

Executive Summary

Creating Value

**Results of the National Arts
Participation Survey**

September 2023



Australian Government

**Creative
Australia**

Executive summary

About this research

Arts and creativity connect us: to ideas, to each other, to new perspectives and to the world. Through engagement with arts, culture and creativity we can make sense of the world around us. They enable us to recognise our shared and distinct histories and imagine new futures as a nation. The arts inspire and ignite us, help us to build our collective identity and make us happier and healthier.

Engagement with arts and creativity plays a crucial role in improving quality of life for all Australians. It creates stronger individual and collective futures, building a more civil society for generations to come. Cultural inclusion is critical to the health, wellbeing and prosperity of Australian communities.

The National Arts Participation Survey is a survey series which asks key questions of Australians regarding their engagement with arts and creativity in daily life. It asks Australians to reflect on their views on arts and culture, including on public investment in arts and creativity. It also asks Australians about the impacts of creative participation on everyday life and how their engagement with creativity might be changing.

The 2022 National Arts Participation Survey is the first survey of its kind to be released by Creative Australia and the fifth survey in the landmark research series from the Australia Council, following iterations for 2009, 2013, 2016 and 2019.

The research series provides a comprehensive overview of Australians' evolving relationships with arts, culture and creativity. By examining our engagement with creativity – both through the lens of self-expression and engagement with arts and creative activities – this series builds the evidence base on participation in the arts in Australia.

The 2022 National Arts Participation Survey was conducted in September–October 2022 and the results are based on a nationally representative sample of 9,396 people. The previous National Arts Participation Survey was conducted in 2019, prior to the disruptions of COVID-19, and provided a benchmark of Australians' arts engagement before the pandemic. The 2022 survey results, in comparison, provide an update on arts engagement in the wake of COVID-19.

The 2022 survey results provide critical insights into how Australians' arts engagement might be changing following the disruptions caused by the COVID-19 pandemic, particularly in relation to the role of the arts in our individual and collective wellbeing. The 2022 survey closely examined Australians' relationship with the arts throughout lockdown periods, providing insights into the impact of COVID-19 on mental health and wellbeing. It asked participants to reflect on their digital arts engagement throughout this time and to share their own perceptions of how their engagement might have changed.

Results from the 2022 National Arts Participation Survey show that almost all Australians engage with the arts in some way and overall attendance is consistent with rates seen before the COVID-19 pandemic.

However, while the proportion of Australians attending is similar to 2019, there have been some changes in attendance patterns. Australians are attending arts events and festivals less frequently. Among those who attend arts events, weekly attendance has dropped across all art forms and more Australians are only attending arts events every few months. This will be a trend to watch to determine if these changes are largely the vestiges of COVID-19 or a more enduring shift in behaviour.

At the same time, a larger proportion of Australians are not attending as much as they would like to, with almost half reporting they would like to attend more. This suggests barriers are hindering the frequency with which Australians are able to attend. In 2022, cost and location continue to be the main barriers to arts attendance and are felt particularly among Australians who want to attend more events.

Entertainment, social connection, and understanding other perspectives and cultures continue to be the most common motivations to attend arts and cultural events.

In addition, while there has been little change in the proportion of Australians who believe the arts benefit our wellbeing (with more than half of Australians holding this view), there has been a substantial increase in those who are attending arts and cultural events to improve their wellbeing. A third of all Australians reported this motivation in 2022, up from a quarter in 2019. This increase is contextualised by nearly half of Australians recognising that creative activities and experiences helped with their mental health or wellbeing during the COVID-19 pandemic.

The results also show Australians are increasingly engaging with the arts online. Australians value the flexibility of accessing arts and creativity through digital avenues. However, a large proportion miss the atmosphere of a live event, exhibition and/or experience when viewing online. It will be important to monitor this trend to see if digital audience engagement continues to grow or if this is a temporary peak brought on by COVID-19 disruptions.

Creating Value's spotlight sections consolidate findings from the 2022 National Arts Participation Survey on key themes including:

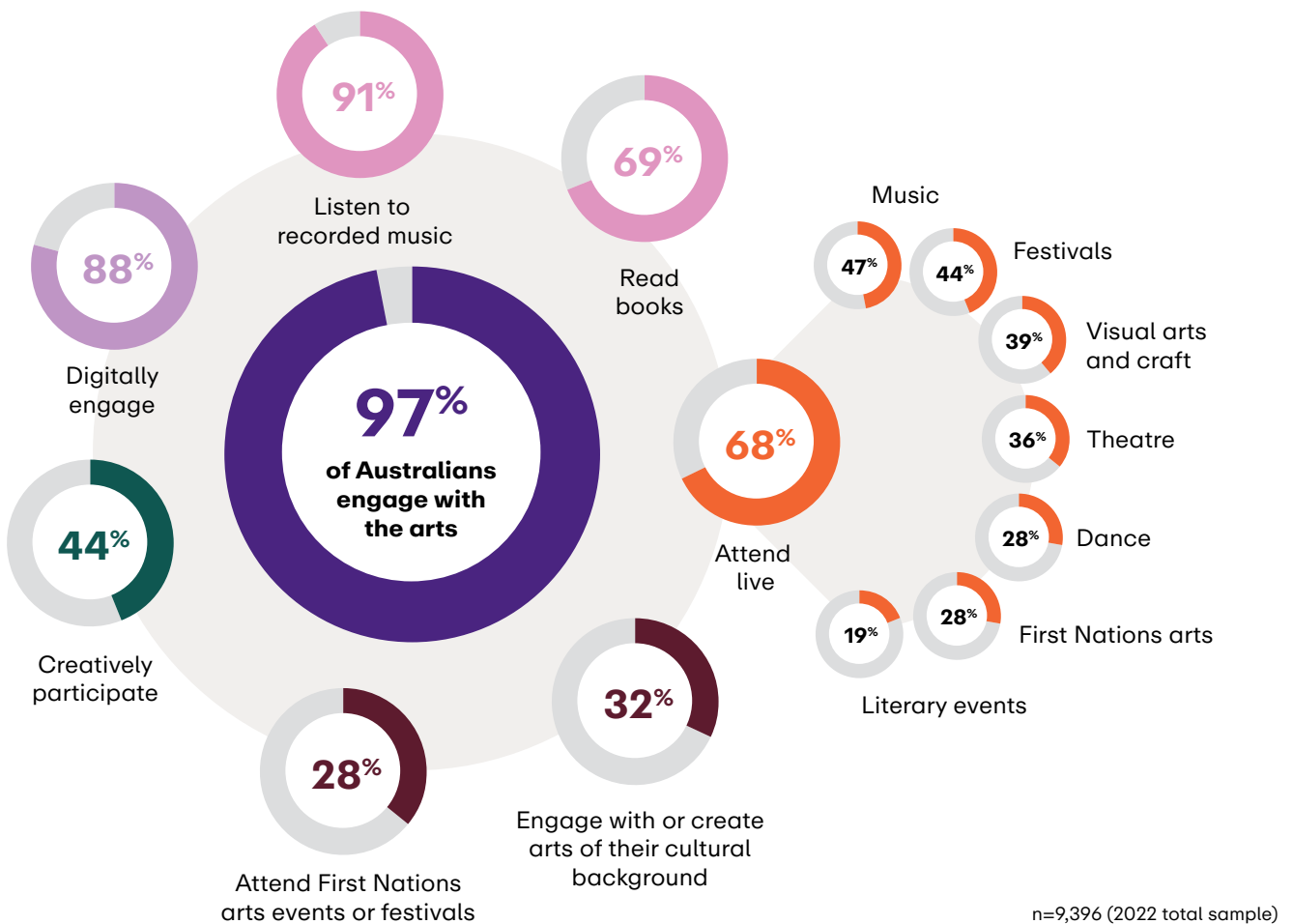
1. skills, jobs and economic prosperity
2. social cohesion and building equity
3. wellbeing
4. digital arts engagement.

Creative Australia and Lonergan Research have developed new and interactive ways for the arts and cultural sector to explore the data from the 2022 National Arts Participation Survey. *Knowing and Growing Your Audience: Guide to the 2022 audience data and advocacy tools*, published alongside this report, helps us to understand the intersections between Australians' behaviour with and attitudes towards arts and creativity. The tools have been developed to support advocacy, audience development and strategic planning.

Summary findings

The results from the 2022 National Arts Participation Survey show that arts are part of the lives of almost all Australians. 97% of Australians engage with the arts in some way, either by listening to music, reading, creating art, engaging with the arts online or by attending arts and cultural events and festivals. This is in line with arts engagement prior to the COVID-19 pandemic (98% in 2019), and illustrates that, despite COVID-19 disruptions, the number of Australians engaging with arts and culture in 2022 is consistent with pre-pandemic levels.

Figure 1: Australians' engagement with the arts and creative activities and events in 2022



1. Our views on arts and creativity

Australians recognise the positive impacts of creative engagement to individuals, communities and the economy. There continues to be strong recognition of the benefits of arts and creativity for our wellbeing, our ability to express ourselves, child development, cultural awareness and adaptability and resilience.

- **17.4 million Australians – or 84% of us – acknowledge the positive impacts of arts and creativity.**⁵ Younger Australians (90% of Australians aged 15–34), parents with children under 16 (89%), women (87%), First Nations respondents and CALD respondents (both 91%) are more likely to recognise the positive impacts of arts and creativity.
- Three in five Australians say the arts have a ‘big’ or ‘very big’ impact on **our ability to express ourselves** (62%); **stimulation of our minds** (62%); and **our ability to think creatively and develop new ideas** (59%). Three in five Australians say the arts have a ‘big’ or ‘very big’ impact on **child development** (61%) and **our understanding of other people and cultures** (60%). Over half of Australians say the arts have a ‘big’ or ‘very big’ impact on **our sense of wellbeing and happiness** (56%), and on our ability to **deal with stress, anxiety or depression** (56%).

Most Australians hold positive attitudes towards the arts, placing strong importance on the role of the arts in our education system and on artists’ freedom of expression.

Australians strongly support public investment in the arts, with three in five Australians agreeing the arts should receive public funding.

- Three quarters of Australians agree **arts and creativity should be an important part of education** (74%) and **artists should have freedom of expression** (74%). Most Australians agree **artists make an important contribution to Australian society** (72%); **cultural and creative experiences help you to understand perspectives that are different to your own** (71%); and **cultural and creative experiences make for a richer and more meaningful life** (69%).

- Three in five Australians agree **culture and creativity should receive public funding** (61%). This is consistent with the 2019 results which found 62% of Australians support public investment in the arts. The results show two clear priorities for public or private investment in the arts: **access to free or low-cost arts events** (68%), and **ensure young people have access to arts and creative experiences to support their learning and development** (65%). Those with lower incomes strongly prioritise making arts and culture accessible through free and low-cost events.

Many Australians feel that creative activities and experiences helped their mental health and wellbeing during COVID-19 lockdowns.

Many also recognise the arts and cultural sector has been disrupted by COVID-19 and say they want to help in some way. A third are prepared to pay more at this time, including some who feel events are more expensive now.

- There is recognition of the impact arts and creative activities had on our wellbeing during COVID-19 lockdowns. Nearly half of Australians believe **creative activities and experiences helped with their mental health or wellbeing during the pandemic** (48%). In 2022, a greater proportion of Australians are attending arts and cultural events **to improve their wellbeing** (32% up from 25% in 2019).
- Three in ten Australians say they didn’t attend events in 2022 because of price increases (30%). At the same time, many Australians recognise the arts and cultural sector has been heavily impacted by COVID-19 disruptions and are willing to support the sector. A third, or 7 million Australians aged 15 and over, are **happy to pay more for events at this time to help support the arts sector** (34%), even though more than half of this group find events are more expensive now (54%). However, while many say they are happy to pay more, Australians have not increased their propensity to donate time or money to the arts: one in ten donated money to the arts (10% consistent with 10% in 2019), only 7% are **volunteering** (down from 9% in 2019) and 6% are **supporting crowdfunding** (down from 8% in 2019).

⁵ Australian population figures are based on the nationally representative survey sample size of 9,396 people and weighted to reflect the Australian population size using the results of the 2021 Australian Bureau of Statistics (ABS) Census. Throughout this report, we have used this methodology to convert percentages into population figures where relevant.

- **Australians aged under 35** are more willing to pay more for arts events to support the sector. Over two in five Australians aged 15–34 say they are **happy to pay more for events at this time to help support the arts sector** (44%). However, older Australians are less willing to spend more to support the arts (36% of those aged 35–49 and 26% of those aged 50 and over).

Australians hold positive sentiment towards Aboriginal and Torres Strait Islander arts and recognise the important role they play in helping us understand who we are as Australians.

However, fewer Australians think First Nations arts are well represented in Australia in 2022 than in 2019. This indicates there is still work to be done to increase discoverability and representation of First Nations creative work throughout Australia.

- In 2022, 15.2 million Australians agree that **Aboriginal and Torres Strait Islander arts are an important part of Australia's culture** (73%). This includes 34% of the population who strongly agree.
- **Interest in First Nations arts** has remained steady between 2019 and 2022 (both 40%). However, fewer than half of Australians believe **Aboriginal and Torres Strait Islander arts are well represented in Australia** (47% down from 51% in 2019).

First Nations and culturally and linguistically diverse (CALD) respondents are highly engaged in the arts, but are also more likely to report feeling disconnected.

- First Nations and CALD respondents are highly engaged in the arts; however, a high proportion report feeling that **cultural and creative experiences are not really for them**. Two in five First Nations respondents and one in three CALD respondents report that **cultural and creative experiences are not really for people like them** (39% of First Nations respondents compared to 27% of non-First Nations respondents; and 31% of CALD respondents compared to 27% of non-CALD respondents).

- These seemingly contradictory results, also seen in previous iterations of the survey for some groups, suggest an ongoing disconnection between active participation and engagement, and perceptions of the arts as expensive, hard to access and narrowly defined. They also resonate with observations of the under-representation of non-dominant cultures and groups in audiences for certain forms of publicly funded arts and culture, adding important context to the body of research that seeks to understand who has access to arts and culture and why.

2. Our cultural connections

Australians are proud of their cultural background and a large proportion connect with, and share, their cultural background through arts and creativity.

To engage with their own cultural background, language group or community, Australians attend arts and cultural events and/or make art such as visual arts and music. Australians value attending cultural events for how it helps them connect with family, friends and community.

- Nearly a third of Australians **connect with, and share, their cultural background** through arts and creativity (32%). While over half of those who identify as **CALD engage with the arts of their own cultural background, fewer are engaging than before the pandemic** (52% down from 62% in 2019). This indicates a need to ensure the range of cultures, languages and perspectives that infuse our nation's vibrancy are well represented in our arts.
- More than a quarter of Australians **attend events focused on their own cultural background** (27%). Some groups are more likely to attend for this reason, including **First Nations respondents** (63% compared to 26% of non-First Nations respondents), **CALD respondents** (46% compared to 23% of non-CALD respondents), **parents with children under 16** (36% compared to 25% of people without children under 16) and **men** (31% compared to 24% of women).
- **CALD respondents** have strong **cross-cultural engagement and engagement with First Nations arts and culture**. **CALD respondents** are more likely to be interested in **First Nations arts** than non-CALD

respondents (49% compared to 38%) and are almost twice as likely to **attend First Nations arts and cultural activities** as non-CALD respondents (40% compared to 21%). This cross-cultural engagement is a positive indicator for social cohesion and intercultural empathy.

- Almost all Australians who attend arts events focused on their cultural background or community recognise the great cultural and social value in attending (96% cite at least one benefit). Australians **increasingly value** these events for their ability to help them **spend time with family and/or friends** (54% up from 51% in 2019) and for benefits to **wellbeing and health** (38% up from 33% in 2019).
- Many Australians also connect with their cultural background or community by **creating art** themselves, including making music and creating visual art. Around 3.7 million Australians – or 18% of the population – **create art to connect with their cultural background** (a slight decrease from 22% in 2019). **CALD respondents** create art to connect with their culture at higher rates than non-CALD respondents, with almost two thirds of CALD respondents who create art doing so to **connect with their cultural background** (64% compared to 41% of non-CALD respondents who create art). However, the rate of CALD respondents who make art to connect with their cultural background has fallen following the pandemic, from 46% in 2019 to 34% in 2022. There's a need to track these changes to see if this is an enduring shift in behaviour.

3. Live arts attendance

The 2022 National Arts Participation Survey results provide an update of Australians' live attendance following the impacts of COVID-19, providing critical comparisons to the results of the 2019 National Arts Participation Survey right before the pandemic hit. The results show that **attendance at live arts and cultural events is returning to pre-pandemic levels**, however at lower frequencies.

- **In 2022, 14.2 million Australians attended arts events or festivals, or 68% of the population aged 15 and over – the same proportion recorded for live arts attendance in 2019.**
- Half of Australians attend **live music events and festivals** (47%), and Australians increasingly attend **visual arts and craft events** (39% up from 37% in 2019). Almost three in ten Australians attend **dance events** (28%). Those who attend dance events and festivals are the most frequent live arts attendees (13 dance events per year). One in five Australians connect through written stories by attending in person **literary events**, including First Nations storytelling (19%). Almost two in five Australians attend **theatre performances** (36%) and while slightly fewer Australians are attending **First Nations arts or festivals**, 5.9 million attended in 2022 (28% down from 32% in 2019).
- **Although the same percentage of Australians are attending arts events and festivals as before the pandemic, Australians are attending live arts events and festivals less often.** Among those who attend arts events, weekly attendance has dropped across all art forms – visual arts and craft, theatre, dance, book or literary and music events – from 5% in 2019 to 3% in 2022. More Australians are opting to attend every few months – up from 18% in 2019 to 21% in 2022. This will be a trend to watch to determine if these changes are temporary or a more enduring shift in behaviour.
- **Younger Australians aged under 35 (84%) and parents with children under 16 (78%) have particularly strong arts attendance.** These high attendance levels emphasise the vital role the arts play in learning, development and education. **First Nations respondents** (87%) and **CALD respondents** (81%) also have strong arts attendance, highlighting the importance of arts events and festivals to our multicultural community.

Motivations to attend

Entertainment, social connection and the chance to understand other perspectives and cultures continue to be the most common drivers of arts attendance. However, the strongest growth has been attending arts events to improve health and wellbeing.

- The results indicate some **shifts in motivations to attend arts and cultural events**. There has been an increase in the number of motivations **young Australians aged 15–17** and **First Nations respondents** are driven by to attend arts and cultural events.
- **Entertainment, social connection and understanding other perspectives and cultures continue to be the main drivers of arts attendance**. Australians attend arts events to have fun and be entertained (69% up from 63% in 2019), **to socialise and connect with others** (46% up from 41% in 2019) and **to understand other perspectives and cultures** (36% up from 33% in 2019).
- While the proportion of Australians who believe the arts **benefit our wellbeing** is unchanged (56% for both 2019 and 2022), a greater proportion are now attending arts and cultural events **to improve their wellbeing** (32% up from 25% in 2019). First Nations respondents (45%), **CALD respondents** (40%), **those living in remote areas** (47%) and **women** (35%) are more likely than the general population to attend for this reason.

Barriers to attendance

Cost and location continue to be the main barriers to arts attendance. These barriers are felt particularly among Australians who want to attend more events.

- Australians increasingly **want to attend more arts and cultural events**, suggesting barriers are hindering the frequency at which Australians are able to attend. Almost half of Australians **would like to attend more creative, cultural and artistic events** (49% up from 42% in 2019). Those living in remote locations (64%), **First Nations respondents** (58%), **COVID-19 immunocompromised respondents** (56%) and **women** (55%) are among those who would like to **attend more cultural and artistic events**.

- **Cost and location** continue to be the **main barriers** to arts attendance. The **cost of tickets/entry** to arts events prevent more than half of Australians from attending as many events as they would like to (55% up from 34% in 2019) and two in five Australians say **there are no arts events near where they live** (40% up from 25% in 2019). These barriers are felt particularly among Australians who want to attend more events, with **cost of tickets and entry** the primary factor preventing attendance despite actively wanting to attend.

4. Listening to music

Music plays an important role in our everyday lives: inspiring and connecting us and improving our mood. Australians are highly engaged with recorded music.

Nine in ten Australians listen to recorded music and Australians are increasingly listening to streamed music. The proportion of Australians listening to paid streamed music has increased at a stronger rate than free streamed music, suggesting a willingness to pay for copyrighted material if it is accessible.

- Nine in ten Australians **listen to recorded music**, making music the most accessed, and potentially most accessible, art form (91%). This indicates the ubiquitous role music plays in our everyday lives.
- Australians are **increasingly listening** to recorded music through **free and paid streaming services**, and less through purchased music such as CDs and paid downloaded music. In 2022, 59% chose to listen to music through **free streaming websites** (up from 55% in 2019) and one in two listened to recorded music through **paid streaming subscriptions** (50% up from 36% in 2019). The percentage of Australians who **pay for streamed music** is increasing at a **stronger rate** than those who opt for free streamed music.

5. Reading books

Reading, like music, connects us with ideas and stories; it sparks joy, improves wellbeing and enhances our feeling of connectedness with local and global communities. Australians are highly engaged in reading for pleasure; however, the proportion who read for pleasure has decreased. Australians are, however, diversifying how they consume literature and are increasingly using digital formats to read.

- More than two thirds of Australians **read for pleasure**. However, Australians' engagement with reading has decreased slightly following the COVID-19 pandemic (69% down from 72% in 2019). The decrease in overall reading highlights a need to understand what might be contributing to this drop, and to promote the many benefits and pleasures of reading for all Australians.
- Reading for pleasure is most common among younger **Australians aged 15–34** (73%). However, **older people** read more often: Australians aged 65 and over are more than twice as likely to read daily as those aged 15–34 (27% compared to 12% of those aged 15–34).
- The proportion of **Australians aged 65 and over** who read for pleasure has dropped significantly (from 77% in 2019 to 68% in 2022) and the proportion **who do not read print books at all has significantly increased** from 25% in 2019 to 35% in 2022. Even though this cohort's overall reading has decreased since 2019, they are still the most likely to read print books on a daily basis (32% compared to 10% of those aged 15–34, 12% of those aged 34–49 and 21% of those aged 50–64).
- The most popular reading format is **novels or short stories**, with almost half of Australians reading this type of text in 2022 (46%). While **women** are significantly more likely to read novels and short stories (55% compared to 37% of men), **men** are more likely to read graphic novels and comics (17% compared to 11% of women). Respondents with an **income below \$40,000** are the least likely to read for pleasure (61% compared to 73% of those earning \$100,000 or more).

- **Australians are increasingly using digital formats to consume literature.** Of those who read, three in five Australians **read ebooks** (60% up from 57% in 2019). A third of Australians **listen to audiobooks** (34% up from 31% in 2019); and half of those who read used audiobooks (49% of readers, an increase from 43% in 2019). However, it is likely Australians use this format on an occasional, rather than regular, basis as monthly or less regular consumption has increased (26% from 18% in 2019).

6. Creative participation

Being creative is a defining characteristic of humanity, enabling us to reimagine the world around us. Almost half of Australians create art. Australians make art in a variety of ways including by making visual arts and craft; creating music, theatre and dance; writing creatively; or participating in local community arts, such as a choir or theatre. Almost half of Australians recognise the positive benefits of engaging with creative activities and experiences on our wellbeing during COVID-19 lockdowns.

- **Almost half of Australians create art, including playing an instrument, writing creatively and dancing** (44%). This includes those who create art to engage with their own cultural background, language group or community and is consistent with findings from 2019 (45%).
- A quarter of Australians create **visual arts and craft** (24%), one in six Australians make **music** (17%), one in six Australians, produce **creative writing**, such as writing poetry, novels and short stories (14%), 9% of Australians **dance** and 6% of Australians creatively participate in **theatre**. In addition, more than one in seven Australians participate in **community arts**, including community choir or community theatre (15%), and one in ten Australians are involved in **community arts and cultural development (CACD)** (9%). In 2022, 3.7 million Australians, or 18% of the population, **created art to engage with their cultural background or community**.

- **First Nations respondents (73%), CALD respondents (60%), gender diverse respondents (84%) and respondents with disability (51%) are most likely to create art.** Younger Australians aged 15–24 are the most likely of all the age groups to creatively participate, with two thirds producing some form of art in the past 12 months (68%).
- **Australians recognise the positive impacts of arts and creativity on our wellbeing during COVID-19 lockdowns.** While learning new creative skills, such as knitting and painting, helped Australians rediscover the joy of an artistic activity, it also provided a sense of accomplishment. Nearly half of Australians believe **creative activities and experiences helped with their mental health or wellbeing during the pandemic** (48%).

7. Digital engagement with the arts

Australians are increasingly engaging with the arts online. Australians are using online and digital technologies and platforms to share, connect, create and experience arts and culture. Australians value the flexibility of digitally engaging with arts and culture, but many note they miss the excitement of attending in person events.

- In 2022, more Australians engaged with the arts online or through digital platforms, compared to before the pandemic (88% up from 82% in 2019). Among other things, Australians engage with the arts digitally to **listen to streamed music (75%), watch live or recorded performances, or view virtual exhibits and museums (41%)** and to **follow, interact with or research artists or art communities (33%)**.
- **Australians value the flexibility of accessing arts and creativity through digital avenues,** enabling a more flexible way to engage with the arts through in person experiences and providing access to a range of creative experiences that wouldn't otherwise be available. Over half of Australians aged 15 and over **like the flexibility of having an online option (53%),** feeling that **online platforms are a great way to sell art/artistic content (51%)** and that they **can access a range of creative experiences and activities that they wouldn't otherwise experience (51%)**.
- **However, a large proportion of Australians miss the atmosphere of in person events.** Three in five Australians agree they **miss the atmosphere of a live event/exhibition/experience when viewing online (60%),** and a third **don't believe overall it's better value to attend experiences and activities online (33%)**.
- **Younger Australians are highly engaged with the arts through online means, with nine in ten younger Australians (aged 15–24) using digital platforms to experience, connect, share and create art (91%).** While Generation Z are highly engaged with watching live and recorded arts experiences online, almost two thirds **miss the atmosphere of a live arts events (63%),** illustrating the importance of providing arts experiences that cater to all audiences.
- Nearly one in three Australians, or 6.3 million Australians aged 15 and over, **use digital platforms to express themselves,** including to create videos, music or songs, digital illustrations and podcasts (31%). **Younger Australians** are the most likely to use **digital platforms to create art,** with three in five of those aged 15–24 using digital platforms to create videos, image galleries, memes and music or songs (62%).



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