

CONNECTING AUSTRALIANS



RESULTS OF THE NATIONAL ARTS PARTICIPATION SURVEY

JUNE 2017

EXECUTIVE SUMMARY

CONNECTING AUSTRALIANS:

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June 2017

Connecting Australians reports on the third National Arts Participation Survey in a series by the Australia Council for the Arts.

Focus groups and the survey were conducted by 10 THOUSAND FEET, a Sydney-based research consultancy.

An exploration of wider societal attitudes was undertaken by social researcher and commentator Dr Rebecca Huntley (Research Director, ARC Public).

Morris Hargreaves McIntyre was engaged to apply their *Culture Segments* to the survey questionnaire. A separate *Culture Segments* report will be published.

The Australia Council would like to thank Megan Brownlow (Partner, PricewaterhouseCoopers) and Pino Migliorino (Chair & Managing Director, Cultural Perspectives Group) for their contributions to this report; and advisers John Daley (CEO, Grattan Institute), Associate Professor Hillary Glow (Faculty of Business and Law, Deakin University) and Distinguished Professor David Throsby AO (Professor of Economics, Macquarie University).

Readers should be aware that this report may contain references to and images of members of the Aboriginal and Torres Strait Islander community who have passed away.

The Australia Council respects Aboriginal and Torres Strait Islander communities and cultures. These lands and waters are the location of the longest continuing cultures and civilisations in the world. At the time of European arrival this place was, and still is, home to some 500 distinct nations, each with its own name. Therefore we acknowledge the right of all peoples to claim, control and enhance their cultural inheritance and the names by which they are known.

Operating across these nations, the Australia Council uses the words 'Aboriginal and Torres Strait Islander', 'First Nations' and 'Indigenous' interchangeably in this report to refer to the Aboriginal and Torres Strait Islander peoples of Australia, and their arts and cultures. We understand that some Aboriginal and Torres Strait Islander people are not comfortable with some of these words. The Australia Council means only respect when we use these words.

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Attribution: Australia Council for the Arts 2017, *Connecting Australians: Results of the National Arts Participation Survey*.

Previous National Arts Participation Survey results were published in:

- Australia Council for the Arts 2014, *Arts in Daily Life: Australian participation in the arts*.
- Australia Council for the Arts 2010, *More than Bums on Seats: Australian participation in the arts*.

Cover image:

Opera in the Park. Credit: James Rogers for West Australian Opera

*'You can sing a song together, or
have a conversation about theatre.
It connects you to people around the
world instantaneously.'*

*'I think dance is an international
language. It crosses barriers.'*

*'With music, you are all dancing
to the same beat.'*

- Focus group participants,
Connecting Australians

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FOREWORD

The Australia Council's vision is for a culturally ambitious nation in which every Australian feels enriched and connected by arts experiences infused throughout their daily lives.

Research, data and analysis underpin the work we do to realise our vision, and are essential to our advocacy for Australian arts.

As the Australian Government's principal arts funding and advisory body, we utilise our research and sector knowledge to inform policy, to champion and advocate for the arts, and to leverage new investment opportunities. Building the evidence base for the arts provides valuable resources for our stakeholders across the arts ecology. This includes all facets of the arts sector, government, the research community, and our international counterparts and networks.

Our research program explores evolving arts practice, the development of careers and markets for Australian artists, and the changing ways that the arts are experienced – arts audiences and participants are crucial members of the arts ecology, as are all Australians. Arts practice, and support for the arts in all its forms, both affect and reflect the society in which we live.

The Australia Council has a legacy of undertaking major studies of public attitudes to the arts over many decades. The Council's current National Arts Participation Survey series began in 2009. It was a landmark study that examined, for the first time, both Australians' attitudes and their arts engagement with a large, nationally representative sample. The Council delivers the survey triennially to paint an evolving picture of the arts in Australians' lives, and to track emerging trends.

I am pleased to share with you *Connecting Australians*, results from our 2016 National Arts Participation Survey – the third survey in this series, building on the 2009 and 2013 editions.

Communicating the essential value of the arts to individual and public life is central to our mission, and our National Arts Participation Survey is a cornerstone of the evidence base for the arts in Australia. It provides new information about the scale and nature of Australians' engagement with the arts; Australians' increasing recognition of the value of the arts to our personal and collective wellbeing; and Australians' attitudes towards the arts at this moment in time.

The report provides new data not previously available at a national level in Australia on festival attendance, attendance at literature events, engagement with the arts as part of Australians' cultural backgrounds, and engagement with community arts and cultural development (CACD).

The scope of this report is much broader than the reach of the Australia Council's funding. *Connecting Australians* captures Australians' engagement with a diverse range of creative activity – arts in the eye and experience of the Australian public. This encompasses arts across both the commercial and not-for-profit sectors; both amateur and professional arts experiences; and online engagement at home through to opportunities for experiential, in-person connections.

The report shows how crucial the arts are at this pivotal moment in time – for understanding our differences, reflecting our cultural diversity and connecting with each other through our common humanity. It shows that digital technology and multichannel

content dissemination have transformed the nature of arts engagement, enabling more Australians to experience the arts in increasingly interconnected ways – growing rather than diminishing arts audiences.

I trust you will find valuable insights in this report about Australians' diverse and evolving relationships with the arts; and that *Connecting Australians* will provoke thought, discussion and action to support an increasingly creative and cohesive nation for us all.

A handwritten signature in black ink, appearing to read 'Tony Grybowski'.

Tony Grybowski
Chief Executive Officer
Australia Council for the Arts

EXECUTIVE SUMMARY

Creativity is innate to humanity, and the arts are vital expressions of human experience. They highlight the world's beauty and brutality; they uncover its truths and reimagine its future. The arts embody individual and collective identities, stories and histories. They empower diverse voices, break down barriers, and grow empathy and understanding – the arts have the power to inspire and unite.

The arts also entertain. They provide moments of release from life's pressures. They connect people with ideas, emotions and stories; and spark imagination, creativity and joy. The arts are intrinsically important, and contribute to individual and collective wellbeing.

What are Australians' relationships with the arts at this point in time? Do Australians recognise the impacts of the arts in their lives? What are their attitudes about artists and freedom of expression? How is engagement with the arts changing, and how is the digital revolution driving this change?

These questions are explored in *Connecting Australians: Results of the National Arts Participation Survey*. The 2016 National Arts Participation Survey is the third in a landmark series by the Australia Council for the Arts, following editions in 2009 and 2013.

This series provides a comprehensive picture of Australians' evolving relationship with the arts in their daily lives. It encompasses engagement with the broad gamut of arts offerings across Australia, including from both commercial and not-for-profit organisations; engagement with free accessible public art; and creative participation at all levels from the hobbyist to the arts professional.

Tracking trends in arts engagement enables insight into growth opportunities and barriers to access. It arms the arts sector with information on participants, audiences and markets; and builds the evidence base about the value of the arts to Australians. It helps to ensure there is an informed conversation about the arts.

The 2016 National Arts Participation Survey was conducted in November–December 2016 with a nationally representative sample of 7,537 Australians aged 15 years and over. For a deeper understanding of the survey findings, *Connecting Australians* incorporates data from two stages of qualitative research based on focus group discussions. Additional research sources are drawn in throughout the report to provide context and paint a richer picture. Stories from the sector about Australians and the arts in 2016 are shared to bring this picture to life. The report also includes expert commentary from Pino Migliorino on the arts and cultural diversity, Megan Brownlow on the arts and online transformation, and Rebecca Huntley on attitudes to the arts in relation to the national mood in 2016.

Society has changed since the previous surveys, and the rate of societal change seems to be ever increasing. The proliferation of information and entertainment choices, interconnected through digital pathways, are seamlessly integrated into our daily lives – influencing who and what we interact with. At the same time, there are geopolitical shifts and conflicts, coupled with changing economic and social structures. Digital platforms have made the world more connected than ever, yet in many ways divisions in society appear to be growing.

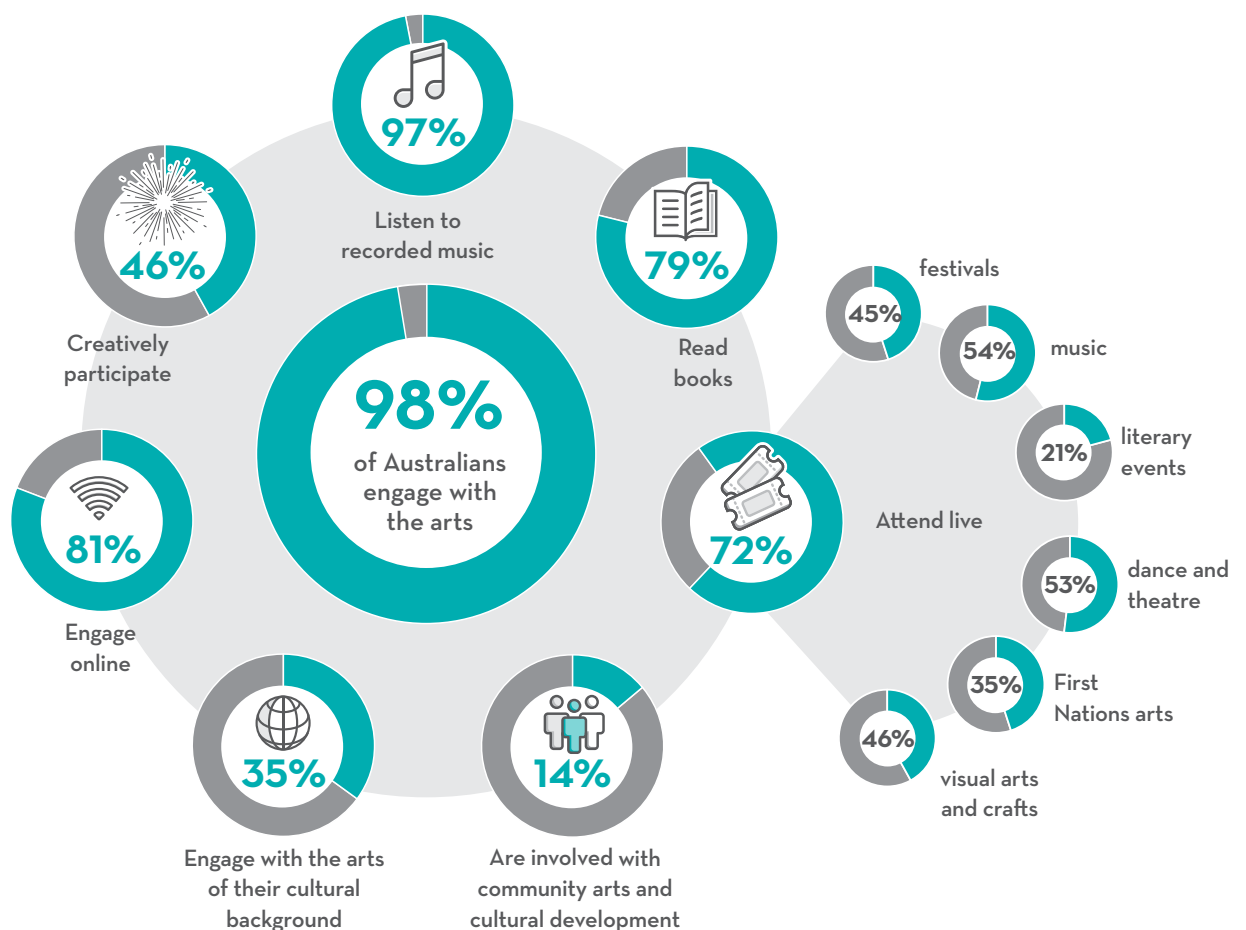
Against this backdrop, the 2016 National Arts Participation Survey found that Australians increasingly believe the arts are critical to social cohesion – the arts reflect Australia's diversity; shape and express identity; and create empathy, understanding and connection.

now feel that the arts contribute to their happiness, and to their ability to express themselves and develop new ideas. The arts make life rich and meaningful, and Australians take pride in their artists on the international stage.

The arts have a place in the lives of 98% of Australians. This is a level of engagement consistent with previous surveys, reinforcing the central role the arts play in Australian life. The shift is the rise of digital platforms – rather than replacing the experience of the arts in person, they provide a complementary extension and diversification of access.

Australians value attending arts events, exhibitions and festivals in person; they create, share and connect with the arts online; they engage with the arts of their own cultural background; and more Australians than ever are engaging with the arts of Australia’s First Nations peoples – the most enduring arts and culture makers on earth. Those reading books and listening to music are also engaging with the arts – even though they may be doing it from the comfort of their home or smartphone. Australia remains a creative nation – almost half of Australians creatively participate in the arts despite their busy lives, and increasingly in ways that enable them to connect with others through the arts.

FIGURE 1: Australians’ arts engagement 2016



n = 7,537 (2016 total sample, online and telephone)



Matilda the Musical Australian Production, view of audience from the stage. Credit: Ze Wong

Matilda the Musical, the adaptation of Roald Dahl's book with music and lyrics by Tim Minchin, has been touring Australia since July 2015. Prior to that it was a hit on Broadway and in the West End, winning seven Olivier Awards and five Tony Awards.

CHAPTER 1: THE VALUE OF THE ARTS TO AUSTRALIANS

Impacts of the arts

More Australians now recognise the many positive impacts the arts have on our daily lives and in our communities. In 2016, 17 million Australians acknowledged the significant positive impacts of the arts (or 86% of the population aged 15 years and over).

More Australians now believe that the arts have a 'big' or 'very big' impact on:

- their sense of wellbeing and happiness (60%, up from 52% in 2013)
- their ability to express themselves (69%, up from 61% in 2013)
- their ability to think creatively and develop new ideas (67%, up from 59% in 2013).

Acknowledgement of the positive impacts of the arts is highest among the youngest age groups and tends to decrease with age, as do most kinds of arts engagement. Young people are less likely to be confined by ingrained perceptions of 'traditional' art forms – their high levels of arts engagement ensure that the arts are evolving and reflect living culture. Given the demonstrated benefits of arts engagement and Australia's ageing population, it is important to ensure that older Australians have access to the arts.

Australians' attitudes about the arts

Australians believe the arts reflect and contribute to society, to cultural identity, and to Australia's international reputation. The arts give life meaning and Australians are proud of their artists.

The 2016 National Arts Participation Survey shows that:

- four in five Australians agree that Indigenous arts are an important part of Australia's culture (80%)
- three in four Australians feel proud when Australian artists do well overseas (76%); agree that the arts should be an important part of the education of every Australian (75%); and agree that the arts make for a richer and more meaningful life (74%)
- seven in ten Australians agree that artists should have total freedom of expression (70%).

Trends in attitudes about the arts

The vast majority of Australians maintained positive attitudes about the arts in 2016. However, there has been a shift among some towards ambivalence.

More Australians 'neither agree or disagree' with some positive attitude statements. For example, that the arts should receive public funding (25% 'neither agree or disagree', up from 13% in 2013), or that it is exciting to see new kinds of art (25% 'neither agree or disagree', up from 10%).

In addition to increased ambivalence, more Australians agree that the arts are too expensive (43%, up from 36%), the arts tend to attract people who are somewhat elitist or pretentious (43%, up from 30%) and the arts are not really for people 'like me' (22%, up from 13%).

While these shifts contrast with other findings in the National Arts Participation Survey, they are likely to reflect the heightened anxiety, disengagement and divisions within society at this point in time. For example, a 2017 global study by Ipsos found that almost half of Australians feel society is broken (47%) and a third of Australians feel like a stranger in their own country (36%).¹

Reading the national mood

Social researcher and commentator Rebecca Huntley used focus groups to examine how attitudes to the arts interact with broader social trends and concerns.

Regardless of their level of interest in the arts, people across the focus groups share the same major concerns, including the cost of living. The barriers of time and money are high for those who are supportive of the arts but currently disengaged.

For those who value the arts, cost of living worries do not dampen their interest in seeing and creating art. For these people, arts are an essential part of life, critical to emotional, personal and social wellbeing.

Perceptions that the arts are expensive and hard to access are driven in part by narrow definitions Australians have about what 'the arts' are. While the National Arts Participation Survey questionnaire steps respondents through an inclusive list of arts activities, the focus groups showed that some people maintain an ingrained, narrow definition of 'the arts'. Those who are less engaged with the arts are more likely to have entrenched perceptions

of them as 'opera and ballet', rather than for example, free and accessible festivals. This shows that there is still work to be done to shift perceptions about the true breadth of the arts so that everyone can feel a point of connection to creative life in Australia.

While the broader public conversation in Australia is one that is fraught with anxieties about the medium-to-long-term future; the value of the arts, particularly for social connection and understanding, is clear to people – even those who are not interested in engaging with the arts themselves.

The arts and social cohesion

There is a growing appreciation among Australians of the role of the arts in creating social cohesion. More Australians now agree that the arts reflect Australia's cultural diversity (75%, up from 64% in 2013) and that the arts shape and express Australian identity (57%, up from 45% in 2013).

New data collected in the 2016 survey show that three in four Australians believe the arts are an important way to get a different perspective on a topic or issue (73%). Two in three Australians believe that the arts impact their understanding of other people and cultures (64%) and allow them to connect to others (64%). These beliefs contrast with 2013, when only one in three Australians felt that the arts had a large impact on empathy for others (36%).

Through the arts, people have the opportunity to see themselves and their worlds reflected, and to gain insights into the lives and worlds of their neighbours near and far.

Giving to the arts

In keeping with the economic concerns in the 'national mood', there is a downward trend in the proportion of Australians who are donating money.² However this trend is not seen in arts giving.

The high value that Australians place on the arts is reflected in the time and money that Australians give to support artists, arts organisations and arts projects – one in four Australians gave their time or money to the arts in 2016 (27%).

The proportion who donate to the arts has remained stable and the proportion who contribute to crowdfunding increased to almost one in ten in 2016 (9%, up from 7% in 2013).

The major performing arts companies have seen substantial growth in the number of private donors,³ and small to medium not-for-profit arts and culture organisations draw a significant proportion of their income from non-government sources.⁴ Given that more Australians now recognise the positive impacts of the arts in their lives, there are opportunities to further cultivate arts giving across the population.

CHAPTER 2: THE ARTS AND CULTURAL DIVERSITY

Engagement with cultural background through arts

In 2016 almost seven million Australians attended or created arts as part of engaging with their own cultural background (35%).

Engagement with the arts of one's background helps to keep diverse cultures and identities strong, whether in First Nations, Anglo-Celtic, or diasporic^a communities. All Australians benefit from this rich cultural tapestry.



Inner Beat Live, Asia TOPA. Credit: Nicola Dracoulis

Inner Beat Live explored the identities of young Asian-Australian artists in collaboration with Aboriginal artists. It was presented in public space as part of Asia TOPA – a triennial contemporary Asian Arts festival held at Arts Centre Melbourne. *Inner Beat Live* performed four sold out shows that enhanced the festival's reach to culturally diverse audiences from outer Melbourne suburbs.

^a Diasporic is used to describe a community of people who live outside their shared country of origin or ancestry but maintain active connections with it. A diaspora includes both emigrants and their descendants.

Among the survey respondents from culturally and linguistically diverse (CALD) backgrounds, half engaged with the arts of their cultural background in 2016 (52%), and four in five attended arts overall (80%).^b Only two percent of CALD respondents exclusively engaged with the arts of their own background without attending other kinds of arts - CALD people engage with diverse cultural offerings, including high levels of engagement with First Nations arts.

'Arts participation as a facet of own-culture connection is a breakthrough question in the 2016 participation survey. The CALD community behaviour demonstrates significant cross cultural arts participation and this can only be a positive indicator for both social cohesion and intercultural empathy.'

Pino Migliorino, leading commentator on multicultural policy
and founder of the Cultural Perspectives Group

Digital technology and social media increase the interconnectedness of our world, and including greater access to networks that enable CALD people to explore, connect with and express their cultural identities. There is a growing dialogue about cultural appropriation, and there are strong voices within CALD communities wanting to tell their own stories. The survey results may also indicate that targeted arts investment and cultural development strategies by all spheres of government, to support professional pathways for artists and participation within CALD communities, are bearing fruit.

First Nations arts

In 2016, seven million Australians, or 35% of the population, attended First Nations arts - a record level of attendance and double that of 2009. More people are attending First Nations arts across art forms.

The 2013 National Arts Participation Survey found that there was a gap between Australians' interest in, and attendance at, First Nations arts; and that less than half of Australians agreed that First Nations arts were well represented (46%).⁵ This highlighted an opportunity to further develop audiences for First Nations arts, including by ensuring that Australians have access to a variety of high quality First Nations arts experiences.

Although the survey results for interest in First Nations arts are not directly comparable due to question changes between the 2013 and 2016 surveys, results from the 2016 National Arts Participation Survey indicate that attendance has substantially increased and the gap is closing. In 2016, 47% of Australians were actively interested in First Nations arts and 35% attended (up from 24% in 2013). More than half of Australians now agree that First Nations arts are well represented (54% compared to 46% in 2013).

^b There are different ways of defining CALD. For example, some definitions are based on language spoken at home or country of birth. The definition used in this survey is based on people self-identifying as being culturally or linguistically diverse. This could include the Auslan community, as well as first generation migrants or those who self-identify with the language or cultural practices of heritages that differ from Anglo-Australians. See from p.24 for information on the representativeness of the CALD sample.



Festival of the Brolga 2016, Beyond Empathy.

Credit: Raphaela Rosella

In July 2016, 650 people crammed into the Moree Town Hall to celebrate the stories of local heroes at the bi-annual *Festival of the Brolga*. More than 150 people from the local Gomeri community participated as paid cast and crew. They were supported by ten emerging artists and nine professional First Nation artists, all of whom have a deep and enduring relationship with the Gomeri people and their country.

As well as reflecting the high quality work of First Nations artists, and initiatives to build audiences for First Nations arts; these findings highlight further opportunities to reach interested Australians, increase First Nations representation, and build interest so that all Australians can experience and take pride in First Nations arts.

Community arts and cultural development (CACD)

In community arts and cultural development (CACD) activities, the line between community member and professional artist is blurred as both work collaboratively to reveal their artistic and cultural expression. CACD processes and creative outcomes can lead to significant social and community impacts through their intrinsic value and artistic resonance – empowering and transforming participants and communities and leading to new forms of storytelling.⁶

In 2016, CACD activities involved one in eight people in regional Australia (13%);^c one in four Australians aged 15 to 24 years (28%); one in three of the Australians with disability

^c This included those who answered 'yes' to the question: *Now, thinking about community arts and cultural development activities, which engage community members in decision making and creation of art - in collaboration with professional artists. Have you been involved in a project like this in the past 12 months?* Australians' perceptions of what is involved in decision-making and co-creation, and who is a professional artist, may capture a broader range of activity than what is perceived to be CACD by the Australia Council or the CACD sector.

surveyed (31%);^d one in four of the Australians from CALD backgrounds surveyed (26%); and one in two of the First Nations people surveyed (55%).^e

These strong engagement figures show that the CACD sector is a leader in the use of the arts to support social inclusion and cohesion, enabling diverse voices to be heard and stories to be shared through creating art.

CHAPTER 3: ARTS ATTENDANCE

Attending arts experiences in person enables Australians to come together as audiences and connect with artists in an unmediated way. More than 14 million Australians aged 15 years and over attended arts events or festivals in person in 2016 (72%), on par with 2013 and 2009.

One in two Australians attended theatre or dance in 2016 (53%), which was a substantial increase from 42% in 2013. Two in five Australians attended theatre in 2016 (41%) and one in three attended dance (32%).^f Attendance increased across most theatre and dance genres, including contemporary dance; social dance (e.g. ballroom or street dance); circus and physical theatre; traditional or contemporary theatre; and experimental theatre. The relevance and diversity of the theatre and dance offerings are striking a chord with Australians and reaching new audiences.

The proportion of Australians who attended visual arts and craft increased from 43% to 46% between 2013 and 2016. There was an increase in attendance across genres, including painting; digital art; photography; sculpture, installation or public art (e.g. light art); and craft (e.g. ceramics, textiles and glass art). Growth in the audience for visual arts in Australia reflects the high volume of diverse visual arts and craft activities on offer; including free exhibitions, popular touring exhibitions and major biennales in 2016.

More than half of Australians attended live music in 2016 (54%), including opera, classical music, musical theatre, art music and contemporary popular music. This reflects the ongoing importance of music performance in the lives of Australians. However, the proportion of Australians attending live music decreased between 2013 and 2016 (from 59% to 54%), driven by a decline in the proportion of Australians attending contemporary music across Australia (from 39% in 2013 to 32% in 2016, following a stable trend between 2009 and 2013).

Live contemporary music in Australia is a dynamic landscape, particularly given changes in the regulatory environment and music festival market in recent years. While there was a reduction in the number of large-scale music festivals between 2013 and 2016, if this was the cause of the attendance decline it would be likely to be more pronounced among younger Australians – but there were declines in contemporary music attendance across most age groups. The declines were also across states and territories, and for both regional and metropolitan residents.

^d There are different ways of defining disability. The definition used in this survey involves self-identification and is based on the social model of disability. See from p.24 for information on the representativeness of people with disability in the sample.

^e See from p.24 for information on the representativeness of the First Nations sample.

^f In 2016 trend data is available for theatre and dance combined, and at the genre level within these art forms.



Installation view 2016 Adelaide Biennial of Australian Art: *Magic Object*, Art Gallery of South Australia, featuring Hiromi Tango, *Breaking Cycle (Lizard Tail)*, Sullivan + Strumpf. Credit: Saul Steed

More than 220,000 people visited *Magic Object, the 2016 Adelaide Biennial of Australian Art*, doubling the 2014 attendance figures. Curator Lisa Slade attributed the strong attendance to the exhibition's accessibility and visibility across the city, and the Biennial's reputation as a platform for new Australian works.

There was strong availability of venue-based live music across Australia in 2016,⁷ and the Australian recorded music industry also had a strong year.⁸ Contemporary music attendance data can be volatile and influenced by high profile international artists' stadium tours; but the live music attendance figures are a trend to watch.

New data in 2016 shows that one in five Australians attend literary events (21%), including writer talks, book launches, book clubs, writers' festivals and Indigenous storytelling.

Attending festivals

Arts festivals are a critical and growing component of the Australian arts ecology - from festivals in the laneways of major cities to festivals drawing locals and tourists to regional centres; and from major international multi-arts festivals to Indigenous festivals in remote Australia. Festivals in their diverse forms provide opportunities for Australians to experience a wider variety of arts than usual, and opportunities for Australian artists to experiment and to showcase their work. Festivals bring people and communities together in immersive arts experiences.

For the first time, the 2016 National Arts Participation Survey collected data on Australians' attendance at arts festivals.

Nearly half the population aged 15 years and over attended an arts festival in 2016 (45%). Music festivals were the most popular, attended by over one quarter of Australians (27%). Around one million Australians attended Indigenous festivals (6%) and a similar number attended literature festivals (5%).

The live audience

Arts attendance is increasingly accessible. Survey respondents with disability are now as likely to attend the arts as respondents who do not identify as having disability. Among respondents with disability, arts attendance increased 12 percentage points between 2013 and 2016, from 61% to 73%, with increases in attendance for dance and theatre.^g

Living in a regional area does not substantially affect arts attendance, with around seven in ten people attending the arts in regional Australia (69%) and metropolitan Australia (73%).

Arts practice in Australia is increasingly interdisciplinary, and Australian arts audiences have multifaceted tastes – Australians who attend one type of arts practice are also very likely to attend other types. For example, around eight in ten of those who attended visual arts and craft, theatre, dance or literature events in 2016 also attended live music, compared to just over half of the general population.

For those who had attended arts in the past, but not in the last 12 months, the main barriers were cost (for 39%) and difficulty finding time (for 34%).

CHAPTER 4: CREATIVE PARTICIPATION IN THE ARTS

Australia remains a creative nation. The digital age has brought a swell of entertainment options and ways to connect with others into Australian homes, which compete for time to pursue solo creative pursuits. Despite these distractions, almost half of Australians creatively participated in the arts in 2016 (46%), on par with 2013.

Creative arts participation can take many forms – from artistic photography to playing an instrument; and from singing in a community choir or taking a community arts class, to more professional forms of arts creation. There is increased participation in social forms of arts practice that enable Australians to connect with each other through the arts.

One in ten Australians creatively participated in theatre and/or dance in 2016 (13%, up from 8% in 2013).^h There is increased participation across all the genres asked about in the survey: ballet and classical dance; social dance, such as ballroom or street; contemporary dance; traditional or contemporary theatre; experimental theatre; physical theatre and circus.

Creative participation in theatre and dance is an inherently social activity. More people than before are getting out of their homes and connecting with others through these creative forms. In the digital age, Australians still have a hunger to connect and create in an experiential, in-person way. The findings may also reflect that there are now more opportunities for creative participation in theatre and dance, including a trend to actively involve audience members as creative participants.

g While arts engagers may be over-represented among survey respondents with disability, changes over time are likely to reflect true change in arts engagement among this group. See from p.24 for information about the representativeness of people with disability in the sample.

h In 2016, 6% of Australians participated in theatre and 8% of Australians participated in dance. Trend data is available for theatre and dance combined in 2016, and at the genre level within these art forms.



The Stance, choreographed by Liesel Zink, *Performance Spaces Liveworks Festival*, 2016. Credit: Liesel Zink

The Stance enlivens busy public spaces with joy and curiosity as thousands of pedestrians unexpectedly witness, and become a part of, an evocative live performance.

More than one quarter of Australians created visual arts and craft in 2016 (30%), on par with 2013. While overall participation has remained steady, there is increased participation in digital or video arts, and painting, drawing, printmaking or street art. Many of those who create cross into a variety of media, including through new creation opportunities offered by digital technology.

One in seven Australians created music in 2016 (15%). This is a decrease from the one in five Australians who created music in 2013 (20%), on par with the 2009 level. There are declines in the proportion of Australians singing or playing an instrument but the proportion of Australians writing music remained stable. At a professional level, the number of Australian songwriters earning royalties has grown. In 2016, more than 36,200 Australian songwriters were paid royalties for their works, an average of five percent growth over the previous two years.⁹

One in five Australians participated in creative writing in 2016 (20%), up from 16% in 2013 and 2009. The increase is driven by increased participation in writing poetry, plays and creative non-fiction. A contingent of Australians use social media as a platform for creative writing,¹⁰ and the increase may reflect the popularity of blogs and other inherently social forms of creative writing. The trend for writing novels is steady.

While creative participation has remained steady among the Australian population, it has increased among people with disability. Among people with disability, creative participation in the arts increased 14 percentage points between 2009 and 2013, and a further 12 percentage points between 2013 and 2016 (from 35% of respondents with disability in 2009 to 49% in 2013, and to 61% in 2016).ⁱ Respondents with disability are now more likely to create art (61%) than survey respondents without disability (44%). This is the case for all art forms.

CHAPTER 5: LISTENING AND READING

As well as attending arts in person and creatively participating in the arts, listening to music and reading are vital, accessible and popular ways that Australians engage with the arts.

Listening to recorded music

Music is infused throughout the daily life of almost every Australian – 97% of Australians listened to recorded music in 2016. Music is both ubiquitous and powerful – it can move people, help them through the day and provide a soundtrack to their lives.

Three in four Australians used streaming services such as Spotify, or websites such as YouTube in 2016 (76%, up from 40% in 2013). Despite the increase in online streaming, there has not been a decrease in other ways of listening.

In line with international trends,¹¹ multi-channel dissemination is growing access points, markets and the user experience, rather than these markets cannibalising each other.

Reading

Reading enables people to step into another world and see life through another person's eyes. It enables them to experience places, stories and realities beyond their own existence through the power of imagination and the written word. Other than listening to recorded music, reading is the most popular way that Australians engage with the arts in their daily lives.

Eight in ten Australians read creative writing in 2016 (79%), down from nine in ten in 2013 (87%), with declines in the proportion of Australians reading novels, poetry, creative non-fiction and short stories.

This decline in reading can be attributed to Australians' increasingly busy lives, increased time spent on social media, and the proliferation of entertainment options at their fingertips since 2013,¹² including the rising popularity of video on demand¹³ and podcasts.¹⁴

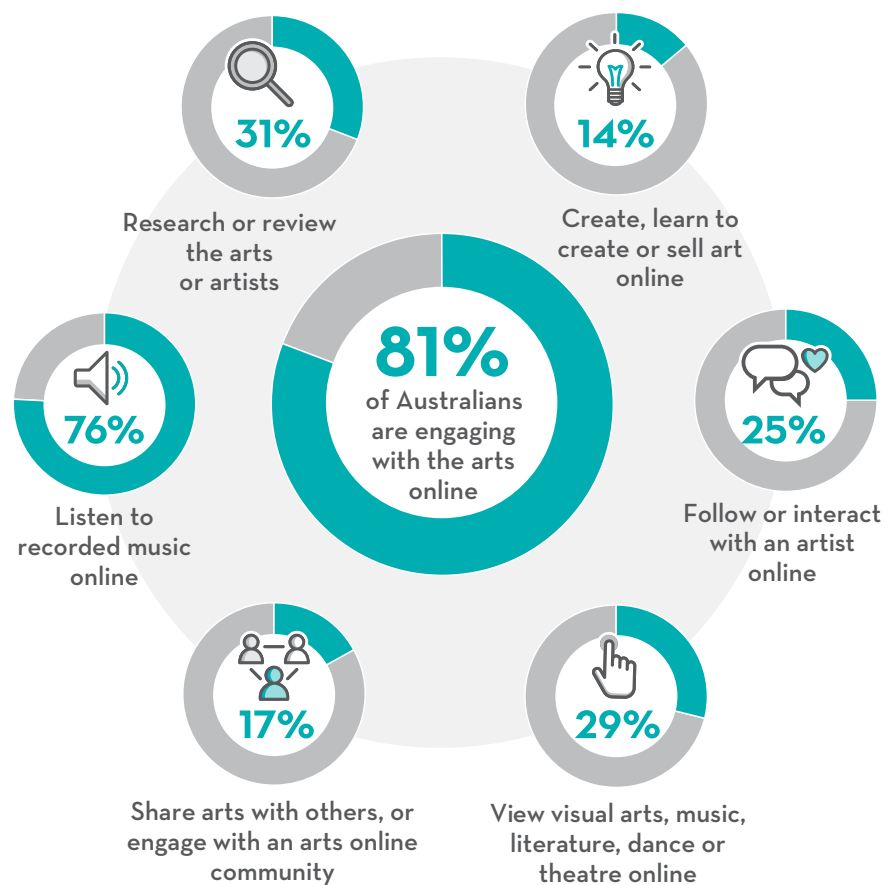
i While arts engagers may be over-represented among survey respondents with disability, changes over time are likely to reflect true change in arts engagement among this group. See from p.24 for information about the representativeness of people with disability in the sample.

CHAPTER 6: ONLINE ENGAGEMENT

Online engagement with the arts is booming – in the digital age the arts are more accessible than ever. Eight in ten Australians engaged with the arts online in 2016 (Figure 2), an increase from 2013 (73%) and 2009 (49%). Music streaming was the largest contributor to both the volume and growth of online arts engagement.

Evolving digital technology is expanding opportunities for creating, accessing and sharing arts; facilitating more direct connections between artists and audiences; and transforming many aspects of the sector. The internet provides a medium to experience and share arts, to reflect on or promote arts experiences, and to find information about arts events.

FIGURE 2: Australians' online engagement with the arts 2016



n = 7,537 (2016 total sample, online and telephone)

‘The democratisation of arts and entertainment realised by the internet is another theme illustrated beautifully by the National Arts Participation Survey. Anyone can become a creator and share their work with the world. Of the 2.7 million Australians who share art online, more than half (1.5 million) are sharing their own work. We can all learn something from the young here. Nearly one in ten of the under-25 survey respondents are selling their art online. This generation of digital natives (who have never not known the internet) are natural entrepreneurs...How does one determine where the artist ends and the arts lover begins? A key trend to watch and perhaps a subject for future research, is this blurring of the two.’

Megan Brownlow (Partner, PricewaterhouseCoopers), media and entertainment industry specialist with over 20 years’ experience in media and marketing.



Jump First: Ask Later, PYT | Fairfield. Credit: Helen Tran

In 2016, PYT | Fairfield’s co-production with Force Majeure, *JUMP FIRST: ASK LATER* played capacity seasons at the Arts Centre and Sydney Opera House, connecting young artists from western Sydney with capacity audiences in Melbourne and Sydney. A Sydney performance was simulcast into Korea.

KEY TERMS

Arts – includes (in this report) engagement with theatre, dance, visual arts and craft, music, literature, First Nations arts and cross-art form engagement. It includes attending the arts live, creative participation in the arts, engaging online, listening to music and reading books.

Community arts and cultural development (CACD) – includes activities where communities, in collaboration with professional artists, are directly involved in the conception, creation and presentation of their own cultural and artistic expression.

Culturally and linguistically diverse (CALD) – includes people who responded ‘yes’ to the question: *Do you identify as a person from a culturally or linguistically diverse background? Culturally and linguistically diverse could include Auslan, as well as first generation migrants or those who self-identify with the language or cultural practices of heritages that differ from Anglo-Australians.* This differs to other CALD measures such as those based on country of birth or language spoken at home. See from p.24 for information on the representativeness of the CALD sample.

Dance – includes any classical dance, contemporary dance and organised social dance.

First Nations – the words ‘Aboriginal and Torres Strait Islander’, ‘First Nations’ and ‘Indigenous’ are used interchangeably in this report to refer to the Aboriginal and Torres Strait Islander peoples of Australia, and their arts and cultural expressions. First Nations survey respondents self-identified. Some, but not all of the First Nations respondents also identified as CALD. See from p.24 for information on the representativeness of the First Nations sample. First Nations arts were not defined based on creative control – it was up to survey respondents to identify whether they engaged with First Nations arts based on their own interpretation.

Literature – includes reading, creative writing and attending literary events (e.g. writers festivals, talks, storytelling and book clubs).

Metropolitan – includes people living in ‘Major Cities of Australia’ according to the Australian Statistical Geography Standard (ASGS) Remoteness Structure. The Remoteness Structure divides each state and territory into several regions on the basis of their relative access to services. For further details see abs.gov.au.

Music – includes playing an instrument, singing, composing music; and attending live music such as opera, classical music, musical theatre, art music and contemporary popular music.

Online engagement – includes viewing arts online; using the internet to create or learn to create arts; sharing, researching or reviewing arts online; following or engaging with artists through social media; and listening to recorded music online.

People with disability – includes people who responded ‘yes’ to the question: *Do you identify as a person with disability and/or do you have an impairment that creates disabling barrier/s which limits the activities you participate in or attend unless access is provided?* See from p.24 for information on the representativeness of the sample of people with disability.

Regional – includes people living in ‘Inner Regional Australia’, ‘Outer Regional Australia’, ‘Remote Australia’, or ‘Very Remote Australia’ based on the ASGS Remoteness Structure.

Theatre – includes any traditional and experimental theatre, circus, acting or being part of a production.

Visual art and craft – includes painting, sculpture, photography, light art, digital art, street art, craft, woodwork, and textiles.

For further information, see australiacouncil.gov.au/research or contact ResearchEnquiries@australiacouncil.gov.au

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