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**Discussion Paper**

**Arts and Cultural Heritage  
in Australia -  
Key issues for an  
information development  
Plan**

**2006**



New  
Issue

**Discussion Paper**

**Arts and Cultural  
Heritage in  
Australia -**

**Key Issues for an Information  
Development Plan**

**2006**

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# **ARTS AND CULTURAL HERITAGE IN AUSTRALIA:**

KEY ISSUES FOR AN INFORMATION DEVELOPMENT PLAN

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# **ARTS AND CULTURAL HERITAGE IN AUSTRALIA: KEY ISSUES FOR AN INFORMATION DEVELOPMENT PLAN**

## **INTRODUCTION**

The Australian Bureau of Statistics (ABS) produces Information Development Plans (IDPs) to improve statistics in a particular field or for a particular subgroup of the population (e.g. health, crime and justice, education and training, rural and regional statistics, children and youth). An arts and cultural heritage IDP is being developed by the ABS' National Centre for Culture and Recreation Statistics (NCCRS) in consultation with the Cultural Ministers Council Statistics Working Group (CMCSWG). The plan will provide a basis for decision making about priority statistical information and research required to inform government policy in the area of arts and cultural heritage. The ABS is not the sole provider of data and other agencies have a significant role to play in meeting data needs. It is expected that this plan will support the coordination of data across key agencies.

As part of the development of the arts and cultural heritage IDP, this key issues paper has been prepared to provide background information about likely data needs and data sources, as the basis for consultation on priorities. The scope of this paper is broad as it seeks to map the wide range of likely data needs that could support informed decision making and community debate across the arts and cultural field, including cultural, social, economic, and quality of life issues.

The paper outlines the current key policy issues, existing data sources, and gives some indication of whether data are available to address the key policy issues. Some working definitions have been included but further work will be required to develop definitions that can be used as a basis for empirical data collection (e.g. to define 'professional artist', 'public good', 'innovation'). Potentially useful research questions have been linked to the key issues to enable an assessment of data availability, and to prompt further discussion.

### **Feedback questionnaire**

The questionnaire that accompanies this paper seeks feedback on the relative importance of the key issues, data sources, research questions and other data needs of users. This will be used to review and prioritise data needs before conducting further analyses. Once the priority needs are identified, more detailed work is likely to be needed to assess the feasibility of any potential new or revised data collection activity (including work on methodology and definitions) but this is outside the scope of this paper. The questionnaire is provided in Appendix 1.

The findings from the feedback and further analyses will later be included in the IDP draft. They may confirm that existing data collections continue to be of high priority or it may be found that some collections are less important relative to identified data gaps and consideration should be given to resourcing new areas of research. The IDP will also be subject to regular review, to include new data sources and emerging or shifting data needs and policy issues.



## **Chapter outline**

Chapter 1 discusses what we mean by arts and cultural heritage, clarifies the boundaries of the subject area, and provides working definitions.

Chapter 2 outlines central data needs (i.e. key characteristics) and identifies key policy issues. It links potentially useful research questions to the key issues under five broad categories: cultural, social, quality of life for persons involved in the arts, quality of life for consumers, and economic.

Chapter 3 identifies existing relevant data sources.

Chapter 4 discusses data gaps by examining key issues that have minimal or no relevant data. Some priority data gaps are suggested to prompt further discussion through the feedback questionnaire.

## CHAPTER 1 - WHAT IS THE SCOPE OF THIS PAPER AND THE IDP?

This chapter discusses the broad concept of 'culture' and explains how the term is used in this paper. It also provides working definitions for arts and cultural heritage activities, and describes persons and organisations involved in the arts and cultural heritage.

### What is culture?

Arts and cultural heritage are two areas of activity with strong linkages to the wider concept of 'culture'. As noted by sociologist Raymond Williams, defining culture is a difficult task:

Culture is one of the two or three most complicated words in the English language. This is so partly because of its intricate historical development, in several European languages, but mainly because it has now come to be used for important concepts in several distinct intellectual disciplines and in several distinct and incompatible systems of thought.<sup>1</sup>

The term 'culture' has been and will continue to be used in a variety of ways, with different meanings. The intent of this discussion is not to provide any definitive view about what is meant by culture, but simply to provide a meaning that can be used in the context of our discussion of the arts and cultural heritage.

Williams provides two particularly useful definitions of culture:

1. the independent noun, whether used generally or specifically, which indicates a particular way of life, whether of a people, a period, a group, or humanity in general; and
2. the independent and abstract noun which describes the works and practices of intellectual and especially artistic activity. This seems often now the most widespread use: culture is music, literature, painting and sculpture, theatre and film.<sup>2</sup>

For the purpose of this paper we propose to take a broad view of culture and use the term to describe a particular way of life, as in Williams' first definition. To simplify matters, we will use 'the arts' to mean artistic activity, as in the second definition. (There is no intention, however, to refute that the arts may be equally described as culture in other contexts.) By adopting this approach, it is possible to formulate research questions that assess the relationship between arts and culture, and/or between cultural heritage and culture.

The concept of culture denoting 'a particular way of life' is an important and recurring theme in policies promoting the arts and cultural heritage. These policies often draw on related concepts such as cultural identity and multiculturalism. Hence it is important to understand what we mean by 'way of life' and how this applies to individuals or communities, when numerous ways of life are possible. According to the UNESCO Universal Declaration on Cultural Diversity, "culture should be regarded as the set of distinctive spiritual, material, intellectual and emotional features of

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<sup>1</sup> Raymond Williams 1988, *Keywords, A Vocabulary of Culture and Society*, p. 87.

<sup>2</sup> *Ibid.*

society or a social group, and that it encompasses, in addition to art and literature, lifestyles, ways of living together, value systems, traditions and beliefs.”<sup>3</sup>

Williams' first definition of culture and UNESCO's focus on ways of life, values, shared identity and the symbols that represent a culture have been used to provide a definition of 'culture' for this paper:

Culture is a broad term that is used to describe particular ways of life, whether for a group of people or a period of time. A way of life can be known as a 'culture' if there are collectively understood representations of customs, traditions, beliefs or values shared by a group or prevailing during a period.

Culture could relate to a group as small as a local sporting club or as large as a nation, or a group of nations (as in 'European' or 'Asian' culture). Similarly, a 'period' could apply to the culture of a century (e.g. the 20th century) or to the culture of a decade (e.g. the 1960's). Most policy in this area discusses culture in relation to either 'Australian' culture, Indigenous culture, and/or diverse ethnic cultures (multi-culturalism). Individuals may feel an affinity with one or more cultural groups, and may have multiple cultural identities.

Culture may be symbolised or communicated in many ways (e.g. song, dance, art, philosophy, religion, fashion, food, work patterns, family relationships, relationship to land or water, relationship to animals). The various outward expressions of culture that are readily identifiable (such as art, fashion or food) are elements of a way of life that may form part of a 'cultural identity'. These elements make a culture recognisable to people within the group as well as those outside it.

The working definition of culture allows us to view the arts as one of the important symbols or representations of cultural identity. The arts can provide a way of communicating or sharing cultural values or traditions, thus establishing the link between arts and culture. The arts may also be a vehicle for challenging traditional culture, perhaps contributing to the shaping of a new shared way of life and evolving culture.

### **What is the scope of arts and cultural heritage?**

The title of this paper is intentionally bounded by two principal areas, arts and cultural heritage. These two areas are related to distinct government policy and programs. The Australian Culture and Leisure Classifications (ALCL) provide useful definitions in relation to industry, occupation and products (goods and services), which can also be used as a basis to distinguish between arts activities and cultural heritage activities.<sup>4</sup>

The ALCL defines arts activities as “the creation, manufacturing and sale of goods and services relating to literature, radio, television, film, digital content, visual arts and crafts, design, music and performing arts.”<sup>5</sup> This practical activity-based

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<sup>3</sup> United Nations Educational, Scientific and Cultural Organisation (UNESCO) 2002, *Universal Declaration on Cultural Diversity*, viewed 25 January 2005, <<http://unesdoc.unesco.org/images/0012/001271/127160m.pdf>>.

<sup>4</sup> ABS 2001, *Australian Culture and Leisure Classifications*, cat. no. 4902.0, ABS, Canberra.

<sup>5</sup> *Ibid.*

definition groups activities that involve 'creativity' and 'artistic expression'. These include writing, drama, playing and recording music, music composition, dance, theatre, film, visual arts and crafts, design (including graphic and architectural design), and radio and television broadcasting. Arts activities include a vast array of creative and artistic expression, from amateur or hobby arts to professional and so called 'high' art. For example, manipulating digital family photos is an increasingly popular amateur or hobby arts activity, which is within the scope of this definition in addition to the highly sophisticated digital image processing undertaken for film production. The wider industry that supports these activities includes the distribution and retailing of arts products and services such as music distribution, cinemas, and video hire services. Arts industries discussed in this paper relate to the industries defined by the ACLC.

To define the scope of cultural heritage, we begin with a wider definition of 'heritage'. According to the ACLC, heritage activities are:

...the management of sites and collections which represent the natural or cultural environment of Australia and the rest of the world. The sites and collections have historic, aesthetic, scientific, environmental and social significance. 'Significance' may be of relevance on an international, national or sub-national basis (i.e. state/territory, or a local region or community).<sup>6</sup>

This definition refers to both cultural and natural heritage - the main difference being a central focus on either human activity or the conservation of the natural environment. The IDP will focus on cultural heritage only; therefore an examination of natural heritage sites and collections (e.g. nature parks and reserves, zoos and aquaria, botanic gardens) is beyond the scope of this paper.

Cultural heritage activities comprise the management of sites and collections which represent the cultural environment. This means the preservation of the objects, writings or other records that reflect ways of life of various cultural groups, including items of aesthetic, scientific or social significance. Within the ACLC definition of heritage, the activities most closely aligned with cultural heritage are those of museums, art museums, libraries and archives. These institutions are predominantly government funded and governed by policies that espouse their roles in preserving culture and in providing public access to information and education services about our culture.

## **Participation in the arts and cultural heritage**

This paper takes a broad view of participation in the arts and cultural heritage field and potentially includes all kinds of participation. However, a distinction is drawn between 'consumers' and 'persons involved' in the arts and cultural heritage (including 'creative participants').

By using the term '**consumers**', we do not mean to imply that any economic transaction is inherent. Consumers include people who attend cinemas, listen to music, read books, view public sculptures and visit museums and libraries, creating demand for products and services.

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<sup>6</sup> *Ibid.*

The definition of '**persons involved**' in the arts and cultural heritage is broad and includes: people with any kind of paid or unpaid work in arts industries and cultural heritage services; those doing paid or unpaid work in arts or cultural heritage occupations in other industries; and also 'creative participants'. So, for example, a paid administrative manager or ticket collector in a theatre are 'involved' in the arts, even though they are not themselves artists.

'**Creative participants**' include people who produce art works, music, film, books, and those who participate in performances, either professionally or for leisure. The focus of this form of participation is the use of 'creativity' and 'artistic expression'. In this paper, 'professional' and 'leisure' participation are dealt with separately as key policy issues for these groups are often different. Professional creative participants are broadly defined as creative participants who have a serious commitment to their arts practice and consider it a major aspect of their working life, regardless of their income or employment status.<sup>7,8</sup>

### **Services and businesses involved in the arts and cultural heritage**

Organisations involved in the arts and cultural heritage range from commercial businesses to not-for-profit and government subsidised services. In this paper, these organisations and services are defined as those included in the arts and cultural heritage industry classification of the Australian Culture and Leisure Classifications (ACLC). The main organisations and services are listed below, and more detail is available from the ACLC publication.<sup>9</sup>

**Cultural heritage organisations** include libraries, archives, museums, art museums and antique retailing and restoration.

**Arts organisations** include businesses or other services involved in: newspaper publishing and printing; book publishers and retailing; performing arts (e.g. music, dance, theatre) and performing arts venues; visual arts and crafts; commercial art galleries; commercial photography; architecture design, advertising design and graphic design; broadcasting, media and film production and distribution; cinemas; video hire services; electronic information services; arts education; and musical instrument retailing.

It is worth noting that the ACLC does not include government arts departments as part of the arts and cultural heritage industry, although government funded services such as museums and libraries are included. Government agencies such as arts departments are included in a separate industry called 'government', as they primarily administer government policies. Key issues and questions related to the role of government organisations are dealt with separately in this paper.

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<sup>7</sup> For more detail, see page 14 of David Throsby and Virginia Hollister 2003, *Don't give up your day job: an economic study of professional artists in Australia*, viewed 29 November 2005, <[http://www.ozco.gov.au/arts\\_resources/publications/dont\\_give\\_up\\_your\\_day\\_job\\_an\\_economic\\_study\\_of\\_professional\\_artists\\_in\\_australia](http://www.ozco.gov.au/arts_resources/publications/dont_give_up_your_day_job_an_economic_study_of_professional_artists_in_australia)>.

<sup>8</sup> The Australian Taxation Office also differentiates between 'professional' artists and arts participation for hobby or recreational pursuits in its taxation ruling *TR2005/1 Income tax: carrying on business as a professional artist*, viewed 16 January 2006, <<http://law.ato.gov.au/atolaw/view.htm?docid='TXR/TR20051/NAT/ATO/00001'>>.

<sup>9</sup> ABS 2001, *op. cit.*

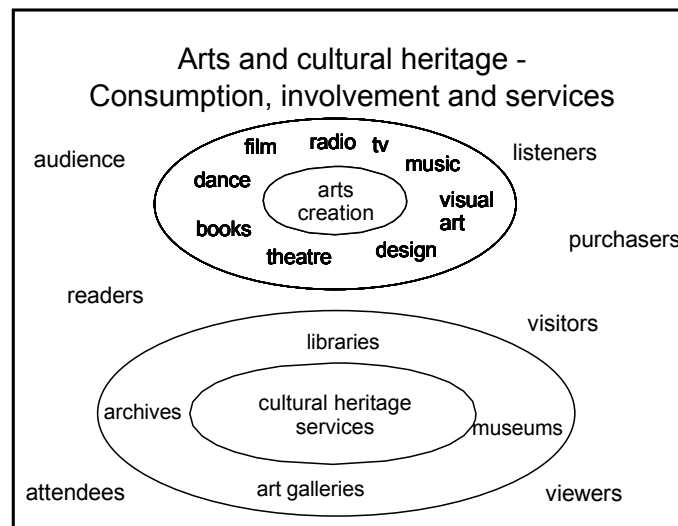
## Summary of key definitions

When we refer to 'culture' in this paper, we mean a way of life particular to a group of people or a period of time, which is associated with a cultural identity and shared traditions, beliefs and values, and which may be represented in various ways including (but not limited to) art forms. To avoid confusion, a distinction has been made between the term culture and activities in the arts.

In this paper, 'the arts' refers to a sphere of artistic activities (e.g. literature, radio and television, film, performing arts, visual arts and craft, design, music). The output of these activities, such as stories, paintings, music, performances and films, may be referred to as 'arts products'. With regard to 'cultural heritage', we mean the preservation of culture through the collection and management of objects and ideas that represent ways of life of particular groups of people. The sphere of cultural heritage activities includes activities generally associated with museums, art museums, libraries and archives.

'Persons involved' in the arts and cultural heritage include: 'creative participants' as well as people who are not artists but who work or volunteer in the arts or cultural heritage services. 'Creative participants' refer to artists, musicians, writers, performers and others who use their creativity and artistic expression, either in a professional or hobby capacity. For the purposes of this paper, 'consumers' are those who attend, view, listen to, or otherwise consume arts or cultural heritage products, and create demand for these products.

The following diagram shows the two spheres of activity: arts and cultural heritage. Creative participants are involved in 'arts creation', the core of arts activity. Their products include dance, radio and visual art which may be purchased, viewed, read, etc. Cultural heritage services include collecting institutions.



In this paper, organisations involved in the arts or cultural heritage are defined as those included in the arts and cultural heritage divisions of the industry classification from the ABS Australian Culture and Leisure Classifications.

These definitions are used for the following discussion of key issues in the areas of arts and cultural heritage.

## **CHAPTER 2 – THE KEY ISSUES**

The key issues outlined in this chapter were identified following a policy and literature review that focussed on Australian arts and cultural heritage policies across all levels of government, and also articles covering community debate. This review and consultation with members of the Cultural Ministers Council Statistics Working Group (CMCSWG) were used to determine the underlying questions that would inform, or have already informed, decision making in this area.

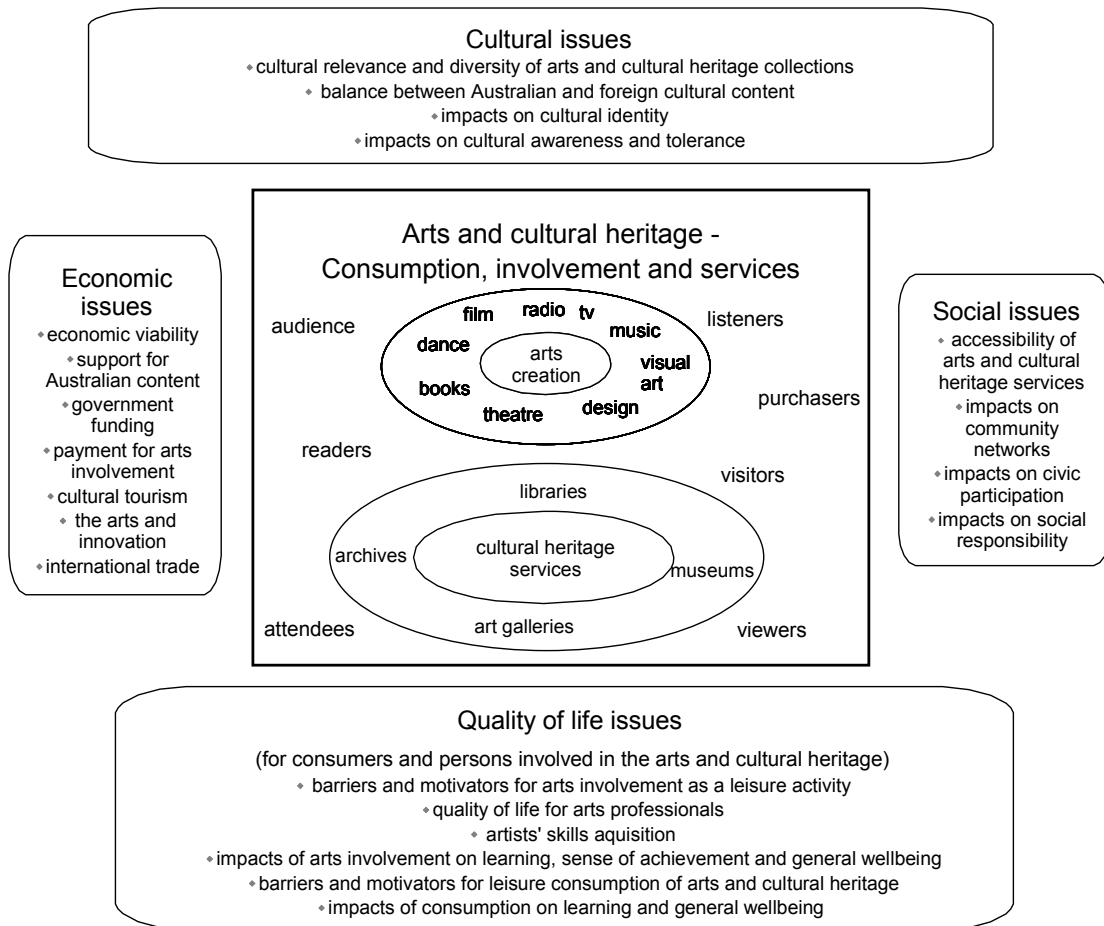
Although it is clearly important to address the issues of particular population subgroups (e.g. Indigenous people, children, youth), regions, and types of activity (e.g. performing arts, visual arts and craft, film and television production), this paper takes a broad view of key issues. The feedback questionnaire that accompanies the paper will be used to identify research priorities and the associated data needs, including those for population subgroups, regions, industries and activities. It is intended that these priorities will be regularly assessed to ensure that the research agenda continues to meet users' needs, where possible.

### **Categorising key policy issues**

Arts and cultural heritage policies aim to deliver cultural, social, quality of life and economic benefits. These potential benefits are not mutually exclusive, for example, policies addressing 'cultural tourism' - although categorised as an economic issue in this paper – may also increase awareness of cultural traditions, strengthen social cohesion, enhance quality of life, and contribute to local industry and employment outcomes. While noting their non-exclusivity, the following broad categories have been used to group issues as a starting point for discussion:

- Cultural
- Social
- Quality of life for persons involved in the arts
- Quality of life for consumers
- Economic

These categories are summarised in the diagram below and are briefly discussed in the remainder of this chapter. (Note: arts and cultural heritage activities form the core of the diagram, but the diagram does not intend to show cause and effect relationships.)



## Key characteristics of demand, involvement and services

An understanding of demand for activities, existing services and persons' involvement in the arts and cultural heritage is central to any discussion of cultural, social, quality of life and economic issues. Data describing these key characteristics are often a pre-requisite for research and analysis across many of the policy areas of interest; hence these key characteristics have been separately identified:

### A. Demand for arts and cultural heritage services - Individuals

What are the key characteristics of:

- A1 Australian residents who consume arts and cultural heritage services and those who don't consume these services
- A2 Visitors to Australia who consume Australian arts and cultural heritage services during their visit
- A3 People who consume Australian arts and cultural heritage services from a location outside Australia (e.g. on-line, reading Australian books, seeing Australian films, Australian exhibitions or collections of Australian cultural heritage overseas)

and how are these characteristics changing over time?



## B. Involvement in arts and cultural heritage services - Individuals

What are the key characteristics of Australian residents who:

- B1 are involved in arts or cultural heritage (and those who aren't)
- B2 are employed in arts or cultural heritage industries or occupations (and those who aren't)
- B3 are creative participants (and those who aren't)
- B4 are professional creative participants<sup>10</sup> in the arts (as distinct from leisure creative participants)

and how are these characteristics changing over time?

## C. Arts and cultural heritage services – Organisations or businesses<sup>11</sup>

What are the key characteristics of:

- C1 Australian arts and cultural heritage industries
- C2 Australian organisations undertaking arts and cultural heritage activities (regardless of industry)
- C3 all Australian industries (for comparative purposes)
- C4 amateur arts and cultural heritage organisations

and how are these characteristics changing over time?

A preliminary data needs analysis has been undertaken to identify the type of core data required for each research question listed in this paper, and to determine whether these data are available. Data sources and data gaps are discussed in Chapters 3 and 4.

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<sup>10</sup> See page 6 for definition and reference.

<sup>11</sup> As defined in the *Australian Culture and Leisure Classification*, ABS 2001, *op. cit.*

## 1. CULTURAL POLICY ISSUES

Governments across Australia, at all levels, have a range of legislation, policies and programs to support and protect Australian arts and cultural heritage activity and industry development. They aim to ensure that Australians have the opportunity to maintain or express their own cultural identities. For instance, the Australian Government election policy stated that “all Australians should be able to access and participate in Australian artistic and cultural endeavour, regardless of where they live.”<sup>12</sup> Government funding supports the promotion of Indigenous art, and also programs such as *Visions of Australia* and *New Australian Stories* which reflect our diverse identity.<sup>13</sup> Many local, state and territory arts policies also seek to support cultural diversity and expressions of identity

This section outlines the following key cultural issues:

- 1.1 Cultural relevance and diversity of arts and cultural heritage collections
- 1.2 Balance between Australian and foreign cultural content
- 1.3 Impacts of arts and cultural heritage on cultural identity
- 1.4 Impacts of arts and cultural heritage on cultural awareness and tolerance

Research questions have been linked to these key cultural issues to prompt further discussion and feedback on their relevance and relative priority (please see the feedback questionnaire).

However it must be noted that many of these research questions are inherently difficult to answer as they cover concepts that cannot be easily measured such as cultural relevance, cultural identity and cultural awareness. Some of the key issues and questions posed here may address general policy aims that cannot be easily assessed empirically. In putting forward these key issues and questions for consideration, it is the intention of the ABS to gauge their relative priority and, for higher priority issues, to provide guidance about the feasibility of their research (see also Chapter 4).

### 1.1 Cultural relevance and diversity of arts and cultural heritage collections

According to the Department of Immigration, Multicultural and Indigenous Affairs’ (DIMIA’s) policy *Multicultural Australia: United in Diversity*,

Australian multiculturalism is the philosophy, underlying Government policy and programs, that recognises, accepts, respects and celebrates our cultural diversity. It embraces the heritage of Indigenous Australians, early European settlement, our Australian-grown customs and those of the diverse range of migrants now coming to this country.

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<sup>12</sup> The Howard Government Election 2004 Policy, *Strengthening Australian Arts*, Canberra.

<sup>13</sup> Information on *Visions of Australia* and the *Indigenous Art Centres Strategy and Action Plan* is available from the Department of Communications, Information Technology and the Arts’ website at <[http://www.dcita.gov.au/arts/arts/visions\\_of\\_australia](http://www.dcita.gov.au/arts/arts/visions_of_australia)> and <[http://www.dcita.gov.au/\\_\\_data/assets/pdf\\_file/14694/Indigenous\\_Art\\_Centres\\_-\\_Indigenous\\_Art\\_Centres\\_Strategy\\_and\\_Action\\_Plan.pdf](http://www.dcita.gov.au/__data/assets/pdf_file/14694/Indigenous_Art_Centres_-_Indigenous_Art_Centres_Strategy_and_Action_Plan.pdf)>. Information on *New Australian Stories* is available from the Australia Council’s website at <[www.ozco.gov.au](http://www.ozco.gov.au)>.

...subject to the law, all Australians have the right to express their own culture and beliefs and have a reciprocal obligation to respect the right of others to do the same.<sup>14</sup>

This concept is reflected in arts and cultural heritage policies. For example, the *Strategy and Action Plan for Indigenous Art Centres* states, "Strong art centres play a role in maintaining and strengthening cultural values – operating as meeting places and offering opportunities for training, education and enterprise."<sup>15</sup> Research may be needed to gauge the effectiveness of these policies by exploring the cultural relevance and diversity of heritage collections and the arts (see also 1.2). However, there is no absolute measure of cultural relevance. Its assessment in relation to heritage collections and the arts is dependent on the policy and programs of particular services, which makes research difficult.

(The research questions have been separately identified for cultural heritage services and the arts as, in some cases, the data needs are different.)

### **Cultural heritage**

- 1.101 What types of cultural content are included in the collections of Australia's heritage institutions?
- 1.102 Does the cultural content of Australian heritage collections reflect the cultural diversity of Australian society, including Indigenous culture and various ethnic community cultures?
- 1.103 What proportion of cultural content included in cultural heritage collections relates to contemporary culture or a projection of the future society, compared with historical material? Does the contemporary cultural content of Australian heritage collections reflect aspects of Australian contemporary society that will be important to preserve for future generations?

### **Arts**

- 1.104 To what extent do people contribute to the maintenance of cultural traditions and/or the development or interpretation of culture through their involvement in arts (or is it mainly done for recreation, entertainment or business reasons which are less concerned with a cultural dimension)?
- 1.105 Does the level of participation in the arts represent our diverse community (including Indigenous people and different ethnic or cultural groups)?
- 1.106 Does Australian arts output (with a cultural content) adequately represent the cultural diversity of Australia, including Indigenous culture?

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<sup>14</sup> DIMIA 2003, *Multicultural Australia: United in Diversity*, viewed 1 February 2005, <<http://www.dimia.gov.au/multicultural/australian/index.htm>>.

<sup>15</sup> The *Indigenous Art Centres Strategy and Action Plan* is available at <[http://www.dcita.gov.au/\\_\\_data/assets/pdf\\_file/14694/Indigenous\\_Art\\_Centres\\_-\\_Indigenous\\_Art\\_Centres\\_Strategy\\_and\\_Action\\_Plan.pdf](http://www.dcita.gov.au/__data/assets/pdf_file/14694/Indigenous_Art_Centres_-_Indigenous_Art_Centres_Strategy_and_Action_Plan.pdf)>.

## 1.2 Balance between Australian and foreign cultural content

The International Symposium on Cultural Statistics described some of the impacts of globalisation on cultural diversity:

...in our contemporary world lifestyles, values, traditions and beliefs are mostly embodied in films, television programs, recordings, printed matter and other cultural goods that are expensive to produce, but not to reproduce and distribute. It is mainly through these types of cultural goods that people learn about the rest of the world. Through them they also learn what they need to know about their own culture, provided of course their own society produces these goods. If their society does not produce them, experience reveals that people are then laid open almost exclusively to the cultural goods of other cultures, and that the usual paths by which they would normally develop and transmit their lifestyles, values, traditions and beliefs may well be insufficient to keep their own culture alive. The smaller and less affluent a culture is, the bigger its risks of being unable to produce industrially the cultural goods it needs to develop and communicate with others. When this is the case, the response to what is perceived as an invasion can lead to conflict.<sup>16</sup>

Debate within the arts and cultural heritage field and the wider community reflects these concerns. It questions the balance between Australian content (albeit diverse Australian content) and 'foreign' content, particularly in film, television and radio. For instance, government regulation<sup>17</sup> of broadcasting services sets quotas for Australian content. Research may be required to identify the type of content and level of access that is currently available.

As with other cultural issues discussed in this section, some of these questions are difficult to address empirically. For example, 'foreign content' may be difficult to define and measure quantitatively, and the question of 'the right balance' between Australian and foreign content rests on policy decisions and community opinions.

- 1.201 To what extent are Australians consuming Australian arts compared with overseas-sourced arts? How do Australians access foreign arts content?
- 1.202 What proportion of cultural heritage collections include non-Australian content or represent overseas cultures?
- 1.203 Do Australians have reasonable access to Australian arts content?
- 1.204 What level of access to Australian arts and cultural heritage content do Australians want, compared with access to foreign content?
- 1.205 To what extent can people in ethnic groups in Australia gain reasonable access to arts and cultural heritage services relevant to their cultural background?

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<sup>16</sup> UNESCO Institute for Statistics 2003, *Proceedings of the International Symposium on Culture Statistics, 21-23 October 2002*, Montreal, viewed 25 January 2005, <[http://www.colloque2002symposium.gouv.qc.ca/h4v\\_page9\\_an.htm](http://www.colloque2002symposium.gouv.qc.ca/h4v_page9_an.htm)>.

<sup>17</sup> See the *Broadcasting Services Act 1992* available at <<http://www.comlaw.gov.au/comlaw/Legislation/ActCompilation1.nsf/current/bytitle/7F3AC509ACB712F6CA25702800133A3A?OpenDocument&mostrecent=1>>.

### 1.3 Impacts of arts and cultural heritage on cultural identity

The policy and literature in this field indicates that the arts and cultural heritage are important to our sense of identity. For instance, the charter of the Australian Broadcasting Corporation (ABC) aims to provide: "broadcasting programs that contribute to a sense of national identity and inform and entertain, and reflect the cultural diversity of, the Australian community".<sup>18</sup> It seems there is a desirable collective cultural identity – 'an Australian identity' – and also a multiplicity of cultural identities.

If research is required to explore the role of arts and cultural heritage in contributing to cultural identity, national identity and cultural diversity, the complexity of these concepts would require further work to develop definitions, methodology and assess the feasibility of research. It must be acknowledged that the relativity and subjectivity of the concept of cultural identity does not translate easily to data collection. Research in this area would most likely call for qualitative methods in the context of particular programs (e.g. evaluations of the impacts of arts programs on young people's developing sense of identity).

- 1.301 Do people become involved in or consume arts and cultural heritage services in order to develop or maintain affinity with a particular cultural group? Does this contribute to a healthy sense of belonging?
- 1.302 What impact does involvement in or consumption of arts and cultural heritage have on the development and maintenance of cultural group networks?
- 1.303 What do Australians think an Australian cultural identity is, and how important is this to Australians? To what extent do Australians belong to multiple cultural groups with multiple cultural identities, and how important are these? How do these Australian and other multiple cultural identities relate to arts and cultural heritage involvement or consumption?
- 1.304 Of all the things that contribute to cultural identities, how important are involvement in and/or consumption of arts and cultural heritage services? How do Australians come to understand or share their cultural identities (i.e. via television, radio, going to live performances, reading, neighbours, friends, family history, going to a museum)?

### 1.4 Impacts of arts and cultural heritage on cultural awareness and tolerance

According to UNESCO and DIMIA, respect for cultural diversity, tolerance, dialogue and cooperation are an important way of achieving community harmony and international peace and security.<sup>19,20</sup> Many arts and cultural heritage policies and programs aim to promote understanding and acceptance of diversity. For example, the Western Australian policy, *Creative Connections*, describes arts education as a way of reconciling apparent differences:

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<sup>18</sup> Australian Broadcasting Corporation (ABC) 2005, *Fact Sheet: The ABC's Charter, Independence and Accountability*, viewed 11 November 2005, <[http://www.abc.net.au/corp/pubs/documents/Charter\\_Independence.pdf](http://www.abc.net.au/corp/pubs/documents/Charter_Independence.pdf)>.

<sup>19</sup> UNESCO 2002, *op. cit.*

<sup>20</sup> DIMIA 2003, *op. cit.*

In arts learning young people become adept at dealing with high levels of ambivalence and uncertainty, and they become accustomed to discovering internal coherence among conflicting experiences. Since young people live in worlds that present them with different beliefs, moralities, and cultures, schools should be the place where learning fosters the reconciliation of apparent differences.<sup>21</sup>

Research on cultural awareness and tolerance requires an assessment of people's perceptions or understandings about other cultural traditions or ways of life that are different from their own cultural identity. This could utilise methods that test or explore people's understandings and assess their attitudes to other cultures. It may be useful to evaluate audience or consumer responses to particular arts or cultural heritage services, in order to gauge whether, and how, these may impact on people's perceptions about other cultures. Given the wide ranging educative role of many government policies in this area, this may be an important area of research.

Further, some arts may provide a means for challenging 'traditional' cultures by questioning prevailing culture and/or shaping new culture. Some community debate centres on the extent to which governments support 'traditional' arts practice compared with 'new' or 'innovative' arts practice (which may challenge traditions).

- 1.401 How much arts or cultural heritage content deals with or expresses cultural issues (such as diverse religious or moral beliefs and values, diverse ways of life of ethnic cultures or nation-state cultures)?
- 1.402 What do people learn about culture from their involvement in or consumption of arts or cultural heritage services?
- 1.403 What impact does involvement in or consumption of arts and cultural heritage services have on Indigenous reconciliation objectives?
- 1.404 Do people develop more tolerant attitudes to different cultures within society through their involvement in or consumption of arts or cultural heritage services?
- 1.405 To what extent do the arts and cultural heritage facilitate the maintenance of 'traditional' cultural identities, in addition to shaping new or evolving culture?

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<sup>21</sup> Department of Culture and the Arts and Department of Education and Training 2004, *Creative Connections: An Arts in Education Partnership Framework 2005–2007*, viewed 11 November 2005, <<http://www.dca.wa.gov.au/artsigned.asp>>.

## 2. SOCIAL POLICY ISSUES

The arts and cultural heritage services may have a significant impact on Australian society, from the national to the local level. Many arts and cultural heritage policies assert that social relationships, community networks and civic participation can be strengthened through involvement in arts and cultural heritage activities, and individual and societal attitudes can be influenced by exposure to alternative views expressed through the arts.

This section outlines the following key social issues and lists research questions that have policy relevance:

- 2.1 Accessibility of arts and cultural heritage services
- 2.2 Impacts of arts and cultural heritage services on community networks
- 2.3 Impacts of arts and cultural heritage on civic participation
- 2.4 Impacts of arts and cultural heritage on social responsibility

### 2.1 Accessibility of arts and cultural heritage services

According to Article 27 of the United Nations Declaration of Human Rights, "Everyone has the right freely to participate in the cultural life of the community, to enjoy the arts and to share in scientific advancement and its benefits."<sup>22</sup>

Governments seek to ensure that people are able to exercise this right, to participate in the arts and access information about their cultural heritage, if they choose to do so. This calls for information on who participates and who doesn't, and the reasons why. As previously noted, increasing access and participation in areas outside the capital cities is a common policy concern.

Similar questions can be asked for the arts and cultural heritage, but these have been separately identified so that they could be prioritised independently.

#### Cultural heritage

- 2.101 How accessible are cultural heritage services in Australia? Who has access and how do they access these services? What level of access is available in regional, rural and remote areas?
- 2.102 Do the characteristics of consumers of cultural heritage services represent our diverse community? How often do they access services and how do they access them (e.g. on-line, visits)?
- 2.103 What are the characteristics of persons who do not access cultural heritage services (even though they have the opportunity to)? Why don't they? What would encourage their attendance? Are they aware of the services, and are they considered relevant or of interest? Are there different patterns of consumption for different population groups, such as Indigenous Australians, ethnic groups, older people or different family types?

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<sup>22</sup> UNESCO 1948, Universal Declaration of Human Rights, viewed 12 October 2005, <[http://portal.unesco.org/education/en/file\\_download.php/197f0d6a2a393aeb56cb9a4f0005cf4Universal+Declaration+of+Human+Rights.htm](http://portal.unesco.org/education/en/file_download.php/197f0d6a2a393aeb56cb9a4f0005cf4Universal+Declaration+of+Human+Rights.htm)>.

## Arts

- 2.104 How accessible are opportunities to participate in or consume the arts in Australia? Who has access? What levels of access are available in regions?
- 2.105 In what ways does consumption of the arts and/or creative arts participation vary for different people across Australian regions and for different population groups? Are there different patterns of consumption for different population groups, such as Indigenous or ethnic groups?
- 2.106 What are the characteristics of persons who choose not to participate in or consume arts services (even though they have the opportunity to)? Why don't they? What "arts" are they aware of, and are they considered relevant or of interest? Are there different patterns of participation and consumption for different population groups, such as Indigenous Australians, ethnic groups, older people or different family types?

## 2.2 Impacts of arts and cultural heritage services on community networks

Many arts and cultural heritage policies and programs aim to bring people together, enhancing community networks and fostering 'social capital'. The concept of social capital is gaining greater attention, for example the ABS recently produced an information paper on its measurement,<sup>23</sup> and in 2000 the Department of Health and Ageing released a strategic paper linking social factors to mental health.<sup>24</sup> Factors such as a "strong cultural identity and ethnic pride" were found to protect against mental illness, while outcomes - including a "sense of connectedness" and "attachment to and networks within the community" – could be strengthened through involvement in activities such as community arts programs.

As a starting point for research, information on the size and nature of community arts and cultural heritage networks and the benefits of participation would be useful. A regional focus may also be important when considering these research questions. It's likely that inner city, outer metropolitan, rural and remote communities have varying existing social capital, and the different regional levels of access and participation in arts and cultural heritage will impact unevenly on these communities.

- 2.201 Do people become involved in cultural heritage or arts in order to meet people or be with other people?
- 2.202 What kinds of arts or cultural heritage activities provide positive social interactions?
- 2.203 Are longer term friendships or social relationships formed from participation in creative arts (other than paid work) or volunteer involvement in cultural heritage activities?
- 2.204 What impact does involvement in arts and cultural heritage have on development and maintenance of community networks and community support?

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<sup>23</sup> ABS 2004, *Information Paper: Measuring Social Capital – An Australian Framework and Indicators*, cat. no. 1378.0, ABS, Canberra.

<sup>24</sup> Department of Health and Ageing 2000, *Promotion, Prevention and Early Intervention for Mental Health: A Monograph (Monograph 2000)*, viewed 11 November 2005, <<http://www.health.gov.au/internet/wcms/Publishing.nsf/Content/mental-pubs/>>.



- 2.205 What impact does consumption of arts and cultural heritage services have on development and maintenance of community networks and community support?
- 2.206 Of all the things that contribute to social capital (i.e. social networks which facilitate cooperation within or among groups, such that this cooperation is a resource available within communities), how important is involvement in and/or consumption of arts and heritage services?

### 2.3 Impacts of arts and cultural heritage on civic participation

Arts and cultural heritage services provide information about Australian society, history and systems of government that better equips people to participate in the democratic process. The Chairman of the ABC recently described the broadcaster's role in civic participation:

If we believe that information helps makes citizenship more meaningful, that by providing debate we add to civic engagement, then this must continue. Information will never make a vote more powerful, but it will make it more meaningful. And while no one can ever enforce civic participation, we can at least assure ourselves of its possibility by providing information on our dominant cultural forms. Public broadcasting is still the best conceivable means by which we make these efforts, if not these guarantees. Just as we take the free expression of opposing views as a sign that democracy is working, we take the existence of a questioning media as proof of democracy's great success. And this is the appropriate role for a good public broadcaster, mainly because it is not necessarily the way to make popular programming.<sup>25</sup>

Research questions about civic participation examine arts and cultural heritage content, particularly the expression of alternative views and the issue of 'balance'. In addition, foreign affairs policies acknowledge the need for Australia to engage in cultural exchange with other countries, as one way of participating in a global political environment. The role of arts and cultural heritage in global 'civic participation' is also potentially a subject for research.

As with many of the cultural research questions, several of the following questions are inherently difficult to answer. Concepts such as civic participation cannot be easily measured, and the question of 'balance' is a matter of government and community opinion.

- 2.301 How much arts or cultural heritage content deals with or reflects on political or civic issues (such as political history, civic decision making, government or international affairs)? Is this changing over time? If so, why?
- 2.302 What impacts do arts and heritage services have on community awareness and debate about current political or civic issues?
- 2.303 To what extent are multiple points of view about social, political and economic issues put forward to the community through the arts and cultural heritage services? Are these views balanced and fairly represented? (This issue predominantly applies to mass media.)

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<sup>25</sup> Australian Broadcasting Corporation (ABC) 2004, *Breaking Through*, An address by ABC Chairman Donald McDonald AO to the Australian Industry Group, 9 August 2004, Parliament House, Canberra.

- 2.304 What are the benefits of international exchange of arts and cultural heritage?

## **2.4 Impacts of arts and cultural heritage on social responsibility**

The issue of social responsibility within the arts and cultural heritage is a difficult one, raising a myriad of questions. It requires an exploration of the ways in which people engage with social issues through the arts, and the ways in which this may enhance the development of constructive or destructive social attitudes. For example, does violence on television promote violent behaviour?

Often arts and cultural heritage content challenges prevailing values and this freedom of artistic expression may, or may not, be supported. Content that is deemed overtly offensive or abusive toward particular communities, or is seen to have the potential to invoke racial prejudice or incite hatred, is not supported by government and is regulated by law.

Is the right balance being struck between arts censorship and freedom of artistic expression? Opinions in the community are likely to be divided on this issue. Research which might assist government policy would need to focus on understanding community attitudes.

- 2.401 How much arts or cultural heritage content deals with or reflects on social issues (such as crime, education, family relationships)? What do people learn about social issues from their involvement with or consumption of arts or cultural heritage?
- 2.402 Do people develop more adaptive behaviour or constructive attitudes to social situations within society through their involvement with arts or cultural heritage (e.g. a movie, novel or music with a social theme or message)? Under what circumstances do destructive attitudes or behaviours arise from arts or cultural heritage activity (such as violence on television)?
- 2.403 What are community attitudes regarding the balance between freedom of expression and minimisation of socially undesirable outcomes for artistic expression or arts censorship decisions (e.g. film and television regulation)?
- 2.404 What impact does involvement in or consumption of arts and cultural heritage services have on crime or anti-social behaviour?

### **3. QUALITY OF LIFE ISSUES FOR PERSONS INVOLVED IN THE ARTS**

This paper takes a broad view of participation in the arts and potentially includes all kinds of participation. 'Creative participants' include people who produce art works, music, film, books, and who participate in performances. Persons 'involved' in the arts include creative participants and also those who undertake paid or voluntary work within the arts industries, such as people who do volunteer catering or administration for their local theatre company. However, for the most part, the key policy issues relate to creative participants in the arts, that is, artists, musicians, writers, performers or other creative artists, whether in a professional or hobby capacity.

All of the Australian government arts policies reviewed for this paper promoted involvement in the arts, and many of these policies explicitly linked arts involvement to individual wellbeing or quality of life. This section outlines the following key issues for persons involved in the arts and lists research questions that have policy relevance:

- 3.1 Barriers and motivators for arts involvement as a leisure activity
- 3.2 Quality of life for arts professionals
- 3.3 Artists' skills acquisition
- 3.4 Impacts of arts involvement on learning
- 3.5 Impacts of arts involvement on sense of achievement
- 3.6 Impacts of arts involvement on general wellbeing

#### **3.1 Barriers and motivators for arts involvement as a leisure activity**

It can probably be assumed that people who are involved in the arts as a leisure activity do so because they enjoy it. However, is it simply enough to know the extent to which arts involvement is undertaken for leisure? Or is research required to explore the nature of these benefits? It may be useful to gain a broad picture of leisure activity, to understand people's leisure choices, and to find out how involvement in arts and cultural heritage is positioned within the range of choices that people make, and the motivation for these choices. Do people engage in the arts as a leisure activity primarily for their own benefits or are they motivated by wider concerns for the culture of their community? Further, if interest in the arts or certain types of arts is changing, policy makers may need to adjust the emphasis of programs.

- 3.101 How much time do Australians spend on involvement in the arts for recreation or leisure, and how does this compare to other leisure activities? Is arts involvement increasing or declining as a leisure pursuit for Australians? Why? What particular activities are increasing or declining, and why?
- 3.102 Why are people involved in arts activities during leisure time? To what extent is leisure participation motivated by a desire to relax and unwind, and/or to make a contribution to the culture of community, or to help others?

### 3.2 Quality of life for arts professionals

Government policies and programs support involvement in the arts on a 'professional' basis, primarily for the economic, social and cultural benefits of industries rather than for the benefit of individual artists. However governments and communities often provide some support for 'professional' artists to maintain a reasonable quality of life as they go about their art practice, and research may assist in more effectively targeting this support. The following questions explore artists' financial situations, satisfaction with their work/life balance, and the way in which their professional arts practice is shaped by the need to earn a living.

- 3.201 How many Australians are involved in the arts as 'professionals' regardless of whether this is their main job?
- 3.202 How much time do professional creative participants spend on their creative practice? Would they like to spend more or less time? What other activities compete for their time?
- 3.203 How does the requirement to earn an income change the nature of the creative practice (i.e. production of 'commercial' products to meet demand)? Is this perceived negatively or positively by professionals?
- 3.204 Why are people involved in the arts as professionals? To what extent are professional artists motivated by a desire to contribute to the cultural life of the community, and/or for their own enjoyment and self-expression, and/or to earn a living as a recognised artist?

### 3.3 Artists' skills acquisition

Organisations and government policies and programs support arts education and training to encourage greater involvement in the arts. For instance, arts training organisations such as the National Institute of Dramatic Art, the Flying Fruit Fly Circus and the Australian Youth Orchestra cover a wide range of activities.<sup>26</sup>

While individual artists acquire their skills in varying ways, some ways of learning may be more effective than others for specific activities. Hence it may be useful to understand the way in which artists acquire their skills. For instance, are skills acquired through formal courses, arts practice, trial and error, working with others, or exposure to other artists, books or other reference material? What is more useful? Answers to these questions could inform policy decisions about education, training and other kinds of skill development initiatives.

- 3.301 How do professional and amateur/leisure artists learn their artistic skills (from peers or mentors, arts education, self teaching through experience and practice)? What are the best learning methods for particular kinds of artists or art forms?
- 3.302 To what extent is arts education needed to support skill development and learning for professional and amateur/leisure artists? How effective is arts training?
- 3.303 What are the skill gaps for amateur/leisure artists (if any)?

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<sup>26</sup> Further information on arts training organisations is available from the Department of Communications, Information Technology and the Arts' website at <[http://www.dcita.gov.au/arts/arts/arts\\_training\\_bodies](http://www.dcita.gov.au/arts/arts/arts_training_bodies)>.

- 3.304 What are the skill gaps for professional artists (if any)? Are professional arts practitioners 'skilled' to the degree required to earn a living from their arts practice? Do they have the business skills that they need in addition to the arts skills? Do they have the skills they need to utilise 'new' technology in the arts production process?
- 3.305 To what extent does school based arts education equip people to be involved in creative arts (on a professional basis) later in life?

### 3.4 Impacts of arts involvement on learning

The arts and cultural heritage have an important place, as curriculum content, within our formal education system. All stages and tiers of education include arts courses, dealing with arts practice, and the interpretation of society and culture through arts practice or arts appreciation (e.g. the study of literature or mass media). According to the Department of Education, Science and Training's *National Education Framework for Schools*:

Creativity is vital for true innovation as well as a source of personal fulfilment, pleasure and enjoyment. Music education, for example, has been shown to be a powerful learning experience for children, as well as an effective learning tool. With the many demands on schools and teachers, it is important not to overlook the educational value of the creative arts. School based arts education can have real benefits for students and provide opportunities for further appreciation of social diversity and cultural identity.<sup>27</sup>

The benefits of arts involvement espoused by arts policies may range from enjoyment and development of creative skills, to the more complex aims that embrace diversity and cultural identity. It may lead to a greater ability to generate ideas and also a generalised improvement in the ability to learn, think critically and be more innovative in other areas. Questions about arts involvement and learning would be important to policies on innovation as well as education.

- 3.401 Does creative arts participation on either a professional or amateur/leisure basis, lead to the development of other skills (e.g. organisational skills, communication skills, critical thinking skills)?
- 3.402 Does participation in creative arts, either on a professional or amateur/leisure basis, lead people to be more creative and innovative in other areas of their lives, and at work (whether it be work in the arts or non-arts work)?

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<sup>27</sup> Department of Education, Science and Training 2004, *Taking Schools to the Next Level – The National Education Framework for Schools*, viewed 1 February 2005, <<http://nefs.dest.gov.au/>>.

### 3.5 Impacts of arts involvement on sense of achievement

Through their involvement in the arts, it may be possible for an individual to make a 'unique' contribution and all kinds of people with variable 'talent' may be able to achieve a degree of success. The feeling or sense that something has been done well, with satisfaction in the end result, may lead to enhanced feelings of self worth. This is known to be important for mental health and is also considered particularly important for people in disadvantaged situations. Thus, arts policies and programs have been used to assist people with disabilities, 'at risk' youth, people who have experienced long-term unemployment, and Indigenous and rural communities. These arts programs are designed to create healthy community connections and contribute to a sense of worth or identity within the community.<sup>28</sup>

Conversely - for some professional artists who are under financial strain or who work in isolation - community debate has shown some concern about the propensity for mental health issues such as depression. Research may be required to explore these issues and identify whether professional support networks and 'community based' arts practices are beneficial in reducing isolation and mental health risks.

- 3.501 What recognition do professional or leisure artists achieve for their work?
- 3.502 To what extent does external recognition contribute to a sense of personal achievement in professional or leisure artists?
- 3.503 To what extent does a sense of achievement in involvement in the arts contribute to enhanced self esteem, a positive sense of self identity, or related aspects of mental wellbeing and adjustment?

### 3.6 Impacts of arts involvement on general wellbeing

This issue and set of research questions are closely related to the previous section (3.5) but take a broader look at the impact of arts involvement on health and general wellbeing.

- 3.601 What impacts (both positive and negative) on health and general wellbeing are experienced by individuals when they are involved in the arts, either on a professional or leisure basis?
- 3.602 What are the underlying mechanisms that result in health benefits (e.g. self esteem derived from arts achievement, sense of belonging derived from participation in a group arts project)?
- 3.603 Are there any health risks for people who are involved in the arts professionally, and how could these be mitigated (e.g. occupational health issues, financial stress, mental health risks associated with isolation or demands of creative work)?

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<sup>28</sup> Vichealth 2003, *Creative Connections: Promoting Mental Health and Wellbeing through Community Arts Participation*, viewed 11 November 2005, <<http://www.vichealth.vic.gov.au/Content.aspx?topicID=241>>.

## **4. QUALITY OF LIFE ISSUES FOR CONSUMERS**

People choose to attend cinemas or the theatre, listen to music, read books, watch television, or visit a museum or library in person or on-line. Information about these choices, and also the choices of those who do not access arts and cultural heritage services, is important for policy makers and service providers. Government support may require equity of access and 'public good' issues to be addressed. It is worth noting that many of the issues relating to creative participants (see 3. Quality of life issues for persons involved in the arts) may also be relevant to consumers.

This section outlines the following key issues relating to consumers and lists research questions that have policy relevance:

- 4.1 Barriers and motivators for leisure consumption of arts and cultural heritage services
- 4.2 Impacts of consumption of the arts and cultural heritage services on general wellbeing
- 4.3 Impacts of consumption of the arts and cultural heritage services on learning

### **4.1 Barriers and motivators for leisure consumption of arts and cultural heritage services**

As with people who participate in the arts as a leisure activity (see 3.1), people who consume arts and cultural heritage services for leisure probably do so because they enjoy it. Information may be required at a broad level about people's leisure choices, and their level of interest in arts and cultural heritage services in comparison with other leisure opportunities. What influences their choices?

In addition to understanding the interests of consumers, it is also important to research those who do not consume arts and cultural heritage services, and to understand why. For example, is distance a barrier for people in regional and remote areas? Are general admission fees or charges a barrier to access for some people, and is this a policy concern? Does the provision of 'free' or subsidised services encourage leisure involvement by those who otherwise would not access these services? The answers to these questions would inform policy and more effective targeting of services.

- 4.101 How much time do Australians spend on the consumption of arts or cultural heritage for recreation or leisure, and how does this compare to other leisure activities? Is this consumption increasing or declining as a leisure pursuit for Australians? Why? What particular activities are increasing or declining, and why?
- 4.102 Why are people involved, or not involved, in consumption of creative arts and cultural heritage services during leisure time? What are the barriers and motivators?

## 4.2 Impacts of consumption of the arts and cultural heritage services on general wellbeing

While the Australian policies reviewed for this paper did not aim to foster arts or cultural heritage consumption exclusively to achieve health benefits, a recent Australia Council report, *Art and Wellbeing*, highlighted several case studies where health benefits were observed.<sup>29</sup> Internationally, Arts Council England recently reviewed the use of arts in healthcare and is considering policy development in this area.<sup>30</sup>

Generic health benefits may be derived from 'leisure' pursuits of all kinds, due to the opportunity to simply relax and unwind. This is of general interest but further research would be required to examine potential links between arts and cultural heritage consumption and general wellbeing. As this is an emerging field of enquiry, research questions are very broad at this stage.

- 4.201 What impacts on health and general wellbeing are experienced by individuals when they consume arts or cultural heritage services?
- 4.202 What are the underlying mechanisms that result in health benefits (e.g. relaxation derived from listening to music)?

## 4.3 Impacts of consumption of the arts and cultural heritage services on learning

Cultural heritage institutions such as libraries and museums primarily aim to provide information services and promote learning. Many arts activities may also have educative value (although it may not be their main objective). For instance, films, books and art works provide information and a means of critically appraising issues. As with arts involvement (see 3.4), the benefits of arts and cultural heritage consumption range from enjoyment to a greater ability to generate ideas and an improvement in the ability to learn, think critically and be more innovative in other areas. The importance of this issue is highlighted by the national *Education and Arts Strategy*, aimed at expanding the role of arts in education.<sup>31</sup>

The learning needs of children and young people are a common focus of many arts and cultural heritage policies. As children and school groups are a large audience for many cultural heritage institutions and arts services, it may be important to research the extent to which children and young people learn from their consumption, and the benefits derived from this learning.

- 4.301 What impact does consumption of arts or cultural heritage services have on individuals' learning?
- 4.302 What impact does an arts-rich education (including opportunities to consume and participate in arts and cultural heritage activities) have on attendance, academic outcomes, life skills and other capacities of children and young people?

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<sup>29</sup> Deborah Mills and Paul Brown 2004, *Art and Wellbeing*, Australia Council, Sydney, viewed 12 October 2005, <[http://www.ozco.gov.au/arts\\_resources/publications/art\\_and\\_wellbeing](http://www.ozco.gov.au/arts_resources/publications/art_and_wellbeing)>.

<sup>30</sup> Dr Rosalia Lechuk Staricoff 2004, *Arts in health: a review of the medical literature*, Arts Council England Research Paper 36, viewed 12 October 2005, <[http://www.artscouncil.org.uk/publications/publication\\_detail.php?browse=title&id=405&page=3](http://www.artscouncil.org.uk/publications/publication_detail.php?browse=title&id=405&page=3)>.

<sup>31</sup> Australia Council 2004, *Education and the Arts Strategy 2004-2007*, viewed 5 January 2006, <[http://www.ozco.gov.au/arts\\_resources/australia\\_council\\_policy/education\\_and\\_the\\_arts\\_strategy](http://www.ozco.gov.au/arts_resources/australia_council_policy/education_and_the_arts_strategy)>.



## 5. ECONOMIC POLICY ISSUES

Government policies and programs acknowledge and support the cultural, social and quality of life benefits of the arts and cultural heritage services, and also seek to generate economic outcomes such as the development of commercial markets, employment opportunities, and the creation of viable businesses in the broader economy (e.g. cultural tourism, design and advertising). Arts and cultural heritage services comprise a significant component of the wider 'culture and leisure industry',<sup>32</sup> and governments at all levels aim to support this industry development in many ways.

This section outlines the following key economic issues and lists research questions that have policy relevance:

- 5.1 Economic viability of arts and cultural heritage services
- 5.2 Support for Australian content
- 5.3 Government funding of arts and cultural heritage services
- 5.4 Payment for arts involvement
- 5.5 Cultural tourism
- 5.6 The arts and innovation
- 5.7 International trade in arts and cultural heritage

### 5.1 Economic viability of arts and cultural heritage services

This covers general economic concerns relevant to the viability of any industry, including: the contribution of the arts and cultural heritage to the national, state, territory and local economies; international industry comparisons; issues of demand and supply, income and expenses; potential benefits of co-locating activities, services or industries; links with other industries; government and private funding; marketing; and labour force issues such as skill shortages, employment growth, and the role of volunteers. Contemporary issues include how the 'value' of cultural heritage collections can be determined, and the impact of new technology on the arts and cultural heritage (e.g. digital content).

In most cases there are some common economic questions that apply both to the arts industries and cultural heritage services, but in some cases the data needs are different. Hence, the research questions have been separately identified for arts industries and cultural heritage services. It is worth noting that regional factors may need to be taken into account when considering many of these research questions.

- 5.101 What are the links, flows or value chains between the arts and cultural heritage and other industries (e.g. what are the upstream and downstream industries)?
- 5.102 Do people and services involved in local creative arts practice and cultural heritage benefit from co-locating with each other in particular areas (e.g. different art forms, groups of artists, or multiple cultural heritage services co-locating)? That is, are there arts/cultural heritage hubs and are these more viable?

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<sup>32</sup> ABS 2001, *op. cit.*

- 5.103 How much do consumers spend on arts and cultural heritage products and services? How does this compare to consumer spending on other items? Is total spending on arts and cultural heritage increasing or declining? Why? Spending on which particular items is increasing or declining and why?
- 5.104 To what extent do arts industries and cultural heritage services compete with each other and with other industries (e.g. sport) for private (individual and corporate) sponsorship or donation dollars? Is private philanthropy of the arts and cultural heritage increasing or decreasing over time? How does it compare with total private philanthropy? What are the motivators and barriers?

### **Arts industries**

- 5.105 How much do arts industries contribute to Australian domestic production (Industry Value Added or Gross Domestic Product)? How is the contribution of arts industries changing over time, and why?
- 5.106 What would be the impact on the economy of a change in demand for arts products?
- 5.107 How is the demand for arts products changing, and why? For example, how is new technology impacting on consumption and demand for these products? How are changing age profiles, family structures and settlement patterns impacting on consumption and demand?
- 5.108 What are the main risks to industry growth or viability for particular arts industries, and what are the strengths?
- 5.109 How profitable are the arts industries? To what extent is income derived from direct sales to consumers compared with other avenues (such as private sponsorship, government subsidy, tax relief, indirect revenue such as intellectual property rights)? What are the expenses and are any of these increasing at a greater rate than income or other costs? How much is being spent on marketing?
- 5.110 To what extent does the 'image' or 'branding' of Australian arts influence consumption of arts products?
- 5.111 Is employment in arts industries growing over time?
- 5.112 To what extent are the arts reliant on volunteers compared to paid employment?
- 5.113 For those industries that are reliant on volunteers, what impact does this have on the services provided? Does the level of volunteer work present any risks to the viability of particular arts industries or is this a strength?
- 5.114 Do arts industries have an adequate supply of skilled people to allow them to remain viable or develop and grow?
- 5.115 Are there advantages in co-locating or otherwise clustering arts and other creative industries with related industries?
- 5.116 How do key economic indicators (e.g. levels of employment, income, expenditure) for Australian arts industries compare with arts industries overseas?

## **Cultural heritage services**

- 5.117 How much do cultural heritage services contribute to Australian domestic production (Industry Value Added or Gross Domestic Product)? How is the contribution of cultural heritage services changing over time, and why?
- 5.118 What would be the impact on the economy of a change in demand for cultural heritage services (i.e. what are the multipliers)?
- 5.119 How is the demand for cultural heritage services changing, and why? For example, how is new technology impacting on consumption and demand for these services? How are changing age profiles, family structures and settlement patterns impacting on consumption and demand?
- 5.120 What are the main risks to industry growth or viability for cultural heritage services, and what are the strengths?
- 5.121 How profitable are cultural heritage services? To what extent is income derived from direct sales to consumers compared with other avenues (such as private sponsorship, government subsidy, tax relief)? What are the expenses and are any of these increasing at a greater rate than income or other costs? How much is being spent on marketing?
- 5.122 What is the size of the collections maintained by cultural heritage services? Are values attributed to the collections, and if so, how is 'value' determined?
- 5.123 Is employment in cultural heritage services growing over time?
- 5.124 To what extent are cultural heritage services reliant on volunteers compared to paid employment? What proportion of organisations has more volunteers than paid employees?
- 5.125 For those services that are reliant on volunteers, what impact does this have on the services provided? Does the level of volunteer work present any risks to the viability of particular cultural heritage services or is this a strength?
- 5.126 Do cultural heritage services have an adequate supply of skilled people to allow them to remain viable or develop and grow?
- 5.127 What impact is information technology having on the supply of cultural heritage services? Does IT change the nature or viability of these services? To what extent is cultural material held by institutions digitised?
- 5.128 How do key economic indicators (e.g. levels of employment, income, expenditure) for Australian cultural heritage services compare with cultural heritage services overseas?

## 5.2 Support for Australian content

While support for Australian content has important cultural, social and quality of life implications, the research questions posed here relate to the economic aspects of this support. For instance, government regulation<sup>33</sup> of broadcasting services sets quotas for Australian content. This aims to address cultural issues, but also has an impact on local employment and economic development. Research may be required to explore the impact of content quotas, foreign competition, new trade agreements, and tax incentives for investment.

- 5.201 How important are Australian content quotas and the Australian expenditure conditions of tax incentive schemes in maintaining arts industries and employment in Australia?
- 5.202 What competition exists for arts industries, particularly competition from foreign businesses? To what extent is competition from foreign arts business a threat to the viability of Australian arts production?
- 5.203 What is the impact of the Australia - United States Free Trade Agreement on Australian arts industries, and production of Australian arts content?

## 5.3 Government funding of arts and cultural heritage services

While some arts and cultural heritage activities and organisations aim for financial self-sufficiency, government subsidies remain the main source of funding for many 'cultural institutions' or 'cultural infrastructure', including public libraries, museums, and art museums. Government funding may occur directly or indirectly via non-government organisations such as professional associations, training bodies and community art centres. Philanthropy (which receives government support in the form of tax incentives) is another indirect source of government funding.

The Myer Inquiry highlighted the complexities of funding arrangements across the various tiers of government, and questioned the levels of both government and private funding for visual arts and crafts at that time.<sup>34</sup> These issues are also the subject of ongoing debate within the broader arts and cultural heritage sector. Government funding, whether direct or indirect, raises questions about the size and nature of funding, and the resultant effects on competition, the type and quality of services provided, and 'value' generated. For instance, do government subsidies for public services adversely impact commercial industry? Alternatively, are increased levels of government subsidies required to maintain professional creative arts participation? In addressing these issues, questions arise about the 'public value' delivered in return for arts and cultural heritage investment by government. (While the concept of 'public value' requires further definition, it is increasingly being explored as a basis for assessment of government policies and programs.<sup>35</sup>)

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<sup>33</sup> See the *Broadcasting Services Act 1992* available at <http://www.comlaw.gov.au/comlaw/Legislation/ActCompilation1.nsf/current/bytitle/7F3AC509ACB712F6CA25702800133A3A?OpenDocument&mostrecent=1>.

<sup>34</sup> DCITA 2002, *Report of the Contemporary Visual Arts and Craft Inquiry*, viewed 7 February 2005, [http://www.dcita.gov.au/arts/arts/cvac\\_inquiry/report](http://www.dcita.gov.au/arts/arts/cvac_inquiry/report).

<sup>35</sup> For example, see British Broadcasting Corporation (BBC) 2004, *Building public value: Renewing the BBC for a digital world*, viewed 16 January 2006, <http://www.bbc.co.uk/thefuture/bpv/prologue.shtml>.

- 5.301 How much do the three levels of government pay in the form of grants or operational funding to support the arts and cultural heritage services? What level of support is provided for particular services (e.g. performing arts, visual arts, museums, libraries, etc)?
- 5.302 What level of government support is provided to arts and cultural heritage services through less direct means, such as tax incentives and the inclusion of art and design in public works projects?
- 5.303 What public value is generated from government subsidised arts and cultural heritage services? How do the direct consumers of these services perceive the public value of these services? How is public value perceived by those who do not directly consume these services?
- 5.304 Which arts and cultural heritage services get government support, and which do not? Why and why not? What proportion of their overall income is from government compared to other sources? Which arts and cultural heritage services are sustainable as businesses or self-employment without government subsidy? What are the income sources for these self-employed people or businesses?
- 5.305 Does a market approach that is required to generate revenue result in a different quality or type of arts practice or cultural heritage service, compared to government subsidised services? What are the differences, and do these match government policy objectives?
- 5.306 How does Australian government funding for the arts and cultural heritage services compare with government funding provided in other countries?
- 5.307 What are people prepared to pay for public cultural heritage services and public arts programs, either in taxes and/or on a fee for service basis, or by other means (e.g. television licensing or other arrangements)? Which kinds of payments do people view as appropriate for which public services?
- 5.308 What publicly funded arts education infrastructure is provided in Australia? How many institutions and staff are there, what art forms are covered, and what are their graduate outcomes?

#### **5.4 Payment for arts involvement**

An economic study recently found that most Australian professional artists have incomes lower than that of the general workforce, and that many have to support their arts practice with other employment.<sup>36,37</sup> This raises many questions at the broader arts and cultural heritage level. Is greater financial support required? How effective are government policies, legislation or programs in supporting reasonable incomes for artists (e.g. through grants; lending rights payments; resale royalties; and copyright and intellectual property rights)?

- 5.401 How much do people involved in the arts in Australia receive for their work? How does the income of professional creative artists compare with the earnings of other employed Australians?

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<sup>36</sup> Throsby and Hollister 2003, *op. cit.*

<sup>37</sup> The ATO (2005, *op. cit.*) also notes that "art activity, even when carried on as a business, may be performed as a supplement to other income earning activities, or may be supplemented by other income earning activities".

- 5.402 To what extent is arts involvement the main job or a secondary job for artists in Australia? How do professional creative artists earn a living, if not from their creative arts work?
- 5.403 If people involved in arts are not earning a living for their work, why do they do it? How important is income from creative arts practice, relative to other benefits of creative participation and/or involvement?
- 5.404 If incomes from creative arts practice are low (see Research Question 5.401), are low incomes from creative arts practice a barrier to participation in creative arts? Is this detrimental to the wider arts industry?
- 5.405 How significant are lending rights payments to Australian writers in terms of the numbers affected and the amounts of the payments?
- 5.406 Would resale royalties increase the incomes of visual artists and how many artists would be affected?
- 5.407 What impacts do copyright and intellectual property rights regulations and collection agencies have on the incomes and costs of artists? To what extent are artists commercialising intellectual property?

## **5.5 Cultural tourism**

Promoting local cultural heritage and arts activity can boost tourism and generate economic benefits. This is of interest to federal, state and territory governments, and is also very important to regional and remote communities and local government. Thus it may be useful to determine the 'value' of local arts and cultural heritage services, to both tourists and the local community. It may be also be important to identify whether tourists plan their journeys to primarily take advantage of arts or cultural heritage activity, or whether these activities are undertaken incidentally.

- 5.501 How significant are arts and cultural heritage related tourism to an area's economy, either for Australia as a whole or for cities, regions or towns within Australia? How many tourists visit, or extend their stay to an area, in order to consume arts or cultural heritage services? What proportion of all tourists to an area consumes arts or cultural heritage services during their visit?
- 5.502 Which cities, regions or towns within Australia do people associate with arts or cultural heritage services (i.e. arts/cultural heritage may be an important factor influencing the decision to visit the area)?
- 5.503 How is Australia viewed internationally as a tourist destination, and what is the significance of arts and cultural heritage in how Australia is viewed?
- 5.504 Do people and services involved in creative arts practice and cultural heritage benefit from co-locating to areas which attract general tourism (not associated with arts/cultural heritage)?
- 5.505 Are there any particular types of arts, art forms or cultural heritage services that are most likely to be attractive to tourists? To what extent are tourists an important market for these activities? What types of arts or cultural heritage services are most attractive, and to which kinds of tourists (i.e. tourism market analysis)?

- 5.506 For those types of arts and cultural heritage services that depend on tourists for income, and/or as a major service population, how does this impact on creative production or cultural heritage services provided? Does a market or customer service approach targeted to appeal to tourists result in changed (reduced or enhanced) quality of arts practice or cultural heritage services? What changes result?
- 5.507 How do arts and cultural festivals and events compare to other kinds of festivals and events, in terms of their overall success in attracting visitors, economic impact and economic viability?

## 5.6 The arts and innovation

A well known international advocate for the economic benefits of ‘creative capital’, Richard Florida, contends that investment in the arts and cultural heritage can foster creativity, and this in turn leads to innovation in other areas of the economy resulting in a healthier economy generally.<sup>38</sup> The concept of an ‘innovation economy’ is now widely reflected in Australian policy, for example, the *National Research Priorities* state:

Understanding the factors that lead to highly creative and innovative ideas and concepts, and the conditions that lead to their introduction, transfer and uptake is critical for any nation that aspires to lead the world in breakthrough science, frontier technologies, and in other forms of innovation. Promoting an innovation culture and economy requires research with a focus on developing and fostering human talent, societal and cultural values favourable to creativity and innovation, and structures and processes for encouraging and managing innovation.<sup>39</sup>

In the arts and cultural heritage field, policies such as the Victorian Arts’ policy *Creative Capacity Plus*,<sup>40</sup> Queensland’s *Creativity is Big Business*,<sup>41</sup> New South Wales’ *Ministry for the Arts Strategic Plan 2004–07*,<sup>42</sup> and South Australia’s *Arts Plus*<sup>43</sup> all highlight the links between arts, cultural heritage, creativity, innovation and economic development. The following questions may be useful in researching these links.

- 5.601 Do arts activities project an image of innovation to the Australian community and internationally?
- 5.602 Do Australian artists create high quality new works, expressing original insights, innovative ideas, and/or using new media or technology? How much content is new and original? How many new artists and new arts products have arisen because of new technology?

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<sup>38</sup> Richard Florida 2003, *The Rise of the Creative Class: And how it’s transforming work, leisure, community and everyday life*, Pluto Press, North Melbourne.

<sup>39</sup> Department of Education, Science and Training 2002, amended in 2003, *National Research Priorities*, viewed 1 February 2005, <<http://www.dest.gov.au/priorities/>>.

<sup>40</sup> Arts Victoria 2003, *Creative Capacity + ... Arts for all Victorians*, viewed 2 February 2005, <<http://www.arts.vic.gov.au/arts/publications/publications/creativecapacity+.htm>>.

<sup>41</sup> Queensland Government State Development 2003, *Creativity is big business: A framework for the future*, viewed 7 February 2005, <[http://www.sdi.qld.gov.au/dsdweb/v3/guis/templates/content/gui\\_cue\\_menu.cfm?id=2242](http://www.sdi.qld.gov.au/dsdweb/v3/guis/templates/content/gui_cue_menu.cfm?id=2242)>.

<sup>42</sup> NSW Ministry for the Arts 2004, *Priorities for the Arts: NSW Ministry for the Arts Strategic Plan 2004–2007*, viewed 2 February 2005, <<http://www.arts.nsw.gov.au/Priorities%20for%20the%20Arts.pdf>>.

<sup>43</sup> Arts SA 2000, *Arts + ... Investing in the Arts & our artists, 2000–2005*, Arts SA, Adelaide.

- 5.603 To what extent do arts industries and practitioners utilise new technologies?
- 5.604 Where artists and/or arts businesses collaborate with other industries, does this lead to greater productivity or innovation?
- 5.605 Does participation in creative arts, or other regular involvement in or consumption of the arts, lead people to be more creative and innovative in other areas of their lives, and at work (whether it be work in the arts or non-arts work)?

## **5.7 International trade in arts and cultural heritage**

International trade in arts and cultural heritage serves several purposes. There are the obvious economic gains from exports and the promotion of Australian culture (e.g. tourism). Partnerships and diplomatic relationships with other countries can be developed and improved through cultural exchange, and this may result in flow-on investment in other industries. In addition, arts organisations and individual artists may benefit from international recognition.

The importance of international trade in arts and cultural heritage is acknowledged by government policies and various forms of support (see also 5.2 Support for Australian content and 1.2 Balance between Australian and foreign cultural content). The aim of “a world class Australian film industry”, for example, is supported by measures to enhance skills development and boost investment in local production.<sup>44</sup>

However there may also be negative aspects to international trade. Recently, there was much debate about the potential impact of a free trade agreement with the United States on the local arts industry. In particular, concerns were raised about whether the Australian film and television industries can remain competitive in the global marketplace.

To assist the development of government policies and programs supporting international trade in Australian arts and cultural heritage, information is required about the extent of trade, and its positive and negative aspects.

- 5.701 What is the level of international trade with Australia in arts and cultural heritage products and services? What countries do we trade with? What particular products are increasing or declining in trade in arts and cultural heritage services? Why?
- 5.702 To what extent do Australian arts and cultural heritage services receive international recognition?
- 5.703 To what extent are Australian arts and cultural heritage representing ‘Australia’ by portraying Australian culture overseas? Does trade in Australian arts and cultural heritage services promote an awareness of Australia and an understanding of Australian culture to other countries? What impact does this have on general levels of international investment in Australia?
- 5.704 What is gained from programs that assist professional artists to achieve exposure in international exhibitions and markets, or from overseas study? Does this enhance artists' careers and provide flow on benefits to Australian arts generally?

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<sup>44</sup> See the Howard Government Election 2004 Policy, *op. cit.*



## **CHAPTER 3: DATA SOURCES**

The previous chapter linked research questions to the key policy issues to prompt discussion, and obtain feedback on their relevance and relative priority. This chapter briefly discusses relevant ABS data sources and research and data provided by non-ABS sources. Chapter 4 then gives some indication of the extent to which data are available for the key characteristics, key issues and research questions outlined in this paper. Although the ABS is not the sole provider of data, and does not aim to be, the Information Development Plan (IDP) will ensure that the ABS continues to focus on the core high priority data needs. By providing a framework for decision making about priority research, the IDP will also help the ABS and others coordinate developmental work around the high priority data needs.

### **Background**

The Cultural Ministers Council (CMC) was formed in 1984 to provide a forum for the exchange of views on issues affecting cultural activities in Australia. It comprises the ministers responsible for arts and cultural heritage at the federal, state and territory levels, and also the New Zealand minister. The CMC established the Statistical Advisory Group (SAG) in 1985 - now known as the Cultural Ministers Council Statistics Working Group (CMCSWG) - in response to concerns about shortcomings in information and statistics for cultural industries. A lack of reliable data was seen as an impediment to policy development and effective planning.

In 1991 the centre now known as the National Centre for Culture and Recreation Statistics (NCCRS) was established within the ABS, in partnership with CMC. The partnership between the CMC and the ABS has been instrumental in encouraging standardisation and coordination of data collection and analysis, and improving the range, quality and accessibility of data.

In addition to the ongoing work program undertaken by the ABS, CMCSWG and its member agencies - particularly, the Department of Communications, Information Technology and the Arts (DCITA), the Australia Council, the Australian Film Commission and state and territory arts departments - maintain data collections to support their ongoing operations, and have commissioned one-off surveys to address particular needs as they have arisen. There are also many other relevant data collections, some of which are outlined below.

Almost 50 ABS and around 90 non-ABS data sources have been identified as relevant to the information needs identified in this paper. Due to size constraints, this material has not been included with this public consultation paper but is summarised here. Details about all data sources are available on request.

### **ABS surveys**

During the last decade, several ABS surveys have been developed and added to the ABS survey program to address some of the needs for statistics in the arts and cultural heritage. These include:

- Work in Selected Culture and Leisure Activities
- Attendance at Selected Cultural Venues and Events
- Children's Participation in Cultural and Leisure Activities
- Performing Arts
- Film and Video Production

The output of other ABS surveys and data collections can also meet some of the data needs of arts and cultural heritage data users (e.g. the Time Use Survey, the Census of Population and Housing, the Household Expenditure Survey, and International Trade in Goods and Services).

The ABS has also run surveys to meet the specific needs. Examples include the Book Publishers and Book Retailers surveys (funded by the Book Industry Assistance Plan) and the Cultural Funding by Governments collection (funded annually by CMCSWG).

More detailed information about these surveys can be found in the Directory of Culture and Leisure Statistics (ABS cat. no. 1143.0.55.001), available through the Culture and Recreation theme page on the ABS web site at <<http://www.abs.gov.au>>

### **Other surveys (non-ABS)**

Government and other agencies commission surveys and research reports from academics and research consultants to address their specific data needs. These may be required to identify people's needs in relation to a specific activity, service or industry; assess the effectiveness of specific policies; focus on a particular population subgroup; or explore industry issues.

Almost 50 commissioned non-ABS surveys and reports have been identified and this list is available on request. Some examples of relevant commissioned non-ABS surveys and reports are listed below.

Professional artists:

- Don't give up your day job: An economic study of professional artists in Australia (David Throsby and Virginia Hollister 2003)

People's needs in relation to a specific activity, service or industry:

- Selling the performing arts: Identifying and expanding audiences for music, dance and theatre (Australia Council 1999)
- The great indoors: Developing audiences for contemporary art and craft in Australia (Australia Council 2003)
- Vanishing acts: An inquiry into the state of live popular music opportunities in New South Wales (Bruce Johnson and Shane Homan 2003)

Effectiveness of specific policies:

- Final destination: Comparison of film tax incentives – Australia and Canada (DCITA 2003)
- Impacts of Copyright Agency Limited's distributions on Australian authors (AMR Interactive and Copyright Agency Limited 2003)

Population subgroups:

- To tell my story: A study of practising professional Indigenous writers of Australia (Judi Cooper, Helen Molnar, Christine Morris and Mark Colbert 2000)
- The taxi driver, the cook and the greengrocer: The representation of non-English speaking background people in theatre, film and television (Santina Bertone, Clare Keating and Jenny Mullaly 2000)

- Cultural diversity and Australian commercial television drama (Harvey May 2000)

Industry studies:

- Creative industries cluster study (DCITA and the National Office for the Information Economy 2002-03)
- Digital content industry road mapping study (Australian Interactive Media Industry Association 2005)

### **Ongoing non-ABS data collections, either surveys or administrative data sources**

Almost 30 relevant ongoing non-ABS data collections have been identified. For example, the Australian Film Commission (AFC) conducts surveys and maintains administrative data sources to monitor the effectiveness of its policies and programs. These include the annual National Survey of Feature Film and Television Drama Production; the compilation of a wide range of AFC and other organisations' data sources that provide information about box office takings of Australian and overseas films; numbers of screenings of Australian and overseas films; awards won by Australian films; and the percentage of Australian content on Australian television.

The Bureau of Tourism Research conducts the National Visitors Survey and the International Visitors Survey which provide a small amount of information about the interests and activities of tourists relating to arts and cultural heritage. The International Visitors Survey has occasionally included additional questions to provide more information, leading to one-off reports such as Cultural tourism in Australia: Characteristics and motivations (1998).

### **Potentially useful databases or directories**

Around 10 relevant databases or directories have been identified. For example, Flinders University's AusStage database records information about all performing arts events and organisations in Australia (available at <http://www.ausstage.edu.au>). Performance Media also provide a performing arts directory. Collections Australia Network (CAN) is a directory of heritage collections including archives, art galleries, libraries and museums. It was formerly known as Australian museums and galleries online (AMOL) but is now available at <http://www.collectionsaustralia.net>.

Other data bases identified were predominantly focussed on providing directories for various industries such as the music industry, film and television production industry, and libraries.

## CHAPTER 4: DATA GAPS

This chapter provides some indication of the extent to which data are available for the key characteristics, key issues and research questions outlined earlier in this paper. As highlighted during the discussion in Chapter 2, some key issues and research questions would require further work to define the specific information needs that would be most relevant. Nonetheless, an assessment has been made - in broad terms - about the likely relevance of current data sources to the key issues and research questions.

The following rankings were used to assess data availability:

- Good - a sufficiently detailed and frequent data source is in place (or if ad hoc data are required, a recent study has been conducted)
- Reasonable - where regular data are required, a data source is in place although it may not provide sufficiently detailed or frequent data. (Further analyses may be required to determine how well the available data answer the questions but this was beyond the scope of this paper.)
- Minimal - one or two studies may have been done, or one or two industries or some aspects may have been covered
- Not at all - no relevant data source of sufficient quality, scope, availability, or recency (as far as we know)

Of the 129 research questions listed in this paper, about one quarter were found to have a reasonable or better level of data while the remainder were assessed as having minimal or no relevant data. Also, most of the questions where data were available related to economic issues, and consumption patterns. Many of the social, cultural and quality of life issues are less well covered by existing data. These findings are not surprising, given the large number of these research questions with quite complex issues to address.

The following discussion focuses on data gaps for the key characteristics, key issues and research questions deemed most likely to have important policy implications. About one third of the research questions with minimal or no relevant data have been selected for consideration in this chapter. This is intended to prompt further discussion as part of the consultation process for the Information Development Plan (IDP). The questionnaire that accompanies this paper seeks feedback on the relative importance of the key issues, research questions, and other data needs of users. This will be used to review and prioritise information needs before conducting further analyses of high priority data needs.

The findings from the feedback and further analyses will later be included in the IDP draft. They may confirm that existing data collections continue to be of high priority, or it may be found that some collections are less important relative to identified data gaps, and consideration should be given to resourcing new areas of research. Although the ABS will be unable to meet all the information needs identified in the IDP, it will assist in meeting core high priority data needs where possible, and can also assist with guidance on definitions and methodology.

The reference numbers for the key characteristics, key issues and research questions (RQs) are provided in brackets.

## **Key characteristics**

Chapter 2 outlined the key characteristics of demand, involvement and services which provide foundation data for the key issues and many of the research questions. For example, to answer questions about artists' skills acquisition (RQs 3.301 - 3.304), it is useful to have some basic information about how many people are artists (Key characteristics B1 - B4). Currently, the availability of data for the key characteristics is reasonable but there are some data gaps.

While the availability of data is good in relation to the characteristics of Australian residents' demand for arts and cultural heritage services (Key characteristic A1), there is less information about the numbers and characteristics of persons who access these services as tourists or visitors to Australia (Key characteristic A2), and there are no known data sources to determine how many people access Australian arts and cultural heritage services from overseas (Key characteristic A3).

Data on creative participants (Key characteristic B3) are also minimal, particularly for participation in a professional capacity (Key characteristic B4). Making a distinction between 'professional' artists and 'amateur' or 'leisure' artists is difficult as there are currently no standard definitions to assist researchers. Similarly, there are minimal data on 'amateur' arts and cultural heritage organisations (Key characteristic C4), and a definition is required here.

## **Cultural policy issues**

Many arts and cultural heritage policies aim to make a positive contribution to Australia's 'national culture', and to contribute to a multicultural society. These important goals are difficult terrain to research, with large data gaps. As noted in the discussion in chapter 2, many of the key cultural issues and research questions cover concepts that cannot be easily measured (e.g. cultural relevance, cultural identity and cultural awareness). Further scoping studies would be required to better define the research that is needed. For example, there are no national data available on the cultural relevance and diversity of heritage collections (RQ 1.102). This could be addressed through liaison with major cultural institutions, some of which do have relevant data.

Key issues 1.3 and 1.4 concern the impacts of arts and cultural heritage on cultural identity, and cultural awareness and tolerance (e.g. RQs 1.301 and 1.404). While more work would need to be done to scope projects in these areas, it might be feasible to design questions that assess what people know about different cultures, and what they have learnt from arts or cultural heritage services. Such questions could be asked in the context of evaluation programs or population surveys. Assessment of people's attitudes to other cultures and level of tolerance is likely to be more difficult to assess by self report survey methods, and other methodologies would need to be explored.

## **Social policy issues**

Some good data are available that allow an assessment of the extent to which various groups of people access arts and cultural heritage services (Key issue 2.1) but for those who do not access services, it is not known whether this is through choice or due to a barrier of some kind (e.g. RQ 2.103).

There are good data on the consumption patterns of different population subgroups such as Indigenous people or people from different age groups (Key issue 2.1). However, there is little information about the consumption of arts and culture by children (although more is known about their creative arts participation).

There are virtually no data to assess the impacts of arts and cultural heritage services on community networks (Key issue 2.2). Given the recent policy focus on social capital, it may be useful to research its development and maintenance through arts and cultural heritage activity (e.g. RQ 2.204).

The key issue of social responsibility also lacks data (Key issue 2.4). This includes research questions about the nature of arts and cultural heritage content; its influence on people's behaviour; and community attitudes about the balance between free expression and censorship or regulation in the arts, particularly television and mass media (e.g. RQ 2.403). While currently topical and policy relevant, social responsibility is a difficult area of research as it is highly dependant on opinions about appropriate content. A scoping study would be required before embarking on research in this area.

### **Quality of life issues for persons involved in the arts and consumers**

Only one of the research questions relating to quality of life issues for persons who are involved in the arts was found to have reasonable availability of data (RQ 3.202). Data from the Throsby surveys can address questions about the amount of time professional artists spend on their arts practice, and their satisfaction with this.<sup>45</sup> However, the future of these surveys is currently not known.

With regard to consumption patterns for the arts and cultural heritage, there are some good data on how many people consume what kinds of services, and their characteristics (Key characteristic A1). Questions about changing consumption patterns, however, have little data and/or require more analyses (e.g. RQ 4.101). Nevertheless, a range of specific studies have been commissioned to provide information about the motives and barriers to consumption of arts or cultural heritage services (RQ 4.102).

It is more difficult to explore the impacts of arts and cultural heritage services on general wellbeing and health (Key issues 3.6 and 4.2). Data are available but establishing causation is very difficult. If this information is a priority then different approaches to research design and analysis will be required to better assess the mechanisms that generate health benefits.

There are particular issues regarding quality of life for those involved in the arts as creative arts professionals (Key issue 3.2), and limited data are available to assess these. Research may be needed about the quality of life of individuals who chose to become creative arts professionals, particularly given the possible impacts of financial stress and occupational health issues (RQ 3.603).

The learning methods of artists may be easier to research (Key issue 3.3). While data are limited, it may be important to address questions relating to artists' skills acquisition (e.g. RQs 3.301 and 3.302) given that most government policies and programs and many organisations support arts education and training to encourage greater involvement in the arts. The common policy focus on the learning needs of

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<sup>45</sup> For example, see Throsby and Hollister 2003, *op. cit.*

children and young people may call for further research on the benefits of an arts-rich education (e.g. RQ 4.302).

## **Economic policy issues**

Economic issues have a reasonable coverage of data compared with other categories of issues. Approximately one third of the many research questions categorised as economic issues were found to have at least a reasonable level of data.

There are some good data available that provide information about various economic aspects of the arts and cultural heritage services. However, these data sources do not enable an adequate assessment of the viability of the industry as a whole or the relationships between arts and cultural heritage and other initiatives, such as innovation and tourism. Further analysis of existing data is needed to better understand the overall viability of arts and cultural heritage services, and this analysis would assist in determining the extent to which additional data are needed. This would be a first step in addressing the wide range of questions for Key issue 5.1. For example, questions about the changing demand for services (RQs 5.107 and 5.119) and the risks or barriers to service or industry growth (RQs 5.108 and 5.120) are likely to require more data.

Questions about the viability of arts industries are normally addressed in relation to particular divisions within the industry. Recently, a major public inquiry was conducted to address a wide range of predominantly economic questions regarding the visual arts and crafts industry,<sup>46</sup> and prior to this work had been done on the performing arts industry.<sup>47</sup> Currently, interest focuses on the music industry<sup>48</sup> and the digital content industry.<sup>49</sup> When investigations such as these look at smaller industry divisions, often core industry data collected by the ABS do not provide sufficient detail and specific industry research is required. The accompanying feedback questionnaire seeks information about industry data needs.

The key issue of payment for arts involvement has reasonable data on the income of artists, but little or no data about the relative importance of income from arts practice, versus income from other non-arts work (RQ 5.403). In ABS data collections, it is also difficult to separate the income or employment data for professional artists compared to 'leisure' artists, each of which have different policy implications. From a policy perspective, it is of particular relevance to understand the extent to which low incomes may be a barrier to professional creative arts participation (RQ 5.404) and hence threaten the viability of an Australian arts industry. In addition, data on

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<sup>46</sup> DCITA 2002, *Report of the Contemporary Visual Arts and Craft Inquiry*, *op. cit.*

<sup>47</sup> Helen Nugent, Michael Chaney, David Gonski and Catherine Walter 1999, *Securing the Future - Inquiry into the Major Performing Arts*, viewed 23 December 2005, <[http://www.dcita.gov.au/\\_\\_data/assets/pdf\\_file/10700/Securing\\_the\\_Future\\_-\\_Inquiry\\_into\\_the\\_Major\\_Performing\\_Arts.pdf](http://www.dcita.gov.au/__data/assets/pdf_file/10700/Securing_the_Future_-_Inquiry_into_the_Major_Performing_Arts.pdf)>.

<sup>48</sup> For example, Cultural Ministers Council Statistics Working Group (CMCSWG) 2005, *A Statistical Framework for the Music Sector: A scoping study by Hans Hoegh-Guldberg and Richard Letts*, prepared by Economic Strategies, CMCSWG, Canberra, viewed 20 January 2006, <[http://www.dcita.gov.au/swg/publications/Music\\_Sector\\_Report\\_April\\_2005.pdf](http://www.dcita.gov.au/swg/publications/Music_Sector_Report_April_2005.pdf)>.

<sup>49</sup> For example, DCITA 2003, *The Measurement of Creative Digital Content*, prepared by Pattinson Consulting, DCITA, Canberra; and Australian Interactive Media Industry Association 2005, *Digital Content Industry Road Mapping Study*, viewed 20 January 2006, <<http://www.aimia.com.au/i-cms?page=1456>>.

professional artists' incomes are needed as a precursor to understanding whether financial stress may be a quality of life issue.

There are many questions posed in relation to cultural tourism (RQs 5.501 - 5.507) but these are not well covered by existing data. The International Visitors Survey gives some indication of whether visitors to Australia attended a cultural event during their stay, but it does not address questions about the significance of arts and cultural heritage to regional economies (e.g. RQ 5.501). While some local case studies have been done, there is no broader state, territory or national perspective on this and data at the regional level could prove costly and difficult to attain.

Small area case studies have also been conducted to explore the arts and innovation (RQ 5.601 - 5.605), and some larger studies have commenced. These aim to estimate the overall economic contribution of 'creative industries', at least at the state level.

International trade in arts and cultural heritage (Key issue 5.7) is covered by some basic ABS data but often this is not detailed enough to enable analysis at the sub-industry level.

## **Summary**

The following research questions (or groups of research questions) have been identified as having minimal or no relevant data, but may have important policy implications:

### Cultural

- representativeness and diversity of cultural heritage content (RQ 1.102)
- maintenance of cultural identity through arts and cultural heritage involvement (RQ 1.301)
- impacts of arts and cultural heritage on development of tolerance to different cultures (RQ 1.404)

### Social

- barriers and motivators for non-consumers of arts or cultural heritage services (RQ 2.103)
- impacts of arts and cultural heritage involvement on community networks and support (i.e. social capital) (RQ 2.204)
- community attitudes about the balance between freedom of expression and minimisation of socially undesirable outcomes (RQ 2.403)

### Quality of life for persons involved in the arts and consumers

- impacts on individual wellbeing from arts or cultural heritage consumption and/or creative participation for leisure (RQs 3.601 - 3.603, 4.201 - 4.202)
- quality of life issues for arts 'professionals' (RQs 3.201 - 3.204, 3.603), including understanding of payment for arts involvement (RQs 5.401 - 5.407)
- the benefits of an arts-rich education, particularly for children (RQ 4.302)



## Economic

- viability of arts and cultural heritage services (RQs 5.101 - 5.128)
- cultural tourism (RQs 5.501 - 5.507)
- the arts and innovation (RQs 5.601 - 5.605)

This selection of research questions is intended to prompt further discussion. The questionnaire that accompanies this paper seeks feedback on the relative importance of the key issues and research questions. This will be used to review and prioritise data needs before conducting further analyses of high priority data needs.

## APPENDIX 1 - FEEDBACK QUESTIONNAIRE

### **What are the priorities for arts and cultural heritage research and statistics in Australia?**

We are keen to hear your views about priorities for arts and cultural heritage research and statistics, and hope you will take the time to respond to this feedback questionnaire.

This questionnaire accompanies the key issues paper, *Arts and cultural heritage in Australia: Key issues for an Information Development Plan*. This paper is based on our understanding of the key issues and our knowledge of data sources. We have linked some potentially useful research questions to the key issues to enable a broad assessment of data availability, and to prompt further discussion.

The questionnaire seeks feedback on the relevance and priority of the key policy issues and research questions as outlined in the key issues paper. Your feedback is important as it will help determine whether we have got the broad issues right and will clarify what the highest priority data needs are, and why. This will assist with planning to potentially address unmet needs for information, and/or maintain or review existing data sources.

The questionnaire can be completed electronically in Microsoft Word, or can be printed and filled in by hand. If you would like to receive this questionnaire as a Microsoft Word file, or have any questions about the key issues paper, the questionnaire, or the Information Development Plan process, please call Sue McKay on (08) 8237 7394 or email her at [sue.mckay@abs.gov.au](mailto:sue.mckay@abs.gov.au).


Thank you for your help with this questionnaire. We would appreciate your feedback before **7 April 2006**.


Yours truly

Lisa Conolly  
Director  
National Centre for Culture and Recreation Statistics  
Australian Bureau of Statistics

**Please return this questionnaire either by:**

 Email: [sue.mckay@abs.gov.au](mailto:sue.mckay@abs.gov.au)

 Fax: (08) 8237 7620

 Post: National Centre for Culture and Recreation Statistics  
Australian Bureau of Statistics  
GPO Box 2272  
Adelaide SA 5001

If you, your organisation or industry provide a unique or important perspective on priority data needs then it may be useful to discuss this in the information plan. For instance, it may be useful to identify the particular needs of regional local government. We will not identify you or your organisation, unless we gain your prior consent to do so. Hence we ask that you provide your contact details so that we may consult you if needed.

**To complete this form electronically, use the 'Tab' key to move between questions. (Microsoft Word will place an 'X' by default in the check boxes  when they are clicked with the left mouse button.)**

**Your contact details:**

Name:

Organisation:

Please indicate the preferred contact details (email, phone or address):

Email:

Phone:

Address:

Please describe your role in the organisation:

## PART ONE - Research and data use

1. Please describe any research and/or data collection that your organisation undertakes in the area of cultural heritage or the arts.

2. Does your organisation use data relevant to cultural heritage or the arts?

Yes

No  → go to Question 6

3. Which data sources are most useful? (e.g. your own data, ABS data, other data)  
Please give examples.

4. What are the main purposes of using these data sources?

5. Do the data sources that you use adequately meet your data needs?

Yes  → go to Question 7

No

6. Which of the following are barriers to your organisation using data relating to cultural heritage or the arts? Please mark all that apply.

Data do not cover the area of interest.....

Data are not recent.....

Data are difficult to access.....

Data are inaccurate.....

Data are not collected frequently enough.....

Data are not readily available.....

Data cannot be compared over time due to method changes...

Data are difficult to understand, use or analyse.....

Please specify any other barriers.

## PART TWO - Feedback on key policy issues

7. Chapter 2 of the key issues paper discusses policy issues within five broad categories. Please rank these categories by placing numbers 1-5 in the boxes, with 1 being the highest research priority.

Cultural policy issues

Social policy issues

Quality of life issues for persons involved in the arts

Quality of life issues for consumers\*

Economic policy issues

Rank  
1-5

\* By using the term 'consumers', we do not mean to imply that any economic transaction is inherent. Consumers include people who attend cinemas, listen to music, read books, view public sculptures and visit museums and libraries, creating demand for products and services.

8. Please briefly explain why you ranked the categories as you did.

9. Which cultural policy issues do you think are most important to address? Please rank these issues by placing numbers 1-5 in the boxes, with 1 being the highest research priority.

Cultural relevance and diversity of heritage collections

Cultural relevance and diversity of the arts

Balance between Australian and foreign cultural content

Impacts of arts and cultural heritage on cultural identity

Impacts of arts and cultural heritage on cultural awareness and tolerance

Rank  
1-5

10. Are there any other cultural policy issues that you think would be important to address? If yes, please specify these issues.

11. Which social policy issues do you think are most important to address? Please rank these issues by placing numbers 1-5 in the boxes, with 1 being the highest research priority.

	Rank 1-5
Accessibility of cultural heritage services (e.g. museums, libraries)	
Patterns of consumption and participation in the arts	
Impacts on social relationships and community networks (i.e. social capital)	
Impacts on civic participation (e.g. contributions to political/community debate)	
Impacts on social responsibility (e.g. responsible free expression, minimising anti-social behaviour)	

12. Are there any other social policy issues that you think would be important to address?

13. With regard to persons involved in the arts, which quality of life issues do you think are most important to address? Please rank these issues by placing numbers 1-6 in the boxes, with 1 being the highest research priority.

	Rank 1-6
Barriers and motivators for arts involvement as a leisure activity	
Quality of life for arts professionals	
Artists' skills acquisition	
Impacts of arts involvement on learning	
Impacts of arts involvement on sense of achievement	
Impacts of arts involvement on general wellbeing	

14. With regard to persons involved in the arts, are there any other quality of life issues that you think would be important to address?

15. With regard to 'consumers', which quality of life issues do you think are most important to address? Please rank these issues by placing numbers 1-3 in the boxes, with 1 being the highest research priority.

	Rank 1-3
Barriers and motivators for leisure consumption of arts and cultural heritage services	
Impacts of consumption of arts and cultural heritage services on general wellbeing	
Impacts of consumption of arts and cultural heritage services on learning	

16. With regard to 'consumers', are there any other quality of life issues that you think would be important to address?

17. Which economic policy issues do you think are most important to address? Please rank these issues by placing numbers 1-8 in the boxes, with 1 being the highest research priority.

	Rank 1-8
Economic viability of arts industries	
Economic viability of cultural heritage services	
Support for Australian content (e.g. subsidies for Australian film production, artists)	
Government funding of arts and cultural heritage services	
Payment for arts involvement (i.e. the ability of artists to earn a living)	
Cultural tourism	
The arts and innovation	
International trade in arts and cultural heritage	

18. Are there any other economic issues that you think would be important to address?

## PART THREE - Needs for regional data, population subgroups, industry and activity subgroups

Each of the research questions identified in Chapter 2 of the key issues paper could be asked for different geographic areas, different groups within the population and/or different types of arts and cultural heritage activities. This section seeks feedback on the need for regional data and data for groups such as Indigenous Australians, people of different ages and culturally and linguistically diverse backgrounds. Feedback is also sought on the relative priority of data for industries and activities (e.g. libraries and archives, performing arts, community cultural development).

19. How important is it for your organisation to access regional data for the geographic areas listed below? Please mark to indicate data needs for each geographic area.

	Very high importance	High importance	Moderate importance	Little importance	No importance
International	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
National	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
State/Territory	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Capital city / Rest of state	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Local government area (LGA)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Smaller area (than LGA)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

20. Are there any other regions that would be important to your organisation? If yes, please specify these areas.

21. If regional data are important to your organisation, please explain why. How would these data be used?

22. How important is it for your organisation to access data for the following population subgroups?

	Very high importance	High importance	Moderate importance	Little importance	No importance
Indigenous Australians	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Children (aged under 15)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Youth (aged 15 to 25)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Older persons (aged over 65)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
People of culturally & linguistically diverse backgrounds	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>



23. Are there any other population subgroups that are of interest to your organisation? If yes, please specify these subgroups.

24. If population subgroup data are important to your organisation, please explain why. How would these data be used?

25. How important is it for your organisation to access data for the following industries and activities?

	Very high importance	High importance	Moderate importance	Little importance	No importance
Art museums/galleries	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Other museums	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Libraries & archives	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Literature & print media	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Performing arts	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Music composition & publishing	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Visual arts & crafts	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Design	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Broadcasting, electronic media & film	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Community cultural development	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Digital content creation	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Arts education	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

26. Are there any other arts and cultural heritage industries and/or activities that are of interest to your organisation? If yes, please specify them.

27. If industry and/or activity data are important to your organisation please explain why. How would these data be used?

## PART FOUR – Data gaps

28. Chapter 4 of the key issues paper discusses data gaps and highlights 12 research issues that may have stronger policy relevance at this point in time. How important are the following research issues to your organisation?

Research issues and associated research questions (RQs)	Very high importance	High importance	Moderate importance	Little importance	No importance
Representativeness and diversity of cultural heritage content (RQ 1.102)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Maintenance of cultural identity through arts/cultural heritage involvement (RQ 1.301)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Impacts of arts and cultural heritage on development of tolerance to different cultures (RQ 1.404)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Barriers and motivators for non-consumers of arts or cultural heritage services (RQ 2.103)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Impacts of arts and cultural heritage involvement on community networks and support (i.e. social capital) (RQ 2.204)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Community attitudes about the balance between freedom of expression and minimisation of socially undesirable outcomes (RQ 2.403)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Impacts on individual wellbeing from arts or cultural heritage consumption and/or creative participation for leisure (RQs 3.601-3.603, 4.201-4.202)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Quality of life issues for arts 'professionals' (RQs 3.201- 3.204, 3.603), including understanding of payment for arts involvement (RQs 5.401- 5.407)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
The benefits of an arts-rich education, particularly for children (RQ 4.302)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Viability of arts and cultural heritage services (RQs 5.101 - 5.128)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Cultural tourism (RQs 5.501 - 5.507)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
The arts and innovation (RQs 5.601 - 5.605)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

## PART FIVE – Feedback on specific research questions, other issues or questions

The key issues paper identified 129 research questions (RQs), of which many have minimal or no data available. Feedback is sought on the relative importance of the research questions to help decide the highest priority data needs.

29. Which questions do you think are most important to address? Please refer to Chapter 2 for a full description of each question and record the numbers of the most important questions here (e.g. up to 10 questions).

30. Which questions in Chapter 2 do you think are least important to address?

31. Are there any additional issues or questions that are not addressed in the key issues paper, that you think would be important to address?

Yes  Please list

No  → go to Question 33

32. Why would it be important to address these additional issues or questions? In particular, which government policies would they be relevant to?

33. Please provide any other comments or suggestions.

34. Would you like to receive updates about the progress of the Information Development Plan?

Yes

No

Thank you for completing this questionnaire



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