Planning for the Future

Statistical Profile:

Performing arts

Companion chapter to music, dance and theatre chapters

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Key points and contents

Introduction: the performing arts industries

Part one: Industry

SUPPLY

Employment

- Performing arts employment estimated at 41,700 people in 1996
- Artists and encoders make up 40 percent of performing arts employment
- Performing arts employment grew faster than total employment and at the same rate as all cultural employment 1986 to 1996
- Performing arts graduates have a lower rate of employment in arts occupations than other arts occupations
- Dance and drama graduates have a higher rate of unemployment than all other people employed
- In 1996, the full-time median income of most performing arts occupations was lower than for total employment, part-time median incomes tended to be higher
- Median incomes of performing arts occupations declined 1986 to 1996
- In 1996, the proportions of people born in a non-English-speaking country was lower for performing arts occupations than for total employment

Organisations

- Performing arts industry output grew faster than the rest of the economy 1975 to 1994
- In 1991, 47 percent of cultural organisations were performing arts organisations; growth in number of performing arts organisations similar to all cultural organisations from 1980 to 1991
- Performing arts industries running surpluses 1991 to 1997
- Financial structure of performing arts industry by industry strata
  - :music and theatre production
  - :performing arts venues
- Corporate sponsorship of performing arts declined between 1993 and 1996 while all arts sponsorship increased
- Performing arts sponsorship is more likely to be from medium and large firms than other art forms and cultural activities

Products

- More than 68,994 performances in 1995
- Price of live performances decreased in real terms from 1992 to 1996

DEMAND

Value of demand

- Household expenditure on live performances $471.9m in 1993-94
- A shift in preference toward live performances may have occurred between 1990 and 1994

Audiences

- Attendance rates for performing arts declined 1991 to 1999, except classical music, for which attendance rates increased
- Audience profiles (described in text)
- Differences between attenders and non-attenders 1999 (described in text)
- Other audience variables (described in text)

Part two: Sector

- Involvements in performing arts are predominantly undertaken as a performer, unpaid and not as part of a main job
- 10,500 students enrolled in tertiary performing arts courses in 1997, around 3 percent of all enrolments
- University enrolments in non-music performing arts courses grew more than all university enrolments from 1989 to 1997; enrolments in music courses grew less
- Vocational education enrolments in the performing arts declined 1990 to 1994, increased from 1995 to 1996
- Enrolments in year 12 non-music performing arts subjects increased more than total enrolments between 1985 and 1993

Part three: Funding

- Government funding of the performing arts was around $157.2 million in 1997-98
- Music funding and funding of venues increased faster than other performing arts and total cultural funding 1988-97

Australia Council funding

- 43 percent of Australia Council funding was distributed to the performing arts 1996/97
- Australia Council performing arts funding increased 9 percent in real terms 1989-1997, more than other core arts

Industry funding

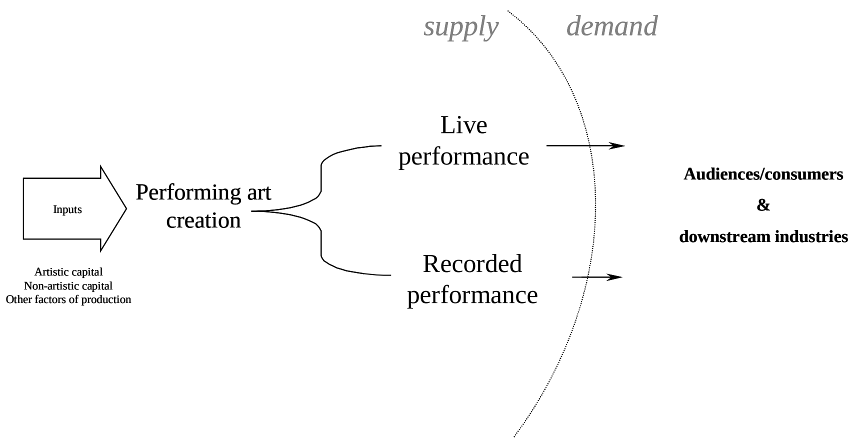
- Government subsidy per attendance increased between 1991 and 1997
- Government funding targetted more to performing arts production than to performing arts venues and services
- In 1997 government funding represented around 30 percent of the total income of the music and theatre production industry

References for all performing arts chapters

Introduction: the performing arts industries

The genesis of the performing arts industry is the creation of a performance artwork by a originators/creators/encoders (who use a variety of inputs but most importantly artistic capital, knowledge and skills). This ‘product’ may then be delivered to audiences in two main ways: as a live performance and/or as a recorded performance. It is common, or even traditional, to restrict the definition the ‘performing arts’ to the live stream only for practical reasons, although this carries a risk that analyses may be biased by definition.

Figure P.1: General representation of performing arts industries



Definitional inconsistency between music and the other performing arts
There is a common definitional inconsistency between music and the other performing arts with respect to the distinction between live and recorded industry streams. Analyses of the music industry often include the recorded stream (for example, Price Waterhouse, 1994), yet the recorded stream is rarely included in analyses of the other performing arts: the recorded streams of the other performing arts are more often seen as separate industries defined by the type of media utilised in supply, such as the film and television production industries. These industries are the audio-visual and kinaesthetic analogue to the recorded stream of the music industry, and are clearly related to live performing arts in both broad theoretical terms and in practice: the products are often similar, in some cases *the same product* merely distributed through recorded media; and they share many industry-specific inputs such as actors and directors and artistic capital.

That said, the recorded music industry is rarely defined as including one mode of distribution: radio. In terms of a value chain, radio is a retailer of music. The main practical problem of including radio in the music industries is that not all radio is music-related. Radio's music resources would have to be distinguished from radio resources devoted to non-music programming, which is impractical. Similar problems are encountered in other media, such as television (including pay TV's music channels) and web distribution.

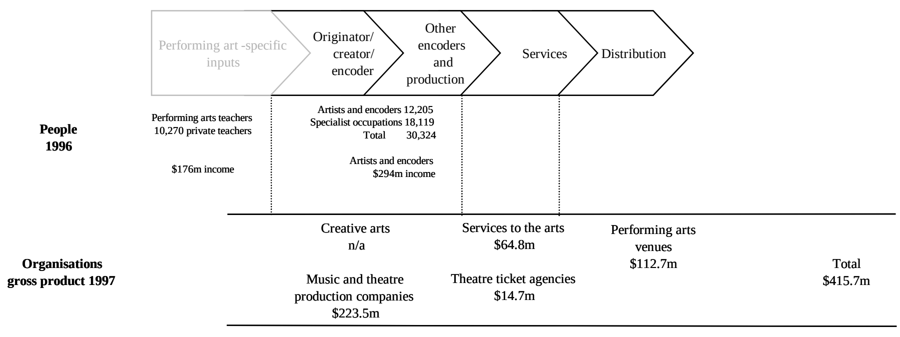
Other definitional inconsistencies are common: music analyses often include musical instrument manufacture and retail, since musical instruments are a specific and inextricable input into the creative process. Price Waterhouse (1994) does not consider musical instruments as part of the industry. The other performing arts rarely include analogous items, since specific inputs are more difficult to identify (such as the manufacture and retail of dance 'gear', ballet shoes being a rare identifiable example).

The analysis here defines the music industry differently to the other performing arts industries: the analysis in the music chapter is for both the live *and* the recorded industry streams; the analyses in the chapters on the other performing arts (dance and theatre) and this background chapter are for live industry streams only.

Part one: Industry

Figure P.2 sets out summary data across a value chain for the *live* performing arts industries. A similar value chain was constructed for the performing arts industries by DASET in 1992. This is attached for comparison.

Figure P.2: Value chain of live performance industry



Source: ABS, Guldberg(2000)

SUPPLY

Employment

Performing arts employment estimated at 41,700 people in 1996

Census data indicates that 30,369 people were employed in the performing arts in 1996. This figure is derived from census data in the usual way by adding together people employed in performing arts occupations with people in non-performing arts occupations employed in the performing arts industry (the performing arts industry being ‘music and theatre production’ and ‘performing arts venues’). A detailed breakdown is set out in figure P.3.

Census data underestimates actual employment by excluding two important populations: people employed in the performing arts as a second job; and performing arts teachers in formal education institutions. Estimates of the first population are possible for selected performing arts occupations by using data from Throsby and Thompson (1994). The estimates are shown in figure P.3 and the methodology used is set out in each of the music, theatre and dance chapters. Estimates of teachers employed in formal education institutions are not possible. The data shows that a more accurate estimate of numbers employed in the performing arts in 1996 is 41,700, although this remains an underestimate.

Artists and encoders make up 40 percent of performing arts employment

The data in figure P.3 also shows that artists and ‘encoders’ make up 40 percent of total performing arts employment, private teachers around one-third of the total. Nearly one out of every five people employed in the performing arts are in non-cultural occupations.

Figure P.3: Performing arts employment detailed breakdown,1996

Occupations	Number employed		*Percent of total*	*Estimate*
Artists/encoders				
Music director	345			
Singer	1,244			
Instrumental musician	5,533			*12,086*
Composer	261			*1,108*
Musicians/related professionals nfd & nec	103			
Actor	1,506			*4,735*
Dancer/choreographer	1,027			*1,473*
Actors/dancers/ related professions nfd and nec	1,573			
Producers and directors, perfoming arts industry*	613			
Sub total		12,205	*40*	*23,280*
Specialised support occupations				
Production assistant (theatre)	72			
Other cultural occupations, performing arts industries[1]	315			
Performing arts support workers nfd and nec	443			
Support occupations, performing arts industries*	1,151			
Sub total		1,981	*6*	
Related occupations				
Performing arts teachers (educational institutions)	*n/a*			
Music teacher (private)	7,113			
Dance teacher (private)	2,761			
Drama teacher (private)	396			
Teachers sub total	*10,270*			
Piano tuner	361			
Sub total		10,631	*35*	
Specialist and cultural occupations (as above)		24,817	*81*	
Non-cultural occupations, performing arts industries		5,822	*19*	
Total performing arts		**30,639**	*100*	*41,714*

*Cross-classified by ASIC categories 'music and theatre production' and 'performing arts veneus'. See Appendix AP.
[1]Eg designers, painters, graphic and fashion designers and librarians

Source: ABS Census, Throsby and Thompson (1994)

Performing arts employment grew faster than total employment and at the same rate as all cultural employment 1986 to 1996

Trend data is not available for all performing arts employment as calculated for 1996 above. Guldberg (2000), however, does allow trends to be estimated for the some performing arts occupational groups. Figure P.4 summarises, showing that performing arts professions have grown at a faster rate than total employment over the ten years to 1996. Much of the growth has been due to increases in the number of private music and dance teachers.

Figure P.4: Employment in performing arts occupations 1986 to 1996

	Numbers			*Percent change*	
Occupation	1986	1991	1996	*1986-1991*	*1991-1996*
Musicians and related professions	6,100	7,000	7,620	*14.8*	*8.9*
Actors, dancers and related professions	2,800	3,100	4,110	*10.7*	*32.6*
Music teachers (private)		5,500	7,110		*29.3*
Dance teachers (private)		1,800	2,760		*53.3*
Drama teachers (private)		300	400		*33.3*
Selected performing arts professions		17,700	22,000		*24.3*
Cultural professions		93,000	115,700		*24.4*
Total employment				*9.1*	*5.6*

Source: Guldberg (2000)/ABS

Performing arts graduates have a lower rate of employment in arts occupations than other arts occupations

Figure P.5 summarises unpublished employment data from the 1996 census. The data suggests that around 17 percent of people with performing arts qualifications are employed in arts occupations compared to 21 percent of all arts graduates, or 14 percent of art and craft graduates, 41 percent of graphic design graduates and 15 percent of fashion design graduates. Data indicates that the majority of arts-qualified people working in non-arts occupations are likely to be employed as teachers.

Dance and drama graduates have a higher rate of unemployment than all other people employed

Figure P.5 also shows that in 1996 the unemployment rate among dance and drama graduates was 13.4 percent compared to 8.8 percent for total Australian employment. The unemployment rate for people with music qualifications was 7.6 percent.

Figure P.5: Labour force status of people with performing arts qualifications, 1996

	Employed in arts occupations*		**Employed in other occupations**		**Unemployed**		**Total in labour force**	
Qualification	Number	*percent*	Number	*percent*	Number	*percent*	Number	*percent*
Music	2,022	*17*	8,962	*75.4*	901	*7.6*	11,885	*100*
Drama and dance	1,223	*16.9*	5,029	*69.7*	967	*13.4*	7,219	*100*
All arts		*21*		*68.6*		*10.4*	84,719	*100*
Total employment						*8.8*		

* Arts teaching included in 'other' occupations.

Source: ABS census unpublished data

In 1996, the full-time median income of most performing arts occupations was lower than for total employment, part-time median incomes tended to be higher

Figure P.6 shows that annualised full-time median incomes of people employed in performing arts occupations tended to be lower than all cultural occupations and total employment. Part-time median incomes tended to be higher than all cultural occupations and total employment. Median incomes of private music teachers tended to be lower than other occupations across both full-time and part-time employment.

Figure P.6: Performing arts incomes,1996

	Median annual income, $[1]			
Occupations	Full-time		Part-time	
Music director	43,591	+	16,339	+
Singer	27,681		17,772	+
Instrumental musician	30,029	+	16,802	+
Composer*	28,075		-	
Musicians/related professionals nec*	-		-	
Musicians/related professionals nfd	29,291		15,919	+
Actor	27,385		17,938	+
Dancer/choreographer	24,596		17,136	+
Actors/dancers/ related professions nec	24,896		15,420	+
Actors/dancers/ related professions nfd*	-		-	
Average of median incomes above	*29,443*		*14,666*	
Production assistant (theatre)*	-		-	
Performing arts support workers nec	32,101	+	21,087	+
Performing arts support workers nfd*	-		-	
Music teacher (private)	28,602		12,179	
Dance teacher (private)	21,350		11,065	
Drama teacher (private)	30,148	+	12,674	
Piano tuner	24,081		14,296	
Total cultural occupations	32,331	+	15,406	+
Total employment	29,424		14,777	

* Calculation prone to large standard error due to small numbers employed in occupation

[1]Full-time = 35 hours or more per week; + signifies if income is above average for total employment

Source: ABS unpublished census 1996

Median incomes of performing arts occupations declined 1986 to 1996

Figure P.7 indicates that median incomes of performing arts occupations declined relative to total employment from 1986 to 1996. The trend is more pronounced between 1991 and 1996, with median incomes for performing arts occupations continuing to decline while median incomes for total employment increased. Any comparison of census median income data should, however, take account of hours worked. Figure P.8 shows the proportion of people working 35 hours and more for selected performing arts occupations. For acting and dancing occupations, the data indicates that much of the relative decline in median incomes might be explained by a reduction in hours worked. The proportion of people working 35 hours and over declined between 1991 and 1996 by 6 percentage points for actors and 5 percentage points for dancers/choreographers, compared to just a 1 point decline for total employment. Census data does not allow for a more detailed analysis of these occupations. A more detailed analysis for music occupations is contained in the music chapter.

Figure P.7: Incomes, performing arts occupations 1986 to 1996

Occupation	Median income at 1996/97 prices ($) 1986	1991	1996	*Annualised percentage change 1986-96*
Musicians and related professions	23,700	21,700	20,500	*-1.4*
Actors, dancers and related professions	21,800	20,500	19,400	*-1.2*
Music teachers (private)	na	13,100	14,400	
Dance teachers (private)	na	12,800	13,500	
Drama teachers (private)	na	14,700	16,200	
Total employment	26,500	22,900	25,500	*-0.4*

Source: Guldberg (2000)/ABS

Figure P.8: Hours worked, performing arts occupations 1991 and 1996

Selected occupations	Percent working 35+ hours 1991	1996
Music director	67	64
Singer	21	24
Instrumental musician	26	26
Composer	67	67
Actors	44	38
Dancer/choreographer	40	35
All performing arts occupations	29	27
Total employment	69	68

Source: Guldberg (2000)/ABS

In 1996, the proportions of people born in a non-English-speaking country was lower for performing arts occupations than for total employment

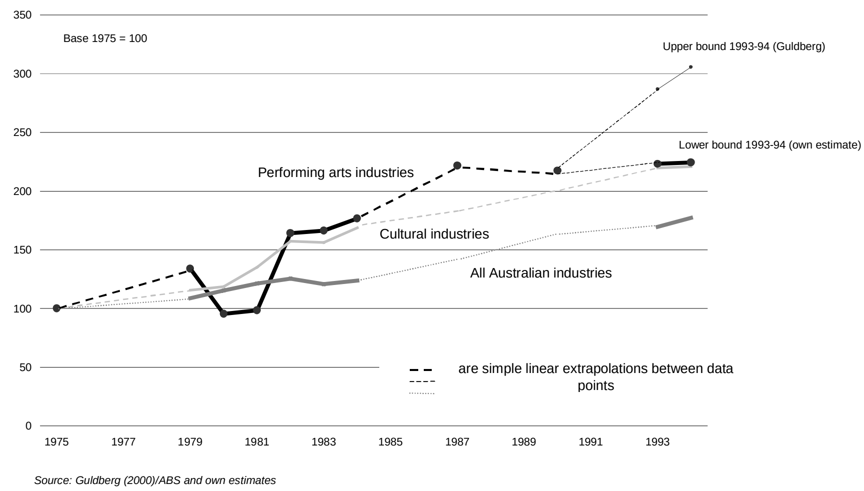
In 1996, 13.4 percent of the Australian workforce were people born in non-English-speaking countries, yet just 7.3 percent of actors and dancers and 9.4 percent of musicians were born in non-English-speaking countries. Data on the proportion of indigenous Australians in performing arts occupations is in the Aboriginal and Torres Strait Islander chapter.

Organisations

Performing arts industry output grew faster than the rest of the economy 1975 to 1994

From 1975 to 1994 the performing arts industry grew nearly twice as much as the rest of the economy. Performing arts output grew strongly over the mid 80s, levelling off from 1984 to 1987. Data points for 1993 and 1994 are estimates only: the upper bound is from Guldberg (2000); the lower bound is from own estimates. The lower bound is likely to be more accurate, as it is more in line with trend employment data from above (which indicates that performing arts employment increased at around the same rate as all cultural employment from 1991 to 1996). Data on the number of organisations next suggest that the growth in output in the 80s may have occurred predominantly in theatre organisations. Australia experienced recessions (declining GDP) in the early ‘80s and early ‘90s. The data in figure P.9 suggest that these recessions impacted on the performing arts industry (indeed, the performing arts seem to have *led* into each recession). The total cultural industries appear to have experienced slowing growth, but not a decline in growth during the recessions.

Figure P.9: Index of output 1975 to 1994

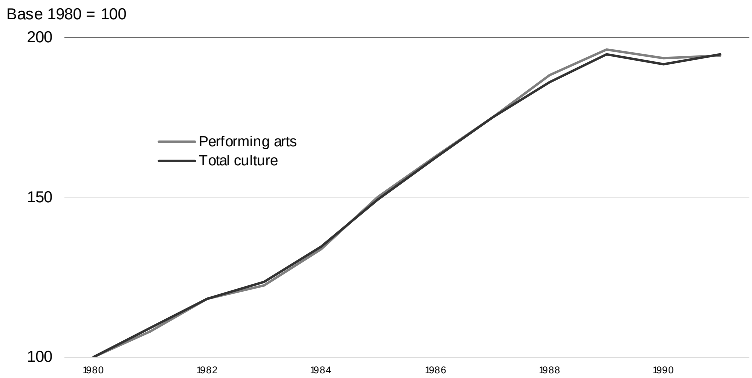


Source: Guldberg (2000)/ABS and own estimates

In 1991, 47 percent of cultural organisations were performing arts organisations; growth in number of performing arts organisations similar to all cultural organisations from 1980 to 1991

The 420 performing arts organisations recorded for 1991 in Guldberg (2000) made up 47 percent of cultural organisations. Of these performing arts organisations, 54 percent are music organisations, 38 percent are theatre organisations and 8 percent are dance organisations. From 1980 to 1991 the number of performing arts organisations grew at around the same rate as all cultural organisations. The number of theatre organisations grew more, while the number of dance and music organisations grew less (see respective chapters). In 1986 there was one performing arts organisation per 45,510 Australians. In 1991 there was one per 41,150 Australians.

Figure P.10: Number of performing arts organisations 1980-91



Source: Guldberg

Performing arts industries running surpluses 1991 to 1997

Figure P.11 shows surplus and deficits in the performing arts from various sources. The ABS' 1991 survey recorded a surplus of $21.5 million for 459 performing arts production businesses. The 1997 survey covered 881 businesses for a total surplus of $2.5 million. Performing arts venues and service organisations had larger surpluses. The 31 organisations covered in the Major Performing Arts Inquiry (MPAI) ran deficits from 1992 to 1997.

Figure P.11: Surpluses and deficits in the performing arts industry

	$m 1991	1992	1997
Music and performing arts organisations	21.5		
Music and theatre production			2.5
Performing arts venues			11.2
Services to the arts			22.6
Total			36.1
MPAI 1997 deficits		-2	-2.9

Source: ABS 1991 and 1997; MPAI (1999)

Financial structure of performing arts industry by industry strata

Figure P.12 presents summary data on the structure of the performing arts industries for 1997. Music and theatre production companies accounted for 63 percent of business, 57 percent of gross product and raised nearly half of their income from the box office. Their 'other income' was largely from private donations (and particularly sponsorship income, which made up half of other income). Almost a quarter (24 percent) of music and theatre production companies' expenditure went on artist employment, 20 percent on non-artist labour costs. More detailed analysis on performing arts production companies and performing arts venues is set out below. Further analysis of government funding is set out in part 3 of this chapter.

Figure P.12: Perfoming art industry structure 1997

		Percentages			
	1997	*Music and theatre production*	*Performing arts venues*	*Services to the arts*	*Total*
Number of:					
Businesses	1,399	*63*	*11*	*26*	*100*
Performing arts spaces	362	*13*	*87*	*0*	*100*
Employment	13,359	*46*	*42*	*13*	*100*
Income ($m)					
Government	294	*30*	*27*	*7*	*23*
Box office	342	*45*	*23*	*0*	*27*
Other	645	*25*	*50*	*93*	*50*
Total	1,281	*100*	*100*	*100*	*100*
Expenditure ($m)					
Non-arts labour*	255.8	*20*	*31*	*13*	*21*
Artists' labour*	114.7	*18*	*2*	*0*	*9*
Contract payments to performers/artists	118.7	*6*	*2*	*24*	*10*
Other	756	*57*	*65*	*64*	*61*
Total	1,245	*100*	*100*	*100*	*100*
Industry gross product	401	*56*	*28*	*16*	*100*

* Non-wage costs distributed evenly between arts and non-arts labour

Source: ABS Performing Arts Industries 1996-97

Music and theatre production

In 1997, 25 percent of music and theatre production businesses were government subsidised, accounting for 58 percent of the industry's gross income. Government funding represented half (52 percent) the income of these subsidised organisations and nearly a third (30 percent) of the income of the total industry.

Figure P.13 shows that popular music businesses were the most numerous and employed the most people (besides 'other' genre businesses), but 'musicals' businesses had the greatest gross revenue and opera the highest average revenue per business.

Figure P.13: Music and theatre production by performing art type

	Number of businesses	Employment	*Average no. employees*	FTEs*	Income $m	Income per business	Income per FTE
Musical	56	591	*11*	471	140.2	2.5	0.30
Popular music	363	1056	*3*	732	76.2	0.2	0.10
Opera	18	659	*37*	568	66.8	3.7	0.12
Drama	121	859	*7*	678.5	58.3	0.5	0.09
Dance	36	557	*15*	445.5	34.5	1.0	0.08
Symphony and choral	46	633	*14*	420.5	32.3	0.7	0.08
Other	238	1727	*7*	1258	185.8	0.8	0.15
Total	881	6082	*7*	4573.5	594.3	0.7	0.13

*Full-time plus half part-time

Source: ABS Performing arts industry 1996-97

Performing arts venues

Figure P.14 indicates that from 1968 to 1998 the number of cultural performance venues who are members of APACA increased steadily, but that the average capacity in 1998 was lower than in 1968.

Figure P.14: Performance venues and capacity 1968 to 1998

	1968	1978	1988	1998
Cultural centres (no.)	14	29	62	82
Theatres (no.)	23	60	141	189
Cultural centres and theatres (no.)	37	89	203	271
Capacity (seats)	15,853	40,867	80,080	100,669
Average capacity/venue (seats)	428	459	394	371

Source: Guldberg (2000)

Corporate sponsorship of performing arts declined between 1993 and 1996 while all arts sponsorship increased

As figure P.15 shows, corporate sponsorship of the performing arts declined from $34m to $29m between 1993 and 1996. The decline was due largely to a $6.6m drop in sponsorship of music. Any interpretation of trends within art forms is hindered by the volatility of the data. A longer time period is required.

Figure P.15: Corporate sponsorship of the performing arts 1993 to 1996

Art form	$m 1993	1996	*Percent change*
Music	14.7	8.1	*-45*
Theatre	8.3	6.9	*-17*
Opera/music theatre	6.2	10.3	*66*
Dance	3.4	2.1	*-38*
Other performing arts	1.4	1.3	*-7*
Total performing arts	34	28.7	*-16*
All arts sponsorship	57	65	*13*

Source: Australia Council Corporate Sponsorship of the Arts

Performing arts sponsorship is more likely to be from medium and large firms than other art forms and cultural activities

Data on the value of sponsorship by art from is not available from the ABS' Business Sponsorship of Cultural Activities 1996-97. The study does, however, provide a breakdown of art forms by the number of businesses who provided sponsorship. Figure P.16 summarises. Medium and large firms dominate the market for music and performing arts sponsorship. Between 40 and 50 percent of music and performing arts sponsorship is from large firms, compared to just 10 percent for all art and cultural activities.

Figure P.16: Businesses sponsoring the performing arts 1996-97

Art form	Number of businesses by size: Small	Medium	Large	Total
Music	30	131	118	278
Performing arts (ex-music)	24	157	162	343
All art and culture	1,985	625	288	2,898

Source: ABS Business Sponsorship of Cultural Activities 1996-97

Products

More than 68,994 performances in 1995
In 1996-97, organisations in the ABS' performing arts industry survey put on 68,994 performances, with an average attendance of 185. Figure P.17 shows the breakdown by type of performing art. Popular music performances were the most numerous, although smaller on average than other performances. Opera performances had the highest average attendance per performance (1,000 per performance).

Figure P.17: Paid performances by performing arts venues, 1997

	Performances	Attendance per performance
Popular music	30,681	102
Drama	10,723	170
Musical	4,160	790
Dance	1,491	365
Classical music	707	721
Opera	519	1000
Other	20,712	144
Total	68,994	185

Source: Guldberg (2000)/ABS

Price of live performances increased in real terms from 1992 to 1997
The MPAI report shows that between 1992 and 1996, the ticket prices of 31 major performing arts organisations rose in real terms by 1.7 percent. If the organisations involved in the inquiry are assumed to be price leaders, this data might provide an indication that performing arts ticket prices *in general* increased relative to other prices over the same period.

DEMAND

Value of demand

Household expenditure on live performances $471.9m in 1993/94
In 1993/94, total household expenditure on live performances was $471.9m (in 1993/94 prices) or an average of $1.37 per week per household (all figures are calculated at 1996/97 prices). Figure P.18 shows that household expenditure on live performances declined from 1984 to 1990 and rose from 1990 to 1994. The swings in expenditure are similar to those for all cultural items, but more pronounced than for total expenditure.

A shift in preference toward live performances may have occurred between 1990 and 1994

Such movements are likely to be due to changes in the relative price of live performances. Data on prices in the previous section indicate that live performances may have become relatively cheaper between 1992 and 1996. If so, and if the demand for live performances is inelastic, which is suggested by limited empirical evidence (Heilbrun and Gray, 1993; 94), then the increase in household expenditure between 1990 and 1994 represents a shift in consumer preference toward live performances.

Figure P.18: Household annual expenditure on live performances 1984 to 1994

	(average annual $ at 1996/97 prices)		
	1984	1989-90	1993-94
Live performances	61.24	57.92	71.32
Percent change		*-5*	*23*
All cultural items	786.18	736.02	885.18
Percent change		*-6*	*20*
Total expenditure			
Percent change		*-1*	*6*

Source: Guldberg (2000)/ABS

Audiences

Attendance rates for performing arts declined 1991 to 1999, except *classical music, for which attendance rates increased*

Figure P.19 shows that the number of people reporting attendance at selected performing arts venues in 1999. There was a decline in attendance *rates* across almost all performing arts genres throughout the 90s, as summarised in figure P.20. The decline from 1995 to 1999 is particularly pronounced as it occurred at a time when cultural attendance rates in general increased. The greatest decline in performing arts attendance rates occurred in opera/musical (data not presented here suggests that the decline was due mainly to a decline in attendance rates of musicals rather than opera). Classical music was the only genre to have experienced an increase in attendance rates in the 90s, from 7.7 to 8.8 between 1995 and 1999. The increase occurred across all ages, with the greatest increases in the attendances rates of people aged 25-34 and 55+.

Figure P.19: Attendance at performing arts venues 1999

	1995	1999	change (no.)
	('000)		
Popular music	3,790.7	3,781.8	- 8,900
Theatre	2,336.3	2,464.9	128,600
Opera or musical	2,722.1	2,430.4	- 291,700
Dance	1,407.5	1,345.0	- 62,500
Classical music	1,081.3	1,310.3	229,000
All culture	11,670.0	12,615.8	945,800

Source: ABS Attendance at selected cultural venues

Figure P.20: Attendance rates at performing arts venues 1991 to 1999

				Change on previous year	
	1991	1995	1999	*1995*	*1999*
Popular music	n/a	26.9	25.4	*-2*	*-2*
Theatre	n/a	16.6	16.5	*0*	*0*
Opera or musical	n/a	19.3	16.3	*-2*	*-3*
Dance	n/a	10.0	9.0	*-1*	*-1*
Classical music	n/a	7.7	8.8	*-1*	*1*
All culture	n/a	82.9	84.6	n/a	*2*

Source: ABS Attendance at selected cultural venues

Audience profiles

There are two main sources of data for performing arts audience profiles: the Australia Council's (1999) *Selling the Performing Arts* and the ABS series *Attendance at Selected Cultural Venues*. Comparisons can be made between these two studies for 1999:

Frequency of attendance: Both studies indicate that popular and classical music performances have a higher frequency of attendance than other performing arts. Both agree that musicals are particularly low in frequency attendance. The studies disagree about the frequency of attendance at dance performances: the ABS shows lower frequency, Australia Council higher frequency.

Qualifications of attendees: Both studies indicate that audiences tend to be skewed toward the university qualified (the ABS shows that attendance at popular music is the exception). Both studies also suggest that attendances by people with a 'tech' or TAFE qualification are particularly low (lower than people with HSC only).

Age: The studies agree that young people have particularly low attendances at classical music performances (according to the ABS, a noticeably older audience than theatre, dance or even opera). But the studies disagree about the age of theatre attendees: the ABS shows a much younger profile than Australia Council. The ABS also shows a younger profile for dance audiences.

Differences between attenders and non-attenders 1999
Australia Council (1999) study highlights a number of differences between attenders and non-attenders of the performing arts. Profiles are attached. Attenders are more likely to be city dwellers than non-attenders. The proportion of women among attenders is higher than non-attenders (53 percent versus 44 percent). Attenders tend to be more qualified, white collar workers and higher earners. Attenders were more likely to have learnt a performing art (and that those who had tended to be heavier users).

Other audience variables
Australia Council (1999) highlights a number of other audience factors.

- Value for money: the two art forms with the highest perceived value for money (as measured on the last performance attended) were multicultural/aboriginal music (56 percent responding that value for money was 'very good') and classical/choral music (55 percent). The two lowest were mime/circus and contemporary/experimental music.
- Advantages of movies over live performance: Cheapness was by far the most popular perceived advantage of movies over live performances (42 percent of respondents). Less need to travel was second most important advantage (30 percent).
- Advantages of live performances over movies: 50 percent responded that meeting/seeing performers was an advantage of live performances over movies, while 38 percent responded that atmosphere was an advantage of live performances.

Part two: Sector

Involvements in performing arts are predominantly undertaken as a performer, unpaid and not as part of a main job
Just over three-quarters (77 percent) of involvements in the performing arts are undertaken as a performer. Some payment is received for 27 percent of involvements, while 14 percent of involvements are as part of a main job (or just over half of *paid* involvements). Performing arts make up around 8 percent of all cultural involvements.

Trend data from series indicates that from 1993 to 1999:

- the proportion of all performing arts involvements undertaken as a performer increased
- the proportion of all performing arts involvements undertaken as part of a main job increased (largely in the non-music performing arts)
- the proportion of musical involvements increased.
- the total number of involvements increased, although the data are gathered using different methodologies and extra caution must be exercised when making comparisons (particularly for 1999, when there was a large increase in recorded involvements across the board).

Figure P.21: Involvements in the performing arts 1993 to 1999

	1993	1997	1999
Number ('000)	379.1	386.3	541.9
Proportion as music (%)	*53*	*58*	*64*
Proportion as performer (%)	*72*	*72*	*77*
Proportion receiving some payment (%)	*23*	*24*	*27*
Proportion as part of main job (%)	*n/a*	*7*	*14*

Source: ABS Work in selected culture/leisure activities

Figure P.22 sets out the same data for non-music performing arts, which are likely to consist mainly of dance and drama. The non-music performing arts have smaller proportions of involvements as performers, involvements receiving some payment and involvements as part of a main job. Trends in involvements are similar to those for performing arts including music.

Figure P.22: Involvements in the non-music performing arts 1993 to 1999

	1993	1997	1999
Number ('000)	177.9	163.1	196.2
Proportion as performer (%)	*58*	*62*	*71*
Proportion receiving some payment (%)	*16*	*18*	*24*
Proportion as part of main job (%)	*n/a*	*6*	*17*

Source: ABS Work in selected culture/leisure activities

Education

10,500 students enrolled in tertiary performing arts courses in 1997, around 3 percent of all enrolments

Figures P.23 and P.24 set out data for enrolments at university and vocational and training performing arts courses for 1997. The vocational and training data is an underestimate, as performing arts enrolments are not able to be disaggregated from the course category ‘visual and performing arts general’. From the data in the two figures, there was an estimated total of around 10,500 enrolments in tertiary performing arts courses in 1997, representing around 3 percent of enrolments in all courses. Music has the largest enrolments of any single art form in both types of institution.

Figure P.23: Enrolments at higher education institutions, 1997*

Course	Number enrolled	*Percent of arts*
Performing arts general	562	*3*
Dance	358	*2*
Dramatic arts	1,395	*7*
Music	4,228	*20*
		Percent of total enrolments
Total arts	21,387	*3.2*
Total enrolments	658,827	

* Overseas students not included

Source: ABS unpublished and Yearbook 2000

Figure P.24: Enrolments at vocational education institutions, 1997*

Course	Number enrolled	*Percent of arts*
Dramatic arts	408	*1*
Music	3,460	*10*
		Percent of total enrolments
Total arts	36,044	*2.5*
Total enrolments[1]	1,444,890	

[1] Total is an own estimate from 1996 and 1998 data and does not include enrolments for recreational purposes

* Overseas students not included

Source: ABS unpublished and Yearbook 2000

University enrolments in non-music performing arts courses grew more than all university enrolments from 1989 to 1997; enrolments in music courses grew less

Figure P.25 sets out indexes of enrolments in performing arts courses at Australian Universities from 1989 to 1997. EFTSU stands for 'equivalent full-time student units', a measure of enrolments that accounts for changes in the proportion of students enrolled part-time. The data shows that enrolments in music courses increased at a slower rate than all university enrolments. After strong growth in the early '90s, enrolments in the non-music performing arts declined in the middle of the decade and grew strongly again from 1995 to 1997. Over the whole period, enrolments in the non-music performing arts grew more than total enrolments. It should be noted that over the late '80s and early '90s a number of creative arts schools were merged into universities under the Unified National System (UNS).

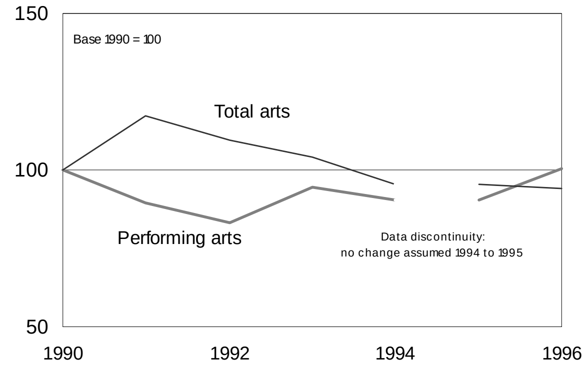
Figure P.25: University enrolments in performing arts courses (EFTSU) 1989 to 1997

Source: Guldberg (2000)/DETYA

Vocational education enrolments in the performing arts declined 1990 to 1994, increased from 1995 to 1996

Figure P.26 compares performing arts enrolments to total arts enrolments at vocational and training institutions (TAFE, adult and community and private education providers). Both declined 1990 to 1994, although all arts increased initially before declining. The data is discontinuous between 1994 and 1995. From 1995 to 1996, performing arts enrolments increased wile all arts enrolments continued to decline. No data is available on the total number of students at vocational institutions.

Figure P.26: Enrolments at vocational and training institutions 1990-96

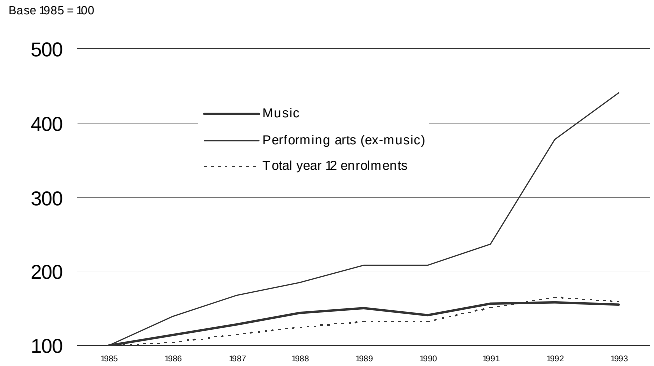


Source: Guldberg (2000)

Enrolments in year 12 non-music performing arts subjects increased more than total enrolments between 1985 and1993

In 1993, 15,313 students were enrolled in tertiary-accredited year 12 performing arts subjects. This was 1.6 percent of all year 12 enrolments at the time. Half of these enrolments were for music subjects. Figure P.27 shows that between 1985 and 1993 year 12 music enrolments increased at around the same rate as total enrolments, but that there was marked growth in enrolments in other performing arts subjects, especially between 1991 and 1993.

Figure P.27: Year 12 enrolments in tertiary-accredited arts subjects 1985-93



Source: SERCARC (1995)

Part three: Funding

Government funding of the performing arts was around $157.2 million in 1997/98

Figure P.28 shows that in 1997/98, governments allocated $157.2 million to core performing arts activities (it should be noted that this does not take account of performing arts in other categories, such as community cultural activities and other culture nec). More than half (56 percent) of funding to the core performing arts comes from federal sources. Music receives the most. The $64.9 million allocated to music represents 70 percent of performing arts funding allocations (or 1.8 percent of total cultural funding). Over three-quarters (78 percent) of music funding is from federal government sources, compared to 40 percent of funding to other performing arts. Data for expenditure on cultural venues and public and civil halls is included as a measure of public investment in infrastructure. Trends in this type of funding may be more pertinent than absolutes, and this is investigated in the next section.

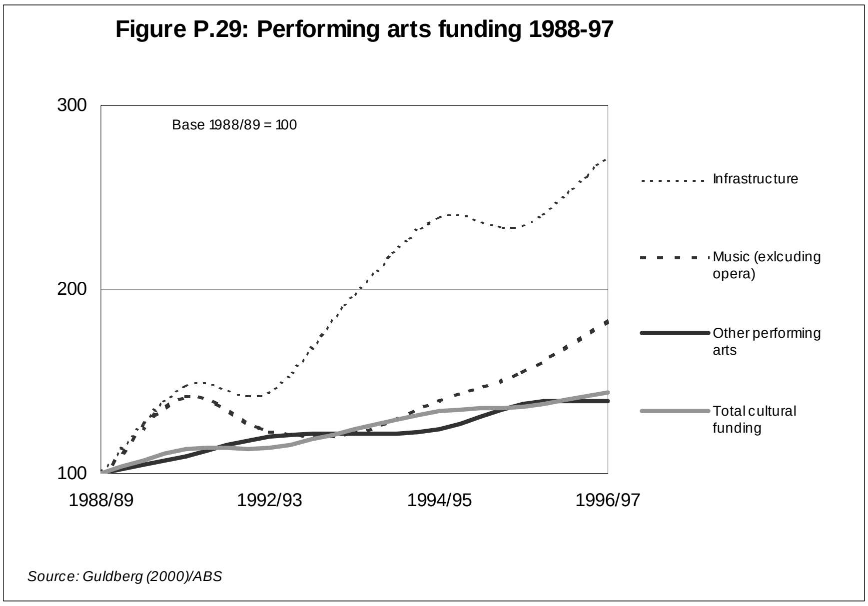
Figure P.28: Performing arts funding 1997/98

	$m 1997/98			
	Fedral (including AC)	State and territory	Local government	Total
Music (excluding opera)	50.8	12.3	1.8	64.9
Other performing arts	36.7	50.1	5.5	92.3
Total 'core' performing arts	87.5	62.4	7.3	157.2
Cultural venues		104.2	56.6	160.8
Public halls and civic centres		1	161.3	162.3
Total infrastructure	0	105.2	217.9	323.1
Total	87.5	167.6	225.2	480.3

Source: ABS Cultural Funding

Music funding and funding of venues increased faster than other performing arts and total cultural funding 1988-97

Figure P.29 indicates that between 1988/89 and 1996/97government investment in infrastructure increase more rapidly than both other performing arts funding and total cultural funding. The higher rate of growth was due largely to an increase in government investments in public and civic halls. Allocations to music also increased more than other performing arts and total cultural funding. The proportion of total cultural funding going to music increased from 0.9 percent in 1988/89 to 1.8 percent in 1997/98 (as derived from figure P.28 above).



Australia Council funding

43 percent of Australia Council funding was distributed to the performing arts 1996/97

Figure P.30 shows that in 1996/97 the Australia Council distributed $30.4m to the performing arts. This represented 43 percent of its funding (12 percent for music (excl. opera) and 31 percent for other performing arts).

Figure P.30: Australia Council funding 1996/97

Category	$m		Percent of total		Percent change on 1993*
All performing arts	30.4		*43*		*9*
Music (excluding opera)		8.6		*12*	*30*
Other performing arts		21.8		*31*	*1*
Visual arts, crafts and photography	8.3		*12*		*-3*
Community and cultural activities	6.6		*9*		*8*
Literature and publishing	5.1		*7*		*7*
Other	19.3		*27*		*data discontinuous*
Total	70.3		*100*		

* Real in 1996/97 dollars, reference period chosen due to large structural change in music funding 1992 to 1993

Source: Guldberg (2000)

Australia Council performing arts funding increased 9 percent in real terms 1989-1997, more than other core arts

Figure P.30 also indicates that performing arts funding increased by 9 percent in real terms between 1989 and 1997, due largely to a $3.2m real increase in music funding. Other core arts funding was broadly stable in real terms (varying from $100,000 to $200,000 in real terms).

Industry funding data

Government subsidy per attendance increased between 1991 and 1997
In 1996/97, government subsidy of subsidised performing arts organisations represented $40 per attendance. This is more than twice the $19 per attendance recorded in 1991 (inflated to 1997 prices using the CPI, which increased over the period by 14 percent). Trends in subsidy per attendance for different types of performing art are only possible for dance and symphony/choral organisations. Between 1991 and 1997 the subsidy per attendance of dance organisations increased from $17 to $23, while the subsidy per attendance for symphony and choral organisations dropped from $35 to $29 (all prices are inflated in the manner described above). Great caution should be exercised in comparing the 1991 to the 1997 figures. The two surveys are based on different organisational populations, so comparisons may be inaccurate (the 1991 survey covered 311 subsidised organisations, the 1997 survey covered 220 subsidised organisations).

Government funding targetted more to performing arts production than to performing arts venues and services
Figure P.31 shows that in 1996/97 nearly two-thirds (61 percent) of government funding of the performing arts industries went to music and theatre production (this includes all performing arts production, ie music, musical theatre, theatre and dance). Government funding represented 30 percent of the total income of music and theatre production organisations, 27 percent of the total income of performing arts venues and 7 percent of the income of organisations providing services to the performing arts.

Figure P.31: Performing arts industry government funding by industry strata, 1997

	$m Government funding	*Percent of funding*	$m Total income	*Funding/income*
Music and theatre production	179.3	*61*	594.3	*30*
Performing arts venues	88.9	*30*	331.6	*27*
Services to the arts	26.1	*9*	355.5	*7*
Total	294.3	*100*	1,281.4	*23*

Source: ABS Performing arts industries

In 1997 government funding represented around 30 percent of the total income of the music and theatre production industry
Figure P.32 shows the proportion of income of the music and theatre production industry made up by government funding. Government funding represents between 30 and 40 percent of the income of all symphony and

choral, dance and opera organisations and less than 4 percent of all popular music and musical organisations.

Figure P.32: Music and theatre production government funding by performing arts industry genre, 1997

	1997 ($m)		
	Government funding	Total income	*Government funding as percent of total*
Popular music	2.9	76.2	*4*
Symphony and choral	13	32.3	*40*
Dance	12.2	34.5	*35*
Drama	*n/a*	58.3	*n/a*
Opera	21	66.8	*31*
Musical	0.5	140.2	*0.4*
Other			
Total	179.3	594.3	*30*

Source: ABS Performing arts industries 1996-97

APPENDIX AP

Breakdown of performing arts occupations cross-classified by performing arts industries

	Performing arts industries Numbers employed 1996		
	Music and theatre production	Performing arts venues	Total
Producers, directors and artist occupations, perfoming arts industry			
Media producer	90	37	127
Artistic director	54	22	76
Artists nfd	150	18	168
Radio presenter	63	28	91
Art director	16	7	23
Director	73	32	105
Technical director	9	3	12
Stage directors nec	8	3	11
Total			613
Support occupations, performing arts industries			
Stage manager	126	56	182
Theatre/cinema manager	106	109	215
Sound technician	133	57	190
Light technician	73	99	172
Production assistant (film/tv/radio)	13	3	16
Make up artist	11		11
Ticket collector/usher	112	253	365
Total			1151

Source: ABS Census

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