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**AUSTRALIAN EXPERIENCE IN DEVELOPING SURVEYS
OF FILM AND VIDEO INDUSTRIES**

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INTRODUCTION

Australia will conduct surveys of film and video production, distribution and exhibition industries in respect of the fiscal year ended on 30 June 1994. Research to determine the feasibility of including these industries in the Australian program of surveys of service industries commenced substantively in July 1993. Forms were despatched to survey respondents in September 1994.

RESEARCH AND CONSULTATION

The research work undertaken to establish the surveys focused on:

a) consultations with prospective users of the statistics and with businesses in the industries to:

- . determine the priority requirements for statistics about film and video industries;
- . determine the scope of the surveys;
- . identify and explore conceptual and practical issues that needed to be considered in the survey design.

b) upgrading ABS knowledge of the way in which these industries operated and were structured. With the exception of the motion picture theatre industry, for which a survey was conducted for 1986-87, this was a new field about which there was very little understanding in the ABS.

c) examine methodological matters such as the use of the ABS business register to provide a population frame, coverage required/achievable, sampling considerations, etc.

ABS consultations and research established the parameters for the surveys. These included the requirement for industry-wide statistics and parallel activity measures from businesses and the inclusion of a range of industry-specific data items relating to income, expenses, employment, assets, liabilities and capital expenditure.

Overall, the response to the possibility of ABS surveying these industries was overwhelmingly positive. It was widely acknowledged that there were deficiencies in statistics currently available. Those consulted hoped that the results of the surveys would provide a definitive picture of the size and importance of the film and video industries to the Australian economy in the light of the current drive for exports of services.

SCOPE OF THE SURVEYS

The scope of the surveys includes the following classes from the Australian and New Zealand Standard Industrial Classification (ANZSIC).

Class 9111 Film and Video Production incorporating the primary activities of motion picture film or tape production, motion picture editing, post-production activities, television program production.

Class 9112 Film and Video Distribution incorporating the primary activities of motion picture leasing, motion picture distribution, video leasing (excl. hire to the public by video hire shops), international sales agents.

Class 9113 Motion Picture Exhibition incorporating primary activities of cinema operation, drive-in theatre operation, film or video festival operation, motion picture screening, motion picture theatre operation.

Clients strongly contended that a complete picture of the Australian film and video production industry would only be obtained if data on the in-house production of film and video by television stations was also included in the collection. Although they expressed interest in industry information the clients were actually referring to film and video production activity. Typically this production activity includes news broadcasts, variety shows, dramas, sports and 'soapies'.

Consequently the survey scope was extended to include the ANZSIC class corresponding to this, namely, Class 9122 Television Services incorporating the primary activities of television service and television station operation. This will incorporate data on in-house production of film and video by television stations.

COVERAGE

The ABS business register was used as the population frame for the surveys.

Feedback from a wide range of clients consistently indicated that there was a large freelance community comprising, for example; actors, animators, cinematographers, directors, gaffers, lighting contractors, and others who provided services to production companies on a contract basis. Most of these formed incorporated companies and were listed on the ABS business register. Those companies whose activity is primary to ANZSICs 9111-9113 and 9122 were included within the scope of the collection.

The number of businesses recorded on the register in each industry class is shown in the table below. Each industry class will be fully enumerated.

ANZSIC class	Number of businesses on the business register
9111 Film and Video Production	2389
9112 Film and Video Distribution	84
9113 Motion Picture Theatres	344
9121 Television Services	70

DATA REQUIREMENTS

Statistics Canada has been conducting annual surveys of the film and video industries for about 10 years, and its data items were used as a starting point in many of the discussions with clients.

The types of information for which clients expressed a need fell into a number of broad categories. These are outlined below.

Income. A wide range of clients expressed strong demand for income by type of activity and source of income. The income items collected were tailored to each industry.

Expenses. As for income, the break-up of relevant expenses were tailored to each industry.

Finance. This item relates to the production industry only. Many clients expressed strong demand for information on the source of finance used by production businesses which for many years have been strongly supported by governments by means of grants, concessional finance and taxation concessions.

Employment. Considerable attention was drawn by clients to the problems of measuring employment in the production industry. Typically, a production business has little or no staff until such time as it produces a film or video. Staff are then engaged on a contract basis for the duration of the 'shoot', which can last for anything from four to twenty-six weeks.

Traditionally there are two or three quiet periods annually for the industry. These occur near the end of each fiscal year while businesses finalise their finance arrangements for the following year, and in wet weather, which occurs in the summer in the north of the continent and in the winter in the south.

Consequently the ABS will ask for employment at the end of each of 12 months. This means we will capture the fluctuations which occur in the industry and we increase the likelihood of collecting employment for any short duration shoots.

Capital expenditure and assets and liabilities. These have been included to maintain compatibility with data requirements from numerous ABS collections for compiling national accounts and because of the significant capital requirements in the distribution and television services industries.

All clients were keenly interested in obtaining data that indicated the viability of the Australian film industry. This manifests itself in clients' intense interest in obtaining domestic/foreign splits for many data items. This requirement will be addressed by linking the data reported in trade in services collections for compilation of balance of payments statistics with the data from this survey.