

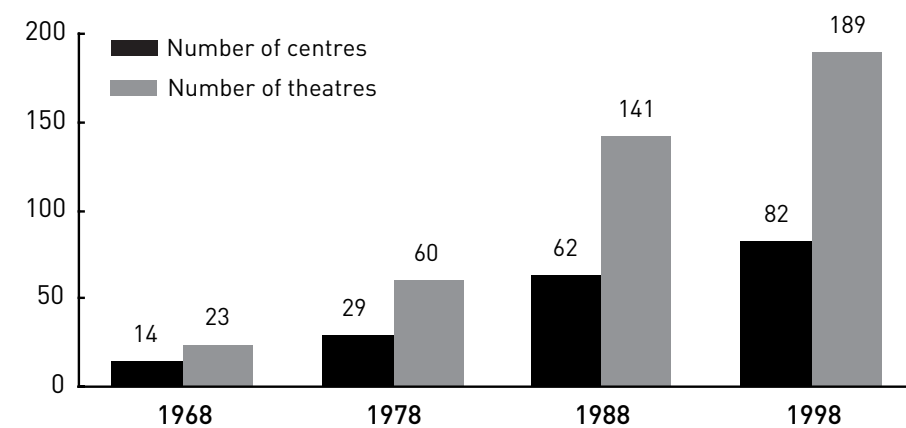
chapter 6 OTHER INDICATORS

CULTURAL CENTRES

All members of the Australian Performing Arts Centres Association (APACA) were contacted after gaining permission from APACA directors. The survey benefited from the latest *APACA Member & Venue Directory* (1998), which shows seating capacity for individual venues. In 1992, when we collected data for the *Artburst!* study, 100% of cultural centre managements responded; in 1998, we obtained the relevant information for all but one centre (representing one theatre). Such high response rates are not often achieved and APACA members are to be congratulated for their cooperation.

The purpose of the survey was to establish the year each venue was established and any changes since establishment, to confirm the seating capacity shown in the 1998 *Directory*, eliminate possible double counting of venue capacity, and estimate any seating capacity replaced by the new venue. We also identified outdoor venues, which were excluded from the main calculations.

6.1: Number of cultural centres and individual theatres

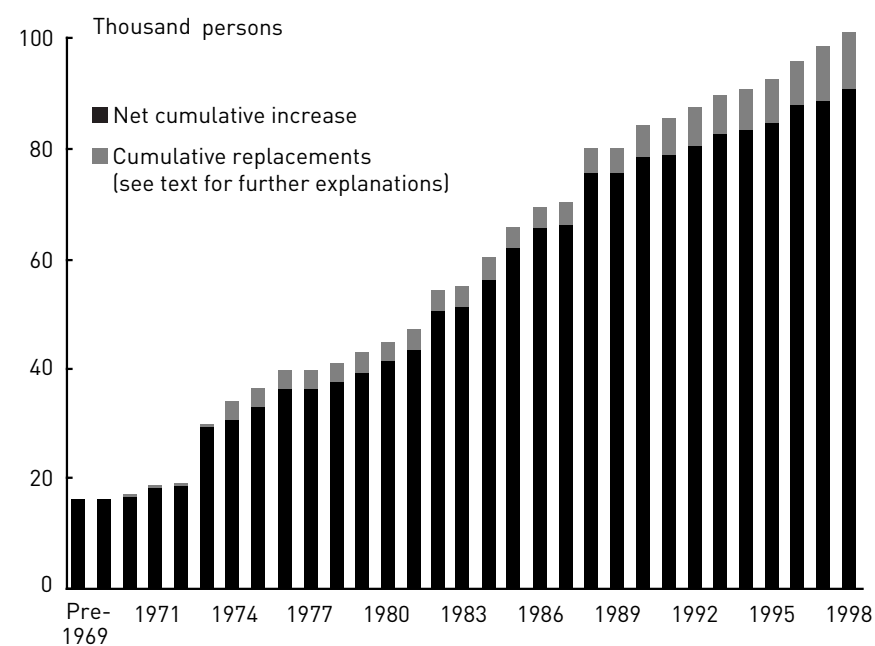


Source: 1998 survey of APACA members based on APACA 1998

Thirty years ago, in 1968, current APACA members accounted for 14 cultural centres with a total of 23 theatres (Chart 6.1). Some of these were venerable institutions still in use, including Hobart's Theatre Royal dating back to 1837, Launceston's Princess Theatre, Her Majesty's in Ballarat and North Sydney's Independent Theatre complex dating from 1911. The Perth Theatre Trust and the Canberra Theatre also existed. A handful of provincial venues, other than Ballarat and Launceston, are more than 30 years old: Newcastle, Wagga Wagga, Mildura and Wangaratta.

Naturally, people attended musical and theatrical performances before the advent of cultural centres in the modern sense. The Town Hall was the main concert venue in Sydney before the Opera House opened in 1973. Similarly, people attended performances in the other mainland capital cities before the Adelaide Festival Centre and the Perth Concert Hall opened in the 1970s and the Victorian Arts Centre, the Brisbane Performing Arts complex and the Playhouse Theatre of the Darwin Entertainment Centre in the 1980s.

6.2: Capacity of Australian cultural centres



Source: 1998 survey of APACA members

The total growth in the seating capacity of cultural centres may present a slightly overstated picture (Chart 6.2). However, in terms of facilities and comfort the modern cultural centre is a new concept, which has spread the opportunity to

attend live performances across the land through the establishment of decentralised centres in metropolitan suburbs and country towns. This is in addition to the renovation of old centres such as existed in Ballarat and Hobart, and the installation of the major new cultural complexes in Sydney, Adelaide, Melbourne, Darwin and Brisbane. Finally, performances are sometimes held nowadays in major sports and entertainment centres that are not associated with APACA.

Table A5.4, Appendix 5, shows the number of cultural centres, venues and seating capacities in each capital city and the rest of each State and Territory, at ten-year intervals from 1968 to 1998. In 1968, there were no cultural centres in the current sense of the word in Brisbane and Darwin, or in the country areas of South Australia, Western Australia and the Northern Territory. Table 6.1 below shows that long-term annual growth was 5% or more in all mainland States, though there has been a slowdown in the past ten years.

Table 6.1: Growth in seating capacity of cultural centres

State/ Territory	Total number of seats				Annual change	
	1968	1978	1988	1998	1968-98	1988-98
New South Wales	3,587	14,896	21,372	22,292	6.3%	0.4%
Victoria	3,904	7,828	18,712	24,968	6.4%	2.9%
Queensland	820	2,635	14,246	19,987	11.2%	3.4%
South Australia	2,612	6,766	9,993	11,092	4.9%	1.0%
Western Australia	1,929	3,658	8,003	12,436	6.4%	4.5%
Tasmania	1,812	1,912	1,912	2,522	1.1%	2.8%
Northern Territory			1,770	2,068		1.6%
ACT	1,189	3,172	4,072	5,304	5.1%	2.7%
Australia	15,853	40,867	80,080	100,669	6.4%	2.3%

Source: 1998 survey of APACA members

Despite a 158% increase in total seating capacity in Australia between 1968 and 1978, none of this made any difference to the five areas mentioned in the previous paragraph. During that period, the number of seats increased by 269%, from 7,500 to almost 28,000, in the five capital cities that already had some cultural centres. The Sydney Opera House and several other centres added a huge number in Sydney, while the Adelaide Festival Centre was the main contributor in that city. The number of seats in country areas increased by a more modest 58% between 1968 and 1978 with new centres being opened in New South Wales, Victoria and Queensland.

Between 1978 and 1988, total seating capacity almost doubled, with an increase of 96% to over 80,000 seats. The greatest growth was in country areas (151%), and all States and the Northern Territory were represented by 1988. The long list of new provincial locations includes Wollongong, Griffith, Taree, Portland, Bendigo, Geelong, Echuca, Ayr, the Gold and Sunshine Coasts, Renmark, Port Pirie, Mt Gambier, South Hedland and Geraldton. The growth rate was 70% for capital cities, boosted by the Victorian Arts Centre and the Performing Arts Centre in Brisbane, as well as many suburban locations.

The bicentennial year stands out. In 1988 22 new venues were opened: 11 in capital cities and 11 in country areas. These added 9,200 seats to the total capacity of APACA venues, excluding replacements of previous venues. No other year can boast such a large increase; according to the responses, 1982 took second place with 13 new venues, while 1986 and 1990 accounted for ten each, and 1973 – the year of the opening of the Sydney Opera House and the main Festival Theatre of the Adelaide Festival Centre – for nine. However, the net increase in seating capacity in 1973 exceeded any other year (10,879). The Bankstown Town Hall also opened its three venues in 1973 with over 2,000 seats, according to the survey.

The growth rate in the most recent decade, from 1988 to 1998, has abated but still amounted to over 25%, to reach more than 100,000 seats. The slowdown was most marked in the capital cities (16%), compared with a 40% increment in country areas. By 1998, the share of capital cities remained over half the total seating capacity (54%), but country areas seemed in the process of returning to the situation of 30 years ago, when most seats were actually in non-metropolitan cultural centres.

Membership of APACA is not compulsory, and there are other venues (see pages 90-91 for some historical information). However, comparison with the previous survey of APACA members, conducted for *Artburst!* in 1992, shows a high degree of compatibility. The total number of seats in the previous survey increased from 18,689 in 1972 to 87,612 in 1992; the new survey shows 18,300 in 1972 and 87,199 in 1992. The recall of establishment year is a possible source of uncertainty; for example, the previous survey identified 15 bicentennial venues compared with 22 in the current survey. In addition, a few centres have either ceased or taken up APACA membership.

As stated above, the survey excludes open-air theatres (17 in all). The largest are the Gardens Amphitheatre in Darwin from 1967 (7,000 seats), the Townsville Civic Theatre Sound Shell from 1978 (5,000), the Burswood Dome in Victoria Park,

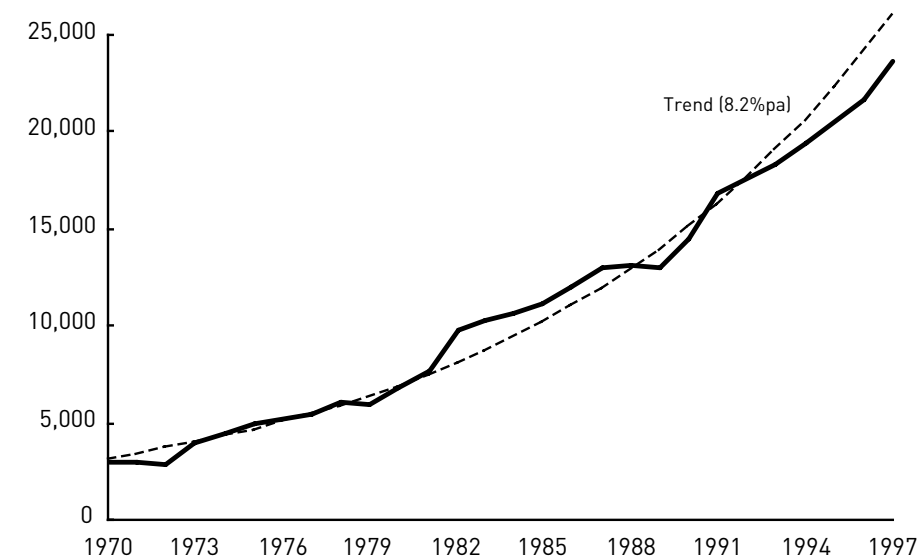
Western Australia, from the bicentennial year (22,000), and the 1985 Rockhampton Music Bowl (15,000).

The oldest outdoor venue, the Myer Music Bowl in Melbourne from 1959, according to the latest survey has a capacity of 2,200 persons. According to the 1992 survey the venue had a capacity of 10,000, which suggests that including outdoor venues in the survey may distort as well as swamp the findings. Three venues have capacities of 2,000: the Orange Civic Theatre Amphitheatre (1985), the Wangaratta Sound Shell (1990) and the Fremantle Arts Centre South Lawn Amphitheatre (no year given).

TERTIARY TRAINING IN THE ARTS

The number of students enrolling in universities (and colleges of advanced education before they became universities) to train in performing and visual arts increased from under 3,000 in the early 1970s to almost 24,000 in 1997 (Table A5.5). The annual growth trend over the full 27 years is 8.2% (Chart 6.3). Since 1987 the trend has fallen back to 6.6%, which is still strong growth.

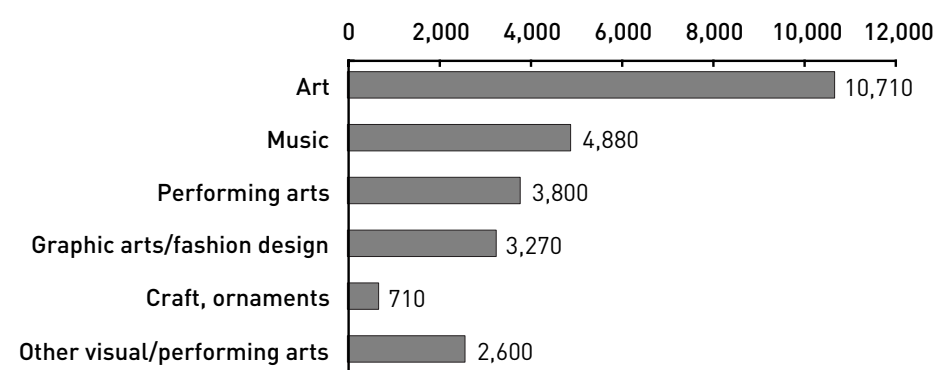
6.3: Number of visual and performing arts students in Australia



Source: Department of Employment, Education, Training and Youth Affairs (since 1977).
Estimated from ABS Year Book and University Statistics (1970-76)

Statistics for the past nine years show fine and creative art to be most popular, representing 41% of all full-time equivalent visual and performing arts students in 1997 (Table A5.6). Music accounted for 19%, compared with 15% for performing arts, 13% for graphic arts and fashion design, 3% for craft and ornaments, and 10% for other visual and performing arts (Chart 6.4). Judging from detailed data shown in *Artburst!*, the last group includes arts management, educational theatre, and conservation art including museum curatorship.

6.4: Specialisation of visual and performing arts students, 1997
(based on full-time student load estimates)

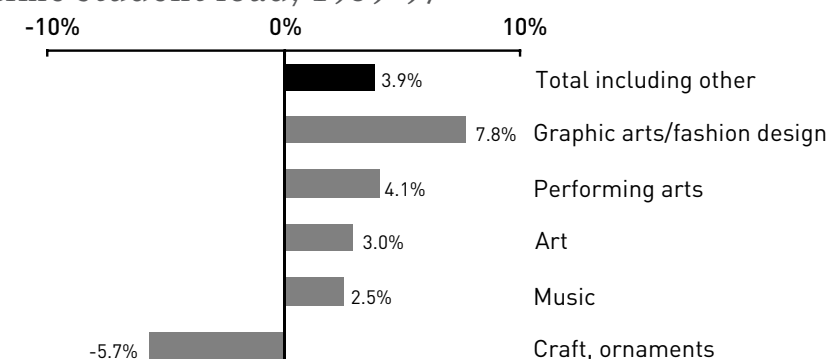


Source: DEETYA

Despite the slowing down in enrolments, the annual trend rate of growth in student load (full-time equivalent students) between 1989 and 1997 was a respectable 3.9% for all visual and performing arts (ignoring a relatively minor discontinuity in the data in 1991). Graphic arts and fashion design topped the list with 7.8% per annum followed by performing arts (4%), art (3%) and music (2.5%). Only the small category of craft and ornaments showed decline (Chart 6.5).

While the long-term trend in number of higher education students can be measured with a high degree of reliability, this was not so for TAFE and other vocational students of visual and performing arts. In recent years, the Adelaide-based National Centre for Vocational Education Research (NCVER) has worked towards remedying this (see Table A5.7 for data since 1990). In 1996, out of almost 184,000 students, 30% were enrolled in the craft and ornaments category, 22% in fine arts, 12% in dance, 8% in music and only 2% in dramatic arts. These figures cover TAFE colleges, adult and community education, and private providers of visual or performing arts education.

6.5: Annual trend rate of change, visual and performing arts students, full-time student load, 1989-97



Source: DEETYA

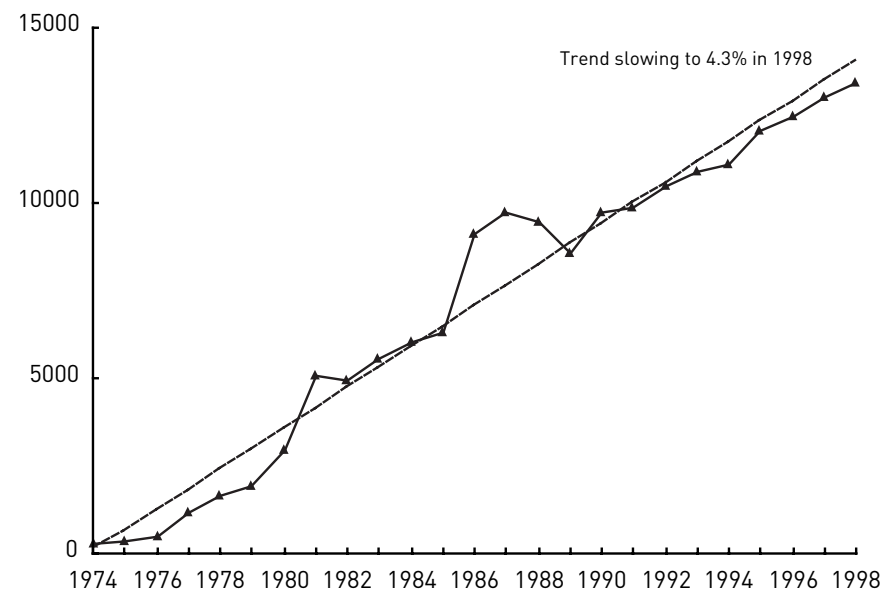
Visual arts dominate vocational education. In addition to the 52% of students enrolling in crafts or fine arts in 1996, 6% were in film and photographic arts, 5% in graphic arts and design, and 3% in fashion design. This adds to two-thirds of all vocational visual and performing arts students. Another 12% of students were in general or unspecified visual and performing arts, so the two-thirds visual arts component may well be even higher.

INTELLECTUAL PROPERTY RIGHTS

The Australian Copyright Council was founded in 1968, the initial year of this 30-year review of the arts economy. The increasing quantity and complexity of copyright issues provide a fascinating corollary to the growth in the arts, incomes and numbers of practitioners. The topic is so important in the total arts picture that we have devoted the next three sections to it.

The Copyright Council was set up in response to issues of artists' rights to own their creative output. The demand for its services measured by telephone and mail enquiries increased from 241 in 1974, when the first count was made, to an estimated 13,400 in 1998. The trend in enquiries is best depicted by the calculated trend recorded on Chart 6.6, which shows that the best regression fit is a constant addition of about 580 enquiries each year. Although this implies a slowing growth rate, the trend was still a respectable 4.3% in 1998; furthermore, the Council's advisory and advocacy role is undergoing significant change as described below.

6.6: Number of enquiries to Australian Copyright Council



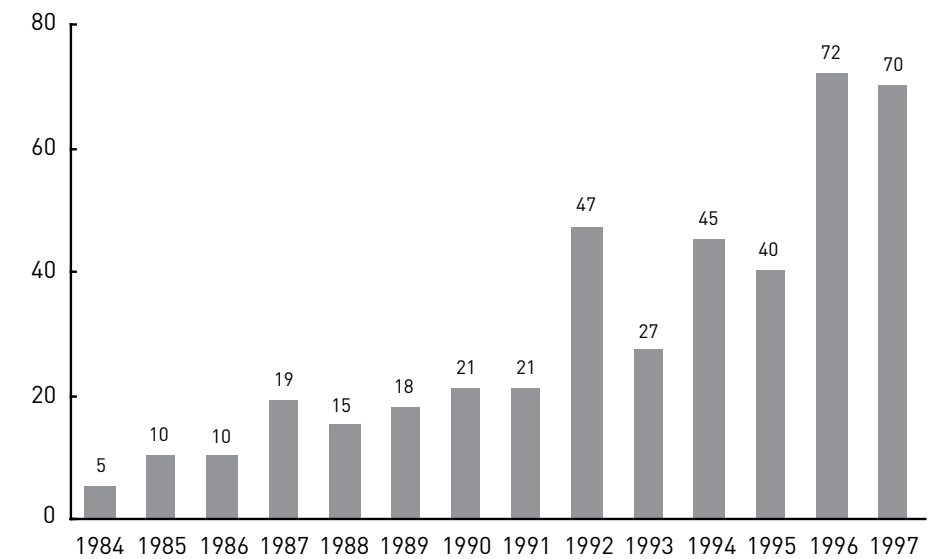
Source: Australian Copyright Council

Tables A5.8 and A5.9 contain data on types of enquiries, which have been recorded for most years since 1982. In 1998, the largest proportion of enquiries handled by staff lawyers (38%) concerned written material (books, articles, poetry, photocopying). Visual arts including photography, design and craft accounted for 30%. Music accounted for 15% of these enquiries, film for 9%, computer software for less than 5% and theatre for less than 2%.

Two related factors have complicated the statistics since 1995: a decision to change the method of responding to enquiries to release limited staff resources for advocacy and other work, and the introduction of a web site in 1996.

Up to the end of 1995, the staff lawyers employed by the Council responded to all enquiries, which placed an increasing burden on resources. There are only six full-time staff members, the same number as in 1987. Four of these are lawyers, including the executive officer and principal legal officer, Libby Baulch. The number of enquiries is by no means the only indicator of growing demand for the Copyright Council's services. For instance, there has been a strong increase in the number of seminars conducted by the Council on a wide range of subjects, including the electronic media. Chart 6.7 shows the growth in number of seminars, reaching 70 in 1997 and covering all mainland capital cities.

6.7: Seminars conducted by Australian Copyright Council



Source: Australian Copyright Council

The staff lawyers engage in many other activities, such as giving lectures and writing papers and articles. They also conduct a wide range of research into multimedia and other topics. In June and November 1997 they were involved in a special training program in Jakarta for Indonesian judges, public prosecutors, customs officials, police, and trade and industry officials.

Australian Copyright Council publications have become more comprehensive, and are subject to frequent revision and expansion before being reprinted. Increasing interest in copyright has meant increasing demand for initiatives and responses in relation to reform issues. The 1997-99 business plan illustrates the rapidly changing environment in which the Council operates. Apart from continuing and improving current activities, the main objectives under this plan are:

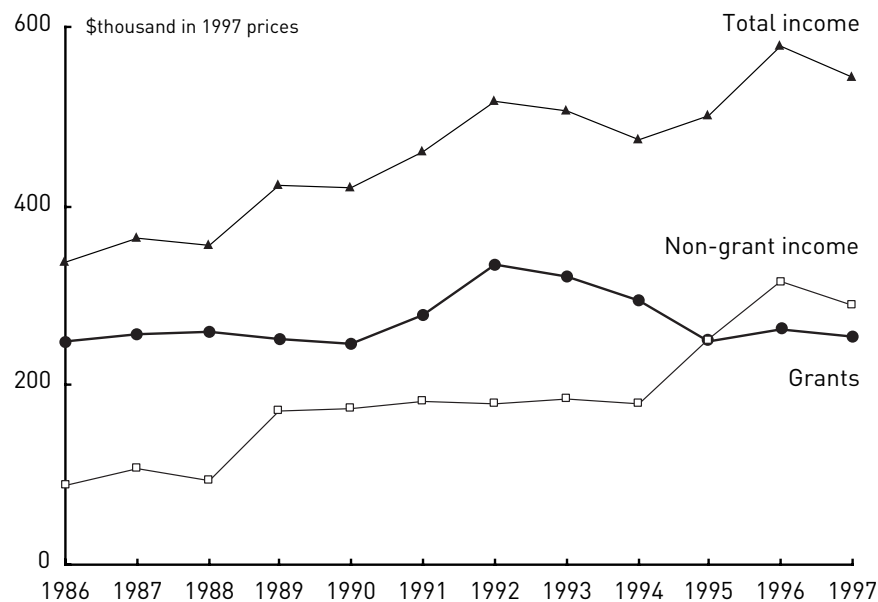
- + To allocate more staff time and resources to research and advocacy
- + To increase staff knowledge of technological developments affecting copyright

- ✦ To increase staff technical skills, particular computer skills and use of electronic resources
- ✦ To increase distribution of publications by better marketing
- ✦ To increase the Council's profile as a source of information and expertise on copyright issues.

The Copyright Council currently represents 25 organisations, whose members are either owners or performers of copyright works. Each organisation appoints a voting representative, and the Council's management committee is elected from representatives of member organisations. While there may be instances where an organisation reflects the views of 'users' rather than 'owners' of copyright, the Council makes its submissions in the interests of owners or creators. So there are cases where the Council doesn't reflect the views of each affiliated organisation.

As federal funding for the arts and related causes has slowed down, the Australian Copyright Council has come to exemplify organisations that have increasingly had to fund their own activities (Chart 6.8). The Council has managed to increase its income in real terms by 4.7% per annum only by achieving an 11.1% annual increase in non-grant income. Grant income has been essentially static in constant

6.8: Australian Copyright Council income



Source: Australian Copyright Council

prices. Income from publications and seminars is largely responsible for the increase in recent years, as shown by the details in Appendix 5, Table A5.10. On the other hand, affiliated societies have contributed an average of only 3% of total income since 1986.

Between 1986 and 1997, the contribution of non-grant income doubled from 26% to 53%, mainly since 1995 when the proportion increased to 50% from 38% in 1994. The contribution from the main public sector sponsor, the Australia Council, remained at an important 39% level in 1997, but was down from 66% recorded between 1986 and 1988. The Australian Film Commission contributes around 4% to total income.

The Copyright Council's web site is changing the manner in which it conveys information and advice to the users of its services. The site provides access to all 60-odd information sheets, recent quarterly newsletters and notes on Copyright Council books. The visitor is advised that he or she may download and copy any information sheet for a non-profit purpose, provided the full sheet is copied and no changes or additions are made.

The web site means that people can get information about copyright without necessarily contacting the Council – nevertheless the number of enquiries has kept going up as indicated by Chart 6.6.

COPYRIGHT AND DIGITAL TECHNOLOGY

Keeping up with copyright issues in a rapidly changing environment is a daunting task. The *Copyright Act* is one of the most frequently changing pieces of legislation in Australia; by late 1999 it had been amended 39 times since its inception in 1968, most recently by two Bills dealing with enhanced CDs and computer programs. Keeping up with change is actively pursued through the Copyright Law Review Committee (CLRC), which the Attorney-General established in 1983 as a specialist advisory body to report on copyright law issues.

Following the 1996 federal elections, the Government restructured CLRC under a new chairperson. The new terms of reference include reviews of the range of materials protected by copyright, the rights of copyright owners, and options for simplifying the *Copyright Act*. In September 1998, the Committee completed its report on simplification, which produced a model for streamlining the various exceptions to copyright owners' rights, while ensuring that the simplified provisions maintain an appropriate balance between the rights of copyright owners and users in the new digital environment.

The Committee's main recommendations concerned fair dealing, that is, the exceptions in the *Act* that allow users to deal with copyright material without the permission of, or payment to, the owner of the copyright for the purposes of research and study, criticism and review, reporting the news, and legal advice. The committee recommended that an open-ended and more flexible approach to fair dealing would enable it to be more easily applied to new technologies.

Other recommendations concerned copying by libraries and archives and copying for educational purposes. This is relevant in the context of the next section, dealing with copyright collecting societies.

The brave new world of digital electronics is at the core of current copyright issues worldwide. In 1996, the World Intellectual Property Organisation (WIPO) adopted two new international treaties dealing with copyright in the on-line environment. In July 1997, the Australian Government released an issues paper, *Copyright Reform and the Digital Agenda*, to invite public comment in the preparation of a new amendment of the *Copyright Act* in line with the new international standards for copyright in the on-line environment.

The *Copyright Amendment (Digital Agenda) Bill 1999* was presented to the Federal Parliament in September 1999 after extensive public consultation. It represents the Government's legislative response to the radical new environment of digital technology, centred on the Internet. The centrepiece is a new technology-neutral right of communication to the public, which includes making copyright material available on-line (such as uploading material to a server connected to the Internet).

This new right is in addition to the existing bundle of copyrights, which includes reproduction, publication, public performance, broadcasting, cable transmission to subscribers, and adaptation (such as dramatised versions of fictional works or arrangements of musical compositions). The 40th amendment of the *Copyright Act* in 2000 promises to be the most radical and far-reaching of them all.

COPYRIGHT COLLECTING SOCIETIES

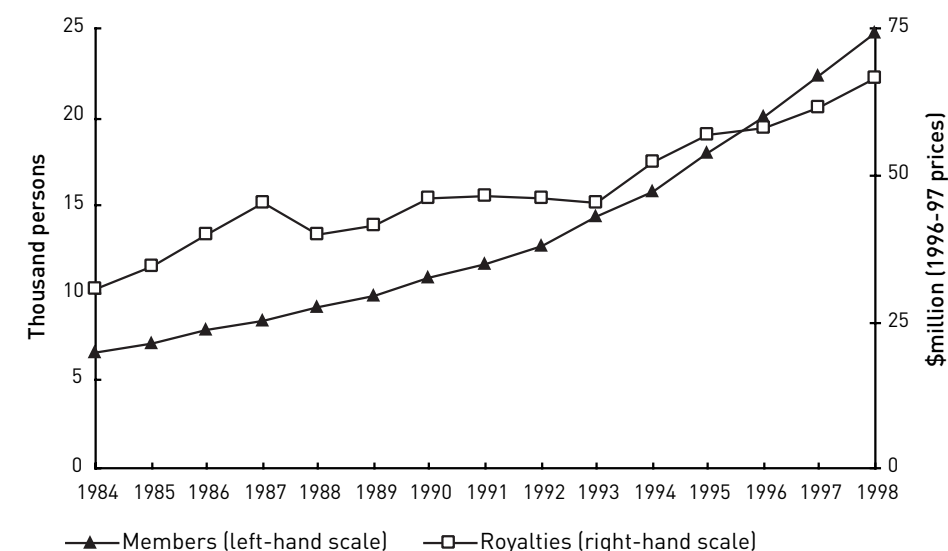
Copyright collecting societies have emerged to secure income for copyright owners who find it difficult or impossible to retrieve their own intellectual property rights. Collecting societies are found in many countries, which enables a local society to extend the rights of its members internationally through reciprocal agreements.

The first collecting society in Australia is APRA, the Australasian Performing Right Association, which was formed in 1926. It had about 24,700 members (composers, lyricists, music publishers) and distributed \$66.7 million of royalty payments in 1997-98 according to the APRA web site. The growth in membership, at an annual rate of 11%, has been faster than the growth in royalty payments to members and affiliated societies according to Chart 6.9. The vast majority of members are writers and composers, with publisher members approaching 300 and successors-in-title accounting for about 250.

The rights administered by APRA include the right to perform a work in public, to broadcast a work, and to transmit a work to subscribers of a cable service, such as pay television. While originally formed as a clearing-house for composers, songwriters and publishers to administer their live performance rights, the model proved right for the then emerging technologies of sound recording and the wireless. Without a collecting society, it would have been difficult for individual copyright holders to exercise their rights, especially in the broadcasting area.

Based on an earlier organisation founded in 1956, the Australasian Mechanical Copyright Owners Society (AMCOS) was established in 1979 to protect music publishers' interests in the reproduction of audio copies of musical works, music

6.9: APRA membership and royalty payments



Source: Australian Performing Right Association (APRA)

incorporated in films, and printed or photocopied sheet music. There are currently about 190 music publisher members of AMCOS, which has close links with APRA.

Another collecting society, the Phonographic Performance Society of Australia (PPSA), was formed in 1969 following the *Copyright Act* of 1968, which introduced broadcast and public performance rights for sound recordings. Its original shareholders were the seven major record companies in Australia. The configuration has changed due to takeovers and mergers, but the stakeholders are still the major multinational record companies.

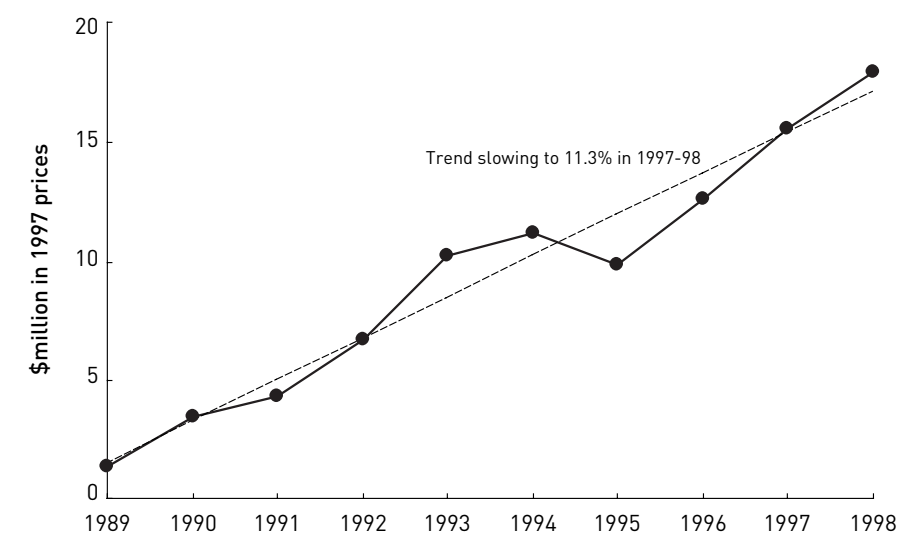
In contrast to APRA, AMCOS and PPSA, which are concerned with music, the three remaining copyright collecting societies to be mentioned here were formed to protect copyright owners' interests against photocopying and other reproduction of their works. This was considered a much more difficult task than that facing APRA¹⁰ even before the digital agenda really hit home. It is relatively straightforward to estimate the total volume of copyright material being broadcast and thus to obtain an accurate estimate of total royalties due, since there are a limited number of sources from which copyright music can be broadcast or performed.

The Copyright Agency Limited (CAL) was the first society to protect copyright owners' rights to compensation for photocopying of their works. While it was formed in 1974 it only became fully operational in 1986, when it finally succeeded in making agreements with educational institutions relating to photocopying. Then came the problem of how to distribute the licence fees to copyright holders, which necessitates extensive continuous sampling of copying activities (conducted by leading market research firm AC Nielsen-McNair). The survey base is widening; in 1996-97, for example, the number of surveys increased from nine to 15 and the number of institutions surveyed from 202 to 353.

By 1991, CAL's chairman was able to state in the *Annual Report*: 'Through the agreements which have been made with universities, schools and other bodies, the principle of payment for the use of copyright material has been established and members of CAL, both authors and publishers, have begun to receive adequate recompense.'

Seven years later, CAL could look back at strongly growing distributions to the benefit of its members (Chart 6.10). The trend rate in distributions is slowing down if we look at the past decade as a whole, but recent years have seen actual distributions accelerate above that trend.

6.10: CAL distribution to members



Source: Copyright Agency Limited (CAL)

CAL's income from schools, universities and TAFE colleges derives from its administration of the statutory licence for copying by educational institutions under Part VB of the *Copyright Act*. Licences are negotiated as head agreements with Education Departments, independent school associations, the Australian Vice-Chancellors' Committee and others. Income from governments derives from Section 183 of the *Act*, which entitles government institutions to copy.

In addition to statutory licences, CAL offers voluntary 'blanket' licences to other types of users such as churches, associations and corporations. CAL continues to identify organisations that are copying without permission and to negotiate copying licences with them. The licence enables them to copy within set limits without having to obtain permission every time they copy. In 1997-98, revenue from all copying licences reached \$22.1 million, 14% above the previous year.

While CAL's core activity to license photocopying and distribute the copying fees to members continues to grow, it is also laying the basis for the next five years to develop into the digital technology environment. This opens a whole new world in which to develop and implement new methods to manage emerging communications systems in ways that take account of intellectual property (*Annual Report 1997-1998*, Chief Executive's Report).

Given the large number of interest groups associated with the Internet and other on-line technology, the task of securing a maximum of intellectual property rights for creators represents the greatest current challenge. Apart from the creators, interest groups include a range of largely new entities such as web page designers and proprietors, bulletin board operators and Internet content providers. The *Copyright Amendment (Digital Agenda) Bill 1999* recognises that stakeholders include communications carriers and content providers (who need to be better protected by law), as well as copyright creators and owners, and traditional users such as libraries, archives and educational institutions.

VISCOPY grew from a perception that visual artists too often miss out on receiving the royalty due to them. Through the initiative of the National Association of Visual Arts (NAVA), this collecting society was formed in 1995 with the financial support of the Federal Government. VISCOPY has created a basis for increasing the royalty income of visual artists, photographers, designers and architects from traditional markets in the print media.

Reflecting their importance in the Australian visual arts industry, VISCOPY represents significant numbers of Indigenous artists and is the only collecting society to offer specialist services to them.

VISCOPY is also negotiating broadcasting rights and digital site licences for institutional, educational and commercial users.

With regard to statutory licences, VISCOPY artists will have the opportunity to share photocopying income with other CAL beneficiaries (AMCOS members already do). The July 1998 amendments of the *Copyright Act* included provision for sharing income when photocopied pages contained both text and images. Previously, the visual artist was only eligible for payment for 'stand-alone' images.

If VISCOPY is to benefit from the new provisions of the *Act*, it is probably best done in cooperation with CAL, whose sampling procedures are well in place. VISCOPY also participates in the Screenrights distribution scheme described below.

Screenrights is the copyright collecting society for producers, distributors, script-writers, music copyright owners and other rights-holders in the film and audio-visual industry. Formerly known as the Audio-Visual Copyright Society (AVCS) and started in 1990, the function of the society is to administer rights that are impossible or difficult for rights-owners to exercise on an individual basis. Its main

income source derives from administering the statutory licence in Part VA of the *Copyright Act*, which allows educational institutions to copy television and radio programs.

In conclusion, collecting societies fill an important role in securing income for copyright owners. This applies equally to societies started a long time ago such as APRA, as to more recent societies like CAL, VISCOPY and Screenrights. The growth in APRA's and CAL's distributions provides ample evidence that there is a real need for an effective vehicle for the collection and distribution of intellectual property rights. This evidence is about to be magnified many times over by the challenge of the on-line revolution, in a future technological environment that can only be imagined in crude outline. It is likely that collecting societies will play a major role in this environment.

NEWSPAPER COVERAGE OF THE ARTS

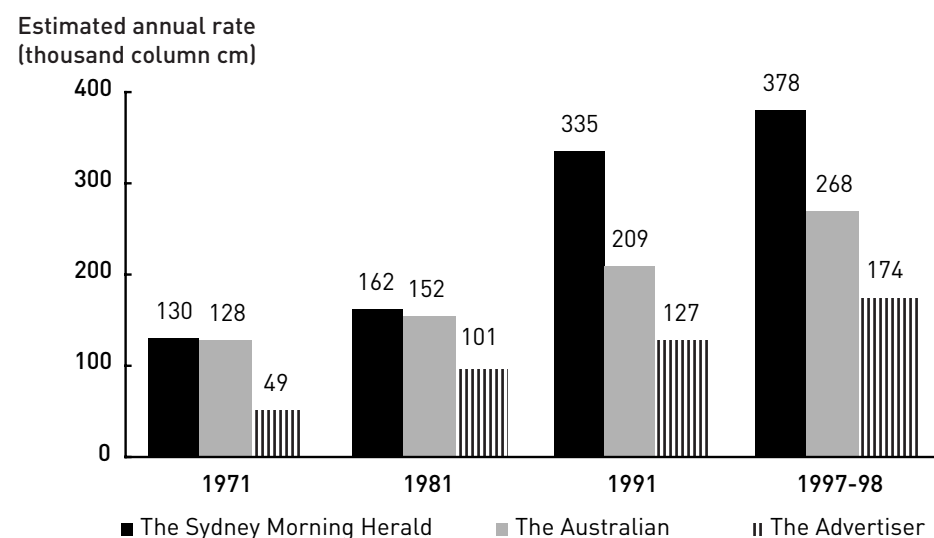
The previous review of the expanding arts, *Artburst!*, contained a survey of newspaper space taken up by arts-related features and reviews and by advertisements. The three newspapers selected were *The Sydney Morning Herald*, *The Australian* and *The Advertiser*. A week in late April or early May and a week in early November were chosen on the assumption that these were typical for the year as a whole and therefore could be expanded to annual estimates.

The previous review covered 1971, 1981 and 1991. We have added November 1997 and May 1998, to constitute 1997-98. Three tables in Appendix 5, A5.11 to A5.13, show the results for each survey.

The column area of features and reviews (called editorial content in *The Advertiser* survey) increased as shown in Chart 6.11. While the results are subject to sampling error, covering only two weeks of each year, the increase in coverage from 1971 to 1991 appears to have been stronger in *The Sydney Morning Herald* than in *The Australian*. This trend was reversed in the 1990s if we take account of an important innovation, *The Australian's Review of Books*, which was launched in 1996 with support from the Australia Council. As an important addition to the cultural content of Australian newspapers, we have added the *Review* to the estimates in Chart 6.11 (see Table 6.2 for detail).

The Advertiser has shown a sustained increase over the period. Just at the start of the 1997-98 survey, the newspaper changed from broadsheet to tabloid format, and the

6.11: Estimated area of arts-related features and reviews



Source: First week of May and November each year for each newspaper; 1997-98 estimate for *The Australian's Review of Books* based on October issue

arts editor promised that this would be accompanied by an increased arts content. Judging from Chart 6.11, this indeed happened, with an estimated increase from 127,000 standard column centimetres in 1991 to 174,000 in 1997-98.

Music has generally been the main topic for features and reviews. In 1991, for instance, it occupied an estimated 32% of arts-related space in *The Sydney Morning Herald* (Table A5.11). In 1997-98, however, there was a strong increase in film reviews and features according to the survey, with film accounting for 25% and music only just keeping in front with 28%. Theatre occupied 16% in the *Herald's* arts-related columns in 1997-98, literature 14%, visual arts 12% and dance 5%.

In *The Australian*, literature retained its top position in 1997-98 with a virtually unchanged 28%, followed by visual arts (22%, up from 16% in 1991), music (17%, down from 18%) and film (16%, down from 21%). Literature also held top position in *The Australian* in 1971, 1981 and 1991. In 1997-98, it would have fallen back to 17% in 1997-98 based on the standard survey of two weeks in November and May, but this was because of diversion of space to the monthly *Review of Books*. The 12 *Reviews* slightly more than doubled the features and review space devoted to literature, from 37,600 to 76,400 column centimetres, and added 21% to the featured arts content of *The Australian* for the year. The visual arts content in the *Review* shown in Table 6.2 consists of the illustrations accompanying the features and reviews.

Table 6.2: Estimated annual space, *The Australian's Review of Books*

	Thousand column centimetres		
	Features and reviews	Advertisements, contents, lists and other contents*	Total
Dance			
Film			
Literature	38.8	7.0	45.8
Music	2.4		2.4
Theatre			
Visual arts	5.8		5.8
Total	47.0	7.0	54.0

* Book advertisements 72% (5,000 ccm), front page text, contents page and descriptions of contributors on page 2, best-selling list and events diary on page 27, a total of 28% (2,000 ccm)

Annual number of reviews and essays: 144; 12 editorials; 72 other items

Based on October 1999 issue (28 pages)

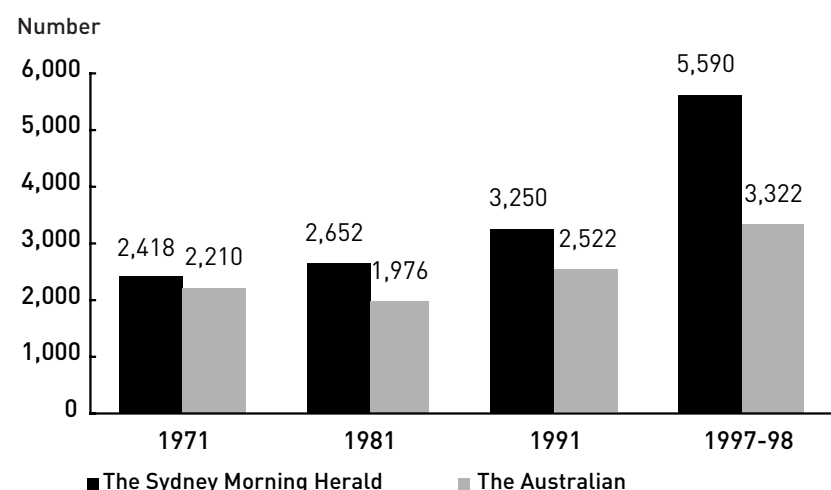
Theatre contributed an estimated 11% (up from 10% in 1991) and dance 6% (largely unchanged) to *The Australian's* arts-related reviews and features in 1997-98.

In *The Sydney Morning Herald*, advertising space outstrips editorial space devoted to the arts. Details are shown for each artform in Table A5.11. In 1997-98, editorial arts-related space totalled 378,000 standard column centimetres compared with 534,000 centimetres of advertising space. The bulk was taken up by film and music and includes lists of cinema performances and gigs, as well as actual advertisements.

Advertising space is relatively less important in *The Australian*, with total column space for arts-related features and reviews estimated at 268,000 standard column centimetres (including the *Australian's Review of Books*), compared with 51,000 for advertisements. The advertising space was also much more evenly spread across the artforms, rather than being dominated by film and music.

The increase in the arts contents of *The Sydney Morning Herald* and *The Australian* appears to be part of a trend towards larger and more all-inclusive daily newspapers, at least during the 1990s. The share of the arts in total non-advertising space in the *Herald* actually dropped from 2.8% to 2.4%, and in *The Australian* from 4% to 3.6%, between 1991 and 1997-98. This still means more absolute space for the arts, and there is no indication of quality of space, as distinct from quantity.

6.12: Estimated annual number of arts features and reviews



Source: First week of May and November each year for each newspaper; 1997-98 estimate for *The Australian's Review of Books* based on October issue

The arts-related editorial content of *The Advertiser* in 1997-98 was primarily arts comment, news and photographs (42% of total space). Performing arts reviews accounted for 25% of total space, as did film reviews and news. This left only 4% each for the visual arts and crafts, and book reviews.

In *The Sydney Morning Herald* the number of features and reviews, as distinct from column space, increased from an estimated 3,250 in 1991 to an estimated 5,600 in 1997-98 (Chart 6.12 based on Table A5.13). This is a much stronger increase than for column space and suggests that the typical item has become shorter and perhaps sharper. The implication is that the average feature shrank from 103 standard column centimetres in 1991 to 68 centimetres in 1997-98 – maybe a parallel to the ‘ten-second sound bite’ on television.

There was a less precipitate movement in *The Australian*, with average space falling from 83 column centimetres in 1991 to 81 in 1997-98. Without the addition of the *Review of Books*, the average would have fallen to 72 centimetres in 1997-98.

In terms of number of items, advertising vastly outnumbers features and reviews, especially in the *Sydney Morning Herald*, where there were 12 times as many advertising items in 1997-98 as there were features and reviews. The corresponding ratio for 1991 was even higher at 21. However, we don't consider these two items comparable, and have generally concentrated on editorial content, features and reviews as the relevant indicator of interest in the arts.

ARTS-RELATED ORGANISATIONS

One prominent feature of *Artburst!* was a survey of growth in the number of organisations related to the arts, based on successive editions of the Australia Council's publication, *Ozarts* (published by Thorpe, Melbourne). Because this publication listed the year each organisation was formed, we could obtain an age distribution for each category: music, visual arts, Aboriginal arts and so on. If an organisation failed to appear in a subsequent edition of *Ozarts*, we could assume that it had been discontinued.

The findings are shown in Table A5.14 in Appendix 5. The results for each type of organisation were described in *Artburst!* The total number of organisations increased at an annual rate of 8.4% between 1970 and 1991, though there was evidence of slowing in the last three or four years.

According to *Ozarts 1991*, 48% of 894 arts-related organisations identified within one of the nine classes listed in Table A5.14 were formed during the past ten years since 1982. While some organisations had been around for a long time, with 9% formed before 1962 and another 12% between 1962 and 1971, most organisations were of recent origin (*Artburst!* pages 6-7).

The *Yellow Pages* of the metropolitan telephone books list those agencies that wish to be listed, which may attract varying parts of the profession from time to time. We identified a number of arts-related organisations and entities that could be traced through the years from the early 1970s to the 1997 *Yellow Pages*.

A check of two conventional listings, of architects and dentists, suggested that the information must be interpreted with caution. The number of dentists according to the 1976 and 1996 Census increased from 4,630 to 7,600, or by 64%. The number of metropolitan listings in the *Yellow Pages* increased from 2,770 in the mid-1970s to 5,270 in 1997 (90%). For architects, the Census data rose from 5,420 to 11,280 (108%), but *Yellow Pages* listings from only 3,190 to 3,600 (13%).

Acknowledging that Census definitions have changed, these figures suggest that there are relatively more metropolitan dentists and that it may have become more advantageous for them to list in the *Yellow Pages*. Only a minority of architects appear to be listing, but the difference may also be due to a growing proportion of corporate entries in the *Yellow Pages*, whereas the Census counts all the individual practitioners.

Acknowledging that the source has shortcomings, Table A5.15 shows the change in numbers listed in the *Yellow Pages* for seven capital cities in 1972, 1977, 1987 and 1997. The categories are art dealers, art galleries, artists, casting agencies, craft materials and supplies, film production facilities, equipment and services, music arrangers and composers, music and musical instruments, cultural and educational organisations, book publishers, theatrical managers, producers and agents, theatrical supplies and services, and valuers of fine arts and antiques.

Each category is subject to all kinds of influences that could have motivated organisations to list, or alternatively to decide not to do so any longer. In total, however, some of these influences may have balanced each other out, leaving a plausible annual growth estimate for all categories combined of about 6% between 1972 and 1987. This has reduced to 2.7% in the last ten-year period to 1997.

In conclusion, these figures are inferior to the previous *Ozarts* estimates, and a return of this publication would be an advantage. In the meantime, the total *Yellow Pages* estimates are in substantial agreement with the *Ozarts* estimates up to the last period. Readers of *Artburst!* may recall that there were signs of such a slowdown in the last few years between 1988 and 1991. So a slowdown in the number of arts organisations in the 1990s may be real.

There are many possible reasons for this. While the arts environment may be growing more complex, there could be efforts to rationalise this complexity. The structure of the arts sector may be changing in manners not entirely understood. A glance at the categories in Table A5.15 shows that the key category slowing down between 1987 and 1997 is associated with the film industry, while other categories showed strong growth. So the mix of activities in the arts sector measured by these indicators has been changing.

Such dynamics are bound to intensify as we enter the new millennium.