	'000	195.2	191.6	142.6	1 361.3	1 890.7
Free	'000	1 311.9	71.4	414.2	6 165.6	7 963.2
Total	'000	1 507.1	263.1	556.8	7 526.9	9 853.9
Free performances during the festival	no.	858	740	2 944	2 139	6 680
Performances during festival						
By Australian artists	no.	4 091	3 906	4 781	10 945	23 724
By overseas artists	no.	308	168	233	2 144	2 853
Total	no.	4 399	4 074	5 014	13 090	26 577
Employment during the festival	no.	344	52	290	1 455	2 141
Volunteers during the festival	no.	4 550	2 960	5 042	5 166	17 718
Total income	\$m	9.1	7.2	5.6	80.8	102.7
Total expenses	\$m	8.3	6.8	6.4	77.5	99.1

CHAPTER 5

OTHER SERVICES TO THE ARTS INDUSTRY

INTRODUCTION

Excluding performing arts festivals of greater than two days duration, there were 454 employing businesses in the services to the arts industry at the end of June 2000. This industry contains a diverse range of businesses such as those operating mainly as costume designers, set designers, casting agencies, theatre lighting, theatre ticketing agencies and arts administration businesses. In addition, some promoters are included where their main activity is the promotion of the artists rather than the theatre production. Separate statistics are shown for performing arts festivals of greater than two days duration in Chapter 4 and are not included in the statistics in Chapter 5.

SOURCES OF INCOME

Businesses in the services to the arts industry generated \$710m in income during 1999–2000.

The three main sources of income for businesses in the industry were government funding of \$233m (33% of total income), royalties of \$158m (22% of total income) and box office takings of \$144m (20% of total income).

EXPENDITURE

During 1999–2000, total expenses for businesses in the industry was \$698m.

The main expense was royalties expenses of \$137m (20% of the total expenses for the industry), of which the majority was paid to Australian performers. The other 2 major expense items were personnel related, with labour costs being \$94m and contract payments to performers and artists being \$79m. When combined, labour costs and contract payments represent 25% of the total expenses.

The average labour cost per employee in the industry was \$24,500. The contract payments to performers and artists comprised \$35m paid to Australian performers and artists and \$43m paid to overseas performers and artists.

Other operating expenses of \$242m, which was not separately itemised, included such expenses as grants and subsidies paid to other organisations, accommodation expenses and travel expenses.

PROFITABILITY

The operating profit before tax of the industry was \$12m, which represented an operating profit margin of 2.5%.

EMPLOYMENT

At the end of June 2000, the total employment in the industry was 3,846 persons. Almost half (45%) of the persons employed worked on a permanent full-time employee basis with casual employees accounting for 44% of employment. Females accounted for 58% of the employment in the industry.

BUSINESS SIZE

Businesses with employment of four or less persons accounted for 73% of all businesses in the industry. However, these small businesses accounted for only 17% of employment and 19% of income of the industry.

In comparison, the 27 large businesses with employment of 20 or more persons, accounted for 62% of the employment, 61% of the industry income and 62% of the operating profit before tax of the industry.

**STATE AND TERRITORY
DIMENSION**

Businesses in the industry were concentrated in New South Wales and Victoria where 73% of the businesses were located. The 226 businesses in New South Wales was 50% of all businesses in the industry, and they accounted for 45% of employment and 52% of industry income. In comparison, New South Wales share of the Australian population is 34%.

There were 21 businesses in the industry located in South Australia (5% of all businesses), and the income generated by these businesses was 12% of the industry income. South Australia's share of the Australian population is 8%. With the exception of New South Wales and South Australia, the respective States and Territories proportional contributions to industry income was below their proportional State and Territory population.

5.1**SOURCES OF INCOME**

	<i>Businesses(a)</i>	<i>Value</i>	<i>Percentage contribution</i>
	no.	\$m	%
Sales of goods and services			
Income from box office takings for events promoted by businesses			
Musical, theatre and other performing arts events	93	143.0	20.1
Other events	22	1.3	0.2
<i>Total</i>	101	144.3	20.3
Income from other services	339	90.7	12.8
Rent, leasing and hiring income	49	3.5	0.5
Royalties income	25	157.7	22.2
Commission from ticket sales	32	52.9	7.5
Other operating income	110	15.9	2.2
<i>Total</i>	446	465.0	65.5
Other sources of income			
Government funding	60	232.7	32.8
Interest income	179	10.3	1.5
Other non-operating income	20	1.7	0.2
<i>Total</i>	202	244.8	34.5
Total	454	709.8	100.0

- (a) Businesses often have more than one source of income. Hence, the total number of businesses does not equal the sum of components.

5.2**ITEMS OF EXPENDITURE**

	<i>Value</i>	<i>Percentage contribution</i>
	\$m	%
.....		
Labour costs		
Wages and salaries	82.8	11.9
Employer contribution to superannuation funds	7.0	1.0
Workers' compensation costs	0.7	0.1
Fringe benefits tax	3.2	0.5
Payroll tax	0.6	0.1
<i>Total</i>	<i>94.4</i>	<i>13.5</i>
Selected expenses		
Contract payments to performers/artists		
Australian artists/artistic support	35.3	5.1
Overseas artists/artistic support	43.3	6.2
<i>Total</i>	<i>78.6</i>	<i>11.3</i>
Repair and maintenance expenses	9.4	1.3
Royalties expenses		
Paid to Australian individuals/organisations	94.6	13.5
Paid to overseas individuals/organisations	42.4	6.1
<i>Total</i>	<i>137.0</i>	<i>19.6</i>
Telecommunication services	7.7	1.1
Rent, leasing and hiring expenses		
Venue hire	11.0	1.6
Other	14.4	2.1
<i>Total</i>	<i>25.4</i>	<i>3.6</i>
Advertising, marketing and promotional expenses	24.3	3.5
Payments to employment agencies for staff	1.6	0.2
Other contract, sub-contract and commission expenses	36.4	5.2
Other operating expenses	242.0	34.7
<i>Total</i>	<i>562.3</i>	<i>80.5</i>
Other costs		
Insurance premiums	2.9	0.4
Interest expenses	3.1	0.4
Depreciation and amortisation	22.3	3.2
Bad and doubtful debts	0.8	0.1
Purchases	12.3	1.8
<i>Total</i>	<i>41.5</i>	<i>5.9</i>
Total	698.4	100.0
.....		

5.3**CHARACTERISTICS OF BUSINESSES, By employment size****EMPLOYMENT SIZE**

		0–4 persons	5–19 persons	20 or more persons	Total
Businesses/organisations at end June	no.	332	95	27	454
	%	73.1	20.9	5.9	100.0
Employment at end June	no.	645	822	2 379	3 846
	%	16.8	21.4	61.9	100.0
Wages and salaries	\$m	16.4	18.1	48.3	82.8
	%	19.8	21.9	58.3	100.0
Total income	\$m	132.9	142.2	434.7	709.8
	%	18.7	20.0	61.2	100.0
Operating profit/surplus before tax	\$m	3.6	*1.0	7.2	11.7
	%	30.8	8.5	61.5	100.0
Operating profit margin	%	2.8	*0.9	3.1	2.5

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

5.4**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	226	49.8	1 742	45.3	47.6	57.5	371.1	52.3
Victoria	107	23.6	1 401	36.4	17.4	21.0	124.3	17.5
Queensland	65	14.3	356	9.3	8.7	10.5	90.2	12.7
South Australia	21	4.6	196	5.1	5.6	6.8	82.0	11.6
Western Australia	20	4.4	96	2.5	1.6	1.9	20.3	2.9
Tasmania	7	1.5	22	0.6	0.7	0.8	np	np
Other	7	1.5	33	0.9	1.1	1.3	np	np
Australia	454	100.0	3 846	100.0	82.8	100.0	709.8	100.0

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

(a) Multi-State businesses are counted in each State 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 1999–2000 from a survey of employing businesses mainly engaged in the performing arts industries.

SCOPE

2 The performing arts industries comprise businesses and organisations (both public and private sector) classified to the following classes of the Australian and New Zealand Standard Industrial Classification (ANZSIC):

- 9241, Music and Theatre Productions, which consists of businesses and organisations mainly engaged in providing live theatrical or musical presentations (including concerts, opera, ballet or drama);
- 9252, Performing Arts Venues, which consists of businesses and organisations mainly engaged in operating performing arts venues such as concert halls, playhouses, music halls (except theatre restaurants), entertainment centres (except centres where the presentation of sporting events is the main activity); and
- 9259, Services to the Arts n.e.c., which consists of businesses and organisations mainly engaged in providing services such as casting agency operation, costume design, set designing, theatre ticket agency operation, theatre lighting and festivals.

3 In addition, the performing arts venues activities of local government authorities were included in the survey, even though local government authorities are defined to another class in ANZSIC.

4 As a result of interest in festivals, data on the Services to the Arts n.e.c. industry is split into performing arts festivals which operated for more than 2 days, and the remainder of the industry.

5 The survey did not include businesses and organisations classified to ANZSIC 9242 (Creative Arts). This industry mainly consists of individuals engaged in musical composition, literary arts and visual arts such as painting, drawing, sculpture and pottery.

IMPROVEMENTS TO COVERAGE

6 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.

7 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.

8 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.

9 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

10 The unit for which statistics were reported in the survey was the management unit. The management unit is the highest-level accounting unit

STATISTICAL UNIT <i>continued</i>	within a business, 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 DATA	11 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 the number of locations, total income, employment, and wages and salaries to enable State and Territory statistics to be compiled and comparisons undertaken.
REFERENCE PERIOD	12 Data contained in the tables of this publication relate to all businesses/organisations which operated in Australia at any time during the year ended 30 June 2000. Counts of businesses include only those businesses that were operating at 30 June 2000.
BUSINESSES CEASED DURING THE YEAR	13 A small number of businesses ceased business during the 1999–2000 reference period. It is normal ABS procedure to include the contributions of these businesses in the survey output.
RELIABILITY OF DATA	14 The estimates in this publication are subject to sampling and non-sampling error. 15 The estimates in this publication are based on information obtained from a sample of 1,437 businesses in the surveyed population. Consequently, the estimates in this publication are subject to sampling variability, that is, they may differ from the 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 (SE), which indicates the extent to which an estimate might have varied by chance because only a sample of units was included. 16 There are about 2 chances in 3 that a sample estimate will differ by less than one SE 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 SEs. 17 Sampling variability can be measured by the relative standard error (RSE) which is obtained by expressing the SE 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. 18 The following table contains estimates of RSEs for a selection of the statistics presented in this publication.

RELIABILITY OF DATA *continued*

RELATIVE STANDARD ERRORS, Key Aggregates

	<i>Music and theatre production</i>	<i>Performing arts venues</i>	<i>Festivals</i>	<i>Other services to the arts</i>	<i>Total</i>
	%	%	%	%	%
Businesses/organisations at end June	1	1	1	2	1
Performing arts spaces	2	1	—	—	1
Maximum seating capacity	—	2	—	—	2
Productions with paid performances					
Paid performances	1	1	6	—	2
Paid attendances	2	—	6	—	2
Employment at end June					
Working proprietors and partners	2	—	—	3	2
Permanent full-time	1	2	6	1	1
Permanent part-time and casual	1	2	6	1	1
<i>Total</i>	1	2	5	1	1
Volunteers during June	3	—	—	—	3
Income					
Income from box office	2	3	11	2	2
Government funding	—	3	7	—	1
Other income	2	2	6	1	1
<i>Total</i>	1	2	7	1	1
Expenses					
Wages and salaries	1	3	6	1	1
Contract payments to performers/artists	1	1	9	2	2
Venue hire	2	—	6	3	1
Other expenses	2	2	7	1	1
<i>Total</i>	1	2	7	1	1
Operating profit/surplus before tax	6	19	—	9	5
Operating profit margin	5	17	—	9	1
Industry value added	1	6	6	3	1

— nil or rounded to zero (including null cells)

19 As an example of the above, an estimate of total income for the music and theatre production industry is \$505.4m and the RSE is 1%, giving a SE of \$5.1m. Therefore, there would be 2 chances in 3 that, if all units had been included in the survey, a figure in the range of \$500.3m to \$510.5m would have been obtained, and 19 chances in 20 (i.e. a confidence interval of 95%) that the figure would have been within the range of \$495.2m to \$515.6m.

20 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, efficient operating procedures and systems, and appropriate methodology.

ACKNOWLEDGMENT

21 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*.

GLOSSARY

Advertising, marketing and promotion expenses	This item refers to costs incurred by a business for promotional and publicity campaigns aimed at bringing the activities of the business to the attention of consumers for the purpose of increasing sales. This does not include the wages and salaries of employees for the distributor who is engaged in promotional activities. However, it does include commissions paid to advertising agencies and the cost of advertising in the press.
Audit and other accounting expenses	This item refers to the costs incurred for the professional advice and skills of an auditor or accountant.
Bad and doubtful debts	This item refers to the amount of accounts receivable that are either written off, or estimated to be uncollectible during an accounting period, and that are expensed in a period's profit calculations.
Box office income	This item includes single ticket sales, subscriptions, box office commissions and booking fees.
Casual employees	This item refers to employees who are not entitled to take paid leave.
Concession income from food and beverage and merchandise sales (from outlets operated by other businesses)	This item refers to contract income received from other businesses for concessions to operate food and beverage and merchandise outlets.
Contract fees paid to production companies	This item refers to payments to production companies for work done or sales made on a contract or commission basis.
Contract payments to performers/artists	This item refers to payments to performers or artists for work done on a contract basis.
Contract performance fees received	This item refers to income from the advance payment of a contract performance fee.
Dance organisations	This item includes ballet, classical, contemporary and modern dance, dance theatre, ethnic and folk dance companies.
Depreciation and amortisation	This item refers to the financial charges made in 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. The charge represents the accounting process of systematically allocating the cost of a non-current asset over its expected useful life.
Donations/bequests	This item is income derived from gifts by individuals or businesses/organisations either directly or as a result of the distribution of a deceased estate.
Drama theatre organisations	This item includes professional and amateur theatre companies which present live drama theatre to the general public.
Duration of festival during the reporting period	This item refers to the number of days that the festival was conducted during 1999–2000.
Electricity, gas and water charges	This item refers to charges that relate to the consumption of electricity, gas and water during the normal operations of the business.
Employer contributions to superannuation funds	This item includes all employer contributions to superannuation schemes (including the employer productivity contribution).

Employment at end June	This item includes permanent full-time and part-time employees, employees absent on paid or unpaid leave, managerial and executive employees, permanent, temporary and casual employees, consultants who are employees, and working proprietors and partners. It excludes non-salaried directors, subcontractors, persons paid solely by commission without a retainer and volunteers.
Employment during the conduct of the festivals	This item refers to the employees working for a performing arts festival during the actual conduct of the festival and for whom PAYE tax was deducted by the festival organisation.
Financial and in-kind sponsorships	This item refers to income derived from businesses/organisations involved in the public support/promotion of the performing arts. Sponsorships are transactions made which resulted in advertising and/or other benefits to the sponsoring business. In-kind sponsorships relate to non-monetary items given to the organisation that is valued in the profit and loss statement of the performing arts organisation.
Free attendances (at festivals)	This item refers to attendances, at festival performances, which were provided free of charge to the public.
Fringe benefits tax	This item includes the tax payable by employees when certain benefits in excess of normal wages or salaries (e.g. free or discounted goods or services) are received by their employees (or associates of employees) in connection with their employment.
Front of house staff	This item refers to staff of performing arts venues who are mainly engaged in dealing with the general public, (e.g. ticket sellers and ushers).
Fund-raising income	This item refers to income from non-government organisations such as corporations, philanthropic trusts, 'friends' groups and includes donations, bequests, and sponsorships.
Government funding	This item refers to project or program payments made by Commonwealth, State/Territory and local governments in the form of operational funds for ongoing operations and capital funds to purchase equipment or property.
Government subsidised organisations	This item refers to organisations which have received some funding from Commonwealth, State/Territory or local government.
Income from other services (to the arts)	This item refers to income derived from the provision of arts related services, such as casting agency operations, costume design and set design.
Income from sales of goods	This item refers to income from the sales of goods, such as merchandise, food and beverages.
Income from ticket sales (of festivals)	This item includes subscriptions, booking fees, box office and commission from ticket sales.
Industry value added	This item refers to the value added of the industry to the economy. For 'for profit' businesses it is defined as the sales of goods and services plus government subsidies, minus purchases of goods and selected expenses. For 'not-for-profit' or charitable organisations predominantly funded by government it is defined as wages and salaries, employer contributions to superannuation funds, workers compensation costs and depreciation.
Insurance premiums	This item refers to expenses incurred by a business in respect of different types of insurance policies but excluding workers' compensation and compulsory third party motor vehicle insurance.
Interest expenses	This item includes outflow of funds related to the cost of borrowing money.
Interest income	This item refers to the income earned through the lending out of funds owned by the business/organisation.

Inventories	The reported total book value of inventories as at the beginning (for Opening inventories) and at the end (for Closing inventories) of the reporting period. The values reported are those as reported on business balance sheets.
Labour costs	This item includes those expenses involved in the production of goods and services and includes such items as wages, salaries, employer contributions to superannuation funds, workers' compensation costs, fringe benefits tax and payroll tax.
Managerial/administrative staff	This item refers to employees of an organisation whose main activity is providing managerial and administrative support.
Marketing and promotional expenses	This item refers to the costs incurred in the long-range promotion of a business and its goods or services.
Motor vehicle running expenses	This item includes the cost incurred using "on-road" motor vehicles owned or leased by the business.
Multi-faceted performing arts festival	This item refers to festivals that have several performing art components and may include theatre, drama, music, dance and other activities.
Musical theatre organisations	This item refers to organisations presenting live performances of music theatre and musical comedy.
Not for profit organisations	This item refers to organisations whose status does not permit them to be a source of income, profit or other financial gain for the units that establish, control or finance them.
Opera organisations	This item refers to organisations presenting live performances of opera including lyric opera and operetta.
Operating profit before tax	This item is a measure of profit (or loss) before extraordinary items are brought to account and prior to the deduction of income tax and appropriation to owners. It is derived as total income minus total expenses, plus closing inventories minus opening inventories.
Operating profit margin	Operating profit margin of a business represents that percentage of its sales of goods and services which becomes profit after all operating expenses have been deducted. It is derived by expressing total operating profit before tax (OPBT) as a percentage of total sales of goods and services (i.e. $OPBT \times 100 / \text{Sales of goods and services}$).
Other artistic support	This item refers to employees whose main activities consist of providing artistic support to performers, (e.g. stage directors or choreographers).
Other contract and sub-contract expenses	This item refers to payments to businesses and self-employed persons (other than performing artists) for work done or sales made on contract or commission basis.
Other income	This item includes net profit (loss) on sale of fixed tangible assets, dividend income, and net profit (loss) on share trading and on foreign loans as a result of variations in foreign exchange rates/transactions. The item excludes extraordinary profit (loss), i.e. not associated with the normal operations of this practice and of a non-recurring basis.
Other operating expenses	This item includes freight and cartage expenses; postal, mailing and courier services; legal, audit and other accounting expenses; paper, printing and stationery expenses; and other management and administrative services.
Other operating income	This item refers to all income, not elsewhere specified in the table, which arises from the normal operations of the business.

Other performing arts organisations	This item refers to artists/organisations presenting live performances of comedy, puppet, mime etc. These also include businesses comprising actors, dancers, and television presenters.
Paid attendances	This item refers to the number of people who paid an admission fee to see a performance of an artist/organisation.
Paid performances	This item refers to performances for which a performance fee is received by an artist/organisation. Where an artist/organisation provided support to another's performance, the performances and attendances are only recorded for the main performing artist/organisation, (e.g. a performance by an orchestra in support of an opera company will only be recorded by the opera company).
Payments to employment agencies for staff	This item includes payment to employment agencies for procuring the services of staff. This is commonly a temporary contract between the client and the employment agency.
Payroll tax	This item refers to a tax levied by State and Territory governments upon the amount of wages and salaries paid by a business.
Performing artists	This item refers to employees whose main activities are performance and includes actors, musicians and singers.
Performing art spaces	This item refers to the number of performing art spaces provided by an organisation for presenting performing art productions to the public. The item excludes rehearsal rooms.
Permanent full-time employees	This item refers to permanent employees who work 35 hours per week or more and were entitled to paid leave.
Permanent part-time employees	This item refers to permanent employees who work less than 35 hours per week and were entitled to paid leave.
Permit fees paid to government authorities	This item refers to payments to councils or government authorities for traffic control, site cleaning etc. during the conduct of a festival.
Popular music performances	This item refers to presentations, in front of a live audience, of music in the popular idiom, including rock, jazz, pop, folk, country, etc.
Profit business	This item refers to businesses and organisations which operate with the intention of making profits.
Purchases of goods for resale	This item includes purchases of food and beverages for resale at owner operated refreshment bars and includes goods used in the preparation of meals, where such services are provided by venue operators.
Rent, leasing and hiring expenses	These are the costs for the rent, leasing and hiring of vehicles, land, buildings, machinery, equipment and any other property to other businesses or individuals.
Rent, leasing and hiring income	This is revenue derived from the rent, leasing or hiring of assets such as land, buildings, vehicles or equipment to other businesses or individuals.
Repair and maintenance expenses	These are costs associated with work undertaken on plant and machinery etc. to maintain normal business operations.
Royalties expenses	These are payments made by one business for the use of rights owned by another company/person. They include Australasian Performing Right Association licence fees and payments under licensing arrangements.
Royalties income	This is the income received from selling the use of rights to another business or individual. It includes income under licensing arrangements.
Symphony and choral performances	These are performances of oratorio, classical and contemporary classical music. Included are philharmonic and youth orchestras, vocal ensembles and instrumental groups.

Technical/performing arts support staff	This item refers to employees whose main activities are to provide technical support to performing artists, (e.g. lighting technicians or set operators).
Telecommunication services	This item includes all payments (of a non-capital nature) for telecommunication services which engage wire, cable or radio transmission.
Total employment	This item includes working proprietors and partners of unincorporated businesses, permanent full-time and part-time employees and casual employees.
Total performances	This item refers to the total number of performances of a production for which an organisation had prime responsibility.
Travelling, accommodation and entertainment expenses	This item refers to the costs of transport and accommodation to staff which are incurred when business activities occur away from the normal place of business. Entertainment expenses are the costs incurred by a business for the provision of entertainment activities.
Volunteers	For the music and theatre production industry, this item refers to the number of volunteers who worked during the month of June 2000. For performing arts festivals, this item refers to the number of volunteers who assisted during the conduct of a festival and includes volunteer components of boards of management, fund raising committees and auxiliary members.
Wages and salaries	This item refers to payments accruing to all employees during the financial year including provisions for employee entitlements, severance, termination and redundancy payments. It excludes drawings of working principals and partners of unincorporated businesses.
Workers' compensation costs	This item refers to the compulsory insurance cover taken out by all employers, except for self-insured workers, according to legislative schemes to cover employees suffering injury or disease in the course or arising out of employment.

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