

CONNECTING AUSTRALIANS



RESULTS OF THE
NATIONAL ARTS PARTICIPATION SURVEY

JUNE 2017

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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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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

CONTENTS

Contents	4
Figures	5
Foreword	6
Executive summary	8
Research approach.....	23
1. THE VALUE OF THE ARTS TO AUSTRALIANS.....	28
Impacts of the arts.....	28
Australians' attitudes about the arts.....	32
Trends in attitudes about the arts	33
Reading the national mood	36
The arts and social cohesion.....	41
Giving to the arts	45
2. THE ARTS AND CULTURAL DIVERSITY	47
Engagement with cultural background through arts.....	48
The arts and cultural diversity – commentary by Pino Migliorino.....	50
First Nations arts	51
Community arts and cultural development (CACD)	54
3. ARTS ATTENDANCE	56
Attending festivals	59
The live audience.....	62
4. CREATIVE PARTICIPATION IN THE ARTS.....	67
5. LISTENING AND READING.....	71
Listening to recorded music	71
Reading.....	74
6. ONLINE ENGAGEMENT	79
Consuming arts online.....	81
Creation and inspiration	82
Sharing and connection.....	83
Researching the arts.....	85
Connecting with artists.....	85
Key terms.....	88
References	90

FIGURES

Figure 1: Australians' arts engagement 2016	9
Figure 2: Australians' online engagement with the arts 2016.....	21
Figure 3: Research approach in 2016.....	23
Figure 4: Focus group structure	23
Figure 5: Respondent profile 2016	25
Figure 6: Proportion of Australians who felt the arts had a 'big' or 'very big' impact on various areas 2013 and 2016.....	29
Figure 7: Australians' attitudes to the arts 2009, 2013 and 2016.....	34
Figure 8: Proportion of Australians who gave time or money to the arts 2013 and 2016.....	45
Figure 9: Australians' engagement with their cultural background through the arts 2016	48
Figure 10: Australians' attendance at First Nations arts 2009, 2013 and 2016.....	51
Figure 11: Trends in live attendance by art form 2009, 2013 and 2016.....	58
Figure 12: Australians' festivals attendance 2016	60
Figure 13: Australians' arts attendance by art form 2016	62
Figure 14: Overlaps in Australians' art form attendance 2016	64
Figure 15: Australians' creative arts participation 2009, 2013 and 2016.....	69
Figure 16: Australians' recorded music engagement 2009, 2013 and 2016	72
Figure 17: Reading preferences among Australians 2009, 2013 and 2016.....	75
Figure 18: Australians' online engagement with the arts 2016.....	80
Figure 19: Media used to engage with the arts online 2016	86

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.

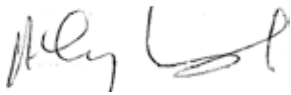
Communicating the essential value of the arts to individual and public life is central to our mission, and our National Arts Participation Survey is a cornerstone of the evidence base for the arts in Australia. It provides new information about the scale and nature of Australians' engagement with the 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.

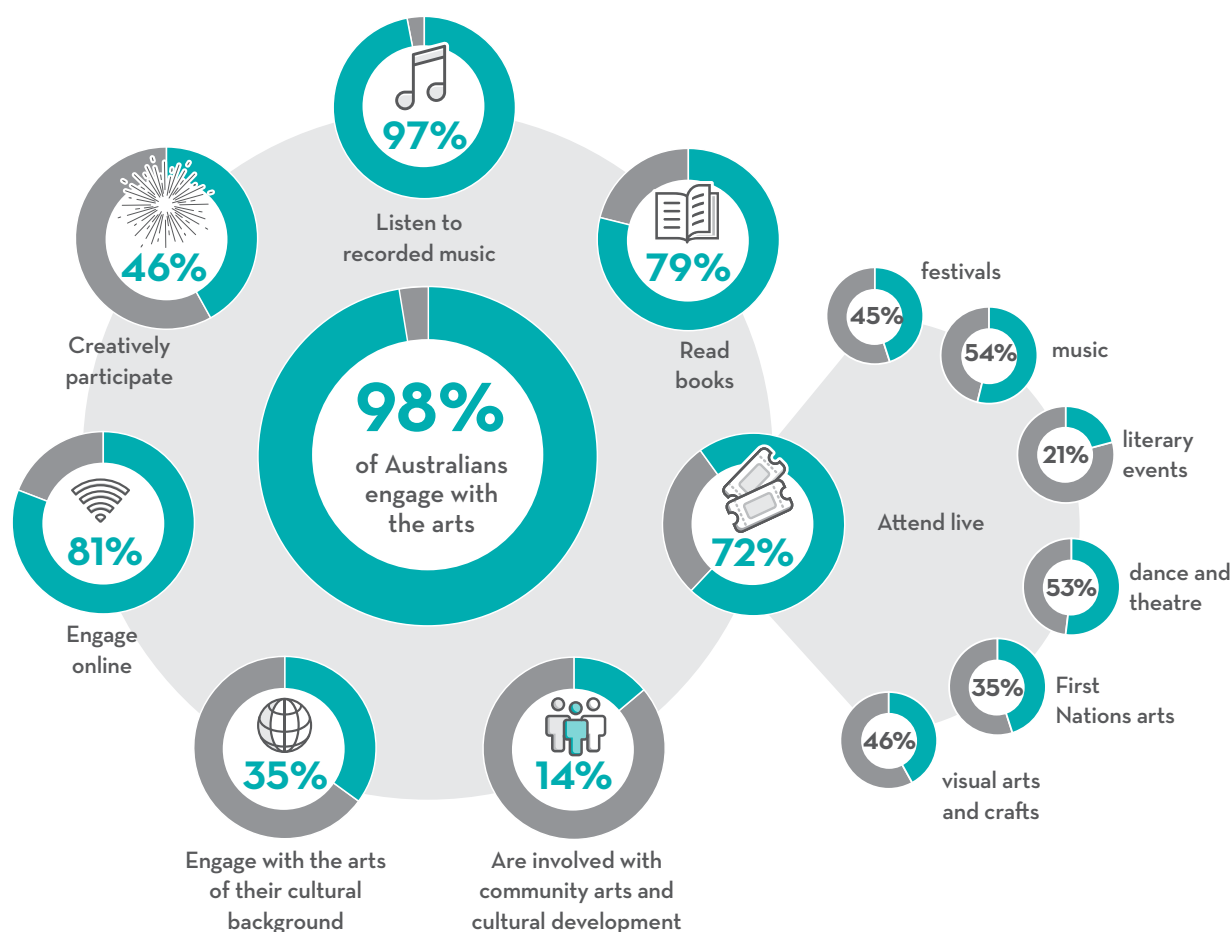
Against this backdrop, the 2016 National Arts Participation Survey found that Australians increasingly believe the arts are critical to social cohesion – the arts reflect Australia's diversity; shape and express identity; and create empathy, understanding and connection.

Overall, Australians value the arts and their positive impact on society. More Australians 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 Gomeroi 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 Gomeroi 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 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)*. 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

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.

opportunities for creative participation in theatre and dance, including a trend to actively involve audience members as creative participants.



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.

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.

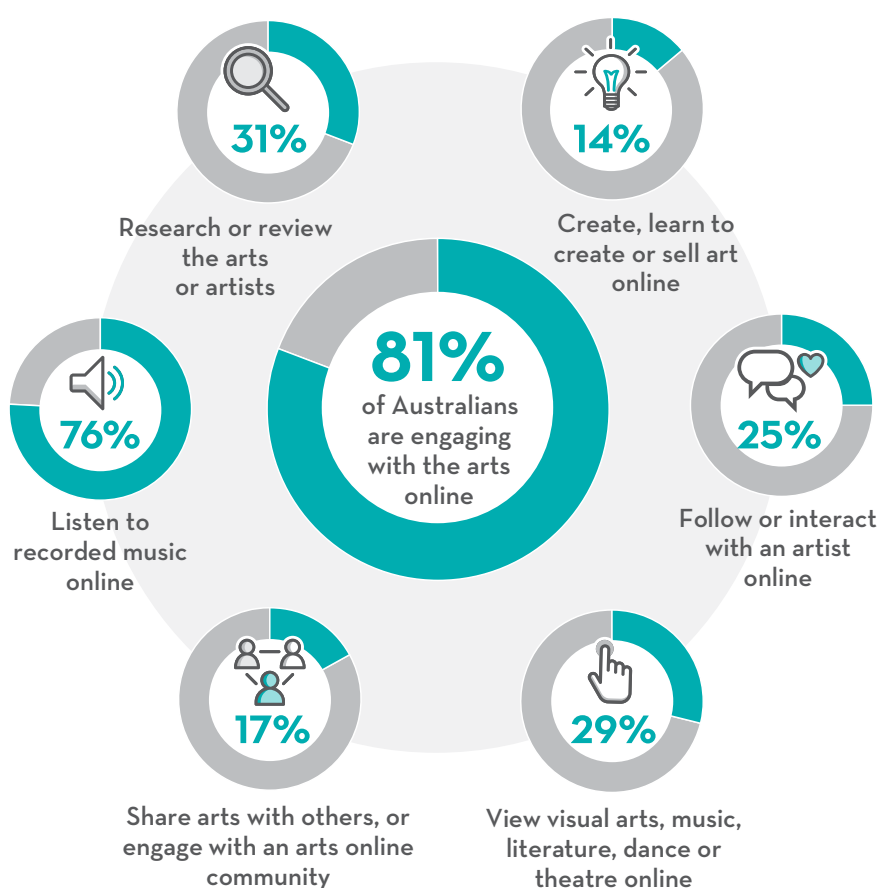
This decline in reading can be attributed to Australians' increasingly busy lives, increased time spent on social media, and the proliferation of entertainment options at their fingertips since 2013,¹² including the rising popularity of video on demand¹³ and podcasts.¹⁴

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.



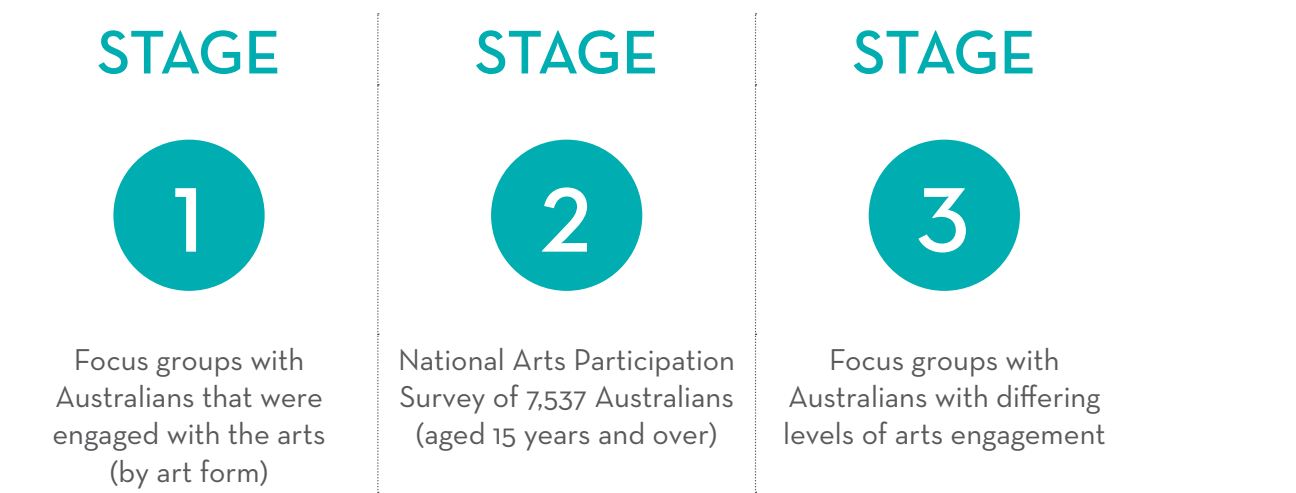
Jump First: Ask Later, PYT | Fairfield. Credit: Helen Tran

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.

RESEARCH APPROACH

Connecting Australians is the third in a landmark series of research studies exploring Australians’ engagement with and attitudes to the arts. The research involved a three stage process (Figure 3).

FIGURE 3: Research approach in 2016



STAGE 1 – FOCUS GROUPS

The first stage of the research included six focus groups with people who are engaged with the arts. The aim was to understand how arts engagement has changed since the 2009 and 2013 surveys, to ensure the questionnaire was relevant and contemporary.

FIGURE 4: Focus group structure

	Sydney CBD	Parramatta
Music	Aged 18-24	Aged 50-60
Theatre and dance	Aged 35-49	Aged 25-34
Visual arts and craft	Aged 50-60	Aged 18-24

Literature

Findings from nine focus groups with readers were also incorporated. Eight of these were done in partnership with Macquarie University, as part of research with readers.¹⁵ One was conducted by Australia Council staff.

STAGE 2 – NATIONAL ARTS PARTICIPATION SURVEY

The second stage of the research was a quantitative survey of 7,537 Australians aged 15 years and over, undertaken from 10 Nov 2016 to 12 Dec 2016.

A mixed method for data collection was used to achieve a larger sample size and allow for more detailed reporting. It included 6,456 online interviews and 1,081 telephone interviews (landline and mobile). Quotas based on age, gender and location were used to ensure representativeness.

The telephone interviews were conducted via Computer Assisted Telephone Interviewing (CATI) using Random Digit Dialling (RDD). The telephone interviewing allowed targeting of more remote parts of Australia to complement the online survey, and included a mobile phone sample to achieve higher response rates among younger age groups.

The online sample of 6,456 respondents was sourced from an online research panel, consisting of over 400,000 active respondents.

On average, the online survey took 15 minutes and the telephone survey 20 minutes to complete. To keep the survey under 20 minutes in length, some questions were asked of the online sample only.

The response rate for the telephone interviews was 18%. The drop-out rate for the online interviews was 20%. That is, 80% of those who started the survey completed it. Only completed surveys were included in the analysis.

Preliminary weighting was performed on both the online and telephone samples to be representative of age, gender and location based on Australian Bureau of Statistics (ABS) data¹⁶ (by states and territories, and metropolitan/regional Australia). Further bridge weighting was used when the online and telephone responses were combined.

STAGE 3 – FOCUS GROUPS

The final stage involved additional focus groups with three key respondent groups to gain a deeper understanding of their attitudes to the arts. This stage included one online focus group that included people from a range of locations across Australia, and two face-to-face focus groups conducted in Sydney. Participants were sourced from the survey respondents based on patterns of responding and a mix of ages, genders and backgrounds. Further details of this stage are explained in ‘Reading the national mood’ on page 36.

NOTE ABOUT REPRESENTATIVENESS

The National Arts Participation Survey was sampled and weighted to be nationally representative based on age, gender and location (by states and territories and metropolitan/regional Australia). While it is representative of Australians as a whole, it is not necessarily representative of any particular sub-group, as described below.

In this report findings are presented for First Nations peoples, people with disability and people from culturally and linguistically diverse (CALD) backgrounds. The profiles of these groups in the National Arts Participation Survey are broadly in line with national profiles.¹⁷ However, the sampling approach was not targeted to these groups, so findings for these groups are indicative and the data should be used as a guide, not an absolute. Further details are provided in Figure 5.

FIGURE 5: Respondent profile 2016

	TOTAL	CALD PEOPLE	PEOPLE WITH DISABILITY	FIRST NATIONS PEOPLE
	<i>n</i>	<i>n</i>	<i>n</i>	<i>n</i>
TOTAL	7537	1796	1137	227
AGE				
15-24 years	1148	359	129	66
25-34 years	1378	432	188	77
35-44 years	1239	334	162	36
45-54 years	1220	251	198	22
55-64 years	1117	198	210	17
65+	1435	222	250	9
GENDER				
Male	3680	922	589	140
Female	3857	874	548	87
LOCATION				
Metropolitan	5480	1488	769	131
Regional/Remote	2044	303	365	93

People with disability

Of the sample of 7,537 Australians, 15% self-identified as having disability.^j This compares to 20% of Australians age 15 years and over with disability as reported by the ABS.¹⁸ In terms of the gender and age distribution, the proportion of people in the National Arts Participation Survey sample with disability broadly mirrors the distribution in the Australian population, with the exception of those aged 65 and over – the survey sample under-represents people with disability in this age group.

Across the population, people aged 65 and over are less likely to engage with the arts. There are also likely to be people in the population with types of disability that would prevent them from responding to the survey, and which would also make them less likely to engage with the arts. Therefore, arts engagers with disability may be over-represented in the sample, meaning that arts engagement figures for respondents with disability may be higher than for people with disability across the population.

As the National Arts Participation Survey is not a targeted disability survey, the results are indicative rather than absolute. However, changes reported over time are likely to reflect true change in arts engagement among people with disability.

Culturally and linguistically diverse (CALD) people

Of the sample of 7,537 Australians, 24% identified as CALD.^k This compares to 22% of Australians aged 15 years or over who are from non-English speaking countries of birth as reported by the ABS¹⁹ (which is a different measure of CALD, provided here for comparative context only). In terms of age distribution, CALD people in the National Arts Participation Survey sample tend to be younger – almost a third of those aged between 15 and 24 within the sample identified as CALD (31%), compared to 15% of those aged 65 or over.

As older people engage with the arts less than the rest of the population, CALD arts engagers may be over-represented in the sample. English-language capability may impact both capacity to participate in the survey as well as arts engagement. This means that arts engagement figures for CALD respondents may be higher than for CALD people across the population. Among CALD communities, there are high rates of difference between individual language groups, age groups and migration pathways. The results should be treated as indicative and interpreted with this in mind.

First Nations people

Of the sample of 7,537 Australians, three percent self-identified as Aboriginal and/or Torres Strait Islander, which is in line with the proportion of First Nations people across the population.²⁰ The sample also aligns with the age distribution of the First Nations population. More than half of the First Nations people in the sample were from metropolitan Australia (58%), compared to about a third of First Nations people across the population (35%)²¹ – the sample over-represents this group, and very few respondents were from remote or very remote Australia.

j By answering '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?

k By answering '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.*

Given the sample size (n=227), low remote representation, and that this was not a targeted Indigenous survey, figures about First Nations people's arts engagement are indicative only. In 2017, the Australia Council will publish detailed nationally representative data about First Nations people's participation in arts and cultural expression, based on the ABS's National Aboriginal and Torres Strait Islander Social Survey.²²

Note about statistical significance

The National Arts Participation Survey uses a nationally representative sample of people to understand the Australian population as a whole. Statistical significance is a test of how likely differences identified between different groups reflect a true difference in the Australian population (rather than chance differences in the people in each sample).

All differences reported in this publication are statistically significant at 95% confidence level.

Note about margin of error

All sample-based surveys are subject to survey error. For the National Arts Participation Survey, the margin of error for the total sample size at 50% is +/-1.13%. This means that if 50% of survey respondents did a particular activity, then it is 95% likely that the population estimate will be between 49% and 51%. A small margin of error means the sample-based estimate of the population is more precise.

The margin of error varies based on the sample size and the sample percentage estimate. Smaller sample sizes make the margin of error larger. For example, there are 1,148 people aged 15–24 sampled in the survey. If 50% of them did a particular activity, then the margin of error for the population estimate would be +/-2.89%, and the population estimate will be between 47% and 53%.

Higher percentage estimates make the margin of error smaller. For example, if 90% of the survey respondents did a particular activity, then the margin of error is +/-0.68%.

1 THE VALUE OF THE ARTS TO AUSTRALIANS

IMPACTS OF THE ARTS

More Australians now recognise the many positive impacts that 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.

In 2016, 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 ourselves (69%, up from 61% in 2013)
- their ability to think creatively and develop new ideas (67%, up from 59% in 2013)
- shaping and expressing Australian identity (57%, up from 45% in 2013).

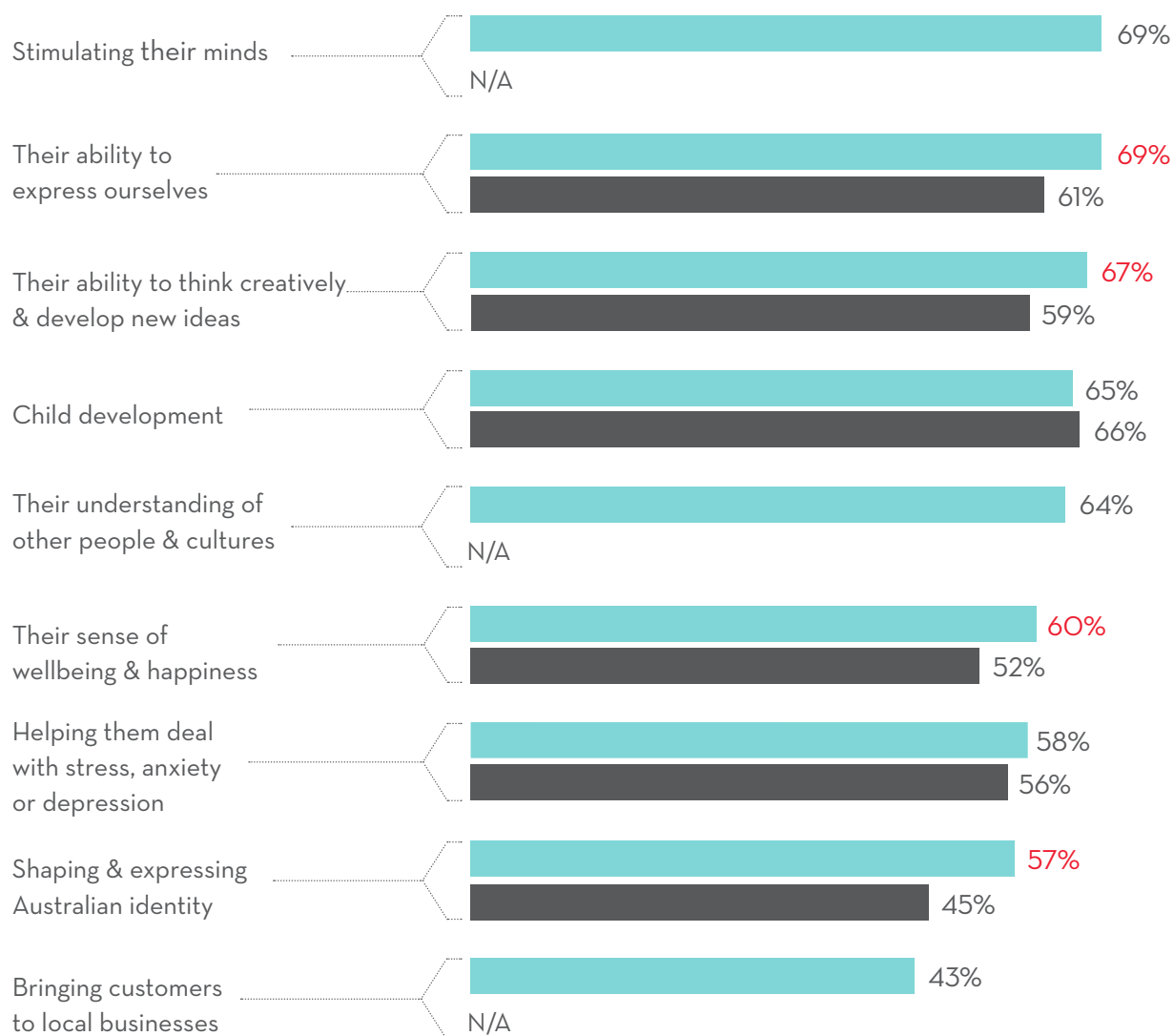
At similar levels to 2013, most Australians agree that the arts have a 'big' or 'very big' impact on:

- child development (65%)
- helping them deal with stress, anxiety or depression (58%).

For the first time, in 2016, the National Arts Participation Survey collected data that shows:

- two in three Australians agree that the arts have a 'big' or 'very big' impact on our understanding of other people and cultures (64%)
- two in three Australians agree that the arts have a 'big' or 'very big' impact on stimulating their minds (69%)
- two in five Australians agree that the arts have a 'big' or 'very big' impact on bringing customers to local businesses (43%). (See Figure 6).

FIGURE 6: Proportion of Australians who felt the arts had a 'big' or 'very big' impact on various areas 2013 and 2016



n = 7,537 (2016 total, online and telephone); 3,004 (2013 total)

■ 2016 ■ 2013

N/A - question not asked.

Red numbers indicate a statistically significant difference to the previous year (2016 vs 2013).

Who acknowledges impacts of the arts?

- Acknowledgement of the positive impacts of the arts is highest among the youngest age groups (90% of those aged 15–34) and tends to decrease with age (82% of those aged 45 or over), 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.
- Females are more likely to acknowledge the positive impacts of the arts (88%) than males (83%) although both males and females enjoy similar levels of overall arts participation and attendance.
- People in metropolitan Australia are a little more inclined to acknowledge positive impacts of the arts (86%) than those in regional areas (84%), and are slightly more likely to attend the arts.
- Respondents with disability are now more likely to acknowledge positive impacts of the arts (89%) than those who do not identify as having disability (85%). While there was increased recognition of the impacts of the arts among both groups compared to 2013, the change was greater among respondents with disability for most impacts. This is in line with the increases in attendance and participation among respondents with disability. Both groups now have similar levels of arts attendance, and more respondents with disability now creatively participate in the arts.¹
- Respondents from CALD backgrounds are more likely to acknowledge the positive impacts of the arts (92%) than those not from a CALD background (83%), and are more likely to attend and creatively participate.



Sing For Your Life! Choir. Credit: Gavin Baskerville

The Sing For Your Life! Choir is a non-auditioned community choir based in Hobart. The group started in 2005 as a six month program funded by the Multiple Sclerosis Society, for people living with MS. Since then it has grown into a 140-voice choir open to anyone who wants to join.

¹ While arts engagers may be over-represented among survey respondents with disability, changes over time are likely to reflect true change among this group. See from p.24 for information about the representativeness of people with disability in the sample.

What do we know from: Research on the health and wellbeing benefits of the arts?

There is an extensive body of research on the transformative impact of the arts in health and wellbeing contexts. This evidence base has informed policy and program development by government, and arts and health organisations and professionals. The National Arts and Health Frameworkⁱ was developed in 2013 to guide local, state, and federal policy coordination to support strategies in this area. The framework has led to a growing number of arts programs in health settings, such as hospitals, aged care facilities and mental health contexts – supported by concurrent research and evaluation demonstrating significant and transformative impacts. Increasing numbers of people are involved in these programs, and the positive impacts are increasingly referenced in media and public debate about the benefits of the arts.ⁱⁱ

What do we know from: Ipsos Top 10 Trends for 2016?

How Australians measure success has shifted from the traditional markers of achievement – career, wealth and status – to a much more personal inventory of things such as happiness, wellbeing and having good relationships. Experiences, not things, are the new symbols of status and tickets to life enrichment.ⁱⁱⁱ

How does this relate to the National Arts Participation Survey?

In 2016, the National Arts Participation Survey found that 60% of Australians believe the arts impact their sense of wellbeing and happiness in 2016, up from 52% in 2013. Growing recognition of the positive impacts of the arts may be a result of exposure to and promotion of the initiatives and research in the arts and health and wellbeing space.

As arts participation is also experiential, the shifting measure of success identified by Ipsos may see the arts become an even more keenly sought activity among Australians.

Sources:

ⁱ Standing Council on Health and Cultural Ministers 2013, [National Arts and Health Framework](#). Meeting of Cultural Ministers and the Standing Council on Health, Australia.

NSW Ministry of Health 2016, *NSW Health and the Arts Framework: Improving the health of the community through integrating The Arts into the design and delivery of health services and public health messaging*. NSW Ministry of Health, North Sydney.

ⁱⁱ Laetsch, K 2013, *Arts and minds: the humanities are as vital as science*. The Conversation, Melbourne, viewed 27 April 2017, <https://theconversation.com/arts-and-minds-the-humanities-are-as-vital-as-science-20702>

Dalzell, S 2016, *Art alleviates anxiety for people with dementia, new research finds*. ABC News, Sydney, viewed 27 April 2017, <http://www.abc.net.au/news/2016-09-13/study-finds-art-helps-people-with-dementia/7840654>

ⁱⁱⁱ Ipsos 2016, [Mind and mood of Australia: Trends wrap up](#). Ipsos Game Changers, Australia, available at <http://ipsos.com.au/trends2016/>

AUSTRALIANS' ATTITUDES ABOUT THE ARTS

The vast majority of Australians have positive attitudes about the value of 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.

Four in five Australians:

- agree that Indigenous arts are an important part of Australia's culture (80%)
- agree that artists make an important contribution to Australian society (78%).

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%)
- agree that the arts in Australia reflect Australia's cultural diversity (75%)
- agree that the arts make for a richer and more meaningful life (74%)
- agree that the arts are an important way to get different perspectives on a topic or issue (73%).

Seven in ten Australians:

- agree that artists should have total freedom of expression (70%)
- agree that it is exciting to see new kinds of art (70%)
- agree that the arts should receive public funding (66%).

Who thinks what about the arts?

- Age has little bearing on attitudes to the arts, except for those relating to freedom of expression, novelty, innovation and building connections to others through the arts – all of which have greater traction with younger people.
- With some exceptions, females are generally more inclined to agree with positive statements about the arts than males.



Prize Fighter, a La Boite Theatre and Brisbane Festival production. Credit: Dylan Evans

Prize Fighter by Future D Fidel tells the semi-autobiographical story of a Congolese child soldier coming to Australia as a refugee. The 2015 premiere season drew an audience of 4,500 people, and over 6,000 people saw the second season at Belvoir in January 2017 as part of Sydney Festival.

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 in some attitudes towards ambivalence. This shift reflects a move away from agreement to more Australians now neither agreeing nor disagreeing with some positive attitude statements about the arts.

While still showing strong agreement, **more Australians neither agreed nor disagreed** with the following statements in 2016.

- Indigenous arts are an important part of Australia's culture (16%, up from 4% in 2013).
- Artists make an important contribution to Australian society (19%, up from 6%).
- I feel proud when Australian artists do well overseas (21%, up from 9%).
- The arts should be an important part of the education of every Australian (20%, up from 7%).
- The arts make for a richer and more meaningful life (21%, up from 9%).
- It is exciting to see new styles and types of art (25%, up from 10%).
- The arts should receive public funding (25%, up from 13%).

In 2016, **more Australians agreed** with the following statements.

- The arts are too expensive (43%, up from 36% in 2013; and fewer Australians disagreed).
- The arts tend to attract people who are somewhat elitist or pretentious (43%, up from 30%, and fewer Australians disagreed).
- The arts are not really for people 'like me' (22%, up from 13%, and fewer Australians disagreed) (see Figure 7).

These shifts in attitude contrast with other findings in the National Arts Participation Survey – stable levels of live attendance and creative participation, increased online engagement with the arts, increased acknowledgement of the positive impacts of the arts, and the strong role of the arts in culturally diverse communities and in facilitating social cohesion more broadly.

At the same time, there has been much commentary in Australia and internationally describing a growing sense of disengagement with traditional social structures and institutions (such as government, the media and the business community), and anxiety about rapid social and technological change.²³ For example, a recent 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%).²⁴ Added to this, it has been noted that social media plays a role in the polarisation of social and political viewpoints, which may be influencing some national and geopolitical shifts.²⁵ Against this backdrop, it is unsurprising that there have been some shifts in Australians' attitudes about the arts.

FIGURE 7: Australians' attitudes to the arts 2009, 2013 and 2016

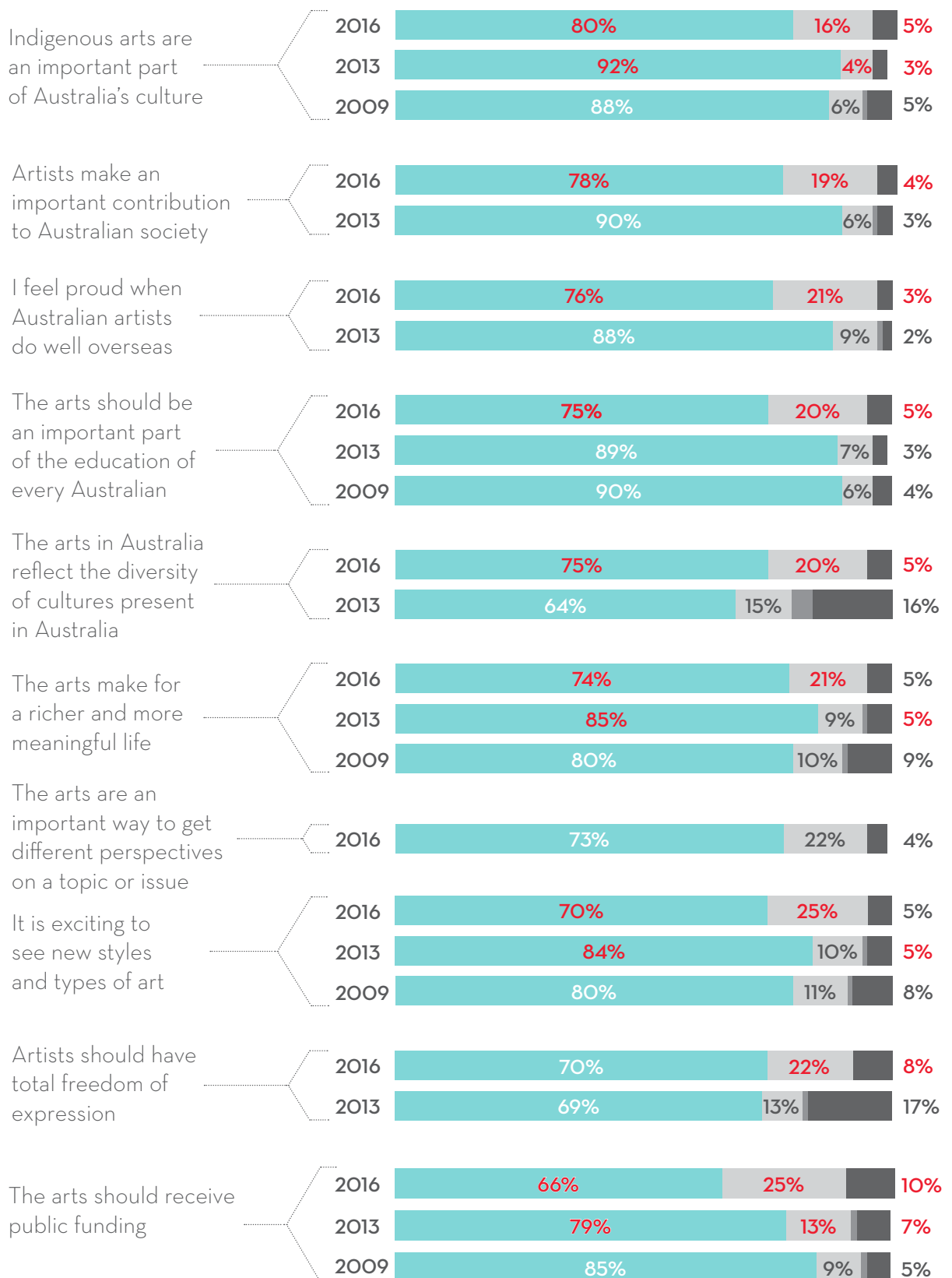
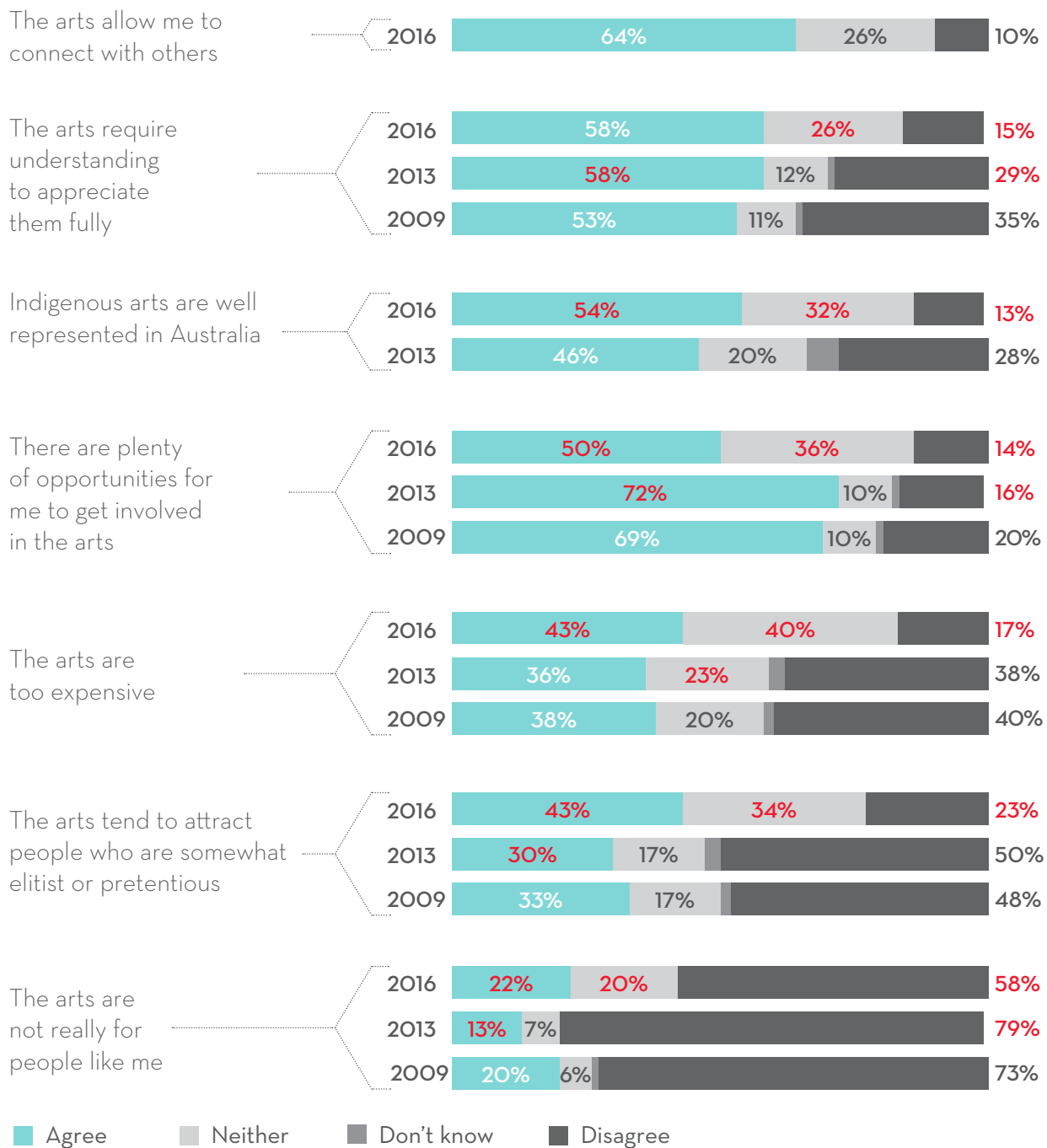


FIGURE 7: (Continued)



n = 7,537 (2016 total, online and telephone); 3,004 (2013 total); 3,006 (2009 total)

Red numbers indicate a statistically significant difference to the previous year (2016 vs 2013; 2013 vs 2009).

'Don't know' was not an option in the 2016 survey. This change in the survey does not account for the large increase in 'Neither agree nor disagree' responses in 2016, as only a minority of respondents selected 'Don't know' in previous years.

READING THE NATIONAL MOOD

In order to explore the extent to which the National Arts Participation Survey may be reflecting aspects of national mood, social researcher and commentator **Rebecca Huntley** was commissioned to examine how attitudes to the arts interact with broader social trends and concerns:

‘Housing affordability; the rising cost of living including utilities, health, transport, education and childcare; anxieties about job security, the economy, immigration and climate change; pressure on household budgets and schedules; high levels of cynicism about institutions of all kinds, private and public. Australians have a shopping list of worries related to the present and near future. And so it is heartening to see that our involvement, interest and support for the arts are still strong, and that our perceptions about their positive impact on society and influence on our national identity have in fact increased. However, in contrast to these strong perceptions of impact and our strong arts engagement, some Australian’s attitudes have shifted towards ambivalence.

To better understand how broader social and economic questions might be affecting people’s attitudes to the arts, three discussion groups were conducted during the week beginning 20 February 2017:

- the **‘disengaged’**: conducted online among Australians from across the nation who did not attend, create, or engage with the arts online in 2016; and who expressed lower than average support for the arts
- two face-to-face groups of Sydney residents:
 - the **‘supportive but disengaged’**: one of non-attenders and non-creators who nevertheless supported the arts
 - the **‘supportive and engaged’**: attenders who reported attending the arts six to eight times in the last year and were supportive of the arts.

All groups were a mix of gender and age.

The highly engaged and creative among us are naturally predisposed to appreciate the value of the arts and to support government funding of the sector. It is in understanding the comparative attitudes of people who are not highly engaged that we understand the broader significance of the arts to the community.

Australians are all feeling life’s pressures, but the impact of this on engagement with the arts varies.

Regardless of their level of interest in the arts, people across the groups share the same major concerns – job security and cost of living, increasing pressure on schedules and budgets, worries about housing affordability and economic inequality. These anxieties about job security and cost of living, as well as wage constraint, have been a constant theme in qualitative research I have conducted with Australians in the last decade.

However, for those who value the arts (the **supportive and engaged**), cost of living worries do not seem to dampen their interest in seeing and creating art. They continue to want to socialise via the arts, albeit sometimes they have to compromise by buying the less-than-best seats in the house. For these people, arts are an essential part of life, critical to emotional, personal and social wellbeing. They are able to speak more eloquently about the value and impact of the arts, and are more passionate in their belief in their importance:

'I think it's what connects people to their humanity and builds rapport.'

– supportive and engaged

The **supportive but disengaged** are still supportive of the arts but the barriers of time and money seem to be higher for them, and they are more likely to nominate relaxing at home or going out for dinner and drinks as the best option for their spare time and cash:

'I feel like I'm time poor so [the arts are] the first thing that will go for me.'

'I think things can be expensive, to go to the arts.'

– supportive but disengaged

For the **disengaged** group, lack of interest is the main barrier to involvement. Cost of living worries in this respect seem secondary to the personal value you place on the arts in your own life.

These findings are broadly in line with the National Arts Participation Survey findings that time and cost are key barriers for those who had not attended arts in the previous 12 months, but had attended in the past. However, lack of interest is the key barrier for those who had never attended the arts.

While the National Arts Participation Survey questionnaire steps respondents through an inclusive list of arts activities, discussions showed that many people have an ingrained, narrow definition of 'the arts'.

The perception that the arts are expensive and hard to access – a relatively common view across the groups – is driven in part by narrow definitions people have about what 'the arts' are. When thinking of the arts, many people think 'opera and ballet' not craft and reading. Many still think of the arts as being in big cities rather than in suburbs and regional areas.

'I do think about quite highbrow types of stuff like galleries, ballet and performance before I think about, say, street art.'

– disengaged

Public and free events such as Sydney's Vivid Festival were held up as great examples of free public art that is popular and still 'arty'. Interestingly, both the **disengaged** group and the **supportive but disengaged** group underestimated their involvement in the arts. When they were given an expansive list of the arts within the focus group process – reading, craft, listening to music – they were surprised and delighted, and realised they are more artistic than they had imagined.

There were those in the online disengaged group who are clearly interested in the arts but actively distance themselves from the idea of identifying as ‘arty’:

‘Over the past year, I’ve listened to music occasionally, played the piano on rare occasions, done a lot of reading, and visited a couple of art galleries (I’m not a particularly arty person!).’

– disengaged

The value of the arts, particularly for social connection and understanding, is clear to everyone – even those who are not interested in engaging with the arts themselves.

When confronted with the idea of life without the arts, the impact that loss would have on social understanding, social cohesion and national identity was remarked upon in all the groups, though it was more pronounced in the **supportive and engaged** group:

‘There would be a real decrease in social cohesion, relating to others.’

– supportive and engaged

While participants in the **disengaged** group do not think their lives would be altered significantly they can appreciate the loss that others would feel, and the role the arts plays in their personal, social and emotional lives:

‘I wouldn’t personally be devastated [but it] would be sad if these activities didn’t exist for those that love them.’

– disengaged

Despite differences in attitudes towards and involvement in the arts, the participants across all groups recognise that a world without the arts would be bleak indeed:

'If none of these things existed, the world would be poorer for it. I would mainly be disappointed at the loss/absence of cultural heritage and the outlet that the arts give others for self-expression.'

– disengaged

While the National Arts Participation Survey found increased ambivalence about whether the arts should receive public funding, perceptions are complex and Australians are generally supportive of funding to make the arts more accessible.

The attitudes to government funding of the arts varied across the groups and within the **disengaged** group. Those in the **disengaged** group who are not supportive of government arts funding tended to position it as an 'either or contest', a choice between funding schools, public hospitals and infrastructure; or funding the arts. This attitude is not surprising given these people are more concerned than others about issues like job insecurity and provision and cost of essential services in their local area. They are very supportive of the idea of 'big business' doing more to promote and fund the arts. They are particularly pessimistic about the future, cynical about government and the media, and have a more limited view about the benefits of the arts in relation to other government funding priorities.

Both the **supportive but disengaged** and the **supportive and engaged** groups were far more positive about government funding of the arts. Any funding concerns they have are largely about the government not doing enough in the arts, not communicating their importance more effectively, and not making them more accessible. There was a strong belief across the face-to-face groups that the media does not prioritise the arts in its reporting or explain the numerous social and economic benefits:

'I think we get a message that it's not as important as other things.'

– supportive but disengaged

Attitudes to the funding of the arts (whether by government or corporates) is shaped not just by personal interest in the arts, but by broader attitudes towards government, and understanding of the contribution of the sector to social and economic life. The idea that government funding should be directed at making the arts more accessible was supported across all groups.

The broader public conversation in Australia is one that is fraught with anxieties about the medium-to-long-term future.

There are particular concerns about the health and longevity of critical institutions and services – public transport, aged care, health care for example – and whether the social safety net that the majority of the population has relied on for so long will hold. All expectations seem to be

that these problems will continue and perhaps become acute without effective leadership across politics and business to address them. Match these anxieties with the general increased busyness of people's lives, issues with transport, and the competing entertainment on offer to people via digital and other technologies, and it seems inevitable that these larger forces will impact Australians' behaviours and attitudes to the arts.

And yet even among the most disengaged there is an appreciation that the arts tell an important story and play an important role in national life.

Those who do not attend the arts still believe they should be supported financially (whether by government or by others), and understand the role the arts play in the economy. And those who attend the arts more regularly are able to quickly and easily articulate their crucial, irreplaceable role in our world as providing not just great entertainment but greater insight into the world and those around us.'

Dr Rebecca Huntley, social researcher and commentator, was commissioned to further explore attitudes to the arts. Rebecca Huntley has been a panellist on Q&A and The Drum (ABC TV) as a social research expert, has commented on social trends in a variety of other media, and is a regular contributor to essay collections, magazines, newspapers and online publications, commenting on social trends.



Damiano Bertoli's Melbourne Art Trams. Credit: James HH Morgan, courtesy Melbourne Festival

Melbourne Festival's *Melbourne Art Trams* project sees eight of the city's iconic trams transformed into moving artworks for six months each year. Since 2013 over 7.2 million commuters have been on board a Melbourne Art Tram, designed by a diverse range of Victorian artists.

THE ARTS AND SOCIAL COHESION

‘With music, you are all dancing to the same beat.’

– Focus group participant

Conversations about the value of the arts often focus on their role in enabling connection, empathy and social cohesion. Through the arts, people have the opportunity to see themselves and their worlds authentically represented in all their complexity, and to gain insights into the lives and worlds of their neighbours near and far. Divisions in society and anxieties in the national mood reinforce the importance of the arts at this moment in time.

New data collected in the 2016 National Arts Participation 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 results contrast with 2013, when only one in three Australians felt that the arts had an impact on empathy for others (36%). 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). There is a growing appreciation among Australians of the role of the arts in supporting social cohesion.

The many and varied stories and perspectives brought to life through literature, music, performance and visual arts can provide a way for people to feel they are recognised – and can recognise each other – as members of diverse and evolving societies. Art can provide points of connection about shared experiences, from the joyful to the traumatic.²⁶ By providing engaging ways to interact with the tensions and extremes of other peoples’ worlds from a safe place, the arts can strengthen communities by replacing fear, misunderstanding and stereotyping with insight and empathy.

WHAT DO WE MEAN BY SOCIAL COHESION?

The rate, nature and consequences of economic, social and political change and upheaval in many parts of the world have increased discussion and discourse about social cohesion.

In Australia, the Scanlon Foundation has been undertaking the *Mapping Social Cohesion* national survey since 2007. It broadly defines social cohesion as ‘the willingness of members of a society to cooperate with each other in order to survive and prosper.’ The survey applies a wide-ranging approach, incorporating concepts of belonging, social justice and equity, participation, acceptance and rejection, legitimacy and worth. The 2016 survey found that while there is more evidence of stability and cohesion in Australia than of deterioration, there are negative indicators – including consistent increase in ‘strong negative’ responses to a range of questions related to cultural diversity.ⁱ

The Organisation for Economic Co-operation and Development (OECD)ⁱⁱ uses the term ‘social cohesion’ to discuss concepts and encourage policies designed to build trust, to promote inclusion and a sense of belonging, to increase wellbeing, and to improve economic and social opportunity for all members of a community. The United Nations (UN)ⁱⁱⁱ describes social cohesion as ‘the glue that holds society together’. The UN has highlighted the need for policies that: encourage civic participation and co-operation at the civil society level; strengthen relationships and trust in institutions; and encourage understanding of diversity as an asset not a threat.

The National Arts Participation Survey applies a similarly broad notion of social cohesion in relation to the arts, with a focus on evidence of:

- opportunities for all Australians to participate in the arts, express themselves and be represented in the arts – regardless of background, country of birth, ability or other status
- the capacity for the arts to build connections, understanding and empathy between people of different background, country of birth, ability or other status
- recognition that diversity in the arts is a cultural asset, and leads to greater artistic vibrancy and innovation
- how these contribute to social cohesion in Australia in the ways described by the Scanlon Foundation, the UN and the OECD.

ⁱ Markus, A, 2016, [Mapping Social Cohesion, The Scanlon Foundation surveys 2016](#). The Scanlon Foundation, Melbourne.

ⁱⁱ OECD 2012, [OECD Multilingual Summaries: Perspectives on Global Development 2012: Social Cohesion in a Shifting World](#) OECD, Paris.

ⁱⁱⁱ United Nations, 2012, [United Nations Department of Economic and Social Affairs](#). United Nations Department of Economic and Social Affairs, New York.

Arts experiences can provide social connection simply through their ability to touch people equally and simultaneously:

'Music can cut through all barriers. So it doesn't matter what social level you are at, you go to see a band and you can have blokes there who are doctors, lawyers, white collar, and they are standing and chilling out next to blue-collar workers, could be unemployed. Outside of that band and place these guys aren't going to interact because they are totally different social groups, but you don't care because you're there to see the band. You don't care if the bloke next to you is earning 100k or 10k. You are there to see the band. For X amount of time that's all that matters. You don't care about social status or money. You are just a bunch of people watching a band.'

– Focus group participant



Malak Community Dinner, Darwin Community Arts. Credit: James McDougall

The Malak Monthly Community Dinners bring together people of all races, ages and religions to share arts and food from across the globe – building respect, harmony and community. The dinners are organised by grass-roots arts organisation Darwin Community Arts (DCA), and feature performances from local artists and groups. They have been held in the northern Darwin suburb of Malak since 2008, as a way of improving racial relations and connecting and strengthening the local community. From 80 to 200 people attend the dinners each month.

What do we know from: Changes in social views and attitudes?

In his 2017 Gandhi Oration, social researcher and commentator Hugh Mackay discussed the current state of Australia as a society in the grip of epidemics of anxiety, obesity and depression. He linked this state to the loss of community, and included book clubs and community choirs among his suggestions for how individuals can help to rebuild connection with their neighbours and communities.

How does this relate to the National Arts Participation Survey?

The National Arts Participation Survey found that two thirds of Australians agree that the arts allow them to connect with others. Even among focus group participants who do not personally engage with the arts, there was recognition of the valuable role the arts play in developing understanding and building connections with others. These findings add weight to Hugh Mackay's commentary about the value of the arts in society at this point in time.

Sources:

Mackay, H. 2017, [Hugh Mackay: the state of the nation starts in your street](https://theconversation.com/hugh-mackay-the-state-of-the-nation-starts-in-your-street-72264). The Conversation, Victoria, viewed March 21 2017, <https://theconversation.com/hugh-mackay-the-state-of-the-nation-starts-in-your-street-72264>

Mackay, H. 2017, [The state of the nation starts in your street - Gandhi Oration 2017](https://www.youtube.com/watch?v=jFoOHPfjTXU). <https://www.youtube.com/watch?v=jFoOHPfjTXU>

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.²⁷ However this trend is not seen in arts giving.

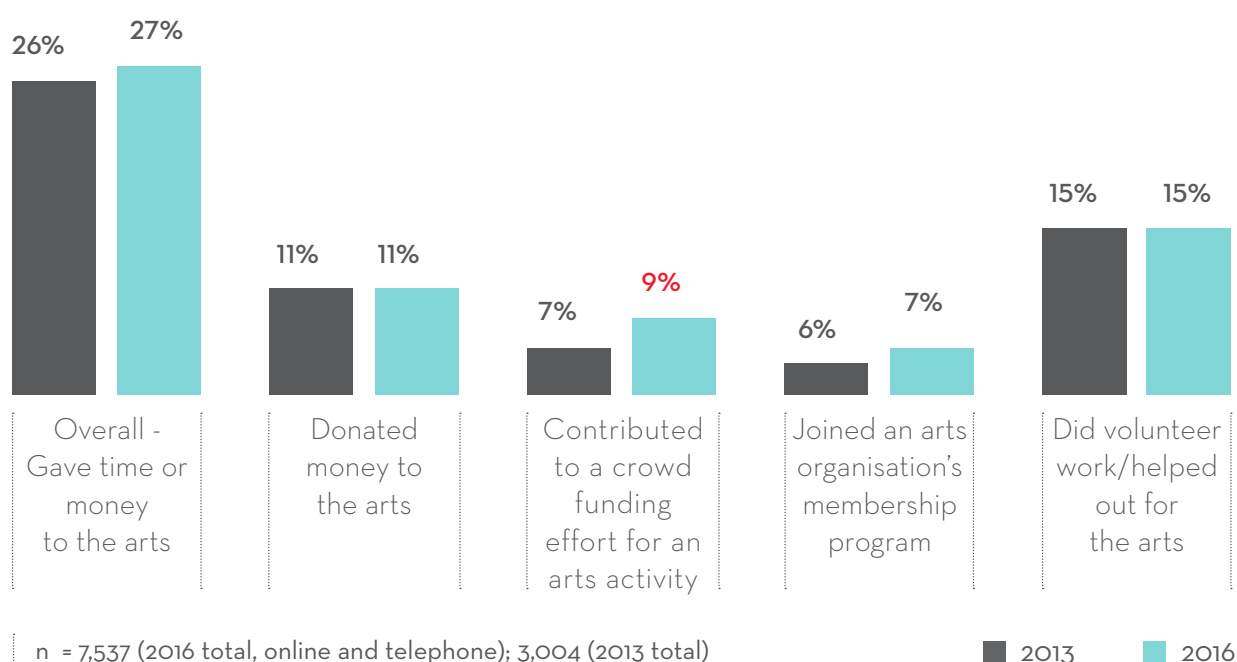
The high value that Australians place on the arts is reflected in the time and money that Australians give to support artists, arts organisations and arts projects – one in four Australians gave their time or money to the arts in 2016 (27%).

The proportion who donate to the arts has remained stable and the proportion of Australians who contribute to crowdfunding increased to almost one in ten in 2016 (9%, up from 7% in 2013) (Figure 8).

The major performing arts companies have seen substantial growth in the number of private donors, and income from private donations makes up a substantial proportion of the companies’ private sector income (54% in 2015).²⁸ Small to medium not-for-profit arts and culture organisations also draw a significant proportion of their income from non-government sources.²⁹

Given that Australians increasingly recognise the positive impacts of the arts – and the importance of private sector income to arts companies, and to the health of the overall arts ecology – there are opportunities to further cultivate arts giving across the population.

FIGURE 8: Proportion of Australians who gave time or money to the arts 2013 and 2016



Red numbers indicate a statistically significant difference to the previous year (2016 vs 2013).

Who gives to the arts?

- People aged 15 to 24, respondents with disability and respondents from CALD backgrounds are much more likely to donate time or money to the arts.
- Although females are more likely to acknowledge the positive impacts of the arts, males are more likely to donate time or money.

What do we know from: *Giving Australia 2016*ⁱ?

Giving Australia 2016 was commissioned by the Department of Social Services to provide a knowledge base about giving and volunteering in Australia. Although not arts specific, it provides useful context for understanding the giving behaviours of Australians.

- The total proportion of Australians donating money has decreased from 87% in 2005 to 81% in 2016.
- However, the total amount given has increased, indicating that fewer people are giving more than in 2005.

What do we know from: *The Australian Major Performing Arts Group's (AMPAG) annual private support survey*ⁱⁱ?

- In 2015, the major performing arts companies reported donations from over 36,000 individual donors, more than double the number reported in 2011 (around 17,000).
- 54% of the companies' private sector income came from donations in 2015.

What do we know from: *The Australian Charities Report*ⁱⁱⁱ?

The Australian Charities and Not-for Profit Commission's (ACNC) *Australian Charities Report* suggests that small to medium arts organisations are also beneficiaries of Australian giving. The report includes annual data reported to the ACNC by registered not-for-profit organisations in the arts and culture sector.

Donations and bequests comprise:

- almost one fifth of income for extra small organisations (19% of income)
- over one fifth for small arts organisations (21%)
- 14% of income for medium-sized organisations
- 16% of income for large organisations
- 8% of income for very large organisations.

How does this relate to the National Arts Participation Survey?

The findings from *Giving Australia 2016* provide important broader context about donation trends, including that there is a large proportion of Australians who donate money but not to the arts.

The AMPAG and ACNC reports provide additional context about trends in private giving to the arts, including the importance of private donations to arts companies. Together with the *Giving Australia* findings, this highlights the potential to further cultivate arts giving across the population.

Sources:

- i Department of Social Services 2016, [Giving Australia 2016 Fact Sheet – Individual giving](#). Australian Government Department of Social Services, Canberra.
- ii AMPAG 2016, [Tracking changes in corporate sponsorship and private donations 2016](#). Australian Major Performing Arts Group, Sydney.
- iii Cortis, N, Young, A, Powell, A, Reeve, R, Simnett, R, Ho, K & Ramia, L 2016, [Australian Charities Report 2015](#). Centre for Social Impact and Social Policy Research Centre, UNSW Australia. Note: The ACNC data groups not-for-profit organisations by size of annual turnover from extra small (less than \$50,000), small (greater than \$50,000 to less than \$250,000), medium (greater than \$250,000 to less than \$1m), large (greater than \$1m to less than \$10m) and very large (greater than \$10m).

2.

THE ARTS AND CULTURAL DIVERSITY

Australia has one of the most culturally and linguistically diverse populations in the world. It is home to the world's oldest continuously living cultures, and waves of Australians who have arrived more recently identify with more than 270 ancestries.³⁰ At least 32% of the Australian population are from non-Anglo-Celtic backgrounds.³¹ While many Australian neighbourhoods and workplaces are testament to this diversity, the arts can provide unique opportunities that go beyond day-to-day encounters – for deep connections with one's own cultural roots, and insights into the cultures of others.

In 2016, 13 million Australians (64% of the population) said that the arts have a 'big' or 'very big' impact on their understanding of other people and cultures. Three quarters (75%), or 15 million, agreed that the arts in Australia reflect the diversity of cultures present in Australia – an increase from 64% in 2013.



Installation view of Choi Jeong Hwa's *The Mandala Flowers*, Queensland Arts Gallery, APT8, 2016.
Credit: Brodie Standen

The Asia Pacific Triennial of Contemporary Art (APT) is the only recurring exhibition in the world to celebrate the contemporary art of Australia, Asia and the Pacific. It is the flagship exhibition series of the Queensland Art Gallery | Gallery of Modern Art. Between November 2015 and April 2016, APT8 attracted almost 605,000 visitors across both gallery buildings, and contributed more than \$21m to Queensland's economy.

ENGAGEMENT WITH CULTURAL BACKGROUND THROUGH ARTS

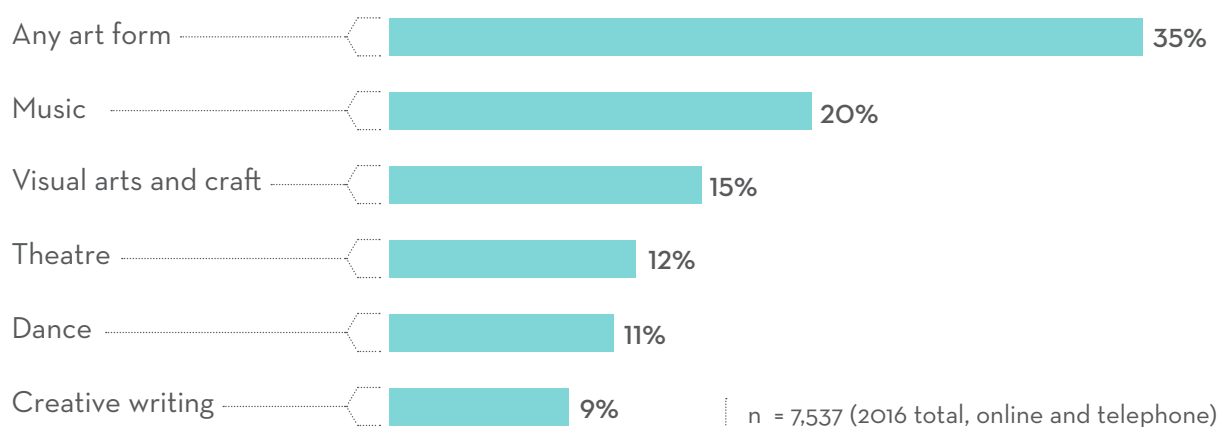
For the first time, in 2016 the National Arts Participation Survey asked people about engagement with the arts as a way of connecting with their cultural background. The arts are a key way that Australians connect with their cultural background, heritage or identity, and people surveyed from culturally and linguistically diverse (CALD) backgrounds are more likely to engage with the arts than the rest of the population – both creating and attending.^m

Engagement with the arts as part of one's background helps to keep diverse cultures and identities strong, whether in First Nations, Anglo-Celtic, or diasporicⁿ communities. As members of a multicultural nation, Australians benefit from this rich cultural tapestry.

In 2016 almost seven million Australians attended or created arts as part of engaging with their own cultural background (35%) (Figure 9). In 2016:

- music was the most common way Australians engaged (20%)
- more than one in ten used visual arts and craft (15%), theatre (12%), or dance (11%) to engage with their own culture
- almost one in ten engaged through creative writing (9%).

FIGURE 9: Australians' engagement with their cultural background through the arts 2016



^m 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 CALD people in the sample.

ⁿ 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 CALD backgrounds, one in two engaged with the arts of their cultural background in 2016 (52%), and four in five attended arts overall (80%). Only two percent of CALD respondents engaged exclusively 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.

This high level of engagement among CALD respondents contrasts with the comparably low level of engagement captured in the 2013 National Arts Participation Survey³² for people born in a non-English speaking country.^o The survey questionnaire was changed in 2016 to encompass a broader definition of cultural and linguistic diversity, to interrogate wider trends in culturally diverse arts engagement.

For CALD communities, the arts can be a vital way of maintaining and expressing living culture. Digital technology and social media have created an increasingly interconnected world in which there is greater access to networks locally and internationally that enable CALD people to explore, connect with and express their cultural identity.³³ 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.

Who engages with their cultural background through the arts?

- Over half of respondents from CALD backgrounds engage with the arts as part of their cultural background or heritage (52%), whereas less than a third of the rest of the population do (28%). For those not identifying as CALD, there may be less likelihood of identifying mainstream cultural offerings as reflecting Anglo-Celtic roots.
- Over half of Australians aged 15 to 24 years engage with the arts as part of their cultural background (52%) – substantially more than other age groups. This reflects, in part, the influence of social media. Younger generations have found a voice in global connections that validate and enable expression of their cultural identities.³⁴ Technology enables youth to communicate, create meaning and consume content across diverse contexts.³⁵
- Males are more likely to engage with the arts of their cultural background (39%) than females (31%). This is driven by younger males aged 15 to 34, half of whom engage with the arts of their cultural background (50%), compared to one third (34%) of females aged 15 to 34.
- Half of respondents with disability engage with the arts as part of their cultural background (52%), compared to one third of respondents who do not identify as having disability (32%).^p

o For example, 38% of respondents born in a non-English speaking country creatively participated in the arts in 2013, which was ten percentage points lower than for respondents born in an English speaking country. As with the 2016 survey, English language capability may have impacted both capacity to participate in the survey and arts participation. As a result, figures may not be representative of new arrivals or people with limited proficiency in English.

p 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.

THE ARTS AND CULTURAL DIVERSITY – COMMENTARY BY PINO MIGLIORINO

'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.'

The cultural diversity picture that emerges is one in which arts participation is both prominent and relevant to CALD communities. From a high 80% attendance at live arts to a significant and substantial 52% engaging with arts from their own backgrounds, we can safely conclude that CALD communities have crossed over into a broader set of arts participation activities including a higher engagement with First Nations arts. This is while also demonstrating significant cultural maintenance behaviour (where participation can be seen to extend beyond the individual activity to a significant engagement with the others in the audience in a discernible cultural community).

Arts participation is not static and immutable in CALD communities. Change in behaviour is taking place and will continue to take place both through pull factors such as arts organisations making themselves more accessible, and push factors such as growing levels of wealth and upward mobility in CALD communities stimulating the demand for arts experiences beyond a narrower CALD frame.'

Pino Migliorino is a leading commentator on multicultural policy and founder of the Cultural Perspectives Group.

FIRST NATIONS ARTS

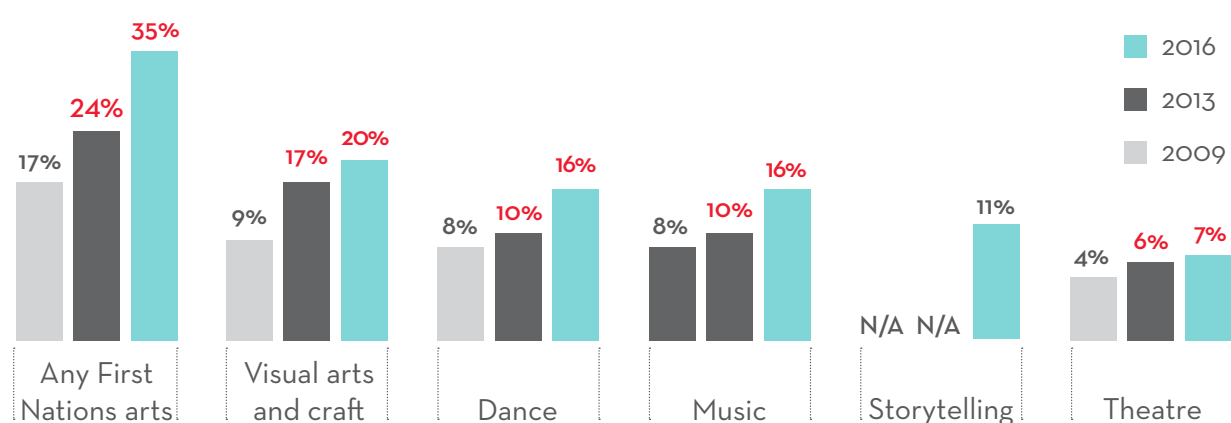
First Nations arts are rich, diverse and contemporary expressions of the world's oldest continuous cultures. They are a source of strength, pride and connection among First Nations peoples and communities. The arts provide opportunities for First Nations peoples and the broader Australian community to connect with the living stories and landscapes of Australia's First Nations, and with each other. First Nations arts tell stories that are essential to Australia's history and identity, and they enrich Australian culture.

In 2016, seven million Australians, or 35% of the population, attended First Nations arts – a record level of attendance and double that of 2009 (Figure 10).

The vast majority of Australians agree that First Nations arts are an important part of Australia's culture (80%). Although this was down from 92% in 2013, it nevertheless had the highest level of agreement of all attitude statements about the arts. The drop was a result of an increased number responding ambivalently, which is likely to be part of a shift in social mood among some Australians (discussed on page 36).

Almost half of Australians had an active interest in First Nations arts in 2016 (47%), and 54% felt that First Nations were well represented, up from 46% in 2013.

FIGURE 10: Australians' attendance at First Nations arts 2009, 2013 and 2016



n = 7,537 (2016 total, online and telephone); 3,004 (2013 total); 3,006 (2009 total)

Red numbers indicate a statistically significant difference to the previous year (2016 vs 2013; 2013 vs 2009).

N/A - question not asked

More people are attending First Nations arts across art forms. First Nations visual arts and craft continues to be the most popular (20%), while almost one in six Australians attended First Nations dance (16%) or music (16%) in 2016.

Among First Nations peoples surveyed, four in five attended First Nations arts in 2016 (84%), highlighting the central role of First Nations arts and cultural expression in Aboriginal and Torres Strait Islander communities.⁹

⁹ While the survey was nationally representative by age, location and gender, the methodology did not include a nationally representative sample of First Nations people, so findings about First Nations peoples' attendance and participation should be treated as indicative. See from p.24 for information on the representativeness of the First Nations sample. In 2017, the Australia Council will publish detailed nationally representative data about First Nations peoples' participation in arts and cultural expression based on the National Aboriginal and Torres Strait Islander Social Survey (NATSISS).



Blood on the Dance Floor, ILBIJERRI Theatre Company. Credit: Bryony Jackson

*In **Blood on the Dance Floor** Jacob Boehme shared his personal story through a powerful blend of theatre, image, text and choreography. 'The show created a space where gay, poz [HIV positive] and Indigenous people were listened to, heard and represented' - Audience response*

Who attends First Nations arts?

In line with overall patterns of arts attendance, First Nations audiences are young and diverse.

- Australians aged under 35 years are more likely to attend First Nations arts (45%) than those aged 45 and over (29%).
- People in regional Australia are as likely to attend First Nations arts (34%) as those in major cities (35%).
- While there are no gender differences overall, males are more likely to attend First Nations music (18%), storytelling (12%) and theatre (9%) than females (15%, 10% and 6% respectively).
- Respondents from CALD backgrounds are much more likely to attend First Nations arts (51%) than those not from CALD backgrounds (29%).
- Respondents with disability are much more likely to attend First Nations arts (49%) than respondents who do not identify as having disability (33%).

What do we know from: *Building Audiences: Aboriginal and Torres Strait Islander Arts*ⁱ?

The Australia Council's *Building Audiences* research found that there are six key motivators for audiences to engage with First Nations arts experiences: an attraction to stories, contemporary experiences, unique experiences, personal connections, and a desire for cultural insight and deeper understanding. Perceived barriers for audiences are uncertainty about how to engage, a lack of awareness or visibility of First Nations programming, and a 'serious' image.

What do we know from: *Showcasing Creativity: Programming and Presenting First Nations Arts*ⁱⁱ?

National mapping of the programs of 135 Australian presenters for the Australia Council's *Showcasing Creativity* research found that First Nations performing arts are under-represented in Australia's mainstream venues and festivals. They comprised around two percent of the almost 6000 works programmed in 2015 seasons.

How does this relate to the National Arts Participation Survey?

The 2013 National Arts Participation Survey found that there was a gap between interest in, and attendance at First Nations arts; and that less than half of Australians agreed that First Nations arts were well represented. 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.

Building Audiences and *Showcasing Creativity* were commissioned by the Australia Council with the aim of supporting the sector to close the gap between interest and attendance.

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).

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.

Sources:

i Bridson K, Clarke M, Evans J, Martin B, Rentschler R & White T. 2015, [*Building Audiences: A boriginal and Torres Strait Islander Art*](#). Australia Council for the Arts, Sydney.

ii Australia Council for the Arts 2016, [*Showcasing Creativity: Programming and presenting first nations arts*](#). Australia Council for the Arts, Sydney.

COMMUNITY ARTS AND CULTURAL DEVELOPMENT (CACD)

A broad range of arts activities occur in local community settings across Australia. Given the role of arts in supporting social cohesion, inclusive arts activities at the local community level are an increasingly important and powerful means of bringing people together, and for individual and community wellbeing.

For the first time, in 2016 the National Arts Participation Survey collected data specifically on community arts and cultural development (CACD). In CACD activities, the line between community member and professional artist is blurred as both work collaboratively to reveal their artistic and cultural expression.

While other kinds of community arts activities – such as neighbourhood choirs and community arts classes or workshops – are also important ways of being creative and connecting local communities; in the 2016 National Arts Participation Survey, community arts activities that do not involve shared decision making with professional artists are captured under ‘Creative participation in the arts’ from p.67 in the report.

CACD activities traverse the spectrum of arts practices – from theatre, music, dance, creative writing, and visual arts and craft; to oral histories and immersive multimedia installations. The creative outcomes can include festivals, seminars, exhibitions, public art, digital stories and online experiences. CACD processes and 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.³⁶

In 2016, 14% of Australians were involved in CACD activities, which actively engaged community members in decision-making and the co-creation of art with professional artists.^r

In 2016 these activities involved:

- one in eight people in regional Australia (13%)
- one in three of the Australians with disability surveyed (31%)
- one in four Australians aged 15 to 24 years (28%)
- one in four of the Australians from CALD backgrounds surveyed (26%)
- more than half of the First Nations people surveyed (55%).

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.

^r 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.



10 Minutes to Midnight, Alphaville. Credit: Danielle Marwick

Nuclear Futures, a three-year program from Sydney-based community arts company Alphaville, supported new works from communities across six countries with experience of nuclear weapons testing. More than 50 artists and 40 partner organisations collaborated to create digital projections, photographic exhibitions, sculptures, music, paintings, and ceramics, bearing witness to the legacies of the atomic age.

'My life has changed. Gave a great opportunity not only to tell Australia, but to tell the rest of the world. Not a lot of people know what happened.'

– First Nations artist Steve Harrison

3. ARTS ATTENDANCE

Attending arts experiences in person enables Australians to come together as audiences and connect with artists in an unmediated way:

'I'm there and hear the bell and then bam! I'm engaged. I'm open to new experiences. I'm open to what I'm about to see on stage. I'm feeling good... You have got an empty space, and that becomes a stage. You have an actor that becomes a character. And us, that become an audience. And something happens between an actor and the audience that you can't even explain.'

– Focus group participant

More than 14 million Australians aged 15 years and over attended arts in person in 2016 (72%), on par with 2013 and 2009. Trends by art form are outlined below and in Figure 11.

Visual arts and craft

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 activity on offer including free exhibitions, popular touring exhibitions and major biennales in 2016.

Theatre and dance

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%).^s

- 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.

Music

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.
- Looking at live music offerings rather than audiences, there was strong availability of venue-based live music across Australia in 2016. APRA AMCOS reported that overall public performance licensing revenue increased by 6.8%, despite localised impacts including Sydney's lockout legislation.³⁷ The Australian recorded music industry also had a strong year in 2016, reporting 5.5% growth on the previous year.³⁸
- 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.

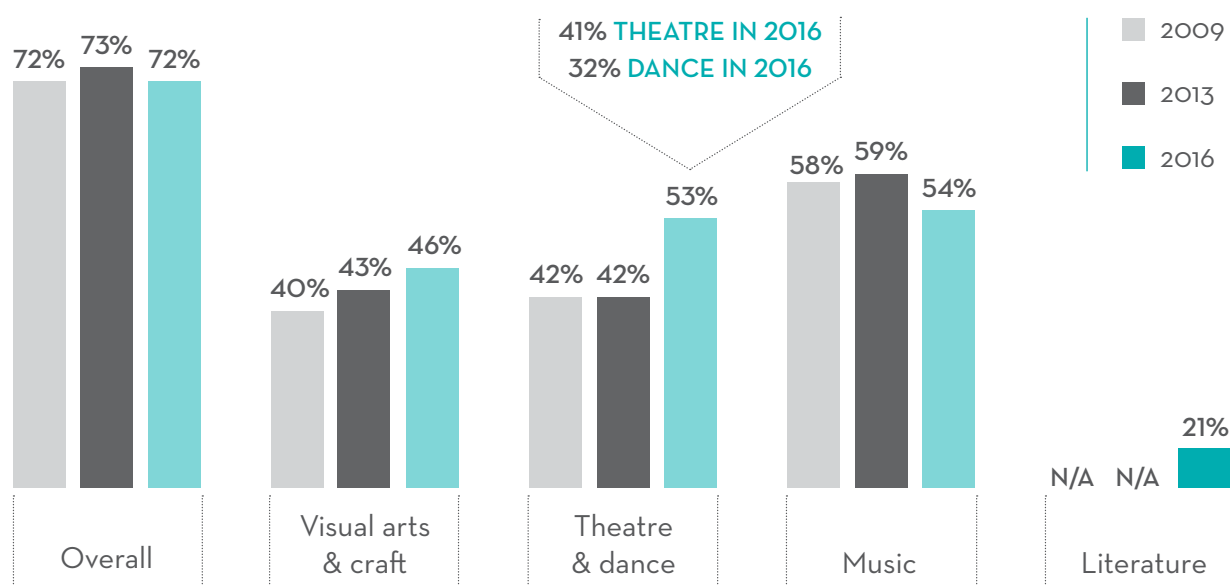
Literature events

In 2016, for the first time, the National Arts Participation Survey captured data on Australians' attendance at literary events. One in five Australians attended literary events in 2016 (21%), including writer talks, book launches, book clubs, writer's festivals and Indigenous storytelling.

Releases of deep-dive reports for each art form are planned for 2017–18. Please see the *Arts Nation: Research and data on the arts in Australia* section of the Australia Council website for further details. australiacouncil.gov.au/research

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

FIGURE 11: Trends in live attendance by art form 2009, 2013 and 2016



n = 7,537 (2016 total, online and telephone); 3,004 (2013 total); 3,006 (2009 total)

N/A - question not asked.

There were some changes to the ways attendance was measured in 2016, including explicitly asking about festival attendance. While this should be taken into consideration when interpreting these trends, the estimates still provide a useful indication of changes over time. No significance testing was applied because of changes in the way attendance was measured in 2016.

What do we know from: The LPA Ticket Attendance and Revenue Survey 2015?

Live Performance Australia's (LPA) Ticket Attendance and Revenue Surveyⁱ covers ticketed attendances reported by ticketing companies, self-ticketing venues, event promoters and the Australian major performing arts (MPA) companies.

LPA reported a small increase in ticketed attendance for theatre (including circus and physical theatre) and dance from 2.8 million in 2014 to 3 million in 2015.

Overall, there was a small decline in attendance at music events (from 11 million in 2014 to 10.2 million in 2015), but this varied between categories. Attendance at contemporary music events declined by 13% – LPA suggests that this was due to fewer high profile artists touring Australia in 2015.

How does this relate to the National Arts Participation Survey?

Although both the LPA survey and the National Arts Participation Survey indicate an upward trend for theatre and dance, and a downward trend for contemporary music, the two surveys measure attendance differently. Ticketed attendances capture individual people attending multiple times, which is different to measuring the proportion of Australians who attend. Consumer spending, including through ticketed attendances, is the main source of income for the arts.ⁱⁱ

Sources:

i Ernst & Young (EY) 2016, [Live Performance Industry in Australia: 2015 ticket attendance and revenue survey final report](#). Live Performance Australia, Melbourne.

ii Australia Council for the Arts 2015, [Arts Nation: An Overview of Australian Arts](#). Sydney, Australia.

ATTENDING FESTIVALS

For the first time, in 2016 the National Arts Participation Survey collected data on Australians' attendance at arts 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 showcase their work. Festivals bring people and communities together in immersive arts experiences.

This new national data shows that nearly half the population aged 15 years and over (45%), or nine million Australians, attended an arts festival in 2016 (Figure 12).

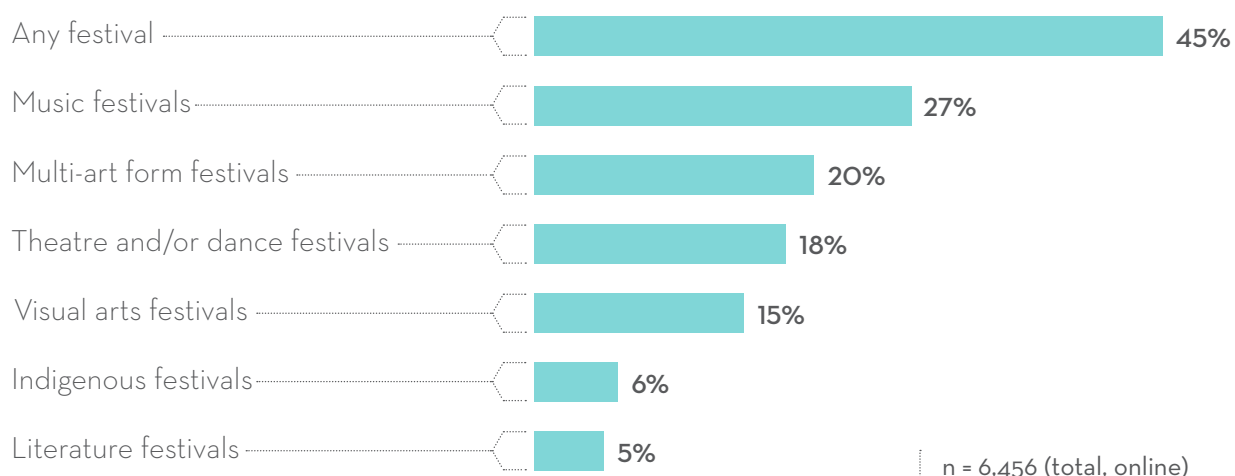
In 2016:

- music festivals were the most popular, attended by one in four Australians (27%). Males and younger Australians are more likely to attend music festivals (31% of males and 47% of those aged 15 to 24 years).
- multi-art form festivals were the second most popular, attended by one in five Australians (20%). Examples include small community arts festivals and major state and territory multi-arts festivals.
- almost one in five Australians attended theatre and/or dance festivals (18%).
- 15% attended visual arts and craft festivals.
- around one million Australians attended Indigenous festivals (6%) and a similar number attended literature festivals (5%).

'Writers' festivals are a growing thing now. When you go to writers' festival events there is a sense that you are with like-minded people and a community.'

-Focus group participant

FIGURE 12: Australians' festivals attendance 2016



Sister performing at the 2016 BIFEM. Credit: Jason Tavener PhotoWgraphy

Bendigo International Festival of Exploratory Music is a free and low cost annual festival that celebrates virtuosity in musicianship and innovation in music composition. It has had 400% audience growth since its launch in 2013.

What do we know from: The LPA Ticket Attendance and Revenue Survey 2015?

There were 2.5 million ticketed attendances at performing arts festivals in 2015, based on the LPA ticketing survey, and this has continued to grow year on year (1.8 million in 2013, 2.3 million in 2014).

How does this relate to the National Arts Participation Survey?

Festival attendance was captured in the National Arts Participation Survey for the first time in 2016. The survey found that nine million Australians had attended an arts festival of some kind. This is much higher than the LPA figure as many Australians attend un-ticketed festivals, and the LPA data focuses on ticketed attendances at performing arts. However, the LPA survey provides an additional source of data that demonstrates the growth of festival attendance over time.

Source:

Ernst & Young (EY) 2016, [Live Performance Industry in Australia: 2015 ticket attendance and revenue survey final report](#). Live Performance Australia, Melbourne.

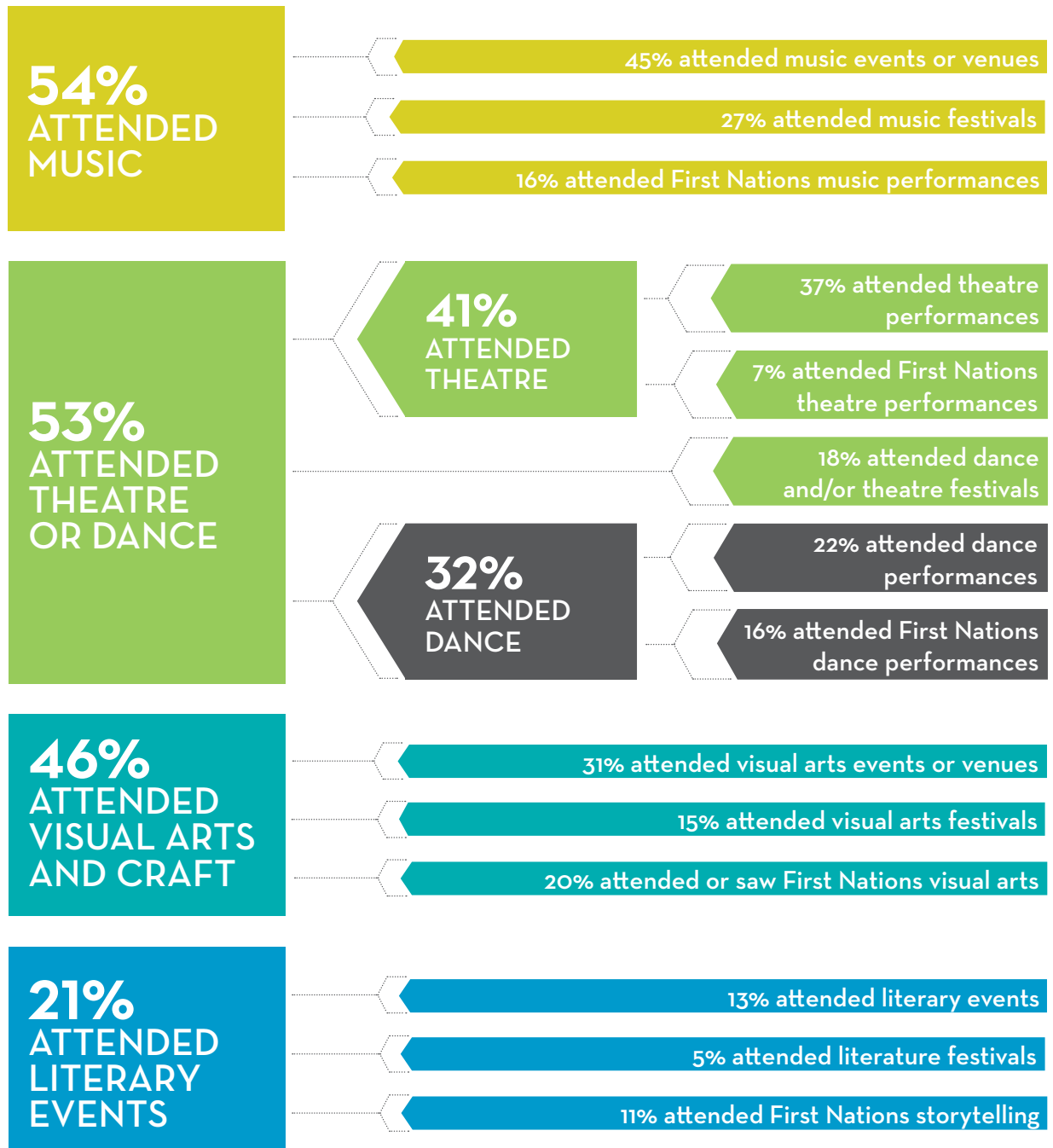
Who attends arts festivals?

- As with other kinds of arts attendance and engagement, younger Australians are the most likely to attend arts festivals. More than half of Australians aged under 35 years attended an arts festival in 2016 (58%), compared to a third of those aged over 45 years (37%).
- Males are more likely to attend festivals (48%) than females (43%) – in particular music, visual arts and First Nations festivals.
- Australians in metropolitan areas are more likely to attend festivals (48%) than those in regional areas (38%). While this may reflect that festivals in cities are more accessible to more Australians, festivals in regional Australia are drivers for regional tourism, including intrastate overnight trips.³⁹
- Respondents from CALD backgrounds are more likely to attend festivals (61%) than respondents not from CALD backgrounds (40%). This is the case across all types of festivals including music, visual arts and craft, theatre and dance, multi-art form festivals, First Nations festivals and literature festivals.
- Respondents with disability are more likely to attend festivals (51%) than those who do not identify as having disability (44%). This is the case across most types of festivals including music, visual arts and craft, theatre and dance, First Nations festivals and literature festivals.

THE LIVE AUDIENCE

The full picture of Australians' live attendance at arts events and festivals in 2016 is provided in Figure 13.

FIGURE 13: Australians' arts attendance by art form 2016



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

Who are the live audience?

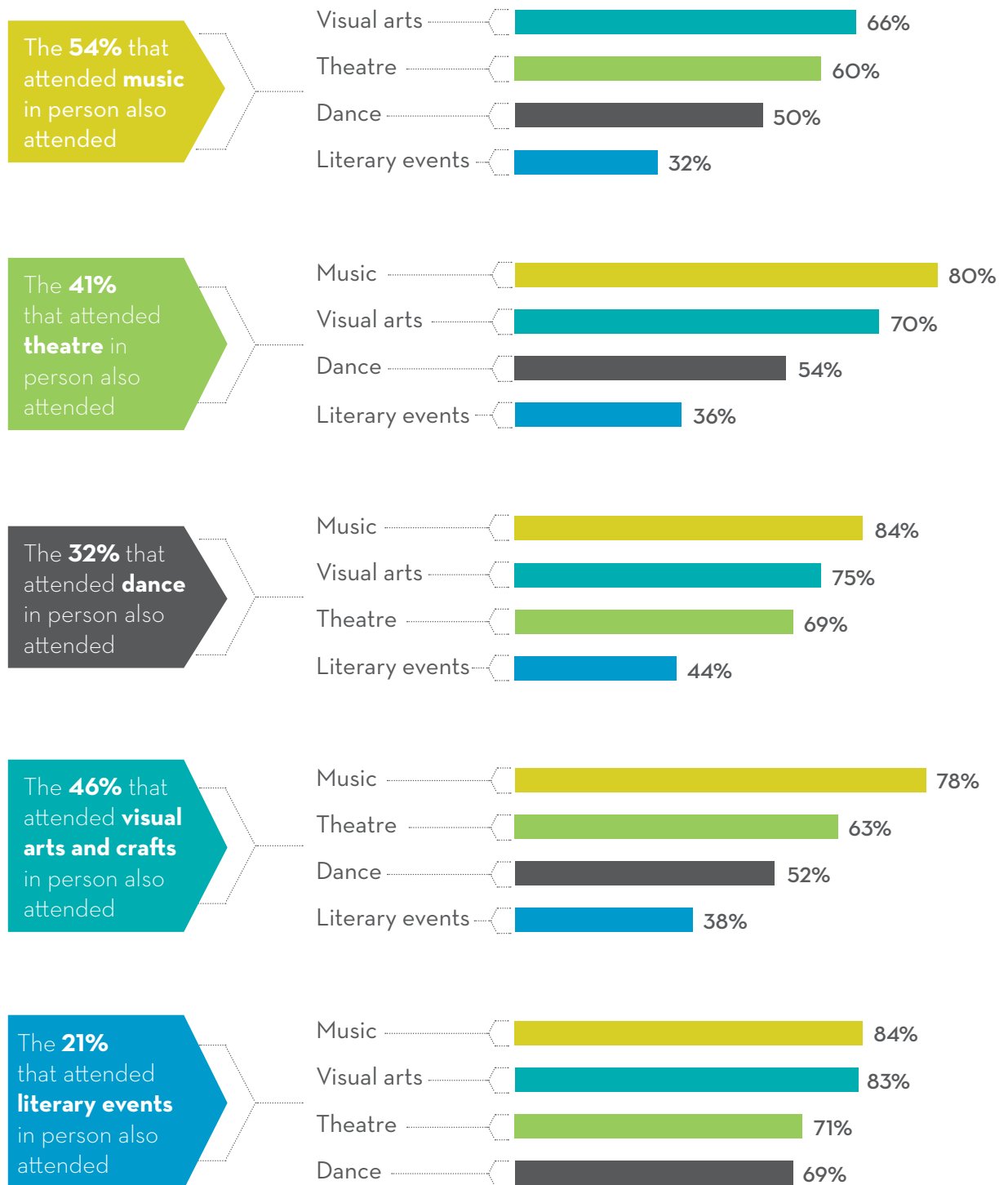
- Arts attendance is increasingly accessible to people with disability, and respondents with disability are now as likely to attend the arts as respondents who do not identify as having disability. Among respondents with disability, arts attendance increased 12 percentage points between 2013 and 2016, from 61% to 73%, following a stable trend between 2009 and 2013.^t In 2016 there were increases in attendance for all art forms. Compared to respondents who do not identify as having disability, respondents with disability are now more likely to attend dance, theatre, visual arts and literature events.
- Younger Australians are more likely than older Australians to attend arts events and festivals. In 2016, 80% of those aged under 35 attended the arts, compared to 66% of those aged 45 and over. There is a decline in attendance across the life stages for music, dance, theatre and literature events; however, there are differences for particular breakdowns within these art forms – for example, classical music is most popular among those aged 65 years and over.
- Living in a regional area does not substantially affect arts attendance, with around seven in ten people attending the arts in both regional Australia (69%) and metropolitan Australia (73%).
- Respondents from CALD backgrounds are more likely to attend the arts (80%) than those not from CALD backgrounds (69%). This reflects the findings that half of CALD people engage with the arts as part of their cultural background, and that there is also diverse engagement with other cultural offerings (only 2% of CALD respondents exclusively engage with the arts of their own cultural background or identity).

Australian arts audiences have broad and multifaceted tastes – Australians who attend one type of arts practice are also very likely to attend other types (Figure 13). In 2016:

- around eight in ten of those who attended visual arts and craft, theatre, dance or literature also attended live music. In comparison, just over half of the general population attended live music.
- around seven in ten of the literature audience (69%) and half of the theatre audience (54%) attended live dance.
- around seven in ten of the dance and literature audience also attended theatre, while six in ten of the live music audience also attended theatre (60%).
- visual arts and craft were attended by eight in ten of the literature audience (83%). This is almost double the attendance rate for the general population.

^t 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.

FIGURE 14: Overlaps in Australians' art form attendance 2016



n = 3,343 (music); 2,606 (visual arts and craft); 2,396 (theatre); 1,895 (dance); 1,187 (literature)



Sydney Writers' Festival. Credit: Prudence Upton

Sydney Writers' Festival is presented annually in venues that extend from the heart of the city up to the Blue Mountains and into regional NSW, and streams live across the nation to 20 community venues. It curates over 350 events, featuring up to 500 authors to audiences of over 100,000.

Non-attenders

- Around one quarter of Australians did not attend an arts event or festival in 2016 (although they may have been creative arts participants, read books, listened to music or engaged online). Of this group of 'non-attenders', around one third had attended the arts at some point in the past (36%). This means that around 15% of the population has never attended the arts.
- There are a variety of reasons people did not attend the arts in 2016, and they differ depending on whether people had attended in the past or not. For those who had never attended the arts, the key reasons for not attending in 2016 were lack of interest (for 55%) and cost (for 21%). For those who had attended in the past but not in the last 12 months, the main barriers were cost (for 39%) and difficulty finding time (for 34%)

Traversing forms and disciplines

The arts increasingly cross boundaries and bridge art forms and industries. This is seen in crossovers within and between well-established arts practice areas, as well as emerging and experimental arts that explore challenging new concepts of arts and culture. The arts are increasingly recognised as providing innovative and inclusive ways to engage with complex fields such as science, and interact with the health and education sectors through their presence and use in hospital and school settings.

The National Arts Participation Survey captured arts across all settings and forms.ⁱ The questionnaire provided guidance for respondents to report some of their cross-art form engagement, such as the reporting of musical theatre with music rather than theatre. In less established cases, it was left to respondents to select the most appropriate art form to report their experiences.

It is clear from the survey findings that Australians are embracing this fluidity of boundaries and engaging with multiple forms of art. For example, more than eight in ten of those who attend live music also attend another art form, and 75% of those who attend dance events also attend visual arts and crafts. Figure 14 shows the overlaps in art form engagement. People who attend one form of art are likely to attend other forms as well.

ⁱ Except reading for work or study.



Anatomy's Confection by Cat Jones, Proximity Festival, Fremantle Arts Centre. Credit: Peter Cheng

Since 2012, Proximity has commissioned 56 intimate performances across five festivals. Proximity's work encourages lateral and experimental approaches to programming.

4.

CREATIVE PARTICIPATION IN THE ARTS

As well as attending arts events, many Australians creatively participate in arts activities in their daily lives. 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.

Focus group participants highlighted that immersing themselves in arts creation plays an important role in their wellbeing:

‘There is happiness when you are creating.’

– Focus group participant

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, following an increase from 2009 (40%) (Figure 15).

There is increased participation in social forms of arts practice that enable Australians to connect with each other through the arts. The art form trends, including some variations within some art form genres, are described below.

Theatre and dance

One in ten Australians creatively participated in theatre and/or dance in 2016 (13%, up from 8% in 2013).^u

- 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.

^u 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.

Visual arts and craft

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. Participation in photography and sculpture has remained stable.
- Many of those who create cross into a variety of media, including through new creation opportunities offered by digital technology.



Visual Arts Society of Yass, oil painting workshop with artist Mark Redzic. Credit: Maren Child

The Visual Arts Society of Yass creates opportunities for creative participation by people of all ages and levels of experience in painting, drawing, allied reproductive processes and sculpture.

Music

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.⁴⁰

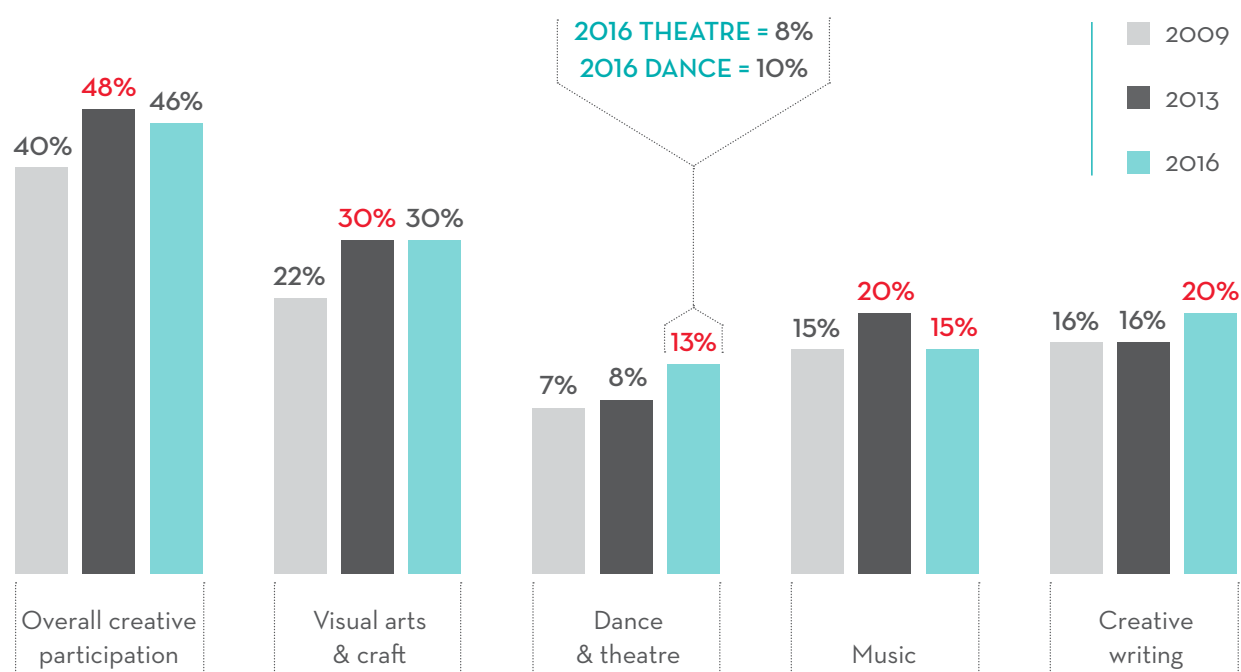
Creative writing

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,⁴¹ and the increase may reflect the popularity of blogs and other inherently social forms of creative writing. The trend for writing novels is steady.

Releases of deep-dive reports for each art form are planned for 2017–18. Please see the *Arts Nation: Research and data on the arts in Australia* section of the Australia Council website for further details. australiacouncil.gov.au/research

FIGURE 15: Australians' creative arts participation 2009, 2013 and 2016



n = 7,537 (2016 total, online and telephone); 3,004 (2013 total); 3,006 (2009 total)

Red numbers indicate a statistically significant difference to the previous year (2016 vs 2013; 2013 vs 2009).

Who are the creative participants?

- 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 61% in 2016).^v 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.

^v 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.

- Younger Australians aged under 35 years are more likely to create art (61%) than those aged 45 years or over (37%).
- Although there are no gender differences in overall creative participation, there are differences by art form. Females are more likely to creatively participate in visual arts and craft (34%) than males (26%). Males are more likely to creatively participate in theatre (10%), music (18%) and creative writing (22%) than females (6%, 13% and 18% respectively).
- While there is no difference in overall creative participation between metropolitan and regional residents, regional residents are more likely to creatively participate in visual arts and craft (33%) compared to metropolitan residents (29%).
- More respondents from CALD backgrounds create art (58%) than respondents not from CALD backgrounds (42%). This is the case across all art forms.



Credit: e.motion21

Established in 2009, e.motion21's vision is to enhance lives and change perceptions of Down syndrome within society through dance, fitness and performance.

Non-participators

Consistent with 2013, over half of Australians did not creatively participate in the arts in 2016 (54%). Three in ten of these people had participated at some time in the past (28%).

Among those who had never creatively participated in the arts, the main reason was a lack of interest (50%), and many also feared that their art would not be good enough (40%); whereas finding the time was the biggest barrier for those who participated in the past but not in 2016 (52%).

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 touches your soul.

You see a film and you are visually stimulated. Music is more of a sensual, sensory type of thing. It really can lift you. It can take you to another place. Music is my escape. I can close my eyes and listen to music and it is like you shut the whole world out.

Music is my drug of choice. I'm a music addict.'

– Focus group participant

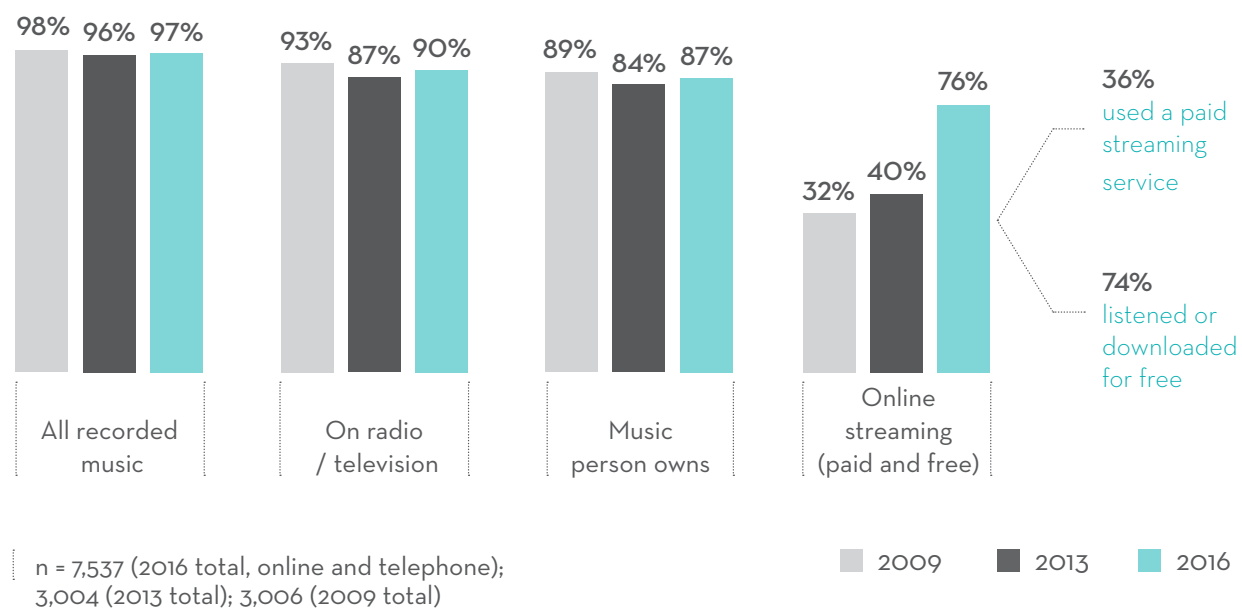
Music is infused throughout the daily life of almost every Australian – 97% of Australians listened to recorded music in 2016. Music is both ubiquitous and powerful – it can move people, help them through the day and provide a soundtrack to their lives.

Accessing music online has become much more prevalent – particularly through streaming services. 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. The most common ways continue to be on the radio or television (90%), and music that the person owns (e.g. CDs, music purchased online) (87%) (Figure 16).

Multi-channel dissemination is growing access points, markets and the user experience, rather than these markets cannibalising each other. This reflects the message of the *Global Music Report 2017* from the IFPI,^w which found that streaming revenues increased by 60% globally in 2016. A focus on points of difference in streaming competition enables market growing rather than market stealing.⁴²

^w International Federation of the Phonographic Industry

FIGURE 16: Australians' recorded music engagement 2009, 2013 and 2016



The answer options for this question were changed slightly to better capture listening behaviours in the 2016 survey. The 2009 and 2013 figures reported are conservative estimates of engagement with recorded music in the last 12 months. No significance testing was applied because of changes to this question in 2016.



Courtney Barnett at SXSW, United States of America. Credit: Pooneh Ghana

Courtney Barnett was awarded Songwriter of the Year at the 2016 APRA Music Awards, following global acclaim for her debut album *Sometimes I Sit and Think, and Sometimes I Just Sit*.

What do we know from: the APRA|AMCOS 2015–16 Year in Reviewⁱ?

The increased popularity of online streaming has been reflected in an increase in streaming revenue for Australian artists. In 2016, artists received \$27.4 million from streaming, over ten times more than in 2013 (\$2.4 million).

What do we know from: ARIA's 2016 wholesale figuresⁱⁱ?

2016 was a successful year for the Australian recorded music industry, with 5.5% growth, driven by the continuing surge in streaming revenues. Streaming accounted for 39% of the market in 2016, up 91% from 2015. Physical formats are still important to music fans, accounting for 31% of the total market in 2016. Although still niche, vinyl sales rose 70% in 2016.

What do we know from: the Share of Listening – Australia reportⁱⁱⁱ?

In 2016, Pandora partnered with Vision Critical to explore how Australians consume and listen to audio. They found that Australians spend on average 3.4 hours a day listening to audio, but that the type of audio they listen to varies throughout the day. For example, listening to the radio was more popular while commuting in a car to and from work; whereas streaming was popular at home, at work and when using public transport.

How do these relate to the National Arts Participation Survey?

These data sources reflect the findings of the National Arts Participation Survey, which show an increase in the use of online streaming across the population, but that Australians are continuing to listen to recorded music in multiple formats and ways.

Sources:

ⁱ APRA AMCOS 2017, [Year in Review 2015-16](#). APRA AMCOS, Sydney.

ⁱⁱ ARIA Charts 2017, [ARIA releases 2016 wholesale figures](#). Australian Recording Industry Association Ltd, Sydney, viewed 3 April 2017, <http://www.ariacharts.com.au/news/2017/aria-releases-2016-wholesale-figures>

ⁱⁱⁱ Vision Critical 2017, [Share of Listening – Australia](#). Pandora for Brands.

READING

'A good story can really lift my spirits or just take me to a different place if I'm having a bad day.'

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.

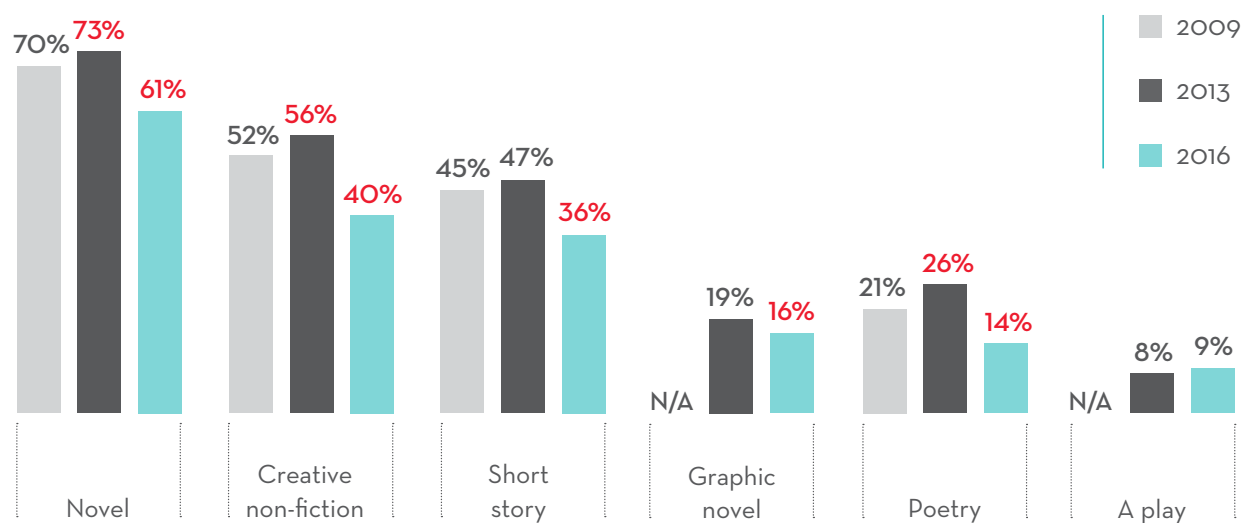
Eight in ten Australians read creative writing in 2016 (79%) down from nine in ten in 2013 (87%), and eight in ten in 2009 (83%), with declines in the proportion of Australians reading novels, poetry, creative non-fiction and short stories.

- 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 2013,⁴³ including the rising popularity of video on demand⁴⁴ and podcasts.⁴⁵ The decrease in reading is in line with international sales trends for fiction in the UK⁴⁶ and Canada,⁴⁷ as well as in Australia.⁴⁸ Many focus group participants attributed their declines in reading to social media use.

Figure 17 shows trends in reading among Australians.

- Novels continued to be the most common forms of writing read in 2016 (61%), but less popular than in 2009 or 2013.
- Creative non-fiction (such as biographies, essays, blogs or histories) has remained the second most popular form of reading material (40%) despite a decline since 2013.
- Short stories also declined in readership since 2013, and are read by one third of Australians (36%).
- Reading of graphic novels has declined slightly from 19% in 2013 to 16% in 2016.
- Poetry has declined in popularity (14%), after a peak in 2013 (26%).
- Despite declines in reading of other genres, the proportion of Australians reading plays has remained stable (9%). Data from Nielsen BookScan suggests this may be due in large part to the stage play, *Harry Potter and the Cursed Child*, which sold almost half a million print books in Australia in 2016.⁴⁹

FIGURE 17: Reading preferences among Australians 2009, 2013 and 2016



n = 2,883 (2016 subset); 3,004 (2013); 3,006 (2009)

Red numbers indicate a statistically significant difference to the previous year (2016 vs 2013; 2013 vs 2009). The reading question was asked of a subset of the sample in 2016 instead of the full sample. The subset was not notably different to full sample across key demographics.* N/A - question not asked.

What do we know from: Nielsen BookScan Australia data?

Overall, print book sales in Australia have declined since 2009.

- Sales of printed novels decreased from 28 million in 2009 to 22 million in 2016.
- However, graphic novel sales increased from 400,000 in 2013 to 500,000 in 2016.
- *Harry Potter and the Cursed Child*, the stage play, sold almost half a million copies in 2016 and was the top selling print book in Australia in 2016. Additionally, *Fantastic Beasts and Where to Find Them: The Original Screenplay* sold over 100,000 print copies and ranked the fourth bestseller in 2016.

How does this relate to the National Arts Participation Survey?

This data is broadly in line with the findings of the National Arts Participation Survey, which show a decline in the popularity of novels and creative non-fiction. The stability in the proportion of Australians reading plays is likely to reflect the high sales figures for the two Harry Potter plays released in 2016.

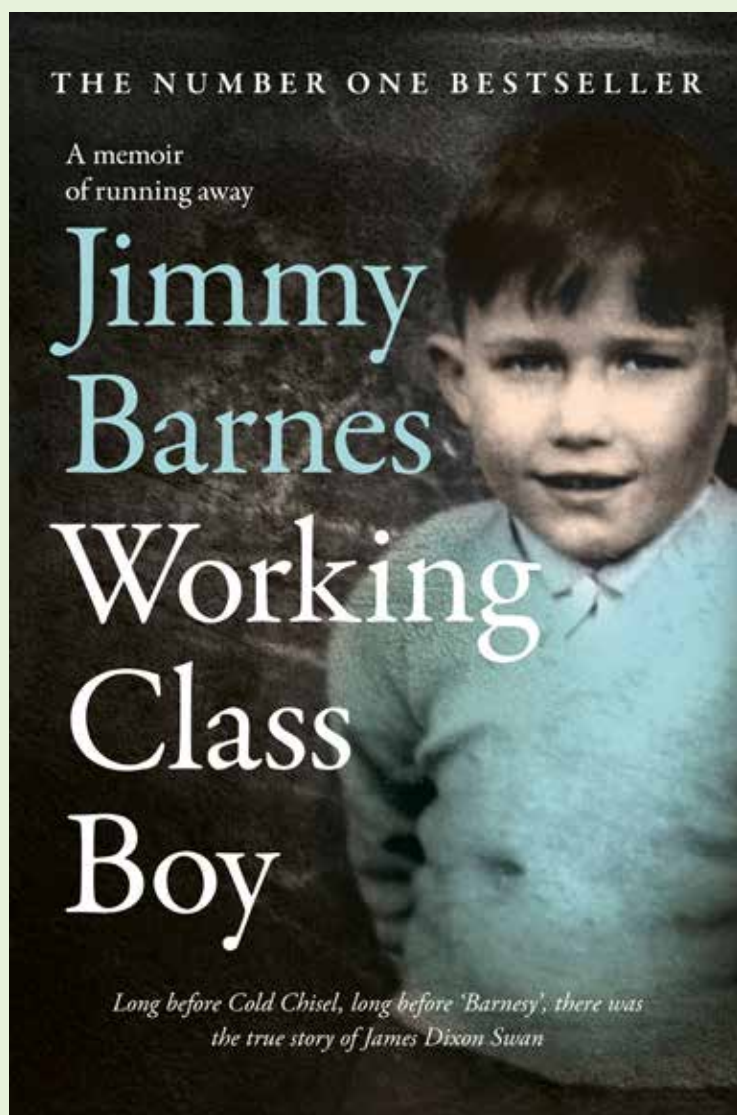
Source:

Based on [Nielsen BookScan](#) 2017, data provided to the Australia Council (customised request) 2009–2016, 20 February 2017.

x The question about reading was changed in the 2016 survey questionnaire. These changes yielded odd results and testing showed that these were driven by the wording changes. To ensure accurate trends, all respondents were recontacted and asked the same question from the 2009 and 2013 survey about reading. The findings above report the results of the re-contacted respondents (n=2,883).

Who are the readers?

- Females are more likely to read creative writing (83%) than males (74%).
- This is particularly true for novels with 69% of Australian females reading novels compared to 53% of males. This is also the case for poetry, with 17% of females reading poetry compared to 12% of males.
- This trend is reversed for graphic novels – males are almost twice as likely to read graphic novels (21%), compared to females (12%).
- Australians aged 15 to 24 are more likely to be readers (86%) than other age groups. They are particularly more likely to be readers of graphic novels, poetry and plays.
- While respondents from CALD backgrounds are not more or less likely to be readers, they are more likely to read graphic novels and plays, and less likely to read novels than those not from CALD backgrounds.



One of the top 20 best-selling books in Australia in 2016,ⁱ Jimmy Barnes' memoir *Working Class Boy* debuted at number one on the bestseller listⁱⁱ and won the Biography award at the 2017 Australian Book Industry Awards.

ⁱ Based on Nielsen BookScan, data provided to the Australia Council (customised request) 2009–2016, 20 February 2017.

ⁱⁱ Based on Nielsen BookScan, week ending October 8 2016.

What do we know from: *Australian Book Readers*ⁱ?

Macquarie University partnered with the Australia Council on a 2016 survey of Australian book readers to investigate preferences, behaviours and attitudes towards books and reading. This was the third part of Macquarie's Book Industry Project. The survey found that:

- Australians are spending more time reading overall, but less time reading books.
- The main reasons for spending less time reading books are having less time because of work/study/family commitments (63%) and spending more time on other leisure activities (38%).
- The main 'other leisure activity' for people aged under 40 is social media. For age groups over 40 years, other leisure activities tend to be dominated by screen media (TV, movies, video-on-demand and video games).
- Overwhelmingly, Australians enjoy reading for interest or pleasure and would like to spend more time reading.
- Print books still dominate over e-books, with 64% reading print books 'often', compared to 31% reading e-books 'often'.

What do we know from: *Disruption and Innovation in the Australian Book Industry*ⁱⁱ?

This second part of Macquarie University's Book Industry Project focused on the publishing industry, adding some context to data on sales of print books from Nielsen Bookscan. Comparisons of e-book and print sales in Australia are difficult because many e-books are bought offshore and there is no single source of combined sales data. However, senior publishing executives estimated their e-book sales in Australia at between 17 and 25% of sales turnover with probably a higher proportion of total volume owing to the lower average selling price of e-books.

The study concluded that digital publishing appears to be offering opportunities for higher sales of genre fiction, but is not currently adding significant numbers to sales of literary books.

How do these relate to the National Arts Participation Survey?

The National Arts Participation Survey found decreases in reading novels and creative non-fiction. The findings of *Australian Book Readers* support the view that reduced leisure time, social media and the proliferation of home entertainment options are affecting reading levels.

Although there is no reliable source of total e-book purchases by Australians, the publishing executives' estimates of e-book sales suggest that purchases of genre-fiction e-books may be adding to the print sales reported by Nielsen Bookscan. However, the National Arts Participation Survey results suggest that this is not currently translating to a greater number of readers.

From an international perspective, 2016 research by UK book industry magazine *The Bookseller*ⁱⁱⁱ showed that after growing from 2012 to 2014, e-book sales decreased in 2015 in that country.

Sources:

ⁱThrosby, D, Zwar, J & Morgan, C. 2017, *Australian Book Readers: Survey method and results*. Macquarie University, available at http://www.businessandeconomics.mq.edu.au/our_departments/Economics/econ_research/reach_network/book_project/readers

ⁱⁱ Macquarie University 2016, *Disruption and Innovation in the Australian Book Industry*. Macquarie University, Sydney, available at http://www.businessandeconomics.mq.edu.au/our_departments/Economics/econ_research/reach_network/book_project/about

ⁱⁱⁱ Tinvan, T 2016, *E-book sales abate for Big Five*. The Bookseller, London, viewed 3 May 2017, <http://www.thebookseller.com/blogs/e-book-sales-abate-big-five-321245>

What do we know about engagement with video on demand?

- In the six months to June 2016, 63% of adult Australians watched online video content.ⁱ
- In the six months to August 2016, 50% of Australians 14 plus had access to one or more types of paid TV services in their home: Subscription Video on Demand (SVOD), Pay TV and Internet Protocol Television (IPTV).ⁱⁱ
- There were 2.7 million paid, free or trial subscriptions to SVOD services in use as at June 2016.ⁱⁱⁱ
- Netflix is the most used paid video-on-demand service in Australia and has over two million subscriber households, reaching up to around five million people as of November 2016.^{iv}
- 44% of Australians watch catch-up television.ⁱⁱⁱ

How does this relate to the National Arts Participation Survey?

The growth in ease of access to video content on demand, coupled with access to social media through smartphones, has led to increased competition for Australians' limited leisure time. This is likely to be a contributing factor to the decrease in reading that is reflected in the 2016 National Arts Participation Survey results.

Sources:

i Australian Communications and Media Authority 2016, [Appetite for digital content drives extensive changes](#), 30 November 2016.

ii Roy Morgan Research, 2016, [More Australians now have SVOD than Foxtel](#), 8 September 2016.

iii Australian Communications and Media Authority 2016, [Digital data the driving force](#), 28 November 2016.

iv Roy Morgan Research 2016, [Second wind lifts Netflix over 5/75 million Australians – but not everyone actually watches it](#), 1 December 2016.

6. ONLINE ENGAGEMENT

'It makes it easier to consume. It is easier for me too...if I'm in a club or whatever and I'm like "what's that song?" I can Shazam it and then at home I can listen to it on Apple music or iTunes.'

– Focus group participant

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, an increase from 2009 (49%) and 2013 (73%).

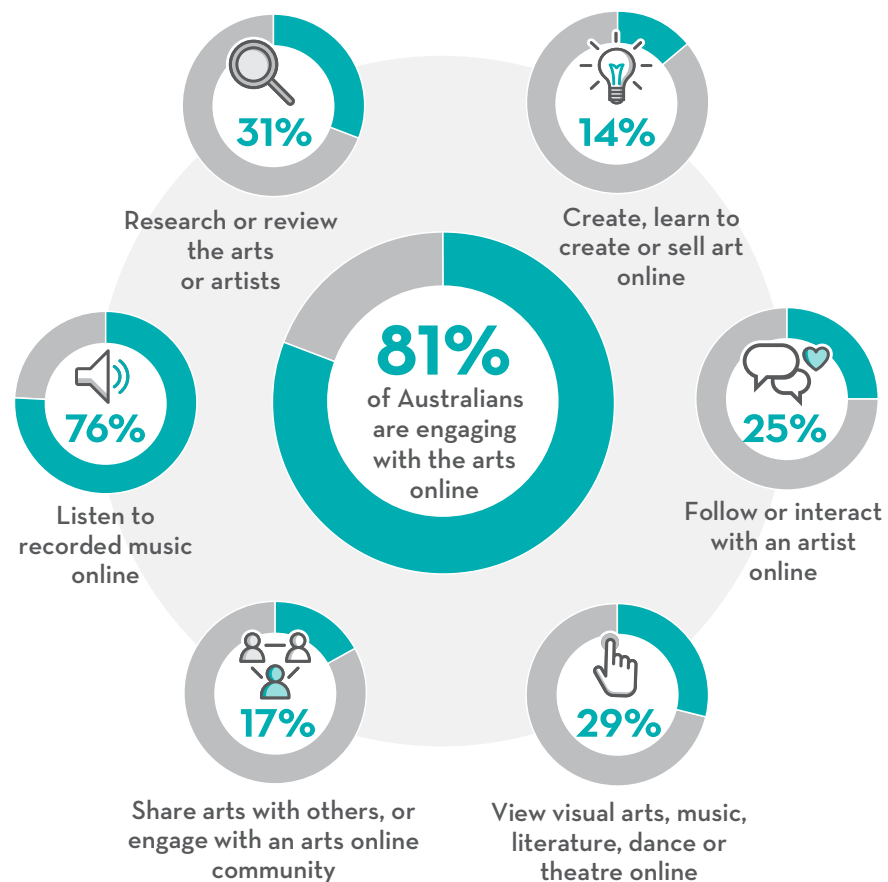
While more Australians now engage with the arts online (81%) than attend arts events in person (72%), diverse forms of online engagement are reaching new arts audiences rather than replacing existing ones. The internet provides a medium to experience and share arts, reflect on or promote arts experiences, and to find information about arts events. There are now more ways for artists and audiences to connect, and for people to connect with others who share their arts interests. See Figure 18 for a breakdown of ways Australians are engaging with the arts online.

Who engages online?

- Almost all Australians aged between 15 and 24 engage with the arts online (97%, compared to 69% of those aged 45 years or over). For younger generations who have grown up with digital technology, constant connection is their reality. This will continue to drive change in the creation and experience of the arts in Australia.
- Metropolitan Australians are more likely to engage online (82%) than regional (77%), but the difference is not substantial given that access to high speed internet is more challenging in regional Australia.⁵⁰
- Males are more likely to engage with the arts online (84%) than females (78%). This is in line with Nielsen ratings from November 2016 showing more males used online streaming (including sites like YouTube, as well as news and other sites).⁵¹ Males and females have similar rates of in person arts attendance and participation.
- Respondents from CALD backgrounds are more likely to engage with the arts online (90%) than respondents not from CALD backgrounds (77%) – yet another example of high arts engagement in CALD communities. This also reflects findings that Australians who speak languages other than English at home are more digitally active than the national average⁵² (but with disparities between CALD groups).⁵³

- The First Nations people surveyed are more likely to engage with the arts online (90%) than the non-Indigenous Australians surveyed (80%). Digital technology has provided a new medium for the maintenance, transmission and sharing of First Nations culture and heritage; including through the development of mobile applications to share Elder's stories,⁵⁴ empower young people and protect against suicide.⁵⁵
- Respondents with disability engage with the arts online at the same rate as respondents without disability (81%), as well as attending arts in person at the same rate. The digital age is increasing the accessibility of the arts, and growing rather than taking arts audiences.

FIGURE 18: Australians' online engagement with the arts 2016



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

CONSUMING ARTS ONLINE

In 2016, 76% of Australians listened to recorded music online (including 96% of those aged 15 to 24). Music was the largest contributor to both the volume and growth of online arts engagement.

Almost three in ten Australians viewed other people's artistic creations online, including viewing visual arts or watching a dance, theatre or music performance (29%).

*'There are all these tours, and you can walk around a virtual gallery...
You get a better view of the artwork.'*

- Focus group participant



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

For over two decades, *Opera in the Park* has been bringing opera to residents and visitors of Perth. A live simulcast connects people in regional centres.

CREATION AND INSPIRATION

'I watch YouTube every night before I sleep - a dance video or good music. It inspires me to dance. It gives me that flame inside me that makes me want to choreograph and dance and create. So I share it with my dance group and we film it and share it online with other people on YouTube.'

- Focus group participant

For many of the focus group participants, the internet provides creative inspiration. Having easy access to a large number of ideas and creations through sites like YouTube, and apps like Pinterest and Instagram, sparks imagination and motivates creativity. This was supported in the survey results, with around one in ten Australians saying that they use the internet to get inspiration for what to create (11%), and two in ten of those aged 15 to 24 (21%).

'I've always drawn but there were periods where I wouldn't draw so much. But then I got Instagram and saw all this amazing art and was like "wow, I should start drawing a bit more". So there was this healthy competitiveness that encouraged me.'

- Focus group participant

Another key way Australians use the internet is to learn how to create - this could include learning new skills through online tutorials, receiving advice or learning how to use new programs in the creative process.

'Before bed I usually do the rounds of social media, but mainly where I spend most of my time is Reddit because there are lots of small communities there where I can fall deep into other people's stories and tips on how to get better. I do frequent the DIY sub-reddits, which are more based on handiwork but there is some visual art in there. And I've wanted to learn how to apply those to my real life. I feel like it is a lot easier with these websites.'

- Focus group participant

In 2016:

- almost one in ten Australians used the internet to learn how to create arts (including 22% of those aged 15 to 24)
- around one in 20 created art using digital technology (including 18% of those aged 15 to 24)
- four percent collaborated with others to create art online (including 14% of those aged 15 to 24).

Some Australians also sell their creations online (4% overall, including 9% of those aged 15 to 24). A 2015 survey of Australian Etsy users suggested that Etsy provides the freedom to creatively engage with the arts while growing a commercial business by removing many traditional barriers to access:

‘I am really happy and excited about running my creative business using Etsy as my platform. I was self-employed as a full-time fine artist before becoming a stay-at-home mum ... Etsy gives me the independence to decide how I want to promote and sell my art, as well as giving me analytic insight to my target clientele. Having Etsy’s global platform and audience to connect with has expanded the possibilities of my creative business.’

– Fine artist and Etsy user Rose Miller⁵⁶

For everyday Australians, digital innovation has brought new opportunities for experimentation with art making, including access to creative technologies that were previously only available at a professional level. Coupled with the ability to instantly share content with audiences without the need for industry gatekeepers, digital technology has transformed the relationship between artist, industry and consumer.⁵⁷

‘Technology has made it so much easier to produce, release and discover music. There are no more distribution networks. The distribution is a split second over the internet.’

– Focus group participant

SHARING AND CONNECTION

Sharing and connecting with others is an intrinsic value of arts engagement. Many focus group participants reported connecting and sharing with arts communities online:

‘Basically we are interest groups on Facebook. We share info about experiences like “I saw this band on this night”, and someone else will say “yeah I was there too! That’s the night the singer went on to do this with this song” and the memories rush back. Like 20 years ago we were at the same venue and it was awesome...It is about sharing experiences.’

– Focus group participant

Online fan-based communities have become more common with the growth of social

media sites like Facebook making it easier to connect with others who share common interests. Around one and a half million Australians were actively engaged with an online community related to the arts in 2016 (7%, including 14% of those aged 15 to 24). One in ten discussed the arts with other people online (10%, including 19% of those aged 15 to 24).

In 2016, 2.7 million Australians shared arts online (14%). While most shared arts created by others, 1.5 million shared their own art (8%). A focus group participant explained that this was a common way to get feedback on their work:

'I put them online via Facebook or groups I'm in and share them immediately and get a response straight away. And then I can talk with other people...you can respond and change the way you take photos based on the feedback.'

- Focus group participant



The *Everyday Australia* Instagram page by award-winning photographer Andrew Quilty had over 56,200 followers by May 2017.ⁱ Everyday Australia is part of the international *Everyday Projects* series aimed at using social media and photography to challenge stereotypes, connect communities and foster acceptance.ⁱⁱ Everyday Australia takes contributions from professional photographers and skilled amateurs across Australia, 'showing the world snippets of Australia they may never have expected.' - Andrew Quilty

i *Everyday Australia on Instagram*, viewed 12 May 2017, www.instagram.com/everydayaustralia

ii The Everyday Projects 12 May 2017, About Everyday Projects, available at <http://everywhere.everydayprojects.org/views/infopage.html#about>

Images: Blacktown, NSW. Credit: @davidmauricesmith; Darwin, NT. Credit: @bookhopper; North Fremantle, WA. Credit: @michaelwwilson

RESEARCHING THE ARTS

Around one in four Australians aged 15 years or over use the internet to find out more about artists (23%). In 2016, almost two in ten Australians looked up reviews for arts they were interested in attending or books they might read (17%), while more than one in ten actively reviewed the arts they had attended or books they had read on sites like Goodreads (11%).

With increasing competition for time, people use reviews to help them make decisions about where to spend their time and money. A survey of Australian authors by Macquarie University showed that authors understand the growing opportunity to use their reader base to generate sales. For example, 80% of genre fiction authors agree that reader reviews are important for sales.⁵⁸ A 2016 survey of book readers by Macquarie University and the Australia Council showed that 37% of readers discover new books via online booksellers and publishers and 13% through Goodreads. Reader book reviews are important in choosing which book to read for almost one in four Australian readers (25%) and professional book reviews are important for one in five (22%).⁵⁹

CONNECTING WITH ARTISTS

One quarter of Australians, or almost five million people, followed or interacted with an artist or arts organisation online in 2016 (25%). Social media in particular allows people to connect more deeply with artists:

‘When you are interested in an artist you follow them on Facebook. Then your phone beeps and you get a notification. And you can reply or respond. If they are live, you can see them and you can ask them questions. And they might give you a shout-out. They might make a statement or comment and you can reply to that in real time. And where someone has replied to what you’ve said you see the notification, for example “Julia Morris likes your comment” and it’s like “Oh! She knows I’m here! She knows I’m here and I’ve stopped what I’m doing to be here to listen to her do her thing.” And I feel validated. They know you exist.’

– Focus group participant

Social media is changing the relationship between artists and audiences, enabling artists to connect directly and personally with their fans.

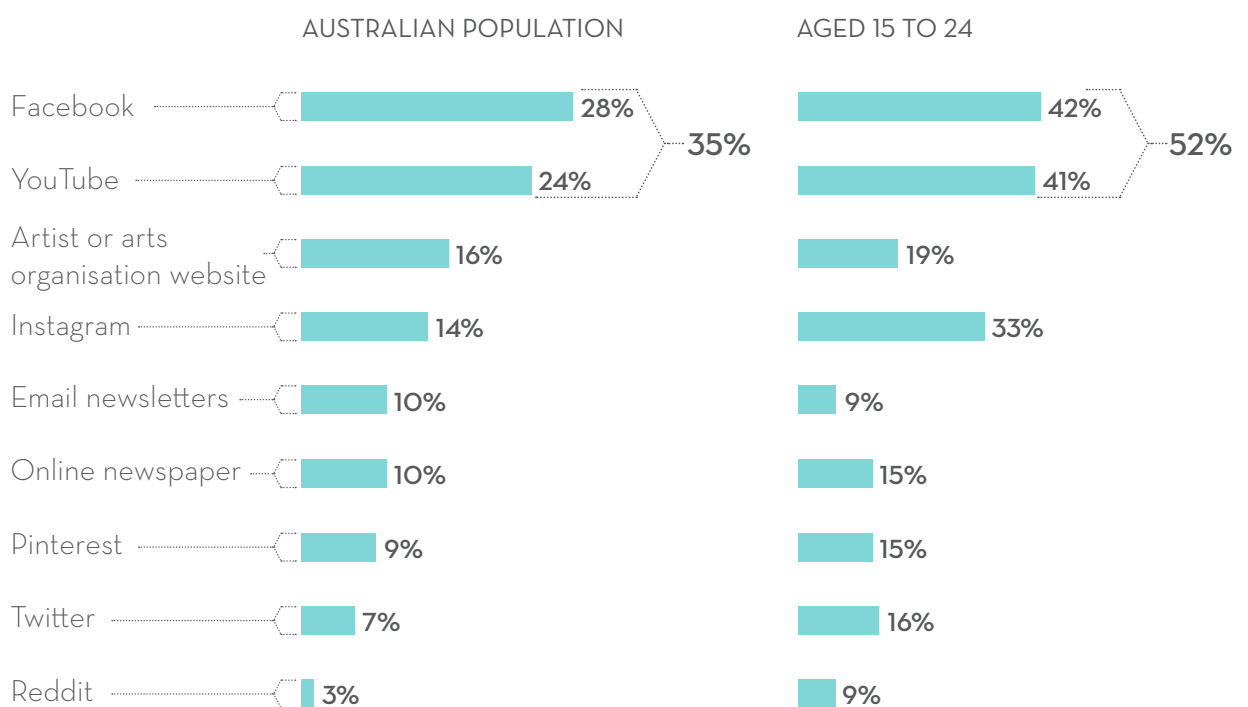
However, as well as creating new opportunities to share and promote work and connect with fans, the digital age also poses a whole new range of challenges for artists:

'In short, most artists used to be trees falling in a forest with nobody to hear them. Now there are millions of "trees" falling at once and so they need to create "remarkable" things that allow them to be heard above a forest of digital din.'

– John Watson, Artist Manager and President,
Eleven: A Music Company⁶⁰

Around one in three Australians actively used Facebook and/or YouTube to connect with and learn about the arts and artists in 2016 (35%), including more than half of Australians aged 15 to 24 (52%). One in three Australians aged 15 to 24 used Instagram to connect with the arts in 2016 (33%) (Figure 19).

FIGURE 19: Media used to engage with the arts online 2016



n = 6,456 (total, online); n = 1,046 (aged 15 to 24, online)

ONLINE TRANSFORMATION – COMMENTARY BY MEGAN BROWNLOW

‘The National Arts Participation Survey gives us insight into some of the more interesting trends in arts, entertainment and media. As content shifts to online distribution and internet-connected devices proliferate, we see Australians embracing a new liberty to access their passions anytime and anywhere. As a result, more time is spent enjoying what they love. The growth in streaming music is a great example.

The democratisation of arts and entertainment realised by the internet is another theme illustrated beautifully by the National Arts Participation Survey. Free online services such as social media platforms have become channels for creators to showcase their work to fans and potential financial supporters. 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. Their work doesn’t have to be perfect before they display it either. Many understand and leverage the concept of ‘beta’, sharing unfinished work in order to ‘crowdsource’ feedback and fast-track improvement in their skills.

The interactive nature of the internet is perfect for garnering input from arts lovers and fellow creators, who, through the act of providing feedback, become invested in their virtual colleague, someone they have likely never met in person. In this sense the observer/commenter becomes part of the creation. 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) is a media and entertainment industry specialist with over 20 years’ experience in media and marketing.

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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