

Planning for the Future

Statistical profile:
Music

10 July 2000
Prepared by Christopher Madden

Key points and contents

Introduction: music industry definitions

Part One: Industry

SUPPLY

Employment

- In 1996 an estimated 21,000 people were employed in music occupations
- Growing employment in music occupations 1986-1996
- In 1996, 17 percent of people with a music qualification were employed in an arts occupation, 7.6 percent were unemployed
- Full-time median incomes lower than average for full-time employment in music occupations, higher than average for part-time employment
- Musicians' incomes declining relative to all occupations...
- ... and the distribution of musicians' incomes widening
- Declining incomes may be due to musicians working more at their musical work
- Increase in musical involvements as part of a job 1997 to 1999

Organisations and trade

- Summary data for the music industry 1991-92 to 1992-93 (see text for details)
- Total output of music industries \$1.6b in 1992-93...
- ...an increase on 1991-92
- Value added of the music industries \$601.7m...
- ... a decrease on 1991-92 at a time when Australia's GDP increased
- Indicators of industry structure (see text for details)
- Classical and 'musical' genres 37 percent of live music industry income
- Music trade balance narrowed 1991-92 to 1992-93...
- ...and widened 1993-94 to 1994-95

- Business sponsorship of music declined by \$6 million 1993 to 1996

DEMAND

Household expenditure

- Household expenditure on CDs, records and tapes \$702.4m in 1993-94
- Household expenditure on musical items increasing
- Expenditure on recorded music volatile 1975 to 1994

Attendance

- Attendance rates for popular music and opera/musical declined 1995-99 and increased for classical music
- Attendance at music concerts by musical genre (see text for details)

Part Two: Sector

Participation

- More than half the Australian population listens to radio, CDs etc daily
- Involvements in music increasing but not as fast as all culture/leisure involvements
- Four out of five musical involvements are as a performer
- Music audience profile (see text for details)
- Motivators and barriers for music performance attendance (see text for details)

Education

- Between 1989 and 1999 university enrolments in music courses increased at same rate as all arts courses and, perhaps, faster than all university enrolments
- University music student loads declining relative to all arts
- TAFE/vocational music enrolments remain steady while all arts enrolments decline
- Year 12 music enrolments increased at same rate as all year 12 enrolments between 1985 and 1993

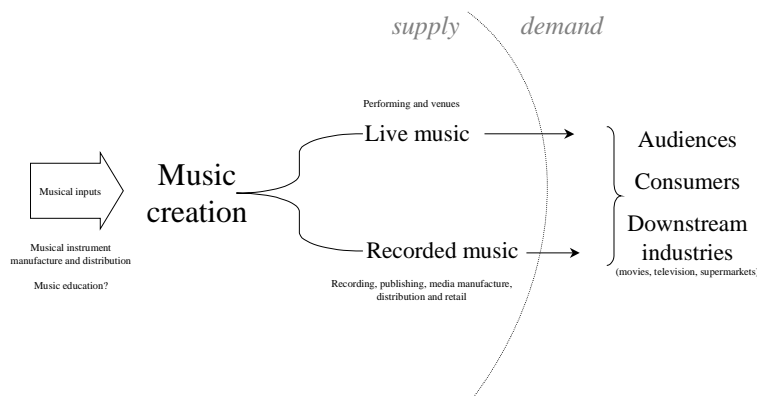
Part Three: Funding

- Music funding increasing relative to all cultural funding

Introduction: music industry definitions

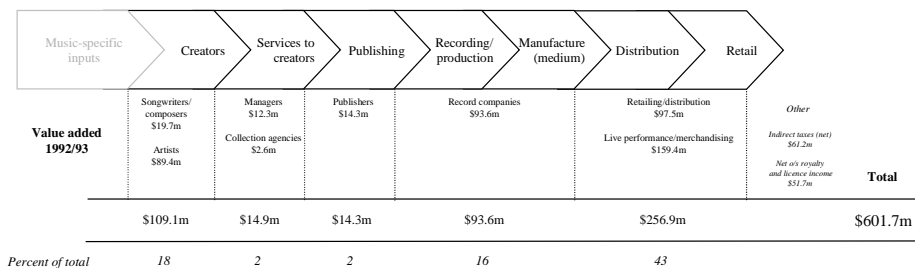
The music industry is extremely complex, as highlighted in the attached industry model from Price Waterhouse (1994). The industry might be simplified into two main streams: live music and recorded music (summarised in figure M.1). The source of both streams is musical creation. Musical creation can be delivered to audiences in two main ways: as live music and as recorded music. The live music stream shares many resources with other performing arts and music data are therefore often not separable from performing arts data. The recorded music stream is more easily identifiable for statistical purposes, although digital and new media technologies are expanding the industry beyond the usual statistics ‘net’. A discussion of definitional issues relating to the music and other performing arts industries is contained in the performing arts chapter.

Figure M.1: General representation of music industries



A ‘value chain’ for the whole music industry would necessarily collapse both streams into the one chain. Figure M.2 sets out such a value chain and incorporates value added data from Price Waterhouse (1994). A full explanation of the data is available in the section ‘Industry and trade’.

Figure M.2: Value chain of music industries



Source: Price Waterhouse (1994)

Part One: Industry

SUPPLY

Employment

There are two main sources of data on artistic employment in Australia: the ABS' census and the studies by Throsby and Mills (1989) and Throsby and Thompson (1994). The census provides the most up-to-date data on musical employment, the most recent data being for 1996. The census also allows for the longest trend data, with employment in some occupations comparable between 1986, 1991 and 1996. The census does not necessarily, however, accurately reflect *actual* numbers employed in the arts in each time period: data is coded by a person's main job only, which is defined as the job in which most income was received in the previous year. Evidence suggests that not only is much arts work is undertaken as secondary employment, but that arts work is often not the main source of income, even for people who consider themselves primarily an artist. The census does not capture these artists: it reflects data only on artists whose main job and main source of income is from their arts-work. The Throsby-related studies provide a more accurate picture of artists' employment in each time period by capturing data on *all* arts employment, but trend data is only available between 1988 and 1993.

The objective of this project is to obtain information on recent trends in the arts sector. Census data is most suited to this objective. Although the census may not provide a perfectly accurate picture in each time period, it provides continuity across a longer and more recent time period. The methodology remains relatively stable, so the data can be interpreted as reflecting movements in a stable sub-group of the artist population and should therefore reveal major trends in artist employment. Other research can be used to supplement the census and to uncover structural changes that might not be captured in the census collection or that might bias the census data.

In 1996 an estimated 21,000 people were employed in music occupations

Figure M.3 presents estimates of people employed in music occupations in 1996. Actuals are taken from the census of population and dwellings and the occupations 'singer/musician' and 'composer' are 'rated up' using more accurate data from Throsby and Thompson (1994). The methodology behind the estimates is explained in Appendix AM. The estimate of 21,000 still does not count music teachers employed in formal education institutions such as universities, TAFEs and schools. Estimates on composers' and musicians' employment might alternatively be obtained by surveying membership organisations, such as APRA, ASM, AMT and AMC. This estimation procedure is not pursued here since the major trends in employment in these occupations are expected to be sufficiently represented in existing research. Data from Guldberg (2000) suggests that the proportion of people employed in music occupations who were born in non-English-speaking countries was lower than in the total workforce (9.4 percent compared to 13.4 percent).

Figure M.3: Estimate of employment in music occupations, 1996

Occupations	Number employed	
	Actual	Estimated
Music director	345	..
Singer/musician	6,777	12,086
Composer	261	1,108
Musicians/related professionals nfd & nec	103	..
Music teacher (private)	7,113	..
Piano tuner	361	..
Total	14,960	21,116

Source: ABS Census, Throsby and Thompson (1994)

Growing employment in music occupations 1986-1996

Figure M.4 shows that from 1986 to 1996 employment in ‘musician and related professions’ grew at a faster rate than for all occupations. The annual average rate for the ten years was 2.4 percent (compared to 1.5 percent for all occupations). As figure M.5 shows, this higher rate of growth would have been accentuated if data on music teachers was included (teachers were not separately identifiable in the 1986 census).

Figure M.4: 'Musicians and related professions' employment 1986-96*

	Number	Percent change	
		Musicians etc	All occupations
1986	6,100		
1991	7,000	14.8	9.1
1996	7,620	8.9	5.6

* Excludes music teachers

Source: Hans Guldberg/Census of population and dwellings

Due to the nature of published data sources, a full disaggregation of employment into musical occupations is only possible for the period 1991 to 1996. Figure M.5 summarises. Interpretation of these figures is limited by the small numbers involved, with sampling and statistical errors and rounding influencing percentages. Nevertheless, the data reinforces the indication that musical occupations have undergone a higher than average rate of employment growth in the ‘90s. The data also indicates that the bulk of the growth in music occupations between 1991 and 1996 was due to an increase in the employment of music teachers of around 1,700.

Figure M.5: Employment in Selected Culture/Leisure Music Occupations 1991-1996

Occupation	Number		Percent change
	1991	1996	1991-96
Composer	218	261	19.7
Instrumental musician	5,168	5,533	7.1
Singer	1,058	1,244	17.6
Music teacher	5,454	7,113	30.4
Music director	342	345	0.9
Piano tuner	228	361	58.3
Other	204	235	15.2
Total music occupations	14,663	17,088	16.5
Total cultural occupations	93,000	115,700	24.4
All occupations	7,109,300	7,509,400	5.6

Source: Hans Guldberg/Census of population and dwellings

In 1996 17 percent of people with a music qualification were employed in an arts occupation, 7.6 percent were unemployed

In 1996, 17 percent of people with a music qualification were employed in an arts occupation. This is about the same rate for dance and drama graduates, more than art and craft graduates (14 percent) and lower than for graphic design (41 percent). Three-quarters of music graduates were employed in other occupations, most of whom were employed as private music teachers (7,113 out of 8,962, or 80 percent). The unemployment rate among people with a music qualification was 7.6 percent compared to 8.8 percent for total employment (data are set out in figure P.5 in the performing arts chapter).

Full-time median incomes lower than average for full-time employment in music occupations, higher than average for part-time employment

Figure M.6 indicates that the full-time median income of most music occupations was lower than for all cultural occupations and total employment. Music directors and instrumental musicians were the only full-time music occupations to have a median income higher than for total employment. Part-time median incomes tended to be higher than both total cultural occupations and total employment.

Figure M.6: Music occupation incomes, 1996

Occupation	Annualised median income, \$ ¹	
	Full-time	Part-time
Music director	43,591 +	16,339 +
Singer	27,681	17,772 +
Instrumental musician	30,029 +	16,802 +
Composer*	28,075	17,148 +
Musicians/related professionals nec*	22,698	12,623
Musicians/related professionals nfd	29,291	15,919 +
Music teacher (private)	28,602	12,179
Piano tuner	24,081	14,296
Total cultural occupations	32,331 +	15,406 +
Total employed	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; annualised = weekly income x 52

Source: ABS unpublished census 1996

Musicians' incomes declining relative to all occupations...

The median income of musicians and related artists declined over the ten years from 1986 to 1996 (shown in figure M.7). The annual average decline over the whole period is larger for musicians than for all occupations.

Figure M.7: Musicians and related professions incomes 1986-96*

	Median income ¹ (1996-97 prices)	Percent change	Annual average change 1986-96	
			Musicians etc	All occupations
1986	23,700			
1991	21,700	-8.4		
1996	20,500	-5.5	-1.4	-0.4

* Excludes music teachers

¹ Income from all sources

Source: Hans Guldberg/Census of population and dwellings

... and the distribution of musicians' incomes widening

There is evidence that some structural change occurred in musicians' employment, with a widening in the distribution of musicians incomes between 1986 and 1991: the ratio of musicians' median to mean incomes increased from 1.12 to 1.18, while the same ratio for both all arts professionals and all occupations remained stable at 1.15. The divergence is even more pronounced for music teachers, for whom the ratio increases from 1.19 to 1.27.

Declining incomes may be due to musicians working more at their musical work

Broad data allows some conjecture over what might have caused the trends described above. Much of the change may be attributable to musicians choosing to work more in their musical occupation. Between 1988 and 1993 the proportion of time musicians spent working in their principal musical creative work rose from 41 to 45 percent (Throsby and Mills, 1989, and Throsby and Thompson, 1994). Since returns from music work tend to be lower than for non-music work (Throsby and Thompson, 1994), this may be the factor behind much of the declining relative incomes of musicians.

Data in figure M.7 indicates that musicians' incomes continued to decline from 1991 to 1996 (by 5.5 percent), and this is even more marked given that median income of total employment increased by 11 percent over this period (from data in figure P.7 in the performing arts chapter). Again, the continuing decline coincides with musicians working longer hours (figure M.8), so declining incomes might again be explained if the increased hours worked was in musical work. There are indications that the trend may have

continued between 1997 and 1999, when the proportion of musical involvements undertaken as part of a main job increased (figure M.9).

Figure M.8: Hours worked in music occupations 1991 and 1996

Occupation	Percent working 35 hours and over		Points change
	1991	1996	
Music teacher	15	17	3
Music director	67	64	-3
Singer	21	24	4
Instrumental musician	26	26	-1
Composer	67	67	0
Piano tuner	64	63	-1
Musicians etc nec & nfd	39	35	-4
Total music	23	24	1
Total culture	63	62	-1
All occupations	69	68	-1

Source: Census, ABS

Increase in musical involvements as part of a job 1997 to 1999

Some indication of structural change in musical employment is discernable from the ABS' series *Work in Selected Culture/Leisure Activities*. This survey has significant limitations when analysing trends due to changes in methodology between surveys (ABS, 2000; 28). Nevertheless, the survey suggests that the proportion of people involved in music as part of their main job increased between 1997 and 1999 (figure M.9). This trend seems to be supported by census data, which shows that the proportion of people in musical occupations employed for 35 hours or more increased from 23 to 24 percent from 1991 to 1996 (attributable mainly to increases in music teachers and singers employed 'full-time'; from figure M.8). The movement may not seem large, but this statistic tends to be relatively stable and should be interpreted in comparison to the decline over the same period for cultural occupations and all occupations – again summarised in figure M.8).

Figure M.9: Musical involvements 1997-1999

Musical involvements	1997	1999
Part of main job	20,400	45,000
Not part of main job	53,400	51,600
Total	73,800	96,600
<i>Proportion that are part of main job (percent)</i>	28	47

Source: *Work in selected culture/leisure activities*, ABS

Organisations and trade

Statistical research on the domestic music industries consists largely of one-off research projects that are incomparable due to differences in definitions.

The main sources are:

- . Guldberg (2000)
- . ABS (1997) Business of music: music recording, manufacture and distribution (excluding retail) –one-off
- . ABS (1997) Sound recording studios – one-off

- . ABS (1991 and 1997) Performing arts industries: Live music – two time periods partly comparable
- . Price Waterhouse (1993 and 1994): live and recorded music industries, no musical instruments – two comparable years

Price Waterhouse (1993 and 1994) provide the most extensive and reliable data on the domestic music industries and are the main source used here.

Summary data for the music industry 1991-92 to 1992-93

Figure M.10 sets out summary data for the music industries covered in Price Waterhouse (1993 and 1994).

Figure M.10: Music industry summary data 1991/92 and 1992/93

	1991-92	1992-93	% change
Employment (full time equivalents)	11,310	12,059	7
	\$m		
Total output	1,437	1,591	11
Value added	622.6	601.7	-3
Exports	120.5	206.2	71
Imports	295.8	342.2	16
Balance of trade (deficit)	(175.3)	(136.0)	-22

Source: Price Waterhouse (1994)

Total output of music industries \$1.6b in 1992-93...

Total output of the music industries (as defined) in 1992-93 was \$1.6 billion. The recorded music stream made up 61 percent of this output. Figure M.11 shows a breakdown of output data for the years 1991-92 and 1992-93.

...an increase on 1991-92

Figure M.11 shows that total output increased by 11 percent from 1991-92 to 1992-93. The growth is largely attributable to an increase in the value of exports (the increase being reflected across all of the export categories (export of recorded music; export earnings from royalties; and other goods and services).

Figure M.11: Value of output of music industry 1991-92 to 1992-93

	Output (\$m)		Percent change
	1991-92	1992-93	
Recorded music:			
Domestic sales	694	755	9
Exports	120	206	72
Broadcast	10	3	-70
Sub-total recorded music	824	964	17
Live performances (including merchandise sales)	613	627	2
Total	1,437	1,591	11

Source: Price Waterhouse (1994)

Value added of the music industries \$601.7m in 1992-93...

The value added, or gross product, of the music industries in 1992-93 was \$601.7 million. Figure M.12 shows the composition of value added.

Figure M.12: Value added and gross product of music industries 1992-93

	Value added	
	(\$m)	Percent of total
Songwriters	19.7	4
Artists	89.4	18
Managers	12.3	2
Publishers	14.3	3
Collection agencies	2.6	1
Record companies	93.6	19
Retailing/distribtuion	97.5	20
Live performance/merchandising	159.4	32
Indirect taxes (net)	61.2	12
Less net overseas income from royalties etc	-51.7	-10
Total gross product	601.7	100

Source: Price Waterhouse (1994)

... a decrease on 1991-92 at a time when Australia's GDP increased

The gross product of the music industries declined by 3 percent between 1991-92 and 1992-93. Australia's total GDP increased by 5 percent over the same period (ABS, 2000). The increase in wages and salaries coincides with a 7 percent increase in employment over the period (measured in 'full-time equivalents').

Figure M.13: Music industries gross product 1991-92 to 1992-93

	(\$m)		Percent change
	1991-92	1992-93	
Wages and salaries	349.7	382.5	9
Gross operating surplus	218.5	158	-28
Indirect taxes (net)	54.4	61.2	13
Total music industries gross product	622.6	601.7	-3

Source: Price Waterhouse (1994)

Indicators of industry structure

A variety of industry structure indicators are set out in figure M.14. Measured by employment, live music organisations are larger on average than other cultural businesses and recorded music organisations are smaller on average than other cultural businesses. Measured in terms of income, live music businesses are on average smaller than recorded music businesses, and both are below the average for all cultural businesses. The data show that the live stream is made up of a small number of large businesses, while the recorded stream is made up of a large number of small businesses.

Figure M.14: Selected structural statistics for music industries 1997

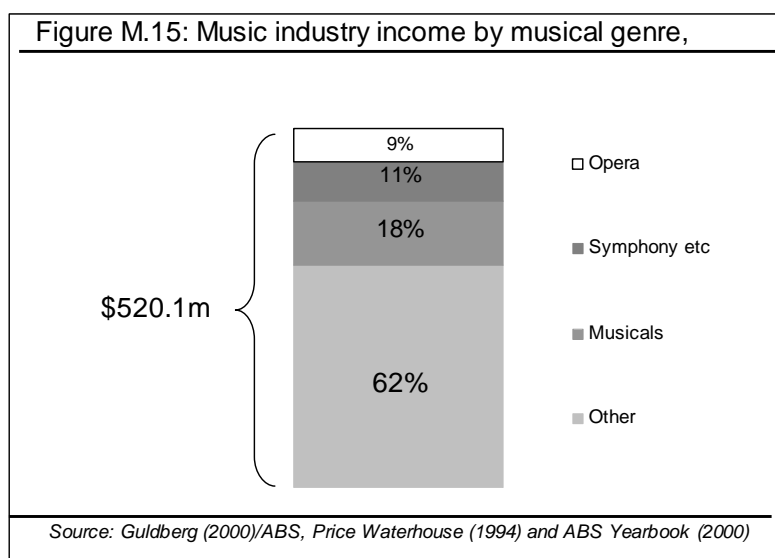
	Number businesses	Employees	Average no. employees	Income (\$m)	Income per employee (\$)	Income per business
Popular music	33	1,056	32	12.0	11,364	363,636
Symphony and choral	23	633	28	30.6	48,341	1,330,435
Opera	10	659	66	66.3	100,607	6,630,000
Musical	8	591	74	1.2	2,030	150,000
Live music (total of above) ¹	74	2,939	40	110.1	37,462	1,487,838
Recorded music ²	541	3,886	7	1,063.9	273,778	1,966,543
All culture	3,667	60,034	16	9,150.3	152,419	2,495,310

¹From ABS (1997)

²From Guldberg (2000)

Classical and 'musical' genres 37 percent of live music industry income

Opera, classical and musical organisations made up 37 percent of all music industry income in 1991. Figure M.15 summarises. Figures for opera, symphony etc and musicals is from the ABS' Performing Arts Industries (1991). The total is from Price Waterhouse (1993), which is derived from ABS data for 1991-92 (see Price Waterhouse, 1993, Appendix 1; iv). The total is then disinflated by the change in total Australian gross income 1990-91 to 1991-92 (which increased by 3 percent; from ABS, 2000).



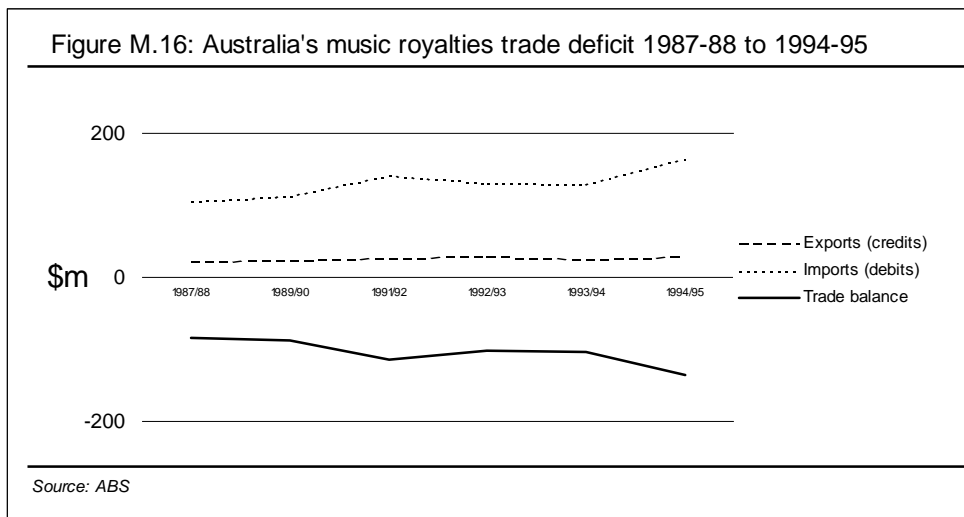
Music trade balance narrowed 1991-92 to 1992-93...

Australia is a net importer of musical goods and services, as indicated by the trade deficits set out in figure M.10 (musical instruments are not included in Price Waterhouse data, but data from the ABS indicates that Australia is also a net importer of musical instruments). However, the deficit decreased by 22 percent from 1991-92 to 1992-93 due largely to an 80 percent increase in overseas royalty earnings (from \$92.1m to \$166.4m).

...and widened 1993-94 to 1994-95

Data from ABS (1996) suggests that the balance of trade worsened from 1993-94 to 1994-95 (due largely to an 81 percent widening of trade balance for CDs and 32 percent widening for royalties).

The above analysis is indicative of how volatile trade data can be. All trade data should be viewed with great caution. Figure M.16 sets out long-term data on music *royalties* trade only.



Business sponsorship of music declined by \$6 million 1993 to 1996

Figure M.17 shows that business sponsorship of music was around \$6 million less than in 1993. Over the period music declined from 26 to 12 percent of all business sponsorship to the arts.

Figure M.17: Business sponsorship 1993 and 1996

	\$m current	
	1993	1996
Music	14.7	8.1
All arts*	57.2	64.9
<i>Music as percent of all arts</i>	26	12

* Excludes purchases of artworks by businesses

Source: Australia Council (1996)

DEMAND

Household expenditure

Household expenditure on CDs, records and tapes \$702.4m in 1993/94

Figure M.18 shows the annual value of demand for selected music-related commodities as estimated from the household expenditure survey in 1993-94. The \$702 million expenditure on CDs, records and tapes represents 0.2 percent of total expenditure.

Figure M.18: Household Expenditure on Selected Musical Items

Item	Gross annual expenditure
	(\$m at 1996-97 prices)
CDs, records and tapes (audio)	702.4
Musical instruments and accessories	168.3
Radio, stereo and hi-fi equipment	951.2
All Culture	8,282.6
All household expenditure	296,942.1

NB: musical concert expenditure not available

: relative price changes not accounted for

Source: Hans Guldberg/Household Expenditure Survey

Household expenditure on musical items increasing

Figure M.19 indicates that between 1988-89 and 1993-94 average weekly household expenditure on recorded music and stereo equipment grew at a faster rate than both total household expenditure and expenditure on cultural products. Expenditure on musical instruments declined. The data does not allow the disaggregation of total expenditure into quantity purchased and price. It is not possible, therefore, to determine whether movements in expenditure reflect a changes in quantity purchased or price, or both.

Figure M.19: Trends in average weekly household expenditure on selected musical items

Item	Percent change	
	1984-1989	1989-1994
CDs, records and tapes (audio)	4.4	39.4
Musical instruments and accessories	-28.6	-17.6
Radio, stereo and hi-fi equipment	4.3	36.7
All Culture	-10.6	14.7
All household expenditure	-1.5	5.8

Source: Guldberg (2000)/Household Expenditure Survey

Household expenditure on recorded music volatile 1975 to 1994

There is some indication that expenditure on recorded music has been extremely volatile over the '80s and '90s. Australia Council (1996; 16) indicates that average weekly expenditure on recorded music declined 14 percent over the two decades 1975-76 to 1993-94. This implies that the decline from over the earlier parts of the period (say 1975-76 to 1988-89) was larger than the 46 percent increase in the second part of the period 1983-84 to 1993-94. Such large swings in expenditure are likely to be due to changing product technologies - (from, for example, vinyl to magnetic tape to CD and digital products, further exacerbated by web music publishing). Expenditure swings such as those highlighted here will be caused by changing relative prices as well as possible lags in surveying methodologies. This is a good example of why trends in expenditure should take account of

changes in the prices of the commodities themselves. Current research sources do not supply the price detail necessary to account for the changes in household expenditure on music goods outlined above.

Attendance

Attendance rates for popular music and opera/musical declined 1995-99 and increased for classical music

The ABS' 'Attendance' series provides the most reliable trend data on attendances at live music concerts. Figure M.20 summarises. Classical music was the only genre to exhibit an increase in attendance rates between 1995 and 1999. Attendance rates for popular music and opera/musical genres declined, with the 3 point decline for opera/musical particularly marked in light of the 1.7 point rise in attendances across all cultural venues. Although differences in methodologies between years makes comparisons difficult, indications are that the declines in popular music and opera/musical genres continues on from declining attendance rates in the preceding period 1991 to 1995. The increase in classical music attendance rates between 1995 and 1999 also appears to follow on from a decline in attendance rates from 1991 to 1995.

Figure M.20: Live Music Attendances 1995-1999

	1995		1999		Change 1995-99	
	Number (000)	Attendance rate	Number (000)	Attendance rate	Number (000)	Attendance rate
Popular music	3,790.7	26.9	3,781.8	25.4	-8.9	-1.5
Classical music	1,081.3	7.7	1,310.3	8.8	229.0	1.1
Opera/musical	2,722.1	19.3	2,430.4	16.3	-291.7	-3.0
Total culture	11,670.0	82.9	12,615.8	84.6	945.8	1.7

* Total for music not calculable due to multiple attendance

Source: Attendance at selected cultural venues, ABS.

Attendance at music concerts by musical genre

Figure M.21 summarises attendance across various musical genres in 1997. Audience profiles and aspirations are covered in the following section.

Figure M.21: Attendance at music concerts by music genre 1997

	Percent attending in past two years
Pop	39
Musicals	36
Jazz/blues	23
Classical	20
Multicultural	13
Opera	12
Contemporary/experimental	7

Source: Australia Council (1999)

Part Two: Sector

Participation

More than half the Australian population listens to radio, CDs etc daily

In 1994, Australians spent an average of 79 minutes a day listening to radio, CDs etc. (this includes listening while doing other activities at the same time). More than half (57 percent) of the population reported free time spent at this activity. Comparisons with the previous survey are inadvisable due to classifications changes to

Involvements in music increasing but not as fast as all culture/leisure involvements

Involvements in music activities (except music teaching) represent between 5 and 8 percent of all culture/leisure involvements. Figure M.23 shows that involvements in music activities increased from 1993 to 1999, but not as fast as all culture/leisure activities. Again, this survey was carried out using different methodologies in each year. The figure is for people aged 18 years and over and the total excludes the activity 'electronic arts' as this was not included in the 1993 survey.

Figure M.23: Involvements in musical activities 1993-1999*

	1993	1997	1999
Music	201,200	223,200	345,700
<i>Percent change</i>		11	55
All culture/leisure activities	2,674,700	3,738,900	6,486,300
<i>Percent change</i>		40	73

* Excluding electronic arts

Source: Work in selected culture/leisure activities, ABS

Four out of five musical involvements are as a performer

Over the period 1993 to 1999, the proportion of musical involvements undertaken as a performer remained relatively stable at around 80 percent.

Music audience profile

Table 10 attached sets out audience profiles for people who attended music concerts in 1997. People who attended classical or choral music performances were mainly white collar, older and more 'conservative' in attitude (courting engagement, but also familiarity – full explanation in source document). People who attended contemporary and experimental music were younger and more 'experiential' in attitude (musical lifestylers and supportive of newness and difference).

Motivators and barriers for music performance attendance

The survey in Australia Council (1999) also contains a qualitative analysis of motivators and barriers to attendance. Figure M.24 sets out selected factors for selected musical types.

Figure M.24: Selected motivators and barriers to attendance by musical type, 1999

Genre	Motivators	Barriers
Classical	Relaxing, involving, escape, uplifting, familiarity, for the more educated	Visually lacking, expensive, old-fashioned, high-brow
Musicals/opereettas	Approachable, good value, 'feel good', big night out, female/family oriented	Price, light-hearted/corny, hackneyed
Experimental/electronic	Unusual, for intelligent, modern people	Unpleasant to listen to, lack of awareness, outside the 'comfort zone', alien.
Jazz/blues	Accessible, cheap, becomes part of one's life	Dingy/smoky venues, audience rough, male oriented, not really an art.

Source: Australia Council (1999)

Education

Between 1989 and 1999 university enrolments in music courses increased less than all arts enrolments and more than all university enrolments

In 1999 there were 5,014 student enrolments (measured in EFTSUs) in university music courses (19 percent of all arts course enrolments). This is 2,370 more than in 1989, an increase of 89 percent. Over the same ten-year period, total university enrolments increased by 55 percent and all arts enrolments increased by 122 percent (see figure P.25 in performing arts section). Comparisons of arts to total enrolments should be undertaken with caution (see again the explanation in the background to the performing arts chapter).

TAFE/vocational music enrolments remain steady while all arts enrolments decline

In 1996 there were 14,400 enrolments in music courses at vocational institutions (TAFE, adult and community education and private institutional providers). This represents 8 percent of all enrolments. Enrolments in music

courses remained relatively stable between 1990 and 1994 (at around 6,000 students), while all arts enrolments at these institutions declined by 5 percent. Data from Guldberg is discontinuous between 1994 and 1995. Enrolments in music at vocational institutions increased from 1995 to 1996, while enrolments in all arts courses remained unchanged. The data may be unreliable.

Year 12 music enrolments increased at same rate as all year 12 enrolments between 1985 and 1993

In 1993 there were 7,591 enrolments in tertiary-accredited year 12 music subjects. This is 54 percent higher than in 1983. This was a similar increase to total year 12 enrolments (60 percent), but less than the increase in all arts enrolments (102 percent). Data is summarised in figure P.27 of the performing arts chapter.

Part Three: Funding

Music funding increasing relative to all cultural funding

Figure M.25 shows that total government funding of music increased in real terms by 83 percent between 1988-89 and 1996-97, nearly twice the increase for government funding for all culture.

Figure M.25: Music funding 1988-89 to 1996-97

Government level	\$m (1996-97 prices)								change
	1988-89	1991-92	1992-93	1993-94	1994-95	1995-96	1996-97		
Australia Council	10.8	11.8	5.4	6.2	6.3	9.1	8.6	-20	
Federal (not AC)	0.2	5.9	7.8	7.4	11.3	11	11.9	5850	
State and territory	9	10.6	10.4	10.2	10.5	10.9	16.2	80	
Local	2	2.9	3.3	2.9	2.5	3	3.5	75	
Total music	22	31.2	26.9	26.7	30.6	34	40.2	83	
All culture	2,390.9	2,708.3	2,728.3	2,961.6	3,193.9	3,249.3	3,447.6	44	
<i>Music as percent of all culture</i>	0.9	1.2	1.0	0.9	1.0	1.0	1.2		

Source: Guldberg/ABS

Figure M.25 also shows that a significant structural or policy changes occurred from 1988-89 to 1991-92 (when non-Australia Council federal government funding increased) and 1991-92 to 1992-93 (when Australia Council funding for music was halved). A more recent structural change that is not reflected in the data in figure M.25 is the reclassification of commonwealth orchestra funding from broadcasting (via the Australian Broadcasting Corporation) to music. As a result, commonwealth funding for the category 'music' increased from \$20.4m in 1996-97 to \$50.9m in 1997-98 (in current dollars). Data for 1997-98 set out in figure M.26 therefore represents a truer reflection of the relative contributions to total music funding, with music funding being 1.8 percent of total culture/leisure funding, the majority (65 percent) coming from Commonwealth non-Australia Council sources.

Figure M.26: Music funding 1997-98

	\$m	percent of
Government level	1997-98	music
Australia Council	8.6	13
Federal (not AC)	42.3	65
State and territory	12.3	19
Local	1.8	3
Total music	64.9	100
All culture	3,531.0	
Music as percent of all culture	1.8	

Source: *Guldberg/ABS*

Appendix AM

Figures AM.1 and AM.2 summarise the calculations for obtaining more accurate estimates for music occupations for 1996. Figures in bold are actuals. An estimate of 1993 census-measured employment in music occupations is obtained by simple linear extrapolation. The higher level of 'capture' in Throsby and Thompson is then estimated by ratio (eg Throsby and Thompson captures 4 composers to every one composer in the census). This ratio is then applied to 1996 census data.

Figure AM.1: Estimating total employment of singers/musicians from two sources

	1991	1993	1996	<i>Ann average</i>
Throsby & Thompson		11,500		
(a) Census 1996*	6226	6,448	6,777	2
(b) Ratio Throsby/census		1.78		
Estimated total (a x b)			12,086	

Figure AM.2: Estimating total employment of composers from two sources

	1991	1993	1996	<i>Ann average</i>
Throsby & Thompson		1,000		
(a) Census 1996*	218	236	261	4
(b) Ratio Throsby/census		4.25		
Estimated total (a x b)			1,108	

Figures in bold are actuals

*Estimates for 1993 obtained by applying annual average change to actual data