

By sector, live performances accounted for about one third of industry value added at \$212m compared to retail/distribution \$110m, record companies \$87m, studios/manufacturers \$1m, collection agencies \$4m, publishers \$17m, managers \$8m, artists \$66m and songwriters/composers \$19m. The high value added of live performances would be attributable to the high labour content and minimal infrastructure costs. However, artists do contribute \$58m to live performances. A reallocation would give value added by artists as \$123m or 18 per cent of the industry total.

Value added is influenced by a number of factors including the relative strength of different sectors in the marketplace. Though artists and songwriters/composers make a low contribution to value added it may be due to limited market power which means that components of value added, such as profits, may be made downstream. To illustrate this point, estimates of employment for artists and songwriters/composers place over half of the industry's employment in these areas.

Rights controlling live performances and retail distribution (plus record companies) are associated with the two largest components of industry value added. Changes in distribution could have a major impact on the allocation of this value added between sectors and industries such as the music industry, broadcasting and telecommunications.

#### **BALANCE OF TRADE**

Australia's music industry had a balance of trade deficit of \$144m in 1991-92 on exports of \$121m and imports of \$265m. The overall trade deficit consisted of deficits in both trade in physical product (records, cassettes, CDs) and trade in services (royalties, performances, etc). The trade in physical product deficit of \$67m was recorded on exports of \$4m and imports of \$71m. CDs accounted for \$61m of imports, by far the preferred format for imported recordings. The deficit in trade in services was \$78m on exports of \$116m and imports of \$194m. While the deficit is

large given the size of the industry, it should be seen in the context of a significantly larger total balance of trade deficit.

#### **CD PRICES**

At the time of the Prices Surveillance Authority report, parallel importation was advocated as a means of delivering cheaper CDs to consumers through increased competition. However in the profile, industry members did not envisage price reductions from parallel importation.

The profile indicates that Australian CD prices are among the cheapest in a group of 23 developed nations. Comparisons were qualified however, because relative prices in Australian dollars may be influenced by changes in exchange rates, and I would imagine differing import duties and indirect taxes may have some influence as well.

*Copies are available through MIAC secretariat, Department of Industry Technology and Regional Development, GPO Box 9839, Canberra ACT 2601, for \$12.*



## **NEW IN THE LIBRARY**

**THE AUSTRALIAN BROADCASTING AUTHORITY LIBRARY ALLOWS PUBLIC ACCESS TO ITS COLLECTION DURING NORMAL BUSINESS HOURS FOR RESEARCH PURPOSES, HOWEVER BORROWING IS NOT PERMITTED. THE FOLLOWING TITLES HAVE BEEN SELECTED FROM THE RANGE OF NEW ADDITIONS TO THE LIBRARY. THESE ENTRIES ARE INDICATIVE OF THE SUBJECT MATTER, BUT ARE NOT INTENDED AS CRITICAL COMMENT OR REVIEW.**

**'WELL, I HEARD IT ON THE RADIO AND I SAW IT ON THE TELEVISION...': AN ESSAY FOR THE AUSTRALIAN FILM COMMISSION ON THE POLITICS AND AESTHETICS OF FILMMAKING BY AND ABOUT ABORIGINAL PEOPLE AND THINGS**

**Marcia Langton. - North Sydney: AFC, 1993.**

*'Australians do not know and relate to Aboriginal people. They relate to stories told by former colonists'*

Marcia Langton.

In this major work of social and cultural criticism, Marcia Langton analyses the making and watching of films,

videos and television programs by Aboriginal people in remote and settled Australia. She introduces theoretical perspectives to investigate concepts of Aboriginality and presents case studies of films such as *Jedda*, Tracey Moffatt's *Night Cries*, Brian Syron's *Jindalee Lady* and Ned Lander and Rachel Perkin's film of the Warlpiri Fire Ceremony *Jardhuarnpa*. The central requirement, she argues, is to develop a body of knowledge on representation of Aboriginal people and their concerns in art, film, television or other media and a critical perspective to do with aesthetics and politics, drawing from Aboriginal world views, from Western tradi-

tions and from history.

**ELECTRONIC MEDIA RATINGS: TURNING AUDIENCES INTO DOLLARS AND SENSE**

**Karen Buzzard. - Boston: Focal Press, 1992.**

*Electronic Media Ratings* is an accessible guide to the methods, services, and day-to-day applications of ratings for radio, television, and cable. This book explains concisely how broadcast and cable audiences are defined and calculated. It details how ratings are used within the industry to evaluate programs and sell advertising time. It

seeks to put the current ratings systems, and the uses to which they are put, into a historical and social science perspective, to enable the reader to assess and employ ratings figures effectively.

**THE IMAGE OF OLDER ADULTS IN THE MEDIA: AN ANNOTATED BIBLIOGRAPHY**

**Frank Nuessel.** - Westport, CT: Greenwood Press, 1992.

This volume provides an account of how older people are depicted in the media and, as a result, an insight into how contemporary society views old age. The book is divided thematically into 21 chapters, under headings such as attitudes and stereotypes; media guidelines; film; advertising; and oral history. Some categories contain only a few entries, while other areas feature abundant citations. In this sense, this reference book points out areas for future study. In its introduction, the book discusses the history and meaning of the terms employed in the title: 'old' and 'media', and indicates the range of literature on the subject. There is also a section which lists related bibliographies, those that complement this reference work, but with no overlap in content or category.

**BROADCASTING BOUNCES BACK: A FINANCIAL EVALUATION OF AUSTRALIAN COMMERCIAL METROPOLITAN TELEVISION: PART ONE: INDUSTRY OVERVIEW.**

**Melbourne: ANZ McCaughan, 1993.**

A comprehensive evaluation of the commercial metropolitan television industry prepared by ANZ McCaughan demonstrates that the industry has definitely recovered from the financial trou-

mas of the 1980s and that it is now in a phase of genuine and sustainable revenue and profit growth. This evaluation is divided into two parts. The first part of the evaluation is this industry overview. The second part will be presented in the form of a multi-issue series of research reports. The industry overview which is presented in this document is divided into five major sections: section one considers the fundamentals, origins, structure, comparative position, ownership, and regulation of the commercial metropolitan television industry; section two examines the interrelationship of ratings, programming and network positioning strategies and how they interact to determine the split-up of the industry's advertising revenue among the three commercial networks and their respective stations; section three presents an historical assessment of financial performance, on an industry and network basis; section four comprises mini-profiles of each of the three major network-owning companies; section five concludes with an assessment of the industry's future prospects.

**BROADCAST/CABLE PROGRAMMING: STRATEGIES AND PRACTICES - 4TH ED.**

**Susan Tyler Eastman.** - Belmont, CA: Wadsworth, 1993.

While US broadcast networks have lost more of their audience to cable, independent stations and home video, Fox has become an established prime-time competitor and pay-per-view television is finally succeeding. The latest industry data on these and other changes in broadcast and cable programming are highlighted in this authoritative look at network and local program-

ming from both commercial and noncommercial perspectives. Author Susan Tyler Eastman's discussion and analysis of the program decision-making process - audience and program evaluation and program selection and scheduling - is augmented by the comments of industry professionals in television, cable, radio, and public broadcasting. The perspectives of these experts add a real-world flavor to the understanding of long-term strategies and day-to-day decision making in specific programming situations.

**POLITICAL MANAGEMENT IN THE 1990s**

**John Halligan & John Power.** - Melbourne: Oxford University Press, 1992.

The last two decades have been ones of unprecedented change in Australian public sectors. This is the first Australian public administration study to address systematically the recent reforms to the Australian public sector by comparing and analysing change. The framework is based on the two main dimensions of change - managerial and political - that have dominated the current period of major public sector change. The authors argue that an understanding of the combination of the two, which they characterise as political management, is necessary for comprehending this period of reform. The book covers the public services of the Commonwealth and four states - New South Wales, Queensland, South Australia and Victoria. Each is accorded a separate chapter which may be read as a self-contained study or as a contribution to the broader argument. The book concludes with a discussion of scenarios for the future.

