

Arts Nation

An Overview of
Australian Arts

2015 Edition

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INTRODUCTION

The arts are a big part of everyday life for Australians.

The arts play a vital role in a culturally ambitious nation. Never before has there been such rapid change driven by creativity and innovation. Never before has there been more engagement, participation or curiosity about art and culture in our everyday lives.

Australia has a great arts story to tell.

Australia is proud to have its roots in the world's oldest living culture, and in more recent times enriched by an incredible breadth of diversity from across the globe. Australia is a critical part of the Asia Pacific region with deep, strong and harmonious ties to other parts of world. Australian arts transcend boundaries and borders, and the Australia Council is committed to supporting increased artistic collaboration and cultural exchange. Australians cherish Aboriginal and Torres Strait Islander arts and we aspire to greater understanding and engagement at home and abroad.

Informing the growth of a healthy arts ecology and nation.

Building a greater understanding about the makeup of the arts in Australia - its scale, dimension, contributors and participants - will help us work collaboratively to support strong future development. We are committed to developing a range of useful indicators to measure and analyse growth and change over time. We intend that this report will speak to the arts sector but also engage and captivate a far broader audience. We hope it will play a role in Australia increasingly being known for its great art and artists.

Arts Nation is a snapshot in time.

The *Arts Nation* report is an important first step in building consolidated and meaningful knowledge about the arts in Australia. This inaugural report will help us to look at the arts through a wider lens - their place in the lives of Australians and the profile of Australian arts internationally. The report draws on a range of existing and new data, framed within a newly created set of indicators designed to inform the conversation about the arts in Australia. Over time, we will work collaboratively to develop and build this report into a comprehensive picture of the Australian arts sector.

Consolidating existing data and new indicators.

The report relies on the important contribution and partnership of organisations including the Australian Bureau of Statistics, Live Performance Australia, Tourism Research Australia, and many others. We thank these organisations for their contribution and acknowledge that the integrity and growth of this report will rely on the support of these and new partners in the years ahead.

Arts Nation takes a fresh approach to consolidating important available data from diverse sources and distilling it down to key indicators which can be easily understood. We have outlined how we plan to expand these indicators in the future and also invite your support, contribution and feedback to ensure that this report becomes the definitive resource on the arts in Australia.

Rupert Myer
Chair

Tony Grybowski
CEO

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EXECUTIVE SUMMARY

Australians value the arts.

A growing number of Australians believe that the arts make for a richer and more meaningful life; they influence how we express ourselves, our creative thinking and new ideas. Understanding the scope and impact of the arts in an Australian context is complex. This first *Arts Nation* report provides a starting point for that exploration at a national level, and will continue to develop over time.

New analysis using the internationally recognised wellbeing valuation approach is one way of calculating the value of intangibles. It suggests that people who engage with the arts have higher life satisfaction. This is a significant finding given the level of engagement by Australians with the arts.

Nearly all Australians consume at least one form of art and half participate in arts creation each year. Geographic location does not impact on arts engagement as much as you might expect and creative participation has increased amongst some groups with historically lower levels of participation. The 44,000 practicing professional artists in Australia predominantly have portfolio careers, with just 17% working full-time on their creative practice.

The arts are deeply embedded in the cultural sector, and cultural activity makes a substantial contribution to the Australian economy. Cultural activity contributes \$50 billion to Australia's GDP, comparable to the GDP share in the USA, including over \$4.2 billion from the arts. Expenditure on culture by Australian governments in 2012–13 was \$7 billion including over \$1.3 billion on the arts. Important to note is that the main source of income to the arts

is consumer spending, for example, ticket sales for performing arts events generated \$1.5 billion in 2013.

Private support for the arts continues to grow, most significantly from private donations. Arts organisations are experiencing rapid growth with the major performing arts companies seeing an 81% increase between 2009 and 2013. Crowdfunding is a small but growing area for Australian artists to raise smaller amounts with a higher than average success rate.

Exploring the way international tourists spend their time in Australia has highlighted the growth in arts tourism. There has been 19% growth over the past four years, with 2.4 million international visitors to Australia in 2013–14 engaging in arts tourism. More than one in four international tourists visit galleries or museums, similar to the levels in the UK and USA.

Aboriginal and Torres Strait Islander^a arts are cherished both at home and abroad. Nine in ten Australians agree that Indigenous arts are an important part of Australian culture and audiences for Indigenous arts are growing. Aboriginal and Torres Strait Islander artists are proportionally more likely to be nominated for a major Australian art award or participate in an international arts event. The Indigenous visual arts sector is a major contributor to the arts economy and responsible for some of Australia's most valuable works of art.

This snapshot in time affirms the significance of the arts in the lives of Australians, as well as our international profile. Central to this is our unique position as home to the world's oldest continuous living culture.

^a The terms 'Aboriginal and Torres Strait Islander' and 'Indigenous' are both used in this report to refer to the Aboriginal and Torres Strait Islander peoples of Australia.

ABOUT THIS REPORT

The Australia Council for the Arts is committed to providing evidence as a catalyst for informed discussion about the arts. This will help decision-makers not only to form well-justified views, but to explain their views and convince others. Over time, this body of credible and independent evidence can also inform the wider community about key issues in the arts, choices in balancing sectoral interests, and the different kinds of value generated by the arts.

Arts Nation: An Overview of Australian Arts is a central feature of the Australia Council's research program. It is intended to encourage national dialogue about arts and culture in Australia and to inform the strategic goals set by the Council in promoting and fostering the arts.

This first report delivers a selected set of initial indicators that enrich the existing evidence base for the arts. It builds on key data collections and research undertaken by sector leaders. The report also invites sector discussion about national data gaps and how to expand the indicators for a more comprehensive report in the future.

Why these indicators?

Data indicators help us to understand where we are and the direction in which we are heading. By their nature, indicators like these cannot represent a comprehensive picture of the current situation. Rather, they are clues, symptoms, or a pointer to something that is changing. The *Arts Nation* indicators were guided by these objectives:

- to reach across commercial and not-for-profit arts sectors
- to take a holistic and cross art form approach
- to create an understanding of change, facilitating comparisons

- to be credible and accessible
- to present unexpected and original analysis.

Definition of the arts

It has been important to establish a definition of 'the arts' for this report. Arts and culture are inextricably linked, but while the arts are expressions of culture, culture is more than the arts alone. This report identifies the core arts in relation to the Australia Council's areas of responsibility and includes:

- literature
- music in all forms
- theatre, musical theatre and opera
- dance in all forms
- other performing arts such as circus, comedy and puppetry
- arts festivals
- visual arts and crafts
- arts education and training
- Aboriginal and Torres Strait Islander arts
- community arts and cultural development
- emerging and experimental arts.

Except for the *Cultural economy* section, which places the core arts in a broader context, this report does not include:

- film or television, which are reported by Screen Australia
- other broadcasting activities, the print media, or multimedia activities without an arts content focus
- cultural institutions such as libraries, museums and archives
- broader areas of cultural activity such as environmental heritage
- broader areas of creative activity such as fashion or design.

Where sources of data have not entirely matched the scope of arts activities intended for coverage in this report, a best-fit approach has been taken.

ABOUT THIS REPORT

Talking points

Diversity and international arts are two discussion points for the *Arts Nation* report in 2015. Eight leaders from across the arts sector were invited to share their personal experiences and offer insight into these topics. Contributors include:

- Wally De Backer,
musician (Gotye & The Basics) and co-founder of independent label Spirit Level.
- Janet Holmes à Court AC,
Chair of the West Australian Symphony Orchestra and Founding Patron of Black Swan Theatre Company.
- Sir Jonathan Mills,
composer and the former Artistic Director of the Edinburgh International Festival.
- Gideon Obarzanek,
choreographer and former Artistic Director of dance company Chunky Move.
- Marion Potts,
Artistic Director of Malthouse Theatre in Melbourne.*
- Ben Quilty,
visual artist and Trustee of The Art Gallery of NSW.
- Professor Kim Scott,
writer and Professor of Writing in the School of Media, Culture and Creative Arts at Curtin University.
- Alexis Wright,
writer and Research Fellow at the University of Western Sydney.

*Marion Potts will be joining the Australia Council as Director Theatre in April 2015, but was not a Council employee when interviewed for *Arts Nation*.

The Australia Council would also like to thank the following contributors to the 2015 *Arts Nation* report:

Ernst & Young
Lateral Economics
Dr George Argyrous
Daniel Fujiwara
Ricky Lawton
Christopher Madden
Barbara Messer
Tandi Williams

The more than a hundred arts and research organisations from across Australia who have shared their data on the arts. See page 44 for a full list of these.

SUMMARY OF INDICATORS

The *Arts Nation* indicators are drawn from current data sources across the arts sector. They have been created through new analysis of existing data and new primary research. Where possible, 2013-14 financial year data have been used. Where current or annual data were not available we have used the most recent information to report results and trends.

Key:  Trend is up  Trend is down  Trend is stable  Trend data not available this year

AUSTRALIANS EXPERIENCING THE ARTS

INDICATORS & MEASURES		RESULTS	TRENDS
1. PERSONAL VALUE FROM ENGAGING WITH THE ARTS			
1.1	Proportion of Australians who agree that the arts make for a more rich and meaningful life	85%	↑
2. SCALE AND MODE OF CONSUMER ENGAGEMENT WITH THE ARTS			
2.1	Proportion of Australians who read literature	87%	↑
2.2	Proportion of Australians using the internet to access arts content	56%	↑
2.3	Number of tickets sold to performing arts events for every 100 Australians per annum	78	↑
3. SCALE OF CREATIVE PARTICIPATION IN THE ARTS			
3.1	Proportion of Australians who creatively participate in the arts six or more times per year	38%	=
4. DIVERSITY OF ARTS AUDIENCES AND PARTICIPANTS			
4.1	Proportion of Australians who attend the arts by region	Major cities: 74% Inner regional: 69% Outer regional: 65% Remote: 67%	?
4.2	Proportion of Australians from these groups who attend or creatively participate in the arts	Non-English speaking country of birth: 63% attendance 38% creative participation People with disability: 59% attendance 49% creative participation Income < \$20,000: 52% attendance 47% creative participation Benchmark of all Australians: 71% attendance 48% creative participation	 = = ↑ = ↑
5. AFFORDABILITY OF THE ARTS TO CONSUMERS			
5.1	Average cost of arts purchases as a share of weekly disposable household income	Ticket to performing arts events: 11% Gallery ticket: 2% Book: 2%	=

SUMMARY OF INDICATORS

ARTISTS AND THE ARTS		
INDICATORS & MEASURES	RESULTS	TRENDS
6. ARTS EDUCATION AND TRAINING		
6.1 Number of students undertaking creative arts qualifications at tertiary level	109,000	↑
7. PROFESSIONAL ARTIST POPULATION		
7.1 Number of practicing professional artists in Australia	44,000	=
7.2 Proportion of professional artists in Australia working full-time on their creative practice	17%	?
8. DIVERSITY OF ARTISTS		
8.1 Proportion of professional artists in Australia who are from a non-English speaking background	8%	?
8.2 Proportion of professional artists in Australia who are living with disability	8%	?
8.3 Proportion of females nominated for national arts awards	30%	?

AUSTRALIAN ARTS INTERNATIONALLY		
INDICATORS & MEASURES	RESULTS	TRENDS
9. IMPACT OF ARTS ON INTERNATIONAL VIEWS OF AUSTRALIA		
9.1 Number of annual international arts tourists in Australia	2.4 million	↑
9.2 Proportion of all international tourists in Australia undertaking arts activities	38%	↑
10. PRESENCE OF AUSTRALIAN ARTS INTERNATIONALLY		
10.1 Proportion of Australian artists who have had their work seen overseas	38%	?
10.2 Proportion of artists in selected overseas arts events who are Australian	1.7%	?
10.3 Proportion of artists nominated in selected international arts awards who are Australian	1.6%	?

SUMMARY OF INDICATORS

ABORIGINAL AND TORRES STRAIT ISLANDER ARTS			
INDICATORS & MEASURES		RESULTS	TRENDS
11.	ENGAGING WITH ABORIGINAL AND TORRES STRAIT ISLANDER ARTS		
11.1	Proportion of Aboriginal and Torres Strait Islander people who creatively participate in Indigenous arts	28%	=
11.2	Proportion of Australians who have a strong or growing interest in Indigenous arts	64%	=
11.3	Proportion of Australians who attend Indigenous arts	24%	↑
12.	DIVERSITY OF ARTISTS		
12.1	Proportion of nominees for national arts awards who are Aboriginal or Torres Strait Islander	4.7%	?
13.	PRESENCE OF AUSTRALIAN ARTS INTERNATIONALLY		
13.1	Proportion of Australian artists in major overseas arts events who are Aboriginal or Torres Strait Islander	4.9%	?
14.	IMPACT OF ARTS ON INTERNATIONAL VIEWS OF AUSTRALIA		
14.1	Number of annual international Indigenous arts tourists in Australia	0.7 million	↑

THE CULTURAL ECONOMY			
INDICATORS & MEASURES		RESULTS	TRENDS
15.	POPULATION OF ORGANISATIONS THAT CONTRIBUTE TO THE ARTS		
15.1	Proportion of new members in key national arts industry associations	7%	=
16.	LEVEL OF DIRECT GOVERNMENT EXPENDITURE ON CULTURE AND THE ARTS		
16.1	Annual expenditure by governments on culture and the core arts	Culture: \$7 billion Core arts: \$1.3 billion	= ↓
16.2	Average annual per-person expenditure on culture and the core arts	Culture: \$308 Core arts: \$58	↓ ↓
17.	PRIVATE SECTOR SUPPORT TO THE ARTS		
17.1	Total annual private sector support raised by arts organisations	\$221 million	↑
17.2	Annual crowdfunding revenue to Australian arts projects	\$4.8 million	↑

AUSTRALIANS EXPERIENCING THE ARTS



Arts engagement is a key goal of the Australia Council's Strategic Plan.

Australians value the arts and increasingly believe that the arts make for a rich and more meaningful life. Nearly all Australians consume at least one form of art and half participate in arts creation each year. Creative participation has increased amongst some groups that have historically been less engaged. Although lower income groups remain less likely to attend the arts, the affordability of tickets has stayed relatively stable.

Personal value

Most Australians agree that the arts enrich their lives and make them more meaningful¹ (**Indicator 1**). They participate in the arts for personal enjoyment, engagement with friends or family, self-expression, relaxation, skills development and income.² Most Australians also believe that the arts have a large impact on how we express ourselves; they enable us to think creatively and develop new ideas, and help us deal with stress, anxiety or depression.¹

The proportion of Australians who agree that the arts make for a more rich and meaningful life has increased from 71 percent in 1999 to 80 percent in 2009, to 85 percent in 2013¹ (**Measure 1.1**). People are more likely to see the value of the arts if they experience them personally. Women are more likely than men to see the value of the arts.¹

AUSTRALIANS EXPERIENCING THE ARTS

New analysis on subjective wellbeing suggests that engagement with the arts correlates with higher life satisfaction. Social impact researchers have been able to calculate a monetary value for the benefits resulting from different activities. Based on this technique, the amount of money required to produce an increase in life satisfaction equivalent to arts engagement is \$4,349 per person per annum. Across the Australian population this is equivalent to \$66 billion a year.³

Consumer engagement

Australians engage with the arts in different ways (**Indicator 2**). Nearly all Australians attended live events, visited art galleries or read literature in 2013 (94%). Reading is the most popular way of consuming the arts. In 2013 nearly nine out of 10 Australians (87%) read some form of literature,^b up from 84 percent in 2009 (**Measure 2.1**). More than half of readers read weekly. Most read novels (73%) or creative non-fiction including biography, memoir or history (56%).¹

Many who do not physically attend arts events use the internet to engage with the arts. In 2013 two thirds of Australians used the internet in some way to engage with the arts (66%), more than double the number reported in 2009 (31%). Over half (56%) of the population used the internet to watch or download art such as music, visual art, performances or creative writing including e-books and audio books¹ (**Measure 2.2**).

Australians are increasingly engaging with the arts online. Use of the internet for the arts increased at a faster rate than overall internet usage between 2009 and 2013 (113% for arts only internet usage, 17% for general internet usage).¹

Physical attendance at performing arts events remains important. About 78 tickets to performing arts events were sold for every 100 Australians in 2013⁴ (**Measure 2.3**). This was equivalent to almost 18 million tickets. Ticketed attendance has fluctuated over the last few years, but it was slightly higher in 2013 than the previous three years.⁵

Creative participation

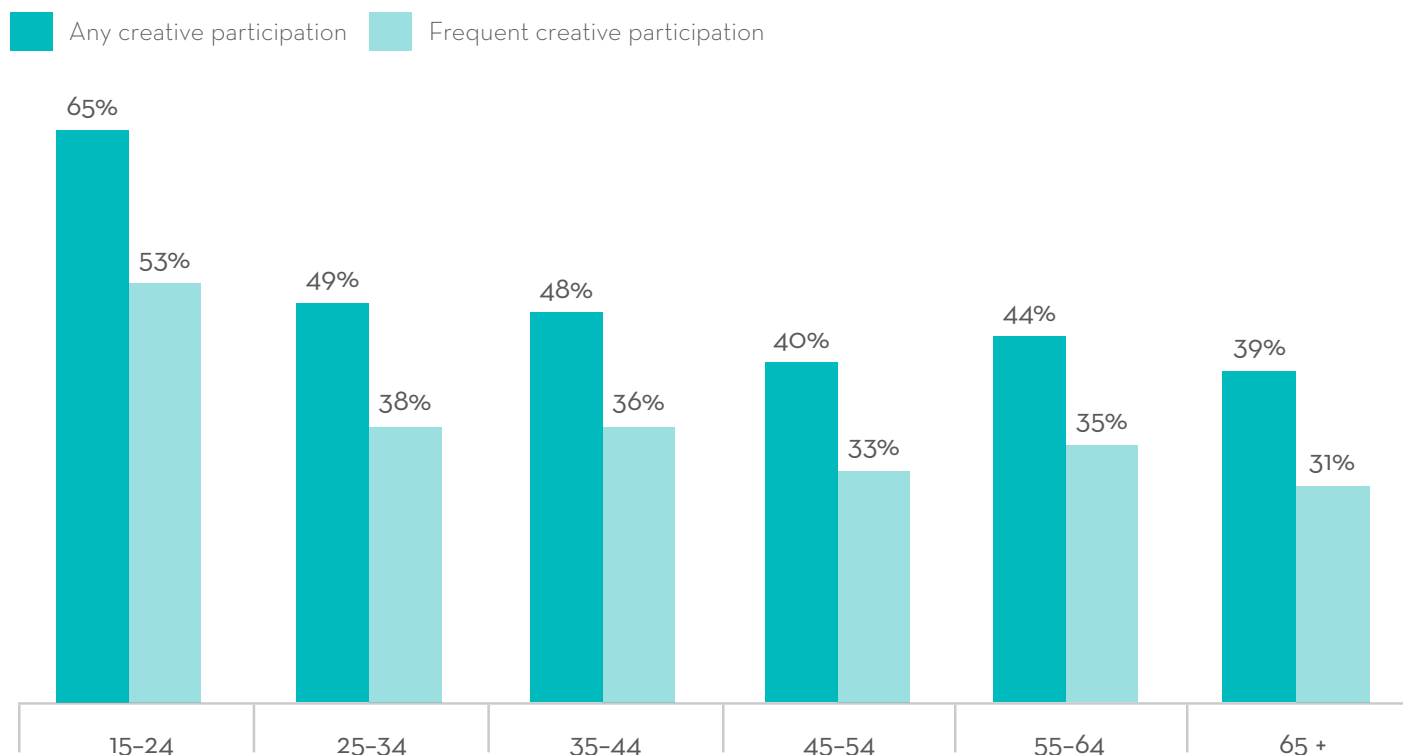
Creating art is an important part of life for many Australians (**Indicator 3**). Over a third of Australians (38%) created arts regularly (at least six times in the year) in 2013¹ (**Measure 3.1**). This includes creative writing, playing music or singing, making visual arts or crafts, and taking part in theatre or dance.

An even larger number of Australians create art occasionally. Almost half (48%) creatively participate in the arts at least once a year, up from 41 percent in 2009, with the largest increases seen in music and visual arts.¹ Younger Australians are more likely to create art (**Figure 1**), which is linked to attending school or tertiary education.⁶

^b This includes creative works of writing such as novels, short stories, biographies, memoirs, essays, histories, poetry and plays.

AUSTRALIANS EXPERIENCING THE ARTS

Figure 1: Creative participation in the arts by age group, 2013



Access to the arts

Over the last four years there has been a big increase in the number of people with disability, and people with low incomes, who have creatively participated in the arts and they are now just as likely to create art as Australians overall.¹ But attendance at art events remains lower for these groups and for Australians who live further away from large cities or were born in a non-English speaking country (**Indicator 4**).

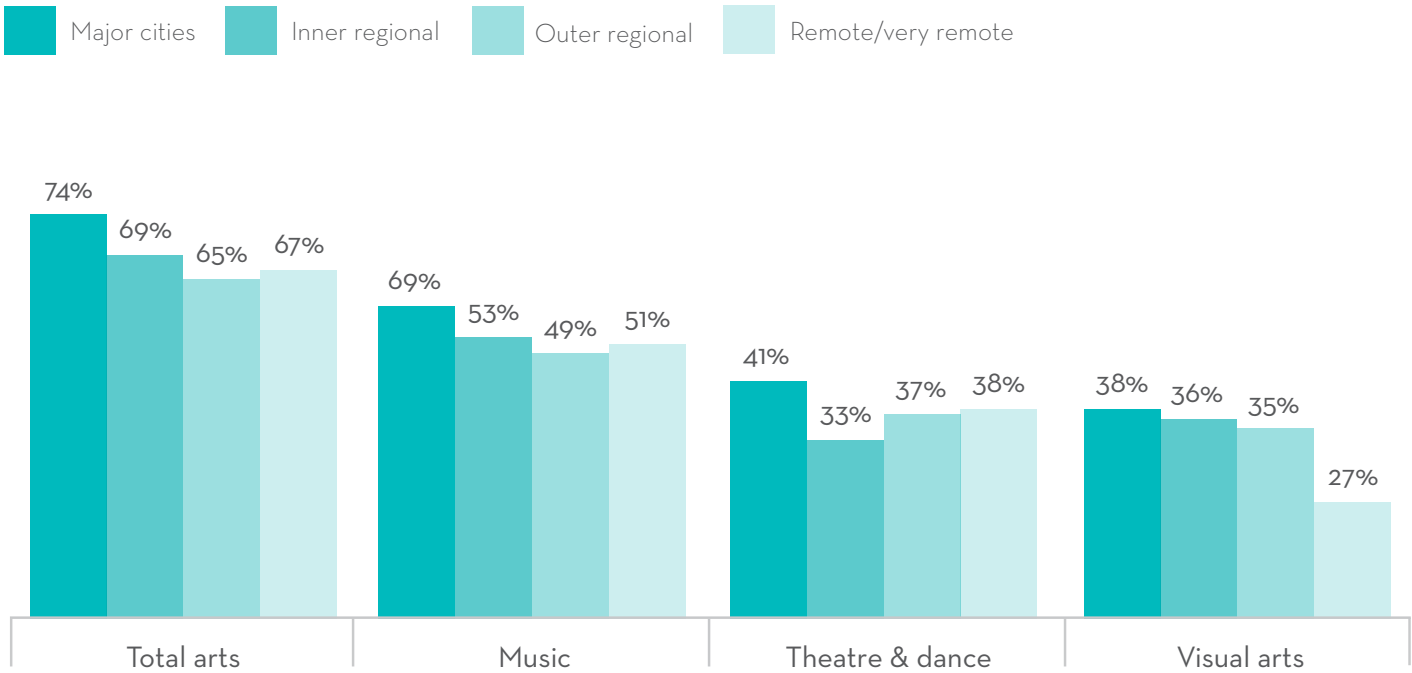
Despite its size, Australia has one of the world's most urbanised populations and there is more arts infrastructure in urban areas where there are larger populations. However, living in a regional location limits engagement with the arts less than might be expected. Residents in major cities

were slightly more likely to attend arts events than those in inner regional, outer regional and remote areas (74%, compared with 69%, 65% and 67%)⁷ (**Measure 4.1**). Attendance is slightly higher in major cities across art forms (**Figure 2**); but people living in regional and remote areas are more likely to have attended Indigenous or community arts.⁷

Looking at attendance in capital cities, people who live within a 20km radius from the city centre (inner urban) have higher arts attendance than those who live outside this area (peri-urban) (74% vs 69%). The largest differences in attendance between inner urban and peri-urban areas are observed in Brisbane (75% vs 54%) and Sydney (76% vs 69%).⁷

AUSTRALIANS EXPERIENCING THE ARTS

Figure 2: Arts attendance by region and art form, 2013



This is partially explained by income differences between peri-urban and inner urban households, which are known to have an impact on arts attendance. On average, inner urban households earn more than peri-urban households in all cities. The income difference is higher in Sydney, Brisbane and Adelaide than in other capital cities.^{c, 8} This correlates with observed attendances in Sydney and Brisbane, but not Adelaide.⁸

There are no material differences in arts attendance based on peri-urban location in Melbourne, Perth and Adelaide.⁷

Looking at creative participation in the arts, those who live in peri-urban areas have similar or higher levels than those who live in inner urban areas.⁷

Access to the arts for culturally and linguistically diverse people is also important. Australians born in non-English speaking countries are less likely to creatively participate in the arts or attend arts events (38% and 63%) compared to Australians overall (48% and 71%)¹ **(Measure 4.2).**

Australians with disability are also less likely to attend arts events than all Australians (59% compared to 71%). However they are now just as likely to creatively engage with the arts. In 2013 nearly half of people living with disability created art, up from over a third in 2009¹ **(Measure 4.2).**

^c Peri-urban to urban average annual household income differences: Adelaide \$20,529; Sydney \$15,548; Brisbane \$7,029; Perth \$2,562; Melbourne \$1,019.

AUSTRALIANS EXPERIENCING THE ARTS

Figure 3: Arts attendance and creative participation by household income, 2013

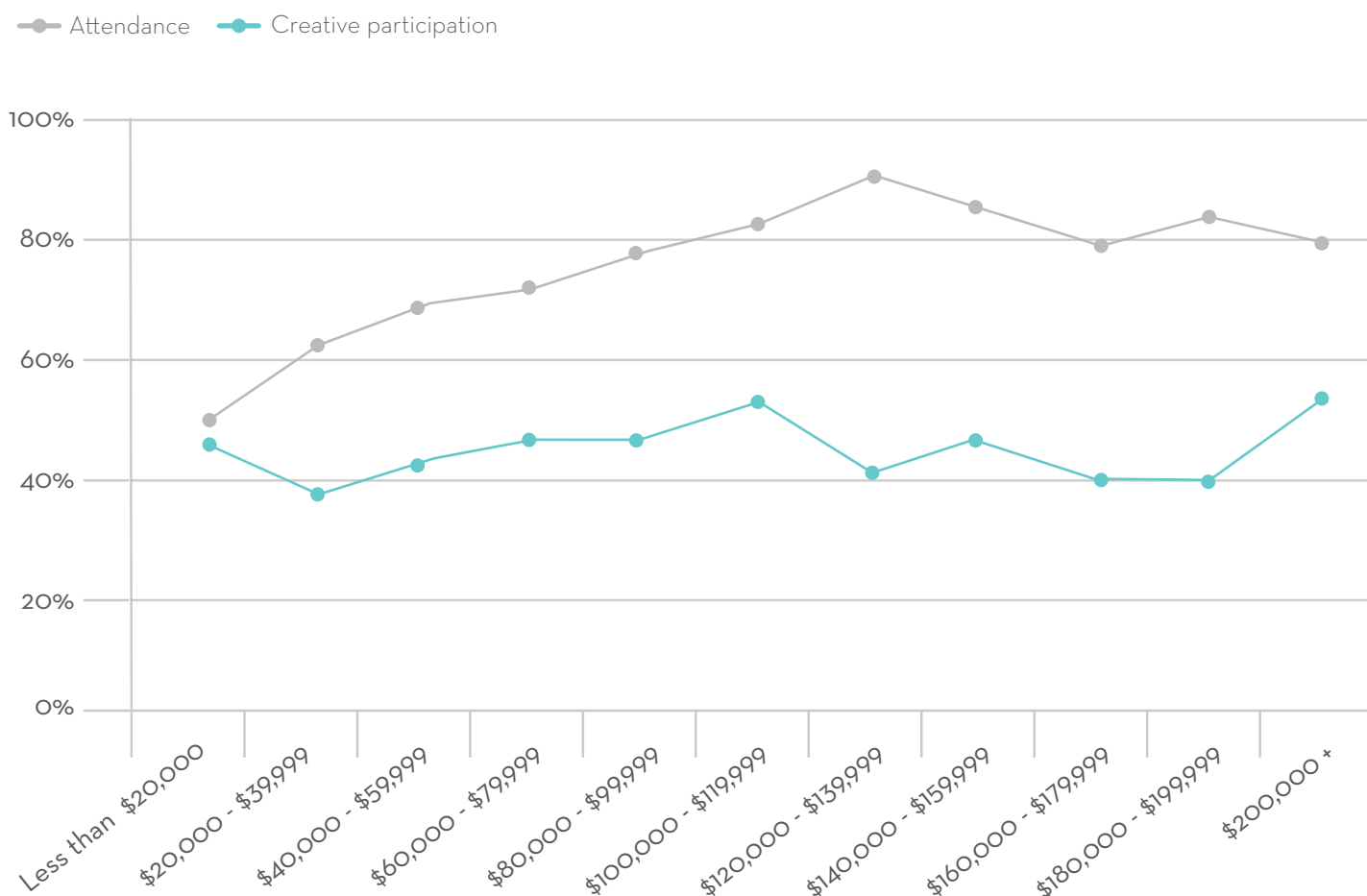
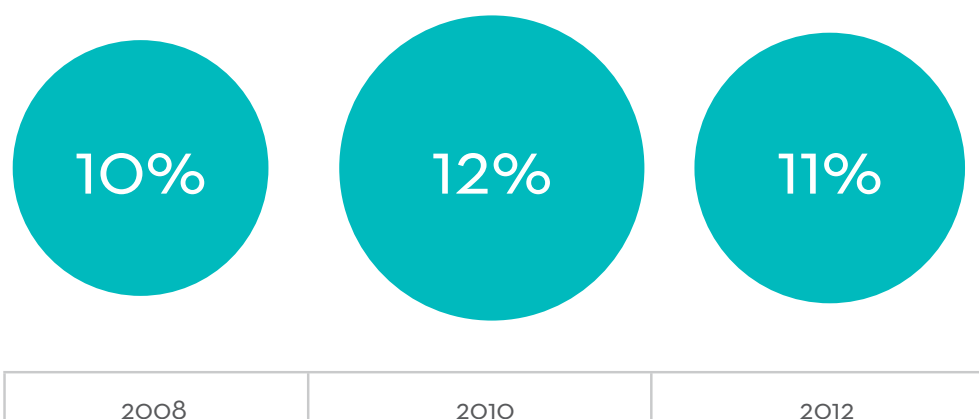


Figure 4: Average ticket price as a proportion of household income



AUSTRALIANS EXPERIENCING THE ARTS

It is not surprising that people with lower incomes are less likely to attend arts events. Only one in two Australians with a household income under \$20,000 (16% of all Australians) attend arts events, compared to nine in 10 of those earning between \$120,000 and \$139,999. However, income does not have the same impact on creative participation⁸ (**Measure 4.2, Figure 3**). Australians with a household income under \$20,000 are just as likely to creatively participate in the arts as Australians overall.⁸ Education also has a strong influence on arts attendance. People with a university degree are 8.2 percent more likely to attend arts events after taking into account other factors such as income.⁸

Affordability

There is no clear trend in the affordability of professional performing arts events (**Indicator 5**). Affordability depends on both ticket prices and how much people have to spend, which can be measured by median weekly equivalised^d household disposable income. In 2012 the average ticket price for a professional performing arts event in Australia was \$85.46, which is about 11 percent of the median household's disposable income⁹ (**Measure 5.1**).

This was more affordable than 2010 when a ticket cost 12 percent, but less affordable than 2008 when a ticket cost 10 percent of median equivalised household disposable

income (**Figure 4**). For a low-income Australian household,^e a ticket cost 18 percent of median weekly equivalised household disposable income.⁹ In 2013 ticket prices increased to \$92.16,⁵ but data on household income is not yet available for analysis.

By comparison, the cost of a book or gallery exhibition ticket was around two percent of the disposable weekly income of the median equivalised household (**Measure 5.1**) and around four percent of a low-income household.¹⁰ In 2013 the average price of a book (excluding children's books) was \$20.78. In 2014 the median price for an adult ticket to a paid exhibition at a major Australian public gallery was \$17.00.¹⁰

LOOKING FORWARD

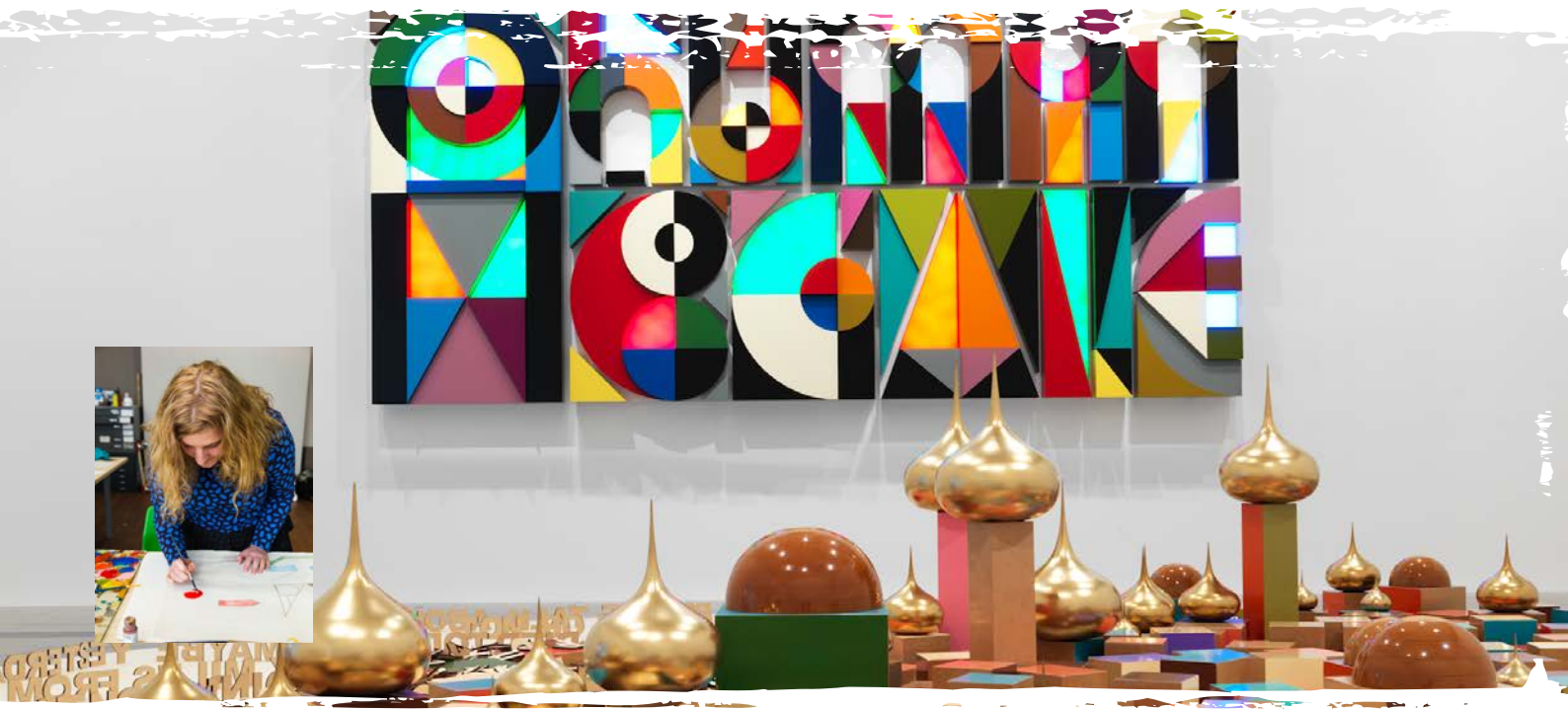
Future versions of this report could look at other aspects of how people engage with the arts. This may include:

- children's engagement with the arts
- public intentions to engage in future arts experiences
- how much people value arts experiences compared with other leisure experiences
- audience numbers for arts and cultural festivals.

^d The method of standardising the income, expenditure or wealth of households to take account of household size and composition differences.

^e Low income households are defined as those with household income in second and third deciles, that is, a household at the 20th percentile of income.

ARTISTS AND THE ARTS



Supporting great art and artists is a key goal of the Australia Council's Strategic Plan.

Artists are among the most highly educated professionals in Australia; however growth in numbers of tertiary students of creative arts has slowed. Professional artists are less culturally diverse and less likely to live with disability than the workforce overall. Female artists are less likely to be nominated for selected Australian arts awards, while Aboriginal and Torres Strait Islander artists are more likely to be nominated compared to population benchmarks.

Arts education

Almost two thirds of practicing professional artists in Australia hold a tertiary qualification and most believe formal training by coursework at tertiary or specialist institutions is the most important way to learn¹¹ (**Indicator 6**). However, growth in the number of tertiary creative arts students has slowed from an average of 4.4 percent per year from 2008 to 2012 to 2.1 percent from 2012 to 2013 (107,000 to 109,000)¹² (**Measure 6.1**).

On average, more than one third of professional artists continue to engage in some form of training throughout their career. Most also recognise that their skills are improved and diversified through experience and learning on the job.¹¹

Artwork: Emily Floyd - *A Human Scale*, 2014
Wood, Paint, LED Lights, fixtures - 6000 x 3000 x 400mm
© Emily Floyd, courtesy Anna Schwartz Gallery
Photo: Garry Sommerfeld, NGV Photographic Services
p. 16

ARTISTS AND THE ARTS

Professional artists and their incomes

In 2009 there were estimated to be about 44,000 practicing professional artists in Australia¹¹ (**Indicator 7, Measure 7.1**). This population experienced strong growth between 1987 and 2001, but numbers have remained relatively stable since then.¹¹

Most artists have portfolio careers. On average they spend about half of their time on their creative practice, and the rest of their time on arts related work (for example, teaching music) and non-arts work (for example, hospitality). Not surprisingly, the amount of time artists spend on their creative practice is reflected in their creative earnings. In 2007-08, 17 percent of professional artists worked full time on their creative practice¹¹ (**Measure 7.2**). In the same year, an artist's median creative income was \$7,000, compared to \$22,500 for those who worked full time on their creative practice.¹¹

Musicians, composers and dancers who worked at least 38 hours per week on their creative practice earned around five times the median creative income for their art form. However, working more hours does not always translate to more money. Craft practitioners earned similar median creative incomes regardless of hours worked.¹¹

Taking into account all sources, the total median income for artists was around \$35,900, compared to \$43,300 for all employees, \$61,700 for professionals and \$77,500 for managers.¹¹

Diversity

Professional artist populations are less diverse than the rest of the Australian workforce (**Indicator 8**).

People from a non-English speaking background account for eight percent of the professional artist population, which compares to 16 percent in the overall workforce (**Measure 8.1, Figure 5**). Most of these artists have a positive view of their cultural background and what it brings to their practice. However, their median income from creative practice is 40 percent lower than the median income of other artists.¹¹

People with disability make up eight percent of the professional artist population,¹¹ which compares to 10 percent for their participation in the overall workforce¹³ (**Measure 8.2, Figure 5**). The gender and age profile of artists with disability does not differ greatly from other artists but, in terms of art form areas, a greater proportion of artists with disability are working in literature and visual arts. On average, artists with disability earn 25 percent less from their practice than other artists.¹¹

Gender balance in the overall artist population is relatively even. However, proportions vary by art form; for example, there are many more male musicians and many more female writers. Female artists earn half the median creative income of male artists, despite spending similar amounts of their time on creative practice (50% for males and 44% for females).

ARTISTS AND THE ARTS

Figure 5: Diversity of the artist population compared to the total workforce

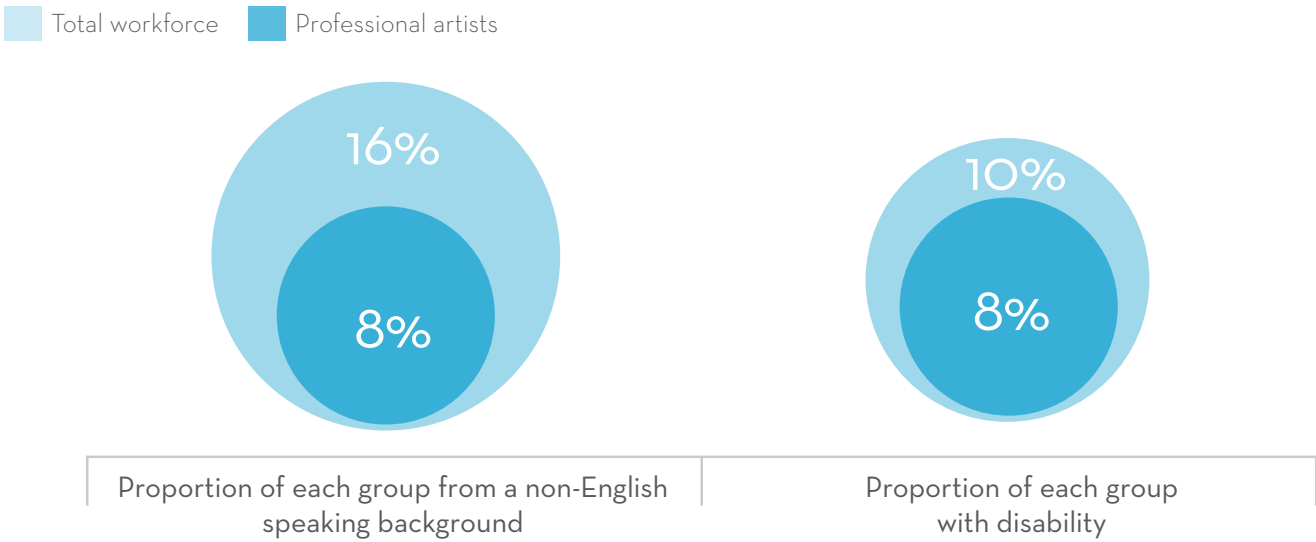
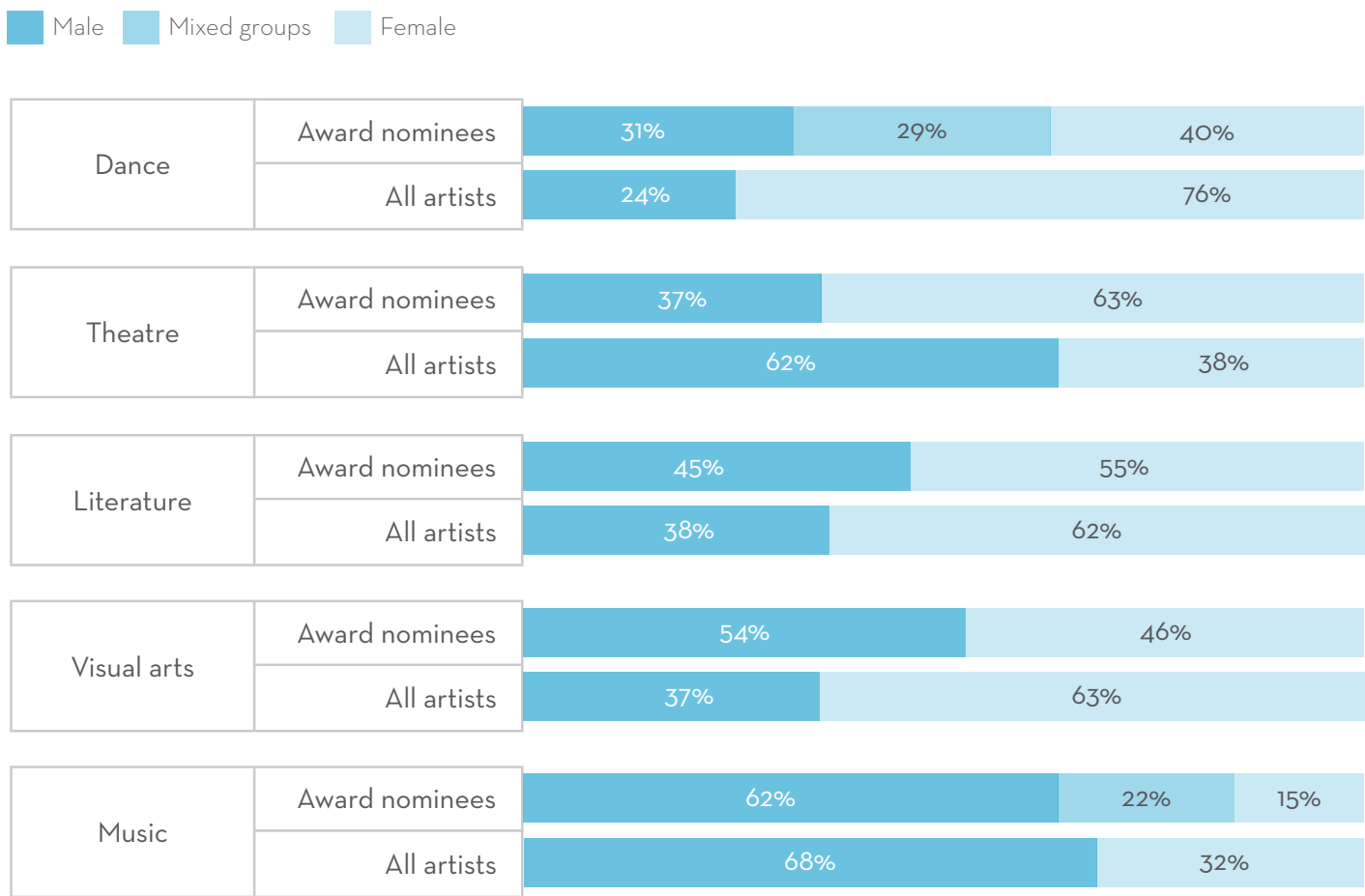


Figure 6: Award nominees and artist population by gender and art form^f



^f The chart excludes gender specific award categories and multi art form awards. The percentages of award nominees have been rounded 1% for mixed groups reported in Literature and Visual arts not displayed in the chart.

ARTISTS AND THE ARTS

This can be partly explained by the concentration of women in lower income occupations such as visual arts, crafts, writing and dance.¹¹

Artistic recognition

Women appear to be under-represented in nominations for major Australian awards, while the proportion of Aboriginal and Torres Strait Islander artists nominated is relatively high.

Individual females accounted for less than a third of nominees for a selection of 21 major Australian arts awards open to both genders over the last three years¹⁴ (**Measure 8.3**). The inclusion of female-specific award categories does not alter this result.^g Overall, 54 percent of nominees were individual males and 14 percent were groups including males and females, with no substantial variation over time.¹⁴ The gender split of nominations tends to reflect the proportions of professional practicing artists.¹¹ However, theatre and visual arts awards are exceptions: although theatre is dominated by male artists, the majority of nominees were female,^h and although the visual arts are dominated by female artists, the majority of nominees were male (**Figure 6**).

Aboriginal and Torres Strait Islander artists are well recognised in Australian awards. Aboriginal and Torres Strait Islander people make up 3.0 percent of the Australian population,¹⁵ and around 2.1 percent of Australians in arts occupations.¹⁶ However, they accounted for 4.7 percent of artists nominated for selected major Australian arts awards in the last three years¹⁴ (**Measure 8.2**). This proportion is higher when nominations from two Indigenous-specific awards are included (16%).¹⁴

LOOKING FORWARD

Future versions of this report could look at other aspects of arts education, excellence and diversity in arts sector populations. This may include:

- Peer and public perspectives on the quality of Australian arts
- The diversity of artists and arts workers across arts organisations.

^g Analysis including female-specific award categories shows that women account for 32%, up from 30% if they are not included.

^h This does not include playwriting, which is classified as literature.



TALKING POINTS: ON DIVERSITY

Australia is home to the longest continuous art and culture makers on earth, and has a vibrant culturally diverse population. Yet only two-thirds of Australians agree that the arts currently reflect our cultural diversity.¹

Janet Holmes à Court, Sir Jonathan Mills, Gideon Obarzanek, Marion Potts, Kim Scott and Alexis Wright, share with us their experiences and hopes for the future of diversity in Australian arts.

Over the past eight years, Sir Jonathan Mills has been watching the Australian arts industry from afar as Director of the Edinburgh International Festival. An expatriate with a keen interest in Australian arts, he feels that discussions currently raging in Europe about cultural diversity and assimilation are extremely relevant to the Australian situation, with the arts playing an important role in creating more stable, inclusive societies that appreciate other points of views and cultures.

For Mills, the key lies in working towards becoming 'a cosmopolitan society that truly embraces diversity, as opposed to a multicultural society that feels it doesn't have to do anything more than tolerate other cultures'. He suggests that diversity should inspire us to think about the possibilities people from other countries bring with them and our responsibility 'to embed those opportunities in a much more mainstream sense'. He cites the Asia Pacific Triennial (APT) in Brisbane as an ideal example of how ground-breaking and successful this approach can be:

“It was transformative both in its effect within the city and far beyond... Who would have thought [it would be] one of the most exciting visual arts projects of the last 50 years in Australia? It shows

to me that if you are prepared to be daring, and trust and create a compelling narrative, there is a mainstream audience... As a result of the APT, not only has appreciation of Asian culture transformed, but there is a permanent legacy in the collection. Other galleries around the world are playing catch up. ”

For Mills, 'subtle transformations' such as these demonstrate how the arts can 'fundamentally change both the ambitions and the shape of a location for the better'.

Marion Potts, Artistic Director at Malthouse Theatre, also believes that 'diversity is absolutely vital'. This should go beyond considerations of cultures and ethnicities to extend into different 'aesthetics and art forms'. In her view:

“The greater the number of lenses that we're invited to look through, the better. It's about being able to see things from a variety of perspectives, and in terms of the artists contributing to the ecology, it's important that whatever we put on stage is representative of who we are as a culture. And if theatre is the place of our collective imagining, then we need to make sure that it has the full benefit of the full breadth of influence here, which is rich and vast. ”

TALKING POINTS: ON DIVERSITY



For Potts, ensuring diversity at all levels is critical to achieving this breadth of influence. In her view, it is about more than changing the on-stage culture, it is about 'having diversity within the producing team, marketing department, box office – it's as much about the diverse make-up of people within decision-making positions as it is about the artists themselves'.

During her time at Malthouse, Potts has applied this philosophy in a number of ways. When she took up the role in 2010, Potts introduced the Female Director in Residence program. The only one of its kind in Australia, this salaried program provides emerging female directors with intensive career development and mentorship from the Artistic Director. The program stemmed from the recognition that 'female directors were losing visibility at that precise point in their careers, and then disappearing.' Now in its fourth year, the program is for Potts a great 'opportunity [that] keeps women working and interacting with the industry'.

Malthouse also employs Jason Tamiru in the role of Indigenous Engagement. For Potts, his role was pivotal to the success of *The Shadow King*, a retelling of *King Lear* using Indigenous languages and creoles:

“His presence gives us confidence to work with Indigenous artists. We're not pussy footing around hoping we won't cause offence. We're actually saying, 'We want to do this, how do we go about doing it?'”

Author Alexis Wright is also concerned with 'how the Indigenous story is told, and who tells it'. As a research fellow at the Writing and Society Research Centre at the University of Western Sydney,

she is working on a major project about 'Indigenous storytelling and the way stories are told about Aboriginal people today'. For Wright, part of this project is about exploring how oral storytelling traditions interact with written texts and developing frameworks for storytelling in the future:

“To me oral storytelling is and isn't the same as putting it down on a page...because we come from an oral storytelling tradition, but we live in a different world that is moving in many different directions, we need to figure out how we look after our own traditions, and that includes storytelling.”

Wright believes that there are 'exciting things going on with Indigenous writing' in Australia both in terms of writers and books being published. However, she's also aware there are difficulties. 'On the one hand there is a lot of support [for] Indigenous artists and writers'; at the same time, she says, 'It's a continuing struggle because we are pushing boundaries and [it can be] difficult for the rest of the country to accept where we're setting those boundaries'. In Wright's view, pushing boundaries is not only about subject matter, it's also 'how a story is told...at [a] particular point in time'. As such, Wright believes publishers too have a role to play in reflecting diversity:

“My publisher Giramondo Publishing is really tremendous in publishing a diverse range of voices in the country and it's a small publisher. I wonder, though I don't know for sure, how many other publishers are taking on that challenge of publishing other voices.”



TALKING POINTS: ON DIVERSITY

Kim Scott, two-time recipient of the Miles Franklin Literary Award, agrees that the Australian literary ecology could be more diverse, not only in terms of 'the people producing literature, but also the people consuming or engaging with it'. A descendant of Western Australian Noongar people, Scott often writes about 'Noongar things'. While Indigenous readers are a small segment of his readership, the question of audience is one that he feels influenced his last novel, which 'came out of that existential dilemma, the post-colonial dilemma they sometimes call it. Who are you writing for, and whose language are you using?' Scott also sees gender as central to diversity in literature:

“*The gender issue is really odd because it seems to me there are a lot more female than male readers, so it is curious when this is not reflected in the number of female authors winning awards.*”

Moreover, Scott believes gender may affect the diversity of audiences and suspects that 'people don't get enough encouragement or help in ways to read literature, especially males'. Audience diversity could be improved through the teaching of literature, he says, and helping 'people to learn to read in a literary way that is related to their own experience'.

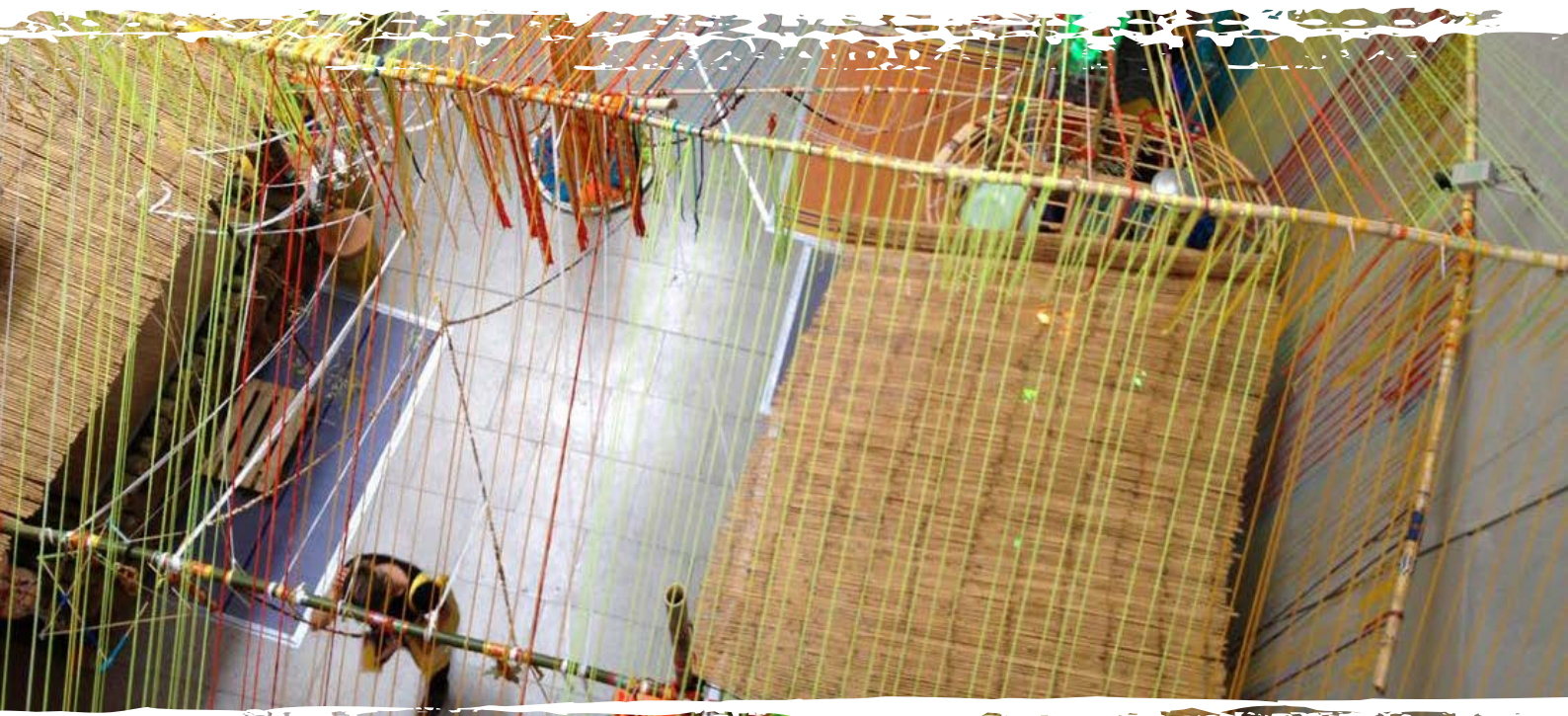
Audience diversity matters also to leaders in the performing arts sector. Director and choreographer Gideon Obarzanek feels that arts education plays an important role in diversifying arts audiences and has recently observed 'a concerted effort to tell diverse stories to different audiences' in the performing arts. Obarzanek also believes

that while it may be challenging, there is an even 'greater role for arts festivals and institutions to find works that connect with different parts of the community'.

Access to the arts for Australians living in regional and remote areas of the country also concerns Janet Holmes à Court, Chair of the West Australian Symphony Orchestra (WASO) and Founding Patron of Black Swan Theatre. Though the orchestra would love to travel more to reach communities in the far north, says Holmes à Court, the costs are enormous because the distances are so great, with Western Australia one-third the size of Australia. The WASO does have a small Education Chamber Orchestra that travels to country areas, and Holmes à Court is 'a great believer that the people of Kununurra deserve the opportunity to hear their orchestra', but she acknowledges that 'touring [the full orchestra] is largely dependent on funding from sponsors'. However, she believes 'the arts are fundamental' and is actively pursuing options for diversifying audiences:

“*It isn't possible for as many people from disadvantaged backgrounds to get to the theatre as it should be...[but] there are things that can be done and we need to concentrate more on them.*”

AUSTRALIAN ARTS INTERNATIONALLY



Supporting international opportunities for Australian artists is a key goal of the Australia Council's Strategic Plan.

Arts tourism has grown as the arts become more popular with international visitors and the number of visitors increases. Australian artists are featured at international arts events in line with population benchmarks, and Aboriginal and Torres Strait Islander artists are more likely to present at international events. The number of Australian artists nominated for major international awards broadly mirrors their representation at international events, though none of the artists nominated were known to be Aboriginal or Torres Strait Islander.

International engagement is an important source of revenue through sales, royalties and copyright. These revenues are complex and therefore difficult to measure, however some indicative findings are reported.

International tourism

Over two million international visitors to Australia in 2013-14 were arts tourists (**Indicator 9, Measure 9.1**), which includes gallery visitors and attendees at festivals or performing arts events. Over the last four years, the number of international tourists to Australia has grown by 13 percent, while the number of international arts tourists has increased 19 percent to 2.4 million in 2013-14¹⁷ (**Figure 7**).

More than one in four international tourists visited a museum or art gallery in 2013-14, making it the most popular arts tourism activity.¹⁷ This level of engagement is similar to the UK and the USA (26% for Australia, 27% for the UK, 24% for the USA).¹⁸

AUSTRALIAN ARTS INTERNATIONALLY

Figure 7: International tourist trends, 2010-11 to 2013-14



As a comparison, around 76 percent of international tourists went shopping for pleasure, 61 percent went to the beach, 38 percent did at least one arts activity (**Measure 9.2**), 14 percent visited casinos and six percent attended an organised sporting event in 2013-14¹⁷ (**Figure 8**).

Around one in eight international tourists participated in Indigenous arts activities in the same period. This includes seeing an art or cultural exhibition, attending festivals or performances, visiting an Indigenous art gallery, and purchasing arts, crafts or souvenirs. The number of people experiencing Indigenous arts has grown over the past four years, though at a slower rate than international arts tourism overall (9% compared to 19%).¹⁷

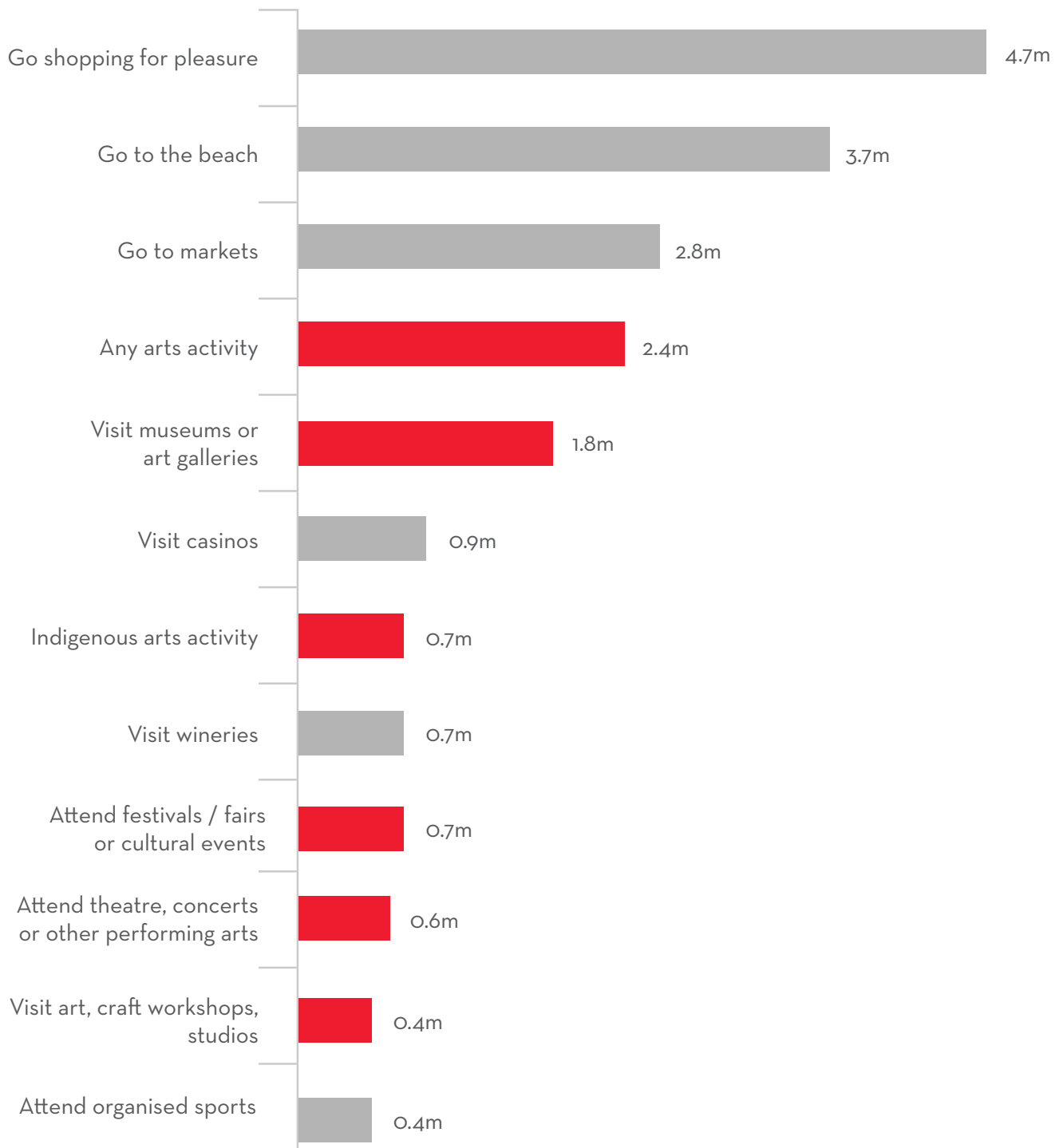
International activity

Many Australian artists work internationally, with almost four in 10 having their work seen overseas¹¹ (**Indicator 10, Measure 10.1**). International work is more common as careers progress, with over one in two established artists taking work overseas, compared to under one in three artists who are still becoming established.¹¹

Overseas engagement is also reflected in the presence of Australian artists at international arts events, as well as in nominations for international awards. New data indicate that these levels of representation reflect population benchmarks.

AUSTRALIAN ARTS INTERNATIONALLY

Figure 8: Number of international tourists undertaking selected activities, 2013–2014ⁱ



ⁱ These categories are drawn from multiple question responses. Therefore figures for Indigenous arts activities may or may not be included in overall arts activities.

AUSTRALIAN ARTS INTERNATIONALLY

Australian artists accounted for approximately 1.7 percent of artists participating in 27 selected major international events in 2013¹⁹ (**Measure 10.2**). This is similar to Australia's representation in the population of OECD countries (1.8%).²⁰ The proportion of these artists who are Aboriginal or Torres Strait Islander people was around five percent, which is notably more than the 3.0 percent of Australians¹⁵ and around 2.1 percent of those in arts occupations¹⁶ who are Aboriginal or Torres Strait Islander.

Australian artists accounted for 1.6 percent of artists shortlisted for 16 selected major international arts awards²¹ (**Measure 10.3**). This representation is similar to Australian artists' presence at major international events.¹⁹ However, none of the nominees were known to be Aboriginal or Torres Strait Islander, despite Aboriginal and Torres Strait Islander artists having a relatively high profile at international arts events.

International arts sales

International engagement with Australian arts is an important source of revenue through sales, royalties and copyright. This can be difficult to measure across the sector because different art forms have different ways of generating international revenue. The value of visual arts exported from Australia was at least \$77 million in 2013–14. This was mainly comprised of \$55 million for paintings, drawings and pastels.^{j,22}

Musical instruments (and some printed music) accounted for around \$8.4 million in Australian exports in the same period.²²

The books of 28 bestselling Australian writers^k generated \$3.6 million in annual physical retail sales in the United Kingdom in 2013. Their Australian sales were seven times this amount (\$25.8 million).²³ Australian literary rights managers and agents reported mixed results for 2014, with a third reporting income growth, a third reporting no change, and a third reporting a decline.²⁴

LOOKING FORWARD

Future versions of this report could look at other ways that Australian artists operate in a global environment and how international arts engagement frames the place of Australian artists in the world. This may include:

- the scale of international sales of arts products and touring
- the scale of international copyright licensing of Australian arts
- arts spend by overseas visitors to Australia
- the proportion of overseas travel articles about Australia that feature the arts.

^j This includes existing artworks being resold and artworks not made in Australia.

^k These authors featured in the top 100 bestsellers list between 2011 and 2013.

TALKING POINTS: INTERNATIONAL



Australian artists shone on the world stage in 2014, touring internationally and forging partnerships with prominent institutions, galleries and theatres around the globe.

The Australia Council caught up with leaders from the arts sector including Wally De Backer, Gideon Obarzanek, Marion Potts, Ben Quilty and Sir Jonathan Mills to find out where the year has taken them and to ask: Why is international activity important for Australian arts?

International activity gives Australian artists the opportunity to connect with their peers overseas and contribute to a global conversation. But beyond that, visual artist Ben Quilty suggests all good art is about looking at yourself in the context of the wider world. As geographical boundaries rapidly break down, he sees unique opportunities for the Australian arts in particular:

“It is really an interesting thing to be such a new race of people, particularly as we live on such an ancient land, and that interface is such a dynamic and incredibly rare thing in the contemporary first world.”

So how have Australian artists and leaders from the sector experienced such opportunity in 2014?

In 2014 Quilty enjoyed significant exposure in Europe, beginning with an exhibition at the prestigious Saatchi Gallery in London in July, followed by a residency in Paris at the Cité Internationale des Arts. For Quilty, being immersed in another culture is a profound experience that impacts greatly on his work:

“It’s like I have had adrenaline pumping through me for three months straight. Every day [in Paris] is so extraordinary that the work then shows this kind of crazy, mad joy. You take risks with

your practice and do things you wouldn’t normally do in Australia that will feed back into my work tenfold when I get home.”

Quilty’s activities have not been limited to Europe. In January 2014 he won the Prudential Eye Awards in Singapore, leading to his being the first Australian invited to host a solo show at the Saatchi Gallery. Quilty has also recently signed with major Asian gallery, Pearl Lam Galleries, which he describes as ‘an even bigger step for me than winning the Archibald’. For Quilty, it is very important for Australian artists to get their work seen outside Australia, and he commends the huge efforts made by many Australian commercial galleries exhibiting at international art fairs. Yet this is not a one way street: Quilty believes also that international galleries should have more opportunities to attend Australian art fairs, to ensure ‘there’s engagement and conversations happening between us and the rest of the world’.

Reciprocal engagement and exchange with other countries is very important to a number of leaders in the arts sector. For Marion Potts, Artistic Director at Malthouse Theatre, a collaboration with the National Theatre of China to produce *The Good Person of Szechuan* was one of her standout experiences of 2014, despite the challenges:



TALKING POINTS: INTERNATIONAL

‘We had to contend with distance, language and cultural differences, quite apart from the normal challenges of putting on a show. But those challenges are the very reason you undertake these kinds of collaborations because you learn so much from them.’

For Potts, it is the nuances of such cross-cultural collaborations that can be most illuminating for arts workers and audiences: her awe at seeing Australian actors doing Chinese aerobics on stage; or an Australian set designer having to recalibrate her sense of space because she is suddenly seeing the world through a Chinese lens. Ultimately, however, Potts believes ‘cultural exchange is not just about our points of difference, it’s about what we have in common’.

Like Quilty, Potts’ international experiences last year also extended beyond one continent. In August, Malthouse partnered with Mexico’s DramaFest to produce a festival dedicated to Australian playwriting. For her, the value of such exchange is partly because Australian artists can often feel isolated, so ‘it’s important that we be part of a bigger international conversation. We certainly have the talent and imagination to be working with partners from all over the world’.

Of course, the production of world class work by Australian artists is not new, even if the models of working internationally are changing. As choreographer Gideon Obarzanek points out, ‘Australian artists

are well practised at travelling and contextualising their work within an international sphere’. When Obarzanek launched Chunky Move in 1995, he soon realised that touring globally was a financial necessity. The Melbourne dance company devoted months to developing each new work, so it made sense to perform each work for as long as possible. Before long, the company was performing twice the number of performances abroad as in Australia. Beyond the economic value of this experience, Obarzanek also found ‘the influences people exerted on us’ really important, ‘and just being able to see and discuss and exchange ideas’.

Obarzanek left Chunky Move in 2012 and is now exploring artistic ideas that combine choreography, documentary and filmmaking. Yet international relationships remain central to his work and he has embraced the possibilities of reciprocal relationships on home soil. He is currently in discussion with Arts Centre Melbourne to host a workshop for Chinese, Southeast Asian and Australian choreographers with the goal of commissioning new works to run in Australia and Asia in 2015. Increasingly over the past decade, says Obarzanek, dance and contemporary performance have become more globalised as art forms and industries, and ‘no longer do artists think of themselves as purely Australian artists working within an Australian industry’.

TALKING POINTS: INTERNATIONAL



While the move away from ‘purely Australian’ artistry and industry brings with it great opportunities for artists, for some it also comes with considerations of uniquely Australian identities. Musician Wally De Backer (The Basics, Gotye) says that in the drive to find global audiences, artists should be careful not to ignore what might be ‘the more interesting aspects of being an Australian musician’. De Backer possesses what he calls ‘contrasting experience’: on one hand his acclaimed work with Gotye explores more universal aspects of emotion; on the other, the new record from The Basics is pointedly Australian and specific to the local context. De Backer is proud to be releasing an album that embraces the Australian and doesn’t necessarily aim for the world, but he has also been intrigued by initial reactions:

“Some friends have already said ‘Wow, it’s really Australian isn’t it?’ The implication being: Are you sure you want to put something out that sounds as Australian as this? You’re cutting off world markets, or even Australians won’t like this because the cultural cringe is still so strong. It’s going to be fascinating to see how it’s perceived.”

De Backer is not alone in questioning cultural cringe. Sir Jonathan Mills recently finished his eighth season as Director of the Edinburgh International Festival, where in 2014 many Australian artists performed to great acclaim. He says it is time to shrug off the insecurity that comes with being a young nation and focus on presenting works that show a ‘level of sophistication in the international arena’. In his view, it is

imperative to think long-term about ‘the actual importance Australia has in the world [as] the twelfth largest economy’ and to start having a strategic conversation about Australia’s role on a global stage:

“What is the story we tell the rest of the world? Is it important? I think it is. It’s important because Australians are extremely well travelled and educated about the rest of the world, and this is a good thing.”

ABORIGINAL AND TORRES STRAIT ISLANDER ARTS



Supporting Aboriginal and Torres Strait Islander arts and cultures is a key goal of the Australia Council's Strategic Plan.

Aboriginal and Torres Strait Islander arts are an expression of culture and are highly regarded in Australia and overseas. Many Aboriginal and Torres Strait Islander people participate in Indigenous arts, which strengthen cultural identity and wellbeing. The achievements of Aboriginal and Torres Strait Islander artists are well represented in Australian arts awards. Internationally, Aboriginal and Torres Strait Islander artists have a proportionally higher presence at international arts events than other Australian artists. Indigenous visual artists are strong contributors to the Australian arts economy. Almost all Australians agree that Indigenous arts are an important part of Australia's culture and audiences for Indigenous arts are growing.

Economy

Cultural knowledge leads to jobs and income based on artistic activity, connections to country and cultural experiences. Cultural tourism is one of the world's largest and fastest-growing tourism markets.²⁵ Aboriginal and Torres Strait Islander festivals, performing and visual arts are unique cultural industries that make an important contribution to the Australian arts economy.

The Indigenous visual arts sector is the largest economic contributor, and is the sector where data is more available. Indigenous visual arts make an important contribution to the Australian arts economy, and Indigenous artists produce some of Australia's most valuable works of art.²⁶ A high proportion of visual arts painters in Australia are Aboriginal or Torres Strait Islander people (15%).¹⁶

ABORIGINAL AND TORRES STRAIT ISLANDER ARTS

Art production is the main source of commercial income for many remote communities with art centres. Between 2008 and 2012, remote Indigenous art centres generated around \$53 million in art sales, with \$30 million paid to artists.²⁷ Around 40 percent of art sales are reinvested in the art centres, which are community hubs. They provide employment opportunities and other social and cultural benefits, as well as producing and marketing some of Australia's most dynamic visual art.²⁸

Art centre production has changed over the last decade, with a higher volume of works produced, and more of lower price. Increased supply of art works has contributed to falling profits for art centres and artists are getting lower returns for their work.²⁷ But there are signs that the decline in art centre sales is slowing.²⁸

This corresponds to signs of recovery in the secondary visual art market, in which contemporary and heritage artworks are resold.²⁹ Auction sales of Indigenous visual artworks reached around \$11 million in 2013, up from \$8 million in 2011 and 2012. However, sales remain well below the record total of \$26 million set in 2007.²⁶

Looking at resale royalty payments, nearly two thirds of artists who have received resale royalties are Aboriginal or Torres Strait Islander. The royalties generated by these Indigenous artists is close to \$2.6 million, which is almost half of the total royalties generated since 2010.^{1, 30}

Participation

As expressions of culture, arts are an important experience of daily life for many Aboriginal and Torres Strait Islander

people. Around two in three Indigenous people participated in a selected cultural activity in 2008, and over one in four participated creatively in Indigenous arts, which remained steady from 2002³¹ (**Indicator 11, Measure 11.1**).

Indigenous arts and crafts were the most popular creative arts activity, with 17 percent (almost 56,600) of Indigenous people taking part at least once in the past year. Around 15 percent participated in writing or telling stories and 11 percent creatively participated in music, dance or theatre.³¹

Aboriginal and Torres Strait Islander people in remote areas have higher participation in arts and cultural activities. Many Aboriginal and Torres Strait Islander people want to participate more in cultural activities.³² Those who do participate have markedly better physical and mental health and self-reported happiness³³ and are more likely to complete secondary school and be employed.³⁴

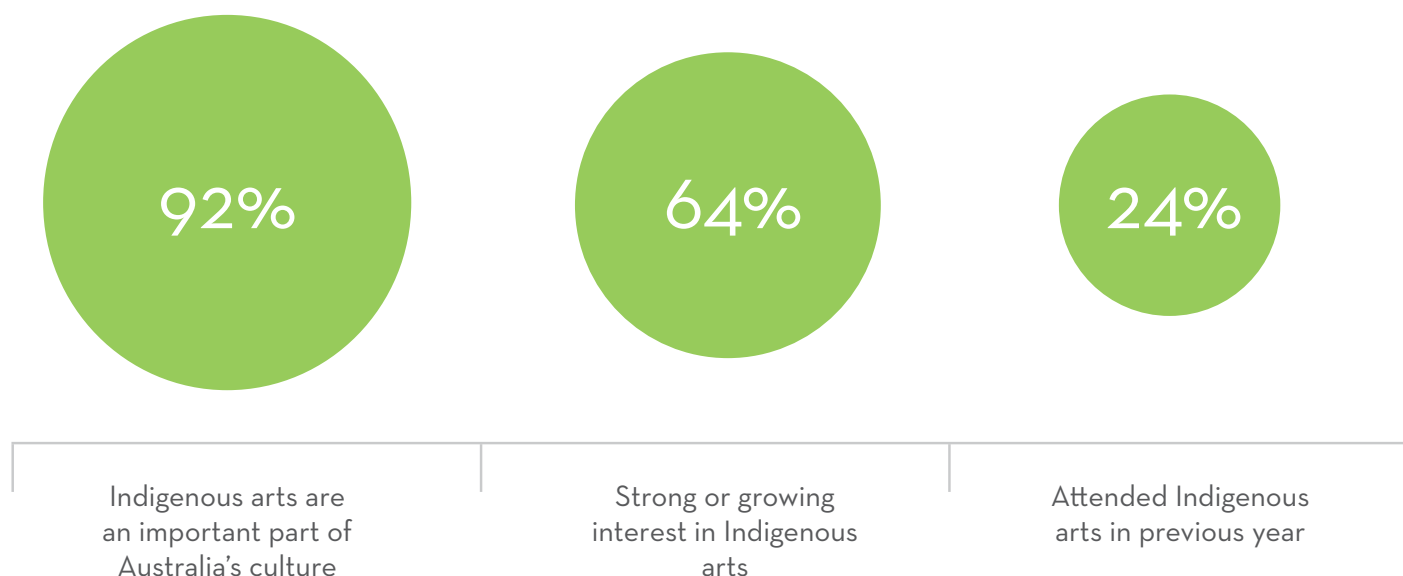
Further academic research is underway in Australia to describe the many roles and impacts of cultural practitioners within Indigenous communities.

Even Australians who are not personally interested in Indigenous arts tend to recognise their importance. In 2013, 64 percent of Australians expressed a strong or growing interest in Indigenous arts; this has not changed since 2009¹ (**Measure 11.2**). In 2013, more than nine in 10 Australians (92%) agreed that Indigenous arts are an important part of Australia's culture. However, only around one in four Australians has actually engaged with Indigenous arts in the past year¹ (**Measure 11.3, Figure 9**). This has increased from 17 percent in 2009.¹

¹ Between June 2010 and July 2014.

ABORIGINAL AND TORRES STRAIT ISLANDER ARTS

Figure 9: Australians' interest in Indigenous arts, 2013



Artistic Recognition

The achievements of Aboriginal and Torres Strait Islander artists are well represented in various major Australian arts awards (**Indicator 12**). Aboriginal and Torres Strait Islander people make up 3.0 percent of the Australian population¹⁵ and around 2.1 percent of all Australians in arts occupations.¹⁶ Of those nominated for a selection of major Australian arts awards in the last three years, 4.7 percent were Aboriginal or Torres Strait Islander artists¹⁴ (**Measure 12.1, Figure 10**).

International Presence

Aboriginal and Torres Strait Islander artists appear to have a proportionally greater international presence than non-Indigenous Australian artists (**Indicator 13**). Among Australians participating in 27 selected international festivals and events across a range of art forms in the last three years, Aboriginal and Torres Strait Islander artists comprised at least 4.9 percent of Australia's participants¹⁹ (**Measure 13.1, Figure 10**).

ABORIGINAL AND TORRES STRAIT ISLANDER ARTS

Figure 10: Indigenous Australians in the arts – percentage of each group who are Indigenous

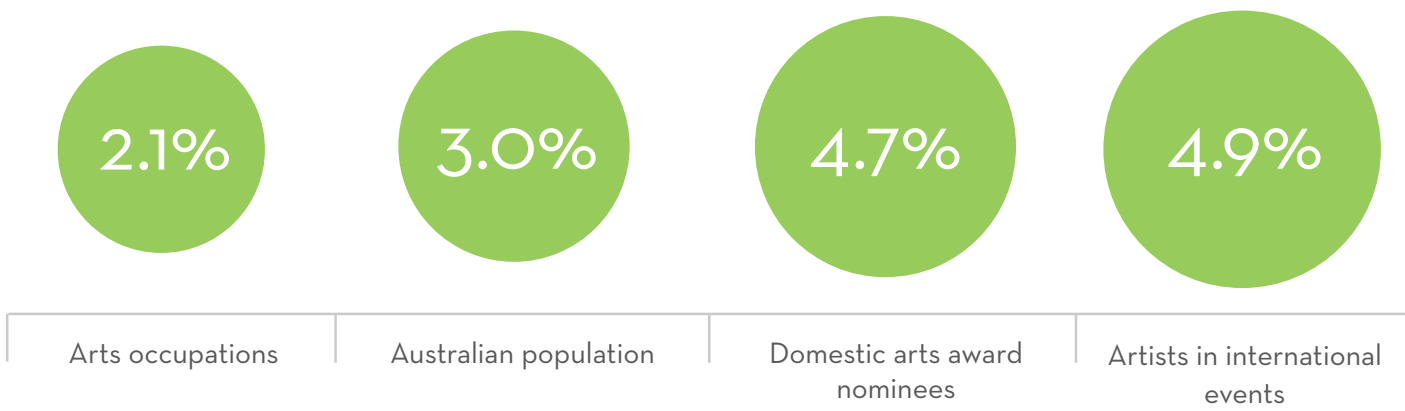
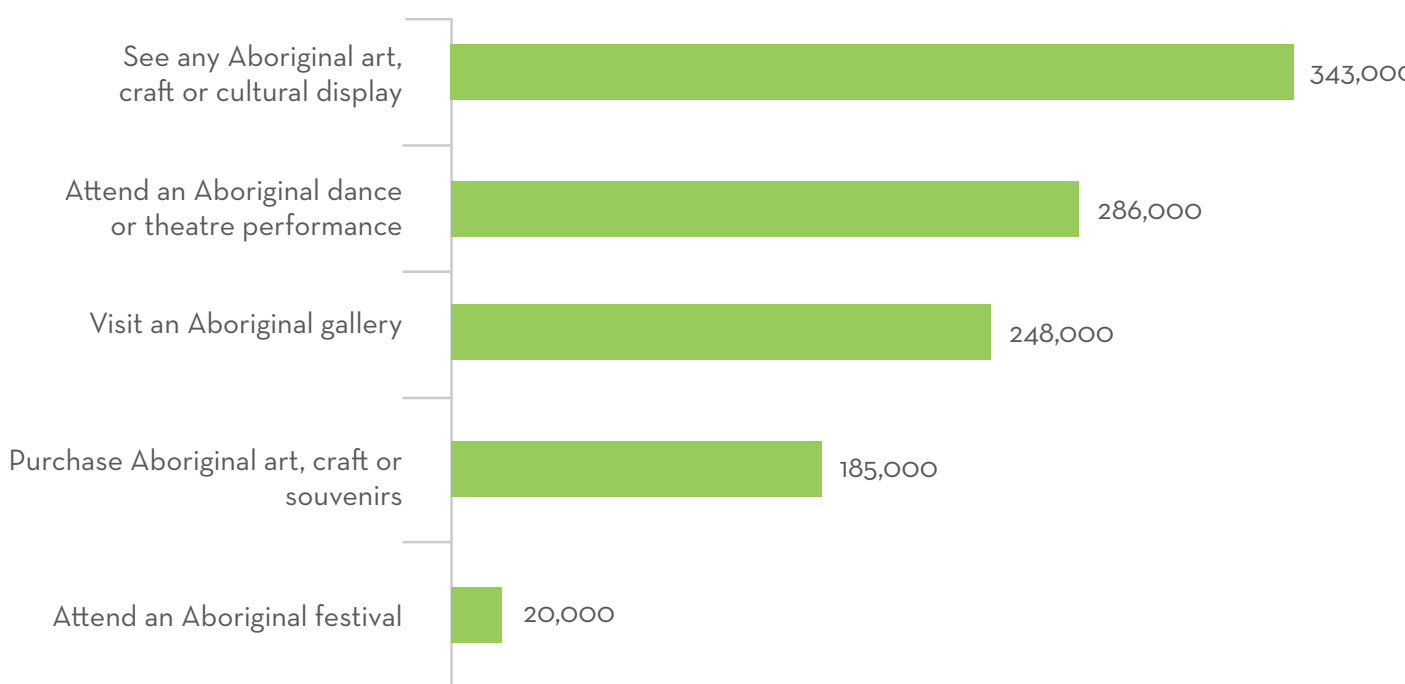


Figure 11: Number of international tourists undertaking Indigenous arts activities, 2013-2014



ABORIGINAL AND TORRES STRAIT ISLANDER ARTS

This result is not yet reflected in international awards. Australians accounted for around 1.6 percent of artists shortlisted for a group of 16 international awards over the last three years, but none of these artists were known to be Aboriginal or Torres Strait Islander.²¹

Around one in 10 international tourists took part in Indigenous arts activities during their stay in 2013–14, compared to around four in 10 experiencing arts activities in general. This includes seeing an art or cultural exhibition, attendance at festivals or performances, visits to Indigenous art galleries, or purchasing arts, crafts or souvenirs¹⁷ (**Indicator 14**). The two most prominent Indigenous arts activities undertaken by international tourists were viewing an Indigenous art, craft or cultural display (5.6%) and attending a dance or theatre performance (4.7%)¹⁷ (**Figure 11**).

The number of international tourists engaging with Indigenous arts activities has grown by nine percent since 2010–11, from over 675,000 to over 737,000¹⁷ (**Measure 14.1**). However, the proportion of international tourists who engage with Indigenous arts activities has fluctuated in recent years between around 12 and 13 percent.¹⁷

LOOKING FORWARD

The Australia Council is committed to reporting data that will benefit Aboriginal and Torres Strait Islander peoples and the Indigenous arts sector. Depending on the sector's feedback and priorities, future versions of this report could include:

- levels of Aboriginal and Torres Strait Islander people working as artists and in the arts
- the economic vitality of Aboriginal and Torres Strait Islander arts organisations
- the scale of production, programming and revenue generated from Aboriginal and Torres Strait Islander arts.
- the social, cultural and economic impacts of Australians engaging with Indigenous arts.

THE CULTURAL ECONOMY



The arts are deeply embedded in the cultural sector, and cultural activity makes a substantial contribution to the Australian economy.

Cultural activity is estimated to make up around 4.0 percent of Australia's GDP³⁵ and 1.3 percent of government expenditure.³⁶ Australian governments spent over \$7 billion on culture in 2012–13, including over \$1.3 billion on the core arts.^{m,37} The main source of income to the arts is consumer spending, and ticket sales for performing arts events grew in the last year. Most private support for the arts is from private donations, which continue to grow faster than corporate sponsorship. Artists are using crowdfunding as a way to raise smaller sums of money, with a higher than average success rate.

Economic contribution

Australia's copyright industries have arts and cultural activity at their core. They generate over \$93 billion in economic activity (6.6% of GDP) and employ 8 percent of the nation's workforce.³⁸

In addition to the core areas of arts activity,ⁿ the cultural ecosystem includes film, television, radio, print media, design, museums, libraries, archives and environmental and other cultural heritage. The cultural sector contributes 4.0 percent of Australia's GDP, similar to levels in the United States, Canada and Spain.³⁵

Image: Brisbane Writers Festival
Credit: Ash Cassel Photography

^m The \$1.3 billion on core arts does not include local government expenditure.

ⁿ Literature, music, theatre, musical theatre, opera, dance, other performing arts, arts festivals, visual arts and crafts, arts education and training, Aboriginal and Torres Strait Islander arts, community arts and cultural development, emerging and experimental arts.

THE CULTURAL ECONOMY

In 2008–09, Australian cultural industries generated over \$50 billion in economic activity, or \$35 billion in Gross Value Added (GVA).^o

This was higher than the GVA for agriculture, forestry and fishing (\$29 billion); electricity, gas, water and waste services (\$27 billion); and accommodation and food services (\$28 billion).³⁵

A conservative estimate of the economic contribution of the arts is that the performing arts, music recording and publishing, and arts education together contribute \$4.2 billion (0.3% of GDP).³⁹ This does not include the value of volunteer services, which are estimated to be worth an additional \$0.8 billion across arts and heritage organisations.³⁵

Arts and cultural infrastructure

A robust network of infrastructure is needed to maintain thriving arts and culture sectors. This includes hard infrastructure, such as art galleries and performing arts centres, as well as soft infrastructure like networks of industry associations and presenters.

It is difficult to estimate the number of arts and culture organisations in Australia; however, we know that there were around 40,800 cultural organisations in 2008–09 that employed one or more person, and that at least 11 percent of these were in core arts industries.^p A further 57,800 individuals were registered as a cultural business, with over a quarter of these being in core arts industries. Around a third of cultural businesses and a half of arts businesses have an annual turnover of less

than \$50,000.⁴⁰ 1,495 charities identify arts and culture as their main activity.⁴¹

Arts industry bodies can give arts workers access to the kinds of infrastructure available in larger organisations, as well as providing advice and support. Measuring the membership of these bodies can provide some indication of industry sustainability (**Indicator 15**). In 2013–14, a group of 17 national and state industry associations for the arts had around 4,800 organisations as members. This is a similar level to the previous two years. In terms of stability, around seven percent of these members were new, on average over the last three years⁴² (**Measure 15.1**).

Government expenditure on culture

In 2012–13, Australian governments contributed over \$7 billion in revenue for cultural activity³⁷ (**Indicator 16, Measure 16.1**). This is the equivalent of \$308 for every Australian⁴³ (**Measure 16.2**). The Australian Government provided one third of this amount (33%), State and Territory governments provided almost a half (47%) and local governments provided one fifth (20%). Total cultural funding by the three layers of government included around \$1 billion for capital works and \$6 billion in recurrent expenditure³⁷ (**Table 1**).

Overall cultural expenditure by government has not changed substantially between 2008–09 and 2012–13 once inflation has been taken into account.³⁷ However, in nominal terms, funding increased from \$6.4 billion in 2008–09 to \$7.1 billion in 2012–13. The largest increase was at the local government level (11% in real terms)³⁷ (**Figure 12**).

^o GVA is the value of goods and services produced (outputs) minus the value of consumption (inputs). GVA enables comparison of different industries' contribution to the economy by removing the distortion caused by taxes and subsidies. Net taxes on cultural products were estimated to be \$2.4 billion in 2008–09.

^p The arts industry estimates are for the performing arts, music recording and publishing, and arts education – arts sector-wide the figure would be higher.

THE CULTURAL ECONOMY

Cultural expenditure as a proportion of total government expenditure is 1.3 percent.^q This compares to 0.8 percent for agriculture, forestry and fishing, 3.0 percent for road transport and 3.9 percent for defence.⁴⁴ Government owned cultural assets include Australia's eight national museums, galleries and archives.^r These had land and buildings valued at \$921.3 million and collections worth \$8.2 billion in 2014.⁴⁵

Government expenditure on the arts

Core arts expenditure, as defined by the Australia Council's areas of responsibility,^s made up around 18 percent of the Australian Government's cultural funding and 28 percent of the State and Territory governments' cultural funding in 2012–13.³⁷ Local government expenditure figures are currently not available for the core arts.

The total Australian and State and Territory governments' spend on making, presenting and accessing the arts was \$1.3 billion in 2012–13³⁷ (**Measure 16.1**), or just over \$58 for every Australian⁴³ (**Measure 16.2**). It is difficult to make international comparisons, but analysis suggests this spend per person is similar to Canada, lower than continental European and Scandinavian countries, and higher than England and the United States of America.⁴⁶

State and Territory governments spent more on capital works, reflecting their responsibility for significant arts infrastructure such as galleries and major performing arts centres³⁷ (**Table 2**). Expenditure on the core arts decreased

from 2011–12 to 2012–13 at both levels of government, but overall has increased by four percent since 2008–09 (in real terms).³⁶ Many State and Territory arts portfolios have been subject to efficiency dividends and budget reductions over recent years. However, Australian Government arts expenditure increased between 2012–13 and 2013–14.^t

Arts expenditure was around 0.3 percent of the total combined State and Territory and Australian Government expenditure in 2012–13.³⁶

Consumer spending

Australians spend almost \$20 billion on cultural activities annually, which is four percent of their average weekly household expenditure. Over a quarter of this expenditure is on arts products and experiences.⁴⁷ Ticket sales for live performances alone generated around \$1.5 billion in revenue in 2013, which was a 3.5 percent increase from 2010.⁴⁸

^q Total government expenditure was \$537.8 billion in 2012–13.

^r The Australian National Maritime Museum, National Archives of Australia, National Film and Sound Archive of Australia, National Gallery of Australia, National Library of Australia, National Museum of Australia, National Portrait Gallery of Australia, Old Parliament House.

^s Literature, music, theatre, musical theatre, opera, dance, other performing arts, arts festivals, visual arts and crafts, arts education and training, Aboriginal and Torres Strait Islander arts, community arts and cultural development, emerging and experimental arts.

^t As a result of initiatives in the 2013–14 Budget.

THE CULTURAL ECONOMY

Table 1: Capital and recurrent cultural funding by layer of government, 2012-13

(\$m)	Capital	Recurrent	Total
Australian Government	147	2,214	2,361
States and Territories	657	2,635	3,292
Local governments	235	1,162	1,398
TOTAL	1,040	6,011	7,051

Figure 12: Cultural funding by layer of government, 2008-09 to 2012-13

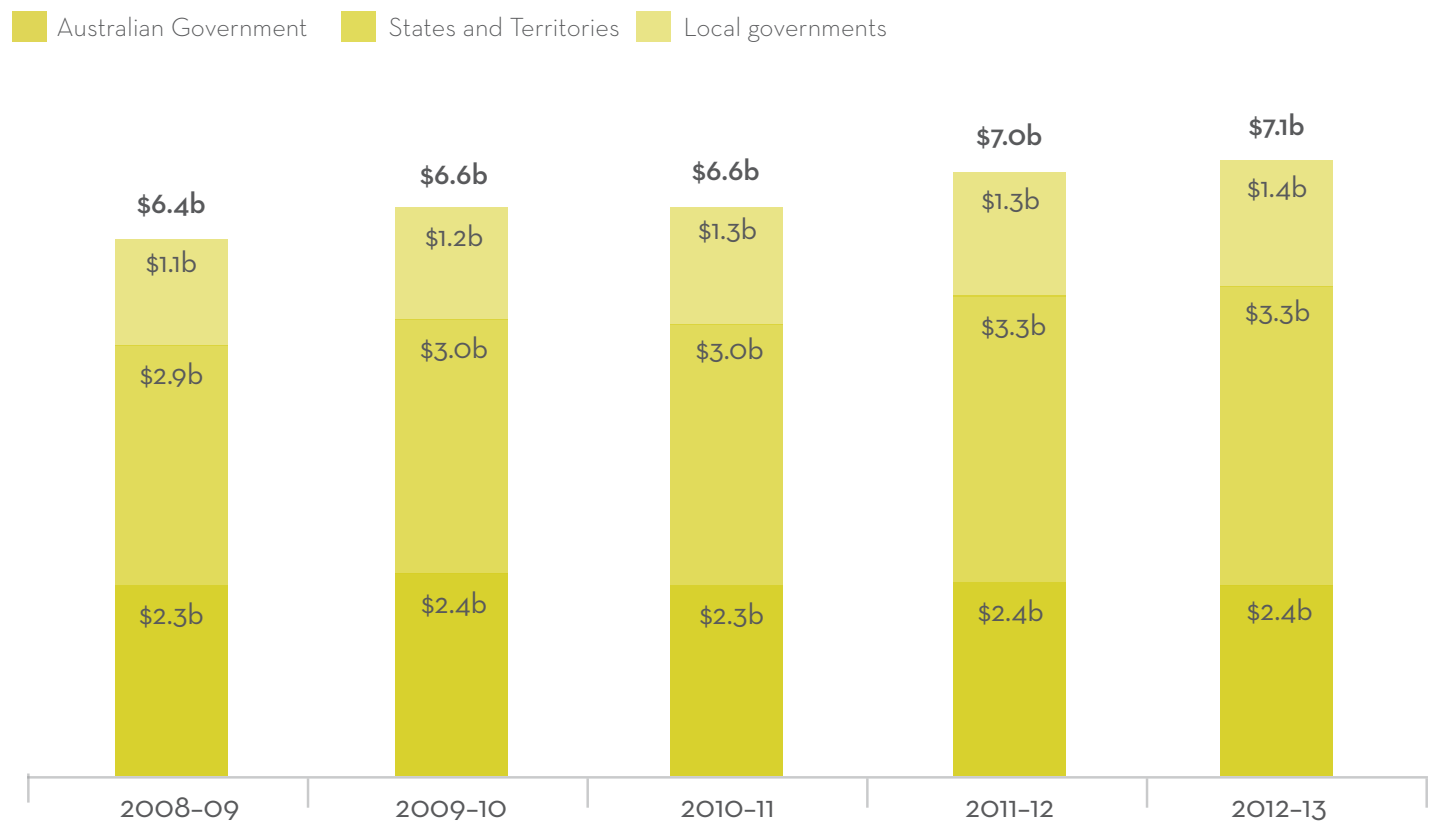


Table 2: Capital and recurrent core arts funding by layer of government, 2012-13

(\$m)	Capital	Recurrent	Total
Australian Government	21	398	419
States and Territories	186	730	916
TOTAL	207	1,128	1,334

THE CULTURAL ECONOMY

Figure 13: Corporate sponsorship and private giving to Major Performing Arts companies, 2009 to 2013

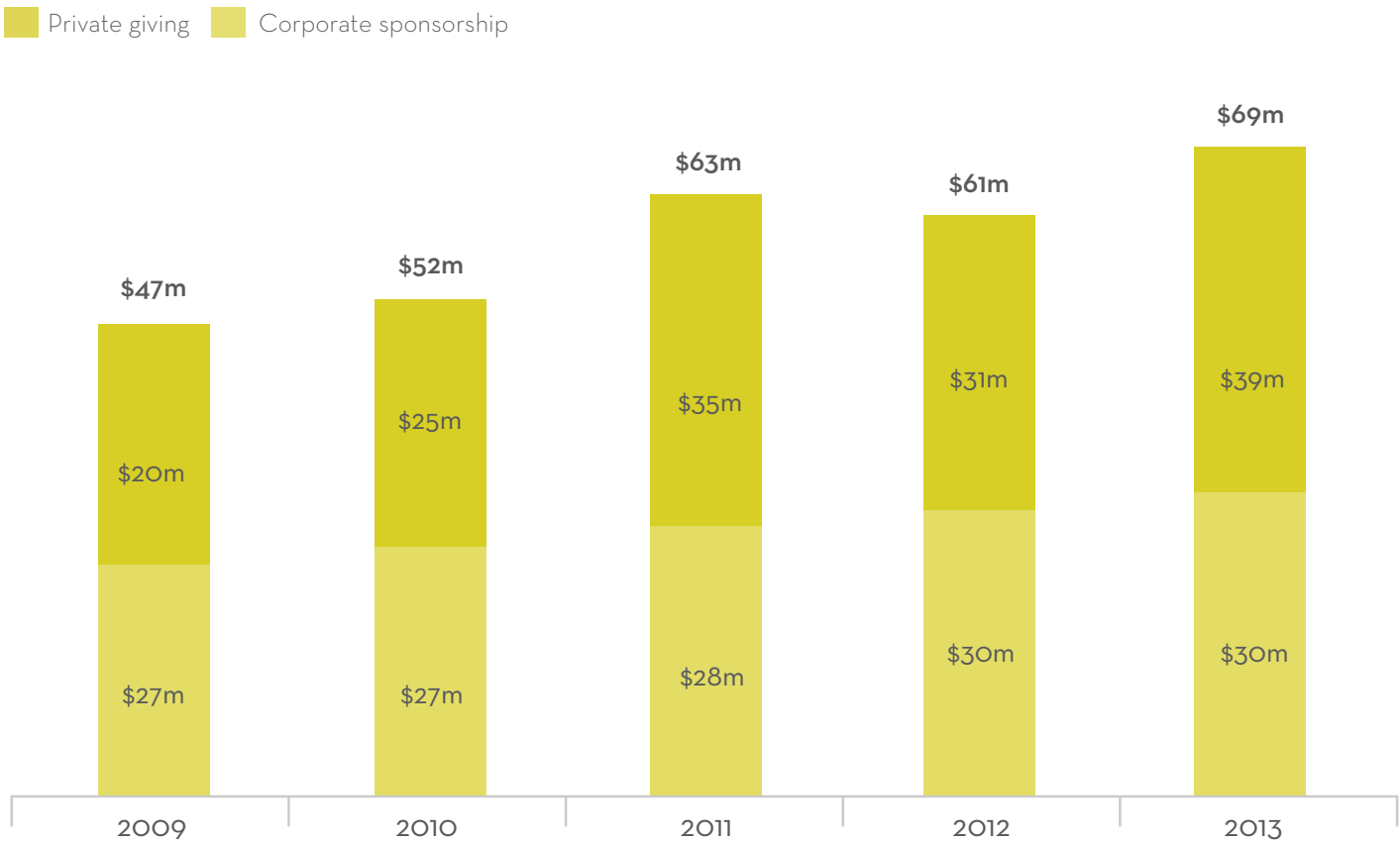


Figure 14: Amount raised by successful arts crowdfunding projects, 2011-12 to 2013-14



THE CULTURAL ECONOMY

Private support

The most recent report on levels of private support to the arts found that arts organisations secured \$221 million from this source in 2009–10 (**Indicator 17, Measure 17.1**). This income had grown by 59 percent since 2001–02 and accounted for more than 10 percent of arts organisations' income.⁴⁹

By 2009–10, philanthropic donations had become the dominant source of private sector support for the arts, overtaking corporate sponsorship. Donations grew from 42 percent to 56 percent of private sector support for the arts between 2001–02 and 2009–10, while corporate sponsorship correspondingly reduced.⁴⁹ This trend appears to have continued.

There is continued growth in private giving to the Major Performing Arts Group organisations. Philanthropic donations rose from almost \$20 million in 2009 to \$39 million in 2013 (an 81% increase). Small, medium and large companies have experienced growth, but the small companies have to commit more of their resources to get philanthropic income.⁵⁰ Corporate sponsorship contributed an additional \$30 million in 2013. These figures show strong growth in philanthropy and stable-to-low growth in sponsorship⁵⁰ (**Figure 13**).

Crowdfunding is a newer form of private support that is small but growing rapidly. In 2013–14, Australian arts projects raised nearly \$5 million through four major crowdfunding sites⁵¹ (**Measure 17.2**).

This is over four times more than in 2011–12 (\$1.1 million) (**Figure 14**). Two in three Australian arts crowdfunding campaigns reached their target in 2013–14, which is higher than the global average of one in two. The average amount raised for these projects was \$5,187 in 2013–14.⁵¹

Around seven percent of Australians report contributing to crowdfunding campaigns for arts activities in the past year.¹

LOOKING FORWARD

Future versions of this report could look at other aspects of the arts economy. This may include:

- the role and scale of local government investment in the arts
- the balance between public and private funding of the arts
- the level of domestic revenue from arts practice
- the financial sustainability of arts organisations
- the spread of physical arts infrastructure.

GETTING THE MEASURE OF HAPPINESS: THE ARTS AND SUBJECTIVE WELLBEING IN AUSTRALIA

By Rachel Smithies and Daniel Fujiwara

Many people believe that the arts have a valuable impact on societal wellbeing, but how can this be measured? Using the results of the Australia Council's 2013 Arts Participation Survey, Daniel Fujiwara and Rachel Smithies have conducted exploratory analysis that shows the arts may be worth \$66 billion to Australia's wellbeing.

In recent years economists and policy makers have started to move away from traditional economic models of rationality, and toward models that consider emotional, social and cognitive factors. More attention is being focused on how to measure the progress of society, because for many the classic measure of GDP per capita is no longer considered adequate. The Nobel prize-winner Daniel Kahneman and former Chief Economist of the World Bank Joseph Stiglitz are adding their voices to the growing view that economics can – and should – measure individual and social wellbeing directly to understand the true value of people's activities. Such measures can be used effectively to inform public policy decisions.⁵²

Subjective wellbeing analysis is an increasingly popular technique that answers this call. It involves analysing people's self-reported levels of wellbeing, such as their life satisfaction or happiness, which is usually done by asking people to rate on a numeric scale (for example 1 to 10) how satisfied they are with their lives or how happy they feel.⁵³ The answers are then analysed together with information on other aspects of their lives to see how different activities, circumstances and policy interventions impact on people's overall levels of wellbeing.

Data is available to carry out this kind of analysis in Australia⁵⁴ as well as in the UK, Germany and USA. Findings have shown that key drivers of higher wellbeing include employment status, health, quality of home life, income, social relationships and community environment.⁵⁵ To date, however, there has been relatively little research on the relationship between engagement with arts and culture and wellbeing. This is a surprising gap, given the widespread belief that the arts are central to quality of life, with 85 percent of Australians agreeing that the arts make for a more rich and meaningful life.¹

The analysis here uses data from the Australia Council's 2013 Arts Participation Survey to explore the relationship between Australians' engagement with the arts and their subjective wellbeing. The Arts Participation Survey is nationally representative of the adult population in Australia and provides a wealth of data on people's engagement in the arts and their life circumstances. These include age, gender, employment, income, educational status, accommodation and household status, health, marital status, ethnicity and geographic region.

⁵² Research shows that how people answer the question of how satisfied they are with their lives draws on both their affect (their positive and negative emotions) and a cognitive assessment of how their life corresponds to their aspirations, goals and peers.

GETTING THE MEASURE OF HAPPINESS: THE ARTS AND SUBJECTIVE WELLBEING IN AUSTRALIA

Regression analysis has been used to analyse the relationship between arts engagement and wellbeing.^y This will provide a picture of the relationship between arts engagement and wellbeing that is clearer than a simple comparison between people who do and do not engage in the arts.^w The aim of regression analysis is to assess whether engagement in the arts is associated with higher levels of subjective wellbeing after controlling for other factors that may be influencing this relationship.

An example of one such possible factor is income. Income is important in determining life satisfaction on its own, but there is also evidence that wealthier people are more likely to engage with the arts. Unchecked, a confounding factor like this would bias the results of our study because any positive association that we may observe between engagement in the arts and wellbeing would in part be due to income. Therefore the regression analysis controls for the main life circumstances that are determinants of subjective wellbeing that are measured in the Arts Participation Survey.

Our analysis has found that engagement with the arts is associated with a significant positive increase in life satisfaction. Where life satisfaction is rated on a scale of one to 10, engagement with the arts is associated with an increase of 0.143 in wellbeing.^x But are more satisfied people more likely to engage with the arts, or

does arts participation lift life satisfaction? Proving a definitive causal relationship using observational survey data is not possible. The only way to do so would be to experiment by randomly assigning arts experiences to people and tracking changes in their life satisfaction. However, the intuition that arts participation might lead to higher life satisfaction is supported by research on individuals' moment-to-moment happiness, which shows that arts activities are among those that make people the most happy.⁵⁷ These results are also closely supported by the growing international literature and evidence on wellbeing, arts and culture, including one small-scale experimental study.⁵⁸

From an economist's perspective, subjective wellbeing analysis can be used to determine the monetary value associated with a given activity. In a typical market transaction, the value gained from a purchase is generally assumed to be reflected to some extent in the amount paid. However, if there are market failures, the price will not reflect the true value. And in some cases – for example a free arts exhibition – specific activities have no market price. In these cases, economists must rely on non-market valuation techniques to determine the value of the item or activity. It is here that subjective wellbeing techniques can come into play.⁵⁹ By calculating the amount of money that would be required to produce an increase in life satisfaction equivalent to arts engagement, the Wellbeing Valuation

^y This is a recommended statistical approach when using observational survey data to analyse subjective wellbeing according to guidelines set out by the UK Government (HM Treasury) and the Organisation for Economic Cooperation and Development (OECD).⁵⁶

^w However, there is still a risk that results will be biased to some extent, because there may be some factors that we do not observe and, therefore, cannot control for.

^x This is smaller than some of the key life circumstances that influence subjective wellbeing employment increases wellbeing by 1.082, and disability decreases wellbeing by 0.583.

GETTING THE MEASURE OF HAPPINESS: THE ARTS AND SUBJECTIVE WELLBEING IN AUSTRALIA

approach reveals the economic value of the activity. An economist would call this the 'compensating surplus' measure of value.

Applying the Wellbeing Valuation approach to this analysis, the identified wellbeing increase of 0.143 is worth an equivalent of AUD\$4,349 per person, per annum. When applied to the proportion of the Australian population aged 15 years and above who engage with the arts, this equates to an overall societal value of about AUD\$66 billion per year. Given the well-documented positive effects of engaging with the arts for children, it is safe to assume that this figure would be even higher if we included children under the age of 15 in the analysis.

Subjective wellbeing analysis can support policy making in several ways. Firstly, the 'compensating surplus' measure is a primary measure of monetary value that can be used in cost-benefit analysis of policy options. Secondly, subjective wellbeing analysis allows us to identify the drivers that make the most difference to people having fulfilled lives, in this case deepening our understanding of how the arts enrich the lives of those who engage with them.

Of course the importance of arts engagement is relative to other factors that affect life satisfaction. Our analysis of the Arts Participation Survey shows that the wellbeing value of being employed versus unemployed is worth \$24,853 per person per annum in addition to the wage income. Although arts engagement is not on the same scale as some of these larger drivers of life satisfaction, it is still a significant driver and of note for arts policy.

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CONTRIBUTORS

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 Arts Victoria
 artsACT
 AusDance
 Australian Booksellers Association
 Australian Bureau of Statistics
 Australian Circus & Physical Theatre
 Association
 Australian Commercial Galleries
 Association
 Australian Dance Awards
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 Australian Performing Arts Centres
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 John Fries Award
 Keir Choreographic Award
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 Prix Ars Electronica
 Prix de Lausanne
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 Pulitzer Prize
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 Modern Art Queensland
 Queensland Writers Centre
 Redland Art Awards
 SA Writers' Centre
 Salzburg Festival, Austria
 São Paulo Art Biennial
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 Theatre Network Victoria
 Tony Awards®
 Tourism Research Australia
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 Umbria Jazz Festival
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 Vancouver International Dance Festival
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SELECTED AWARDS AND EVENTS

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Academy Awards®
 Bessie Awards
 Critics' Circle National Dance Awards
 Future Generation Art Prize
 Golden Lion
 Grammy Awards®
 Hugo Boss Prize®
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 Olivier Awards®
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 Prix de Lausanne
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 Helpmann Awards
 John Fries Award
 Keir Choreographic Award
 Miles Franklin Literary Award
 Moran Prizes
 National Indigenous Music Awards
 Patrick White Playwrights' Award
 Prime Minister's Literary Awards
 Redland Art Awards
 Telstra National Aboriginal & Torres Strait Islander Art Award
 The Anne & Gordon Samstag International Visual Arts Scholarships

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The Australia Council for the Arts is the Australian Government's arts funding and advisory body. The Australia Council supports Australia's arts through funding, strengthening and developing the arts sector. We collaborate to build new audiences, foster philanthropic support and deepen our understanding of the arts through research.

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