



Vital Signs

CULTURAL INDICATORS
FOR AUSTRALIA

first edition – for consultation



Foreword

The Australian Bureau of Statistics National Centre for Culture and Recreation Statistics (NCCRS) produces each year a body of high quality statistics on arts and culture in Australia, but nowhere do those statistics come together to create a comprehensive single picture of Australian arts and culture.

In 2007, the Cultural Ministers Council (CMC) agreed to support the development of a suite of high level cultural indicators and to report periodically on the strength of the arts and cultural sector and its contribution to economic and social wellbeing. This is the first time such a project has been undertaken in Australia, although many national governments, including New Zealand, have had well-developed sets of cultural indicators for some time.

National indicators play an important role in many fields of policy (notably in education, the economy and the environment) in enabling governments to assess the strength of a sector, the key features of its contribution to the community, the impact of policy initiatives, and trends in its growth or decline over a period of time.

Vital Signs is the first attempt to create such a measurement tool for arts and culture in Australia. It draws on international research and practice in the field, and on the New Zealand Government's excellent work in this same area.

The purpose of the report is to deliver a tool to enable governments, the sector and the community to monitor the achievements of the sector, the role arts and culture play in economic and social agendas, and the vitality and cultural impact of Australian arts and cultural output.

The report will also assist the CMC in monitoring the outcomes of the five goals in the CMC strategy, namely:

- Enriching our citizens' lives
- Supporting vibrant cultural communities
- Projecting Australia to the world
- Building creative futures
- Transforming cultural spaces and assets.

Some of these matters – such as the contribution of cultural industries to employment – are already measured and monitored. Others, such as those relating to cultural strength and impact, are more qualitative, and it will take time to develop and refine both the measures and the relevant research and data gathering processes to enable them to be used. Over time, we expect the project will provide feedback into the work of the NCCRS.

This first version of *Vital Signs* has been independently reviewed by Dr Cathy Brown-Watt (former head of research at the Australia Council) and Lisa Connolly (formerly Director of the National Centre for Culture and Recreation Statistics at the ABS), and refined in the light of their valuable input. However, the Statistics Working Group is well aware that this first report is an experiment, and that there will be many ways in which the framework can be improved, the information clarified, and the commentary sharpened. We welcome feedback on the usefulness of the report; the need for other indicators and advice on rigorous sources of data to populate them; and the frequency with which the report should be updated. These comments will be used to inform how any further stages of the work will develop.

We look forward very much to receiving your views on these issues over the next twelve months. Comments should be provided to contact@cmc.gov.au

Leigh Tabrett
Chair, Statistics Working Group

Acknowledgments

CMC's Statistics Working Group, which has managed this project, greatly appreciates the work of the Centre for Public Culture and Ideas at Griffith University (Kay Ferres, David Adair, Ronda Jones and Cory Messenger) for the research which created the fundamental framework for this report, and for their generous and thought provoking assistance in compiling the report. We also wish to thank our colleagues at the Australian Bureau of Statistics' National Centre for Culture and Recreation Statistics for providing the core statistics, for the quality of their advice and work on the project, and for their detailed and rigorous review of all data used in the report.

Statistics Working Group

The Statistics Working Group comprises representatives from participating jurisdictions which are the Australian Government, the Australian Capital Territory, New South Wales, the Northern Territory, Queensland, South Australia, Tasmania, Victoria, Western Australia and New Zealand. Other members come from the Australia Council, the Australian Film Commission, and the National Centre for Culture and Recreation Statistics in the Australian Bureau of Statistics.



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Introduction

The arts show us what we are and what we might become. Arts experiences can inspire, transport, divert, discomfort and shock us.

Technological change, from the printing press to the iPod, has made these experiences available to everyone, wherever they are. The arts and culture are public goods. One person's pleasure does not diminish another's. Indeed, the arts' benefits are multiplied when they are shared. When we are touched by beauty, moved by tragedy, stirred by music or disturbed by the new and strange, our impulse is to share those responses. Now as never before, social networking enables that sharing. Cultural buzz is spontaneous.

Artistic expression travels well, crossing cultures and territories, generations and time. Australian stories, images, music and dance have their sources in many cultures and traditions. The movement of people and ideas is a constant in Australian history, marked by dreaming tracks and manifested in the cultural institutions that are part of our European heritage – the library, museum, theatre and gallery. The creative achievements of Australia's artists, performers, filmmakers, writers and cultural entrepreneurs are recognised locally and internationally.

The vitality of Australian creative work comes from the infusion of existing traditions with new energy and influences. The current creative generation includes many children of post-war migration and more recent arrivals, as well as Indigenous artists. Vibrant cultural communities have emerged from encounters between Indigenous and immigrant cultures. Australian cultural identity embraces this diversity.

Democratisation of culture, mass education and technological change enable people to become curators of their own arts experience. These social forces have also allowed talented people to develop their gifts. We are only now beginning to recognise how this creative capital can promote innovation, economic development, social inclusion and international cooperation.

The development of indicators will assist in defining these benefits, and will support strategic planning and investment in the provision of arts and cultural resources and services.

Purpose of the report

This report provides a basis for the measurement of the contribution arts and culture make to the public good in Australia. It suggests that contribution can be captured using three broad themes: economic development, cultural value, and engagement and social impact. The framework will enable collection of meaningful data and analysis of trends over time, and inform evidence based decision making and evaluation of public policy. It will also allow comparisons of these trends and benchmarking with the international cultural sector. Perhaps most importantly, it will increase public awareness of the value of arts and culture, increase our appreciation of the talent Australia produces, and enhance our understanding of cultural diversity.

The framework and its three themes (economic development, cultural value, and engagement and social impact) have been developed after extensive research on international developments in cultural measurement. In keeping with international trends, the framework gives a central place to cultural value. It also acknowledges the importance of arts and culture as a catalyst for economic growth, and accords with growing recognition of the importance of arts and culture to personal and community wellbeing and social inclusion.

Within these themes, a suite of cultural indicators has been developed. These draw on data collected by the Australian Bureau of Statistics (ABS), through the five yearly population census and other surveys that gather information on employment, household expenditure, Australian time use, cultural funding, education and training, disability, wellbeing and social circumstances of Aboriginal and Torres Strait Islanders, and data from the Australian National Accounts. Useful as the ABS data is, it is not comprehensive enough to reflect the many ways that arts and cultural activity contribute to the economy, to community wellbeing and social inclusion to Australia's cultural heritage and identity, and to our confidence and standing in the world.

Consequently, some indicators have been included that depend on other reliable sources, including data about international and domestic tourism collected by Tourism Research Australia, the Australia Business Arts Foundation (AbaF) survey of private sector support for the arts, material from television and music industry authorities, and information recorded by Australian, state and territory governments.

Some 'unpopulated' data items have also been suggested. Where this is the case, reasons for the inclusion of the items are specified within the text. However, there is a clear need for a process that can assist the standardisation, aggregation and coordination of the collection of data from the many agencies that engage directly and indirectly with cultural producers and consumers. Some already publish data; others include data in annual reports and financial statements.

Consideration needs to be given to the means of collecting data, frequency of surveys and who administers the collection of data. For Australian arts and cultural data collection to be sustainable, useful and valuable, the interests of stakeholders should be taken into account. This report could inform design of appropriate survey instruments and thinking about a broad range of data sources. The framework provided by this report can form the basis of regular reporting of data and trends over time.

A cultural indicators framework

Cultural indicators include both quantitative (statistical) measures and qualitative data drawn from surveys, interviews and case studies. They describe and provide a basis for the interpretation of cultural phenomena. They underpin a robust evidence base for strategic planning and public and private investment.

The development of a cultural indicators framework will enable more effective advocacy for the value of the arts and culture to a wider public. A better informed understanding of the public value of investment in arts and culture will promote confidence in cultural institutions and the cultural sector.

The framework proposed in this paper is built on three themes:

1. economic development
2. cultural value
3. engagement and social impact.

These themes capture the key dimensions of artistic production and consumption, the personal and public benefits that result from arts experiences, and the balance of intrinsic and instrumental value that the cultural sector delivers.

The measurement of cultural value requires:

- clarity about what it is that individual indicators measure. This means definitions and categories have to be agreed upon and the values underlying those distinctions articulated
- indicators that are aligned with relevant and reliable data and matched to defined outcomes in particular domains of activity
- frameworks that draw on and are informed by ongoing research into the benefits and impacts of arts and cultural activity.

Governments and cultural agencies internationally have undertaken cultural measurement initiatives. These have been driven by different national priorities. In the United Kingdom, public value frameworks look to cultural participation to advance a social cohesion agenda, designed to balance the efficiency and accountability legacies of the 1980s with a renewed demand for public services. Operational transparency and trust building are cornerstones of this agenda. Cultural measurement initiatives have emphasised community consultation as a way to authorise investment in arts and culture. Elsewhere, support for arts and culture has been linked to political integration and cultural sustainability. The European Community has its own interests in improving the coordination of local and cross-national cultural measurement frameworks. Canada has a distinctive approach to managing multiculturalism that makes equilibrium a key feature of cultural measurement initiatives, and this is expressed in much of the research there on community cultural development and sustainability. Hong Kong's geopolitical context and local concern with promoting the development of creative industries have been significant influences on cultural measurement there. In the United States, where the state has been less involved in direct support for the arts, but where there is a strong civic-democratic interest in cultural activities, cultural measurement has focused on establishing links between intrinsic and instrumental cultural values.

Closer to home, New Zealand's Ministry for Culture and Heritage, in collaboration with Statistics New Zealand, has prepared a report *Cultural Indicators for New Zealand* (2009). Biculturalism is an established policy in New Zealand, underpinning community development, education and media and critical to the development of creative industries, particularly tourism. New Zealand's cultural indicators framework focuses on identity/place and cultural tourism. It is structured around five themes: engagement; cultural identity; diversity; social cohesion and economic development. While this Australian report draws on a wide span of international initiatives, it takes *Cultural Indicators for New Zealand* as a key reference point.

Theme 1: economic development

Overview

The contribution of the arts and culture to urban development has long been recognised. In economic terms, this contribution has been measured in various ways. Most recently, attention has focused on the idea that the arts and culture are catalysts for economic growth. Richard Florida has developed a 'bohemian index' to represent how certain localities have been able to draw talent and attract new creative industries.¹

The 'creative industries' describe a range of enterprises that focus on design technologies, such as fashion, architecture, media industries and advertising. It is difficult to measure the size of this sector and to define what part of it is 'creative' in the sense of employing artists.

The arts and culture as an economic sector is still not well understood. In her work on arts occupations, the economist Ann Markusen captures the way arts professionals work across the boundaries of commercial and non-profit enterprises while retaining an independent sphere in which they develop their own practice.²

The mix of professional artists with technical and administrative staff in the creative industries and the portfolio nature of arts and cultural occupations make a definition of the arts and culture sector difficult to achieve.

Indicator 1.1 – Cultural employment

Definition

This indicator uses counts of people employed in cultural occupations and industries to show patterns of employment and forms of engagement in the sector.

Rationale

Data collected on employment typically capture information about the respondent's main job. Definitions of cultural occupations are fluid and include administrative and technical as well as creative work. The data indicate some variations in patterns of engagement that reflect the extent of part-time work and changing levels of employment with age. However, it is difficult to discern career paths or patterns of career mobility or progression.

Employment data show the range of cultural industries that support production of arts and creative work. Cultural industries³ not only employ people who develop creative ideas, but many others who assist in the production and delivery of artistic and creative outputs. Demographic data on income, hours worked, gender, age and birthplace may show employment patterns in the sector.

¹ Florida 2003.

² Markusen, Schrock and Cameron et al. 2004; Markusen 2006

³ For the purposes of classification, the ABS includes the following organisations as cultural industries: museums, performing arts venues, film, television, radio, libraries, photographic studios, publishing and advertising (for full list, see the *Australian Culture and Leisure Classifications* (ACLC) cat. no. 4902.0).

For the purposes of this indicator, cultural employment includes:

- cultural occupations in cultural industries
- cultural occupations in other industries
- non-cultural and unspecified occupations in cultural industries.

Data items

Data on selected cultural occupations and industries from the 2006 Census of Population and Housing show the patterns of employment in the sector. Occupations and industries are considered as 'cultural' based on inclusion in the *Australian Culture and Leisure Classifications (ACLC)* (cat. no. 4902.0). The figures show the number and selected characteristics, such as income and hours worked, and age of persons employed in cultural occupations or cultural industries for their main job.

Cultural employment

- Cultural Employment – 1996, 2001 and 2006

Cultural occupations

- Employed Persons by Cultural Occupation – 2006
- Persons Employed in Cultural Occupations by Gross Weekly Income – 2006
- Persons Employed in Cultural Occupations by Hours Worked – 2006
- Persons Employed in Cultural Occupations by Sex – 1996, 2001 and 2006
- Persons Employed in Cultural Occupations by Age Group – 2001 and 2006
- Persons Employed in Cultural Occupations by Birthplace and Indigenous Status – 2006

Cultural industries

- Persons Employed in Cultural Industries by Gross Weekly Income – 2006
- Persons Employed in Cultural Industries by Hours Worked – 2006
- Persons Employed in Cultural Industries by Sex – 1996, 2001 and 2006
- Persons Employed in Cultural Industries by Age Group – 2001 and 2006
- Persons Employed in Cultural Industries by Birthplace and Indigenous Status – 2006

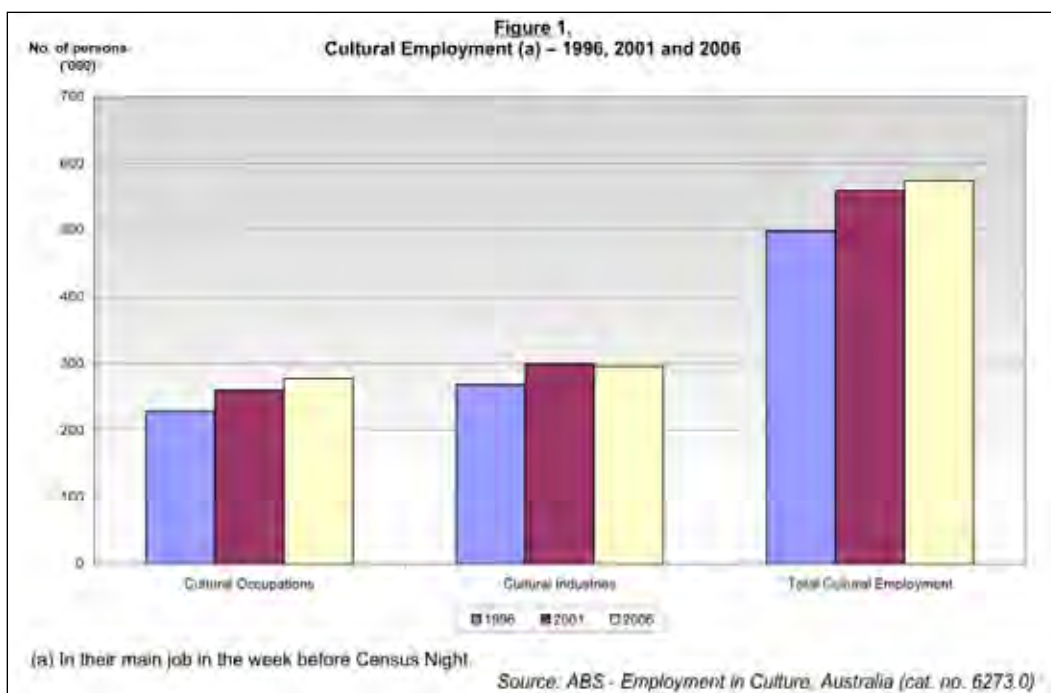
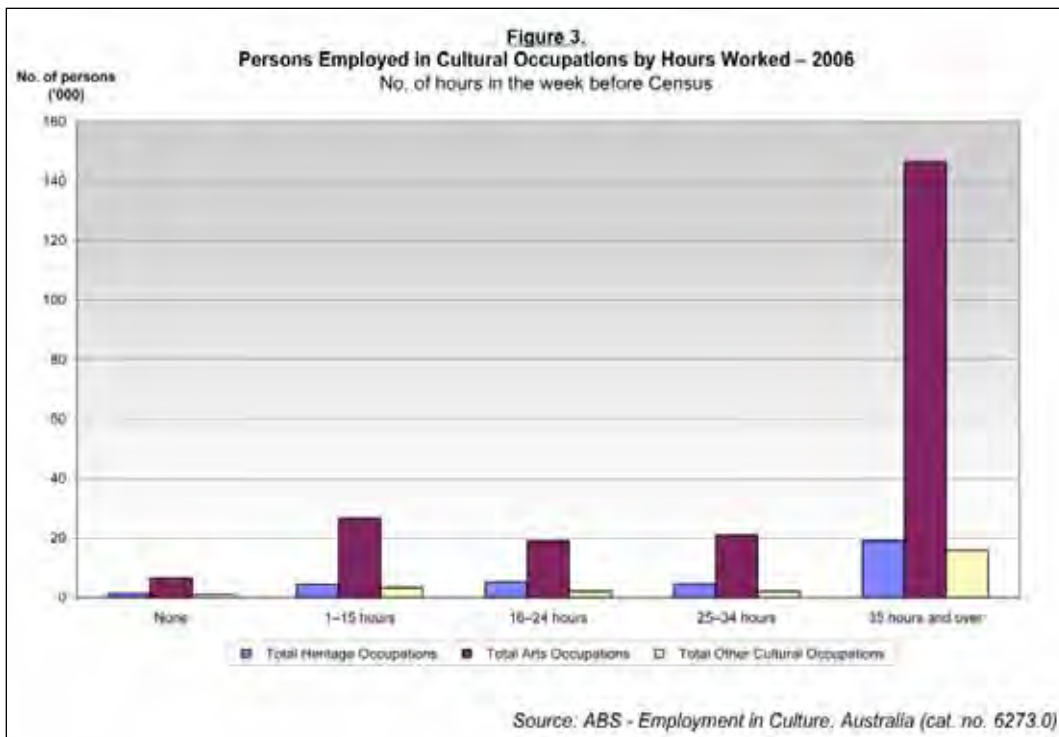
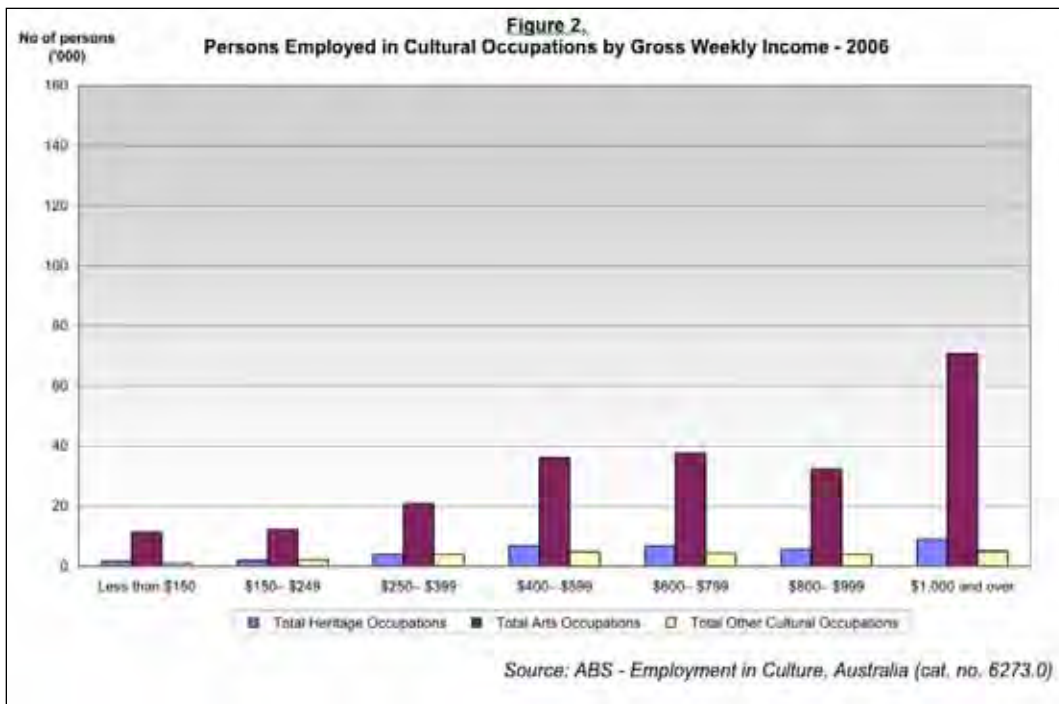


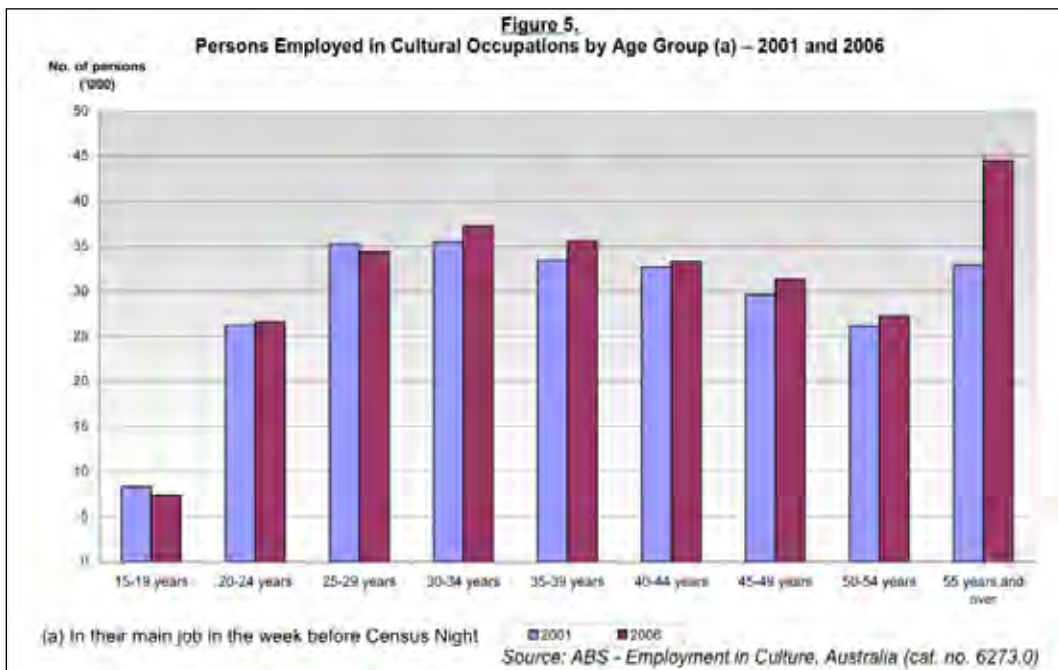
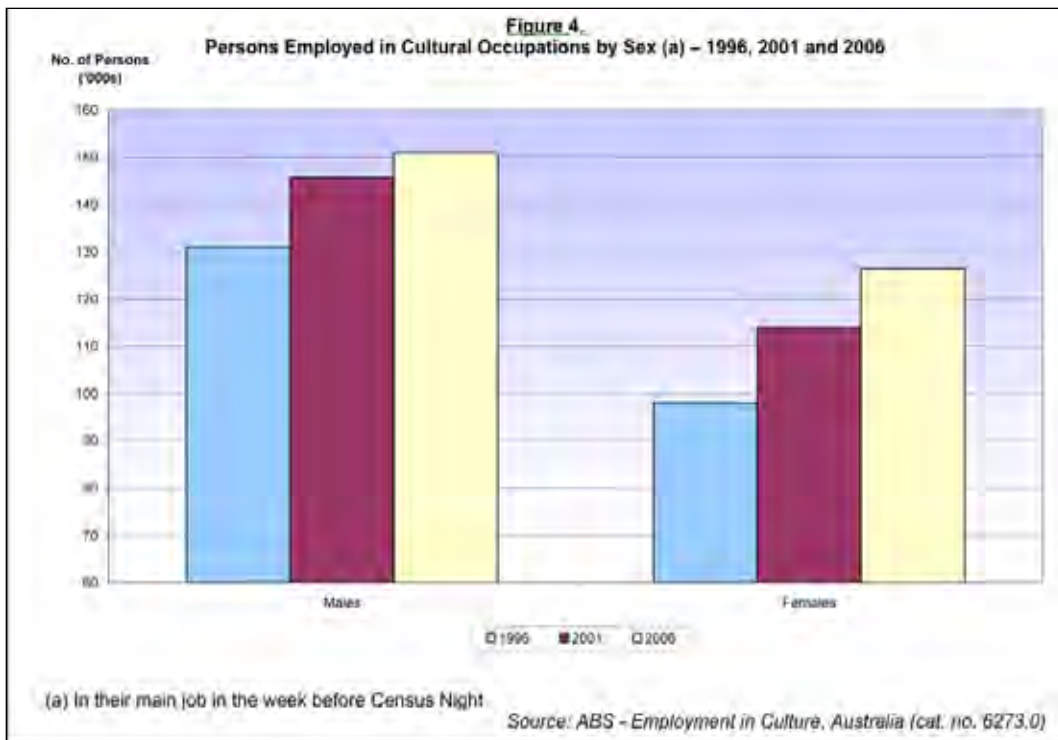
Table 1.
Employed Persons by Occupation (a) (b) (c) – August 2006

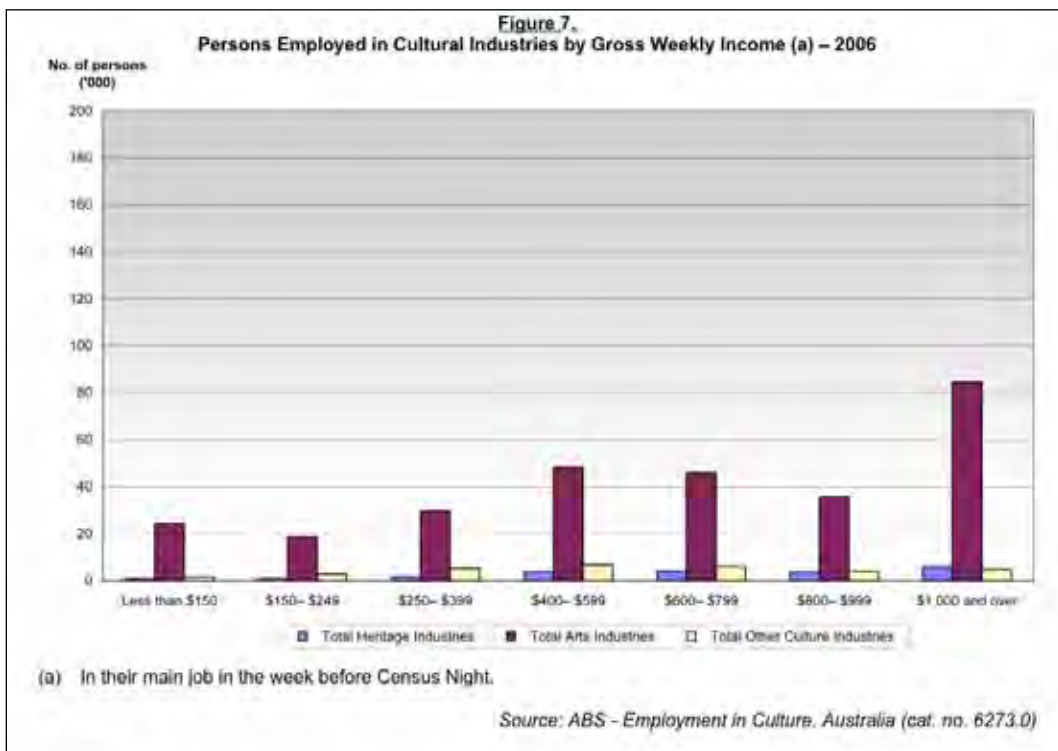
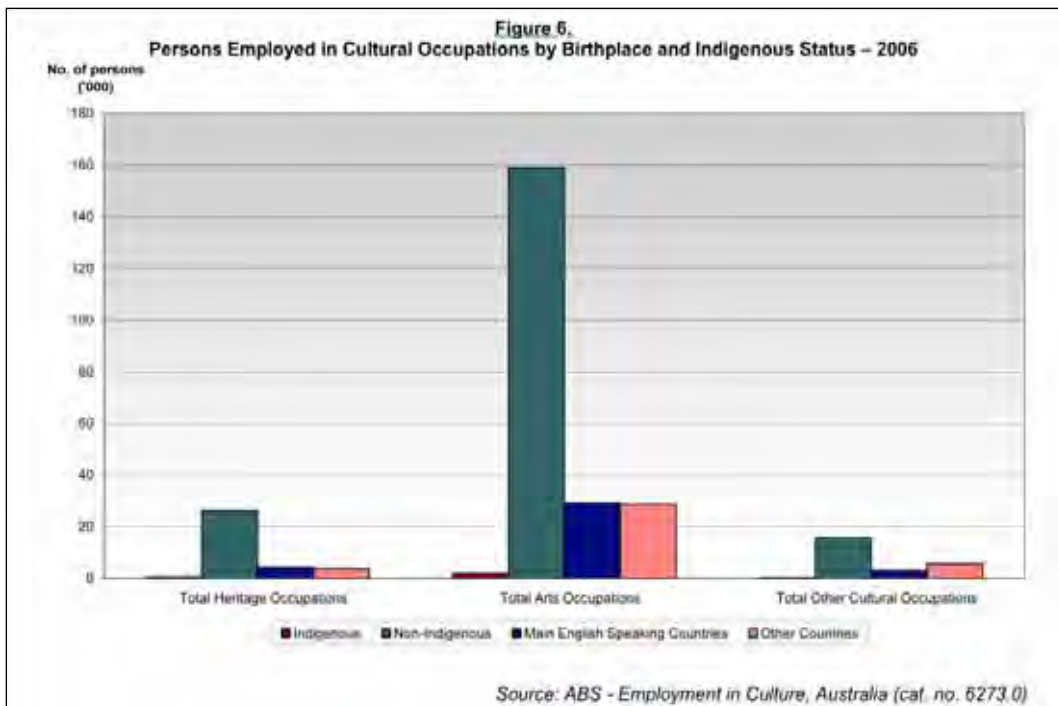
Occupation	Persons employed
	No.
Built, collectable and environmental heritage workers	9,763
Library and archive workers	25,741
Other heritage workers	68
Writers and print media workers	23,769
Performing artists and music composers	15,412
Performing arts support workers	14,745
Visual arts and crafts professionals	14,153
Architects and urban planners	32,038
Design workers	59,333
Broadcasting, film and recorded media equipment operators	8,125
Printing workers	31,073
Other arts support workers	21,119
Other arts workers	4,271
Other cultural occupations	25,181
Total cultural occupations	284,791
Other occupations (d)	8,819,396
Total employed persons	9,104,187

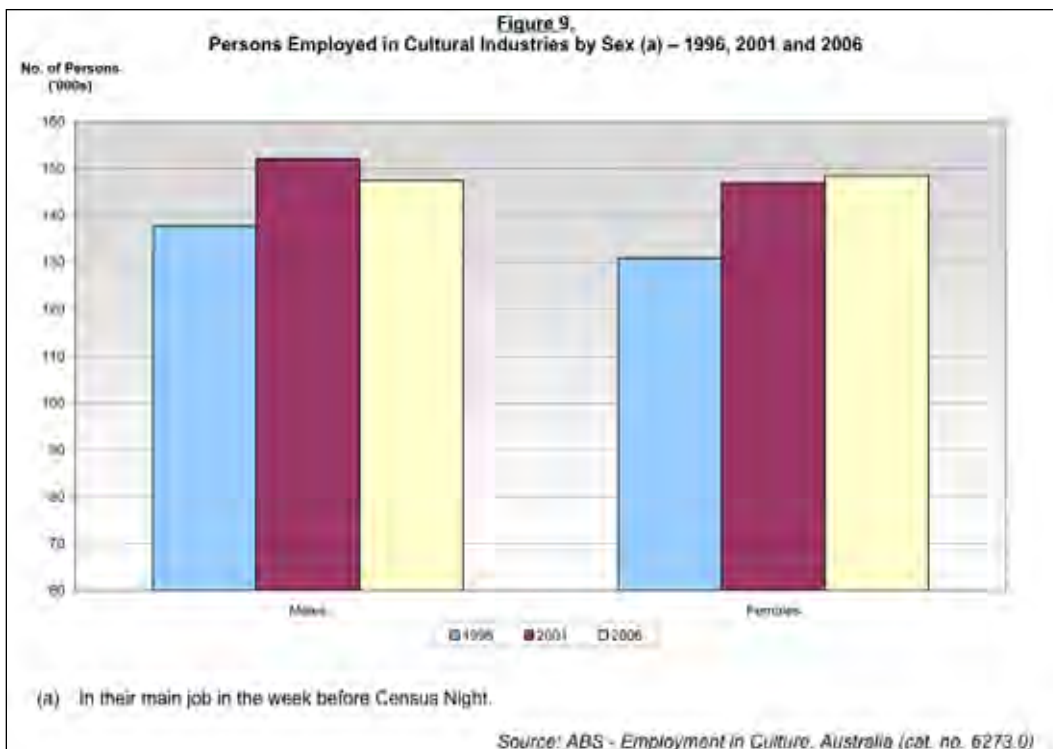
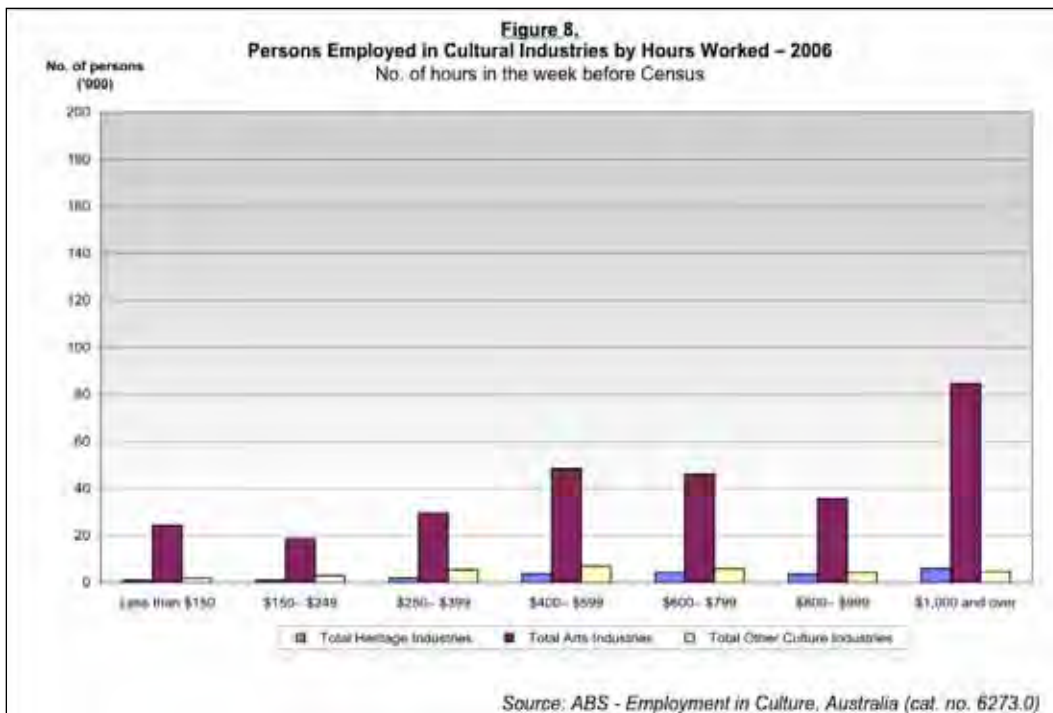
(a) Cells in this table have been randomly adjusted to avoid the release of confidential data.
 (b) In their main job in the week before Census Night.
 (c) The cultural occupations included are a subset of the ANZSCO First Edition Alternate View Culture and Leisure. For More information see *Australian and New Zealand Standard Classification of Occupations, First Edition, 2006* (cat. no. 1220.0)
 (d) includes not stated or inadequately described.

Source: ABS - Arts and Culture in Australia: A Statistical Overview, 2008 (Second Edition) (cat. no. 4172.0)









Discussion

The 2006 census found that 3.1% of employed persons in Australia worked in cultural occupations and 3.8% of employed persons worked in cultural industries. This reflects the number of respondents who reported a cultural occupation or employment in a cultural industry as their main job in the week before the census.

The number of people employed in cultural occupations for their main job increased by 6.8% between 2001 and 2006 (Figure 1). This followed an increase of 13.3% between 1996 and 2001.⁴ The cultural occupations which recorded a percentage increase in main job employment greater than 35% were technical directors, interior designers, book editors, make-up artists, media producers, urban and regional planners, and architectural associates.⁵

The number of people employed in cultural industries for their main job decreased between 2001 and 2006 by 1.0%, following an 11.3% increase between 1996 and 2001 (Figure 1).⁶ For cultural industries, the largest percentage increases in main job employment occurred in the performing arts venues industry (46.3%), photographic studios industry (45.0%), and the recorded media manufacturing and publishing industry (39.5%).⁷

It is still the case that much work in cultural occupations is part-time and low paid, and that it is difficult to differentiate levels of expertise and experience commensurate to income and hours worked (Figures 2 and 3). A large number of people work in unspecified occupational categories (e.g. 'Other' cultural occupations) (Table 1). Levels of employment are fairly consistent for persons aged 25–44 years, but then fall away. Notably people aged 55 years and over exhibit high levels of employment in cultural occupations (Figure 5). However, this would show a different pattern if the group was split into 55–69, 60–64, and 65 and over. Nevertheless, it draws attention to continuing involvement in the sector post-retirement. It is not possible to draw any conclusions about the reasons for this trend. It would be useful to have additional data that reflect career paths and patterns of arts employment, especially relating to mobility across the sector. Similar patterns of employment by age group are apparent in cultural industries (Figure 10).

There have been increasing numbers of both men and women employed in cultural occupations; however, men continue to outnumber women (Figure 4). Between 2001 and 2006, women's employment in cultural occupations increased by 10.8% and men's employment increased by 3.6%.⁸

Most people in cultural occupations are non-Indigenous Australians or were born in the main English-speaking countries (Figure 6). Again, similar patterns are evident for those employed in cultural industries (Figure 11). Data shows that Indigenous people are employed in cultural occupations in relatively low numbers, but this may be proportional to their representation in the national population.

Since 1996, women's employment in cultural industries has increased substantially and they have closed the gap to outnumber men (Figure 9). From 2001 to 2006, women's employment in cultural industries increased by 1% while men's employment declined by 3%.⁹

Data on income and hours worked in cultural industries demonstrate that work in the sector is relatively low paid (Figures 7 and 8). In 2006, the majority of people working in cultural industries worked 35 hours and over. Significantly, the vast majority also earn less than \$1000 per week.

⁴ See Table 2.1 ABS Employment in Culture 6273.0

⁵ See Table 2.1 ABS Employment in Culture 6273.0

⁶ See Table 2.2 ABS Employment in Culture 6273.0

⁷ See Table 2.2 ABS Employment in Culture 6273.0

⁸ See Table 2.1 *ABS Employment in Culture* cat. no. 6273.0

⁹ See Table 2.2 *ABS Employment in Culture* cat. no.6273.0

Indicator 1.2 – Household expenditure on cultural goods and services

Definition

This indicator shows how much Australian households spend on cultural goods and services and what proportion of total household expenditure this represents.

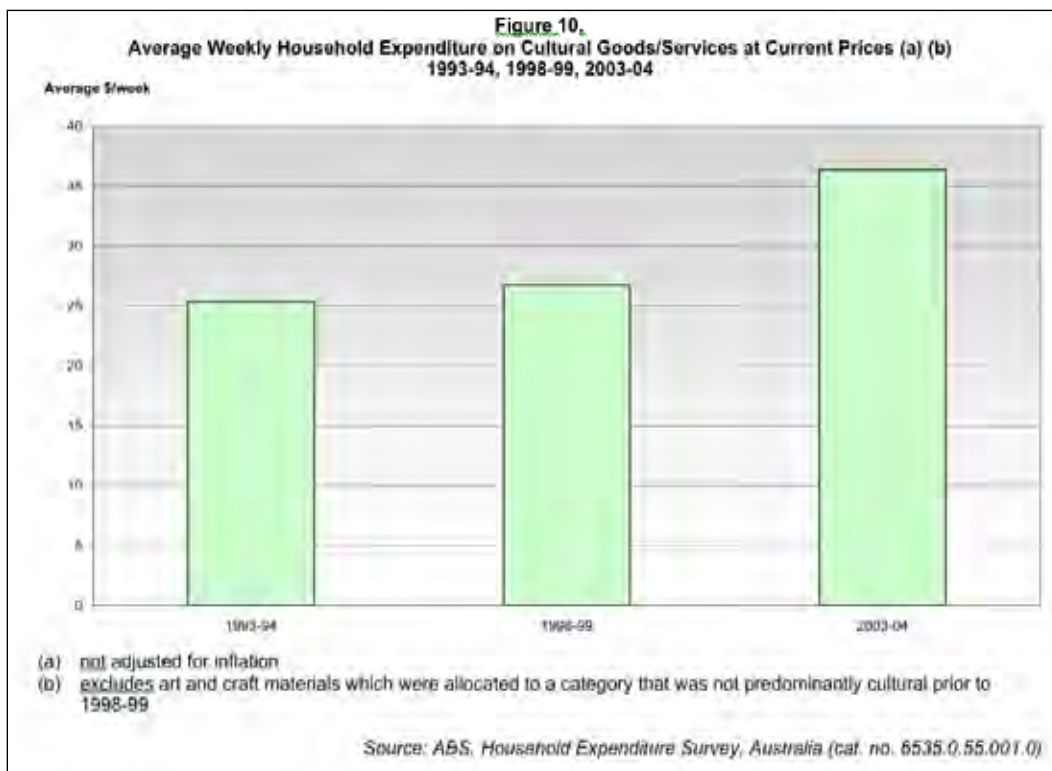
Rationale

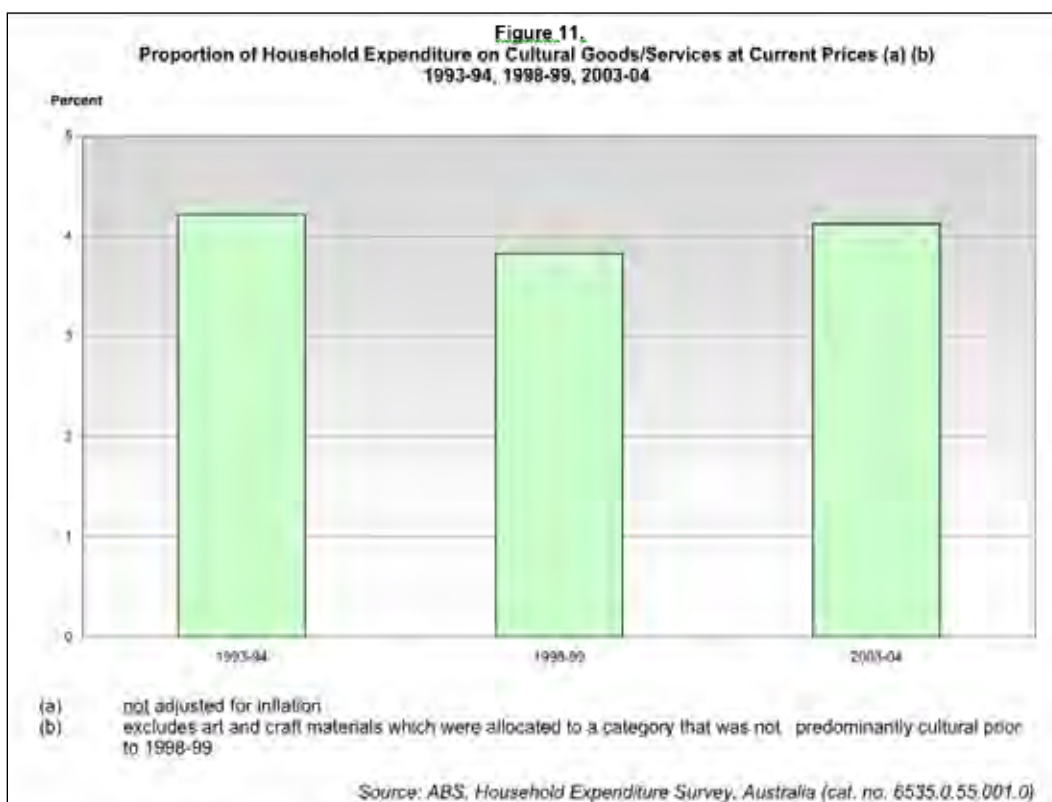
Demand for arts and cultural products is uncertain. Expenditure on aesthetic goods is generally regarded as non-essential and discretionary. The national survey of household expenditure is the most reliable aggregated measure of levels of demand for cultural goods and services over time.

Data items

The ABS collects information on levels and patterns of expenditure on commodities and services by private households in Australia.

- Average Weekly Household Expenditure on Cultural Goods/Services at Current Prices (a) (b) – 1993–94, 1998–99, 2003–04
- Proportion of Household Expenditure on Cultural Goods/Services at Current Prices (a) (b) – 1993–94, 1998–99, 2003–04





Discussion

The average weekly household expenditure for 1993–1994 and 2003–2004 are proportionately similar, with a downturn evident in the 1998–1999 period, despite the considerable rise in spending in 2003–2004 in current price terms (Figures 12 and 13).

According to the most recent ABS Household Expenditure Survey (2003–2004), there were an estimated 7.7 million households in Australia, each spending an average of \$36.40 per week on culture – equivalent to a total annual expenditure of \$14,694m by all households.

Many factors influence household spending on culture, including:

- the size of the household – more people generally equates to higher expenditures
- the location of the household – e.g. some cultural performances may only be staged in larger cities
- the income of the household – expenditure on most goods and services is related to the household’s income
- the composition of the household – cultural interests vary according to the age and sex of individuals in a household, which in turn influences where their cultural dollars are spent.

In 2003–2004, Australian households spent 4% of their total expenditure on cultural goods and services. Households spent the largest amounts on books (\$1587m), televisions (\$1376m), pay TV fees (\$1084m) and newspapers (\$1031m).¹⁰

Between 1998–1999 and 2003–2004, total household expenditure on culture increased from \$26.74 to \$36.40 per week. Part of this increase can be attributed to inflation. During the five years between the surveys, the prices of goods and services, as measured by the Consumer Price Index, rose by 18%.¹¹

¹⁰ For detailed information on people’s spending preferences, refer Table 3.2 in the *ABS Arts and Culture Statistical Overview* (cat. no. 4172.0.)

¹¹ ABS, *Arts and Culture Statistical Overview* (cat. no. 4172.0). pp.20 21

Indicator 1.3 – Visitor expenditure on cultural goods and services

Definition

International and domestic visitor expenditure on Indigenous and non-Indigenous cultural venues, sites and events is a measure of cultural tourism's contribution to the national economy.

Rationale

Cultural tourism attracts international and domestic visitors who wish to experience a uniquely Australian culture. Data on expenditure is an indication of visitors' direct spend on cultural goods and services, and the flow-on effects to other sectors of the economy, particularly hospitality industries. Data also indicates the potential for growth of Indigenous tourism which focuses on cultural production, heritage sites and performances.

Data items

Tourism Research Australia collects information about the international and domestic tourism markets in Australia using a range of surveys and other research methods (refer Appendix A, Schedules 1 and 2 for notes on data collection methods). The following data items have been selected to illustrate the value of tourism in the cultural sector.

- Number of International Visitors and International Cultural and Heritage Visitors¹² – 2004–2008
- Expenditure by International Cultural and Heritage Visitors, per person – 2008
- International Visitors who Participated in Indigenous Activities, 2005–2007
- Expenditure by International Indigenous Tourism Visitors¹³ and Non-Indigenous Tourism Visitors 2007
- Domestic Overnight Visitors who Participated in Indigenous Activities, 2005–2007
- Expenditure by Domestic Overnight Indigenous Tourism Visitors and Non-Indigenous Tourism Visitors 2007

NOTE: Domestic day Indigenous tourism visitor activity is not recorded.

¹² A cultural visitor is defined as a visitor who attends one or more cultural attractions in Australia including: (1) Theatre, concerts or other performing arts, (2) Museums or art galleries, (3) Art/craft workshops/ studios, (4) Festivals/fairs or cultural events, (5) Aboriginal art/craft and cultural displays, (6) An Aboriginal site/community, and (7) History/heritage buildings, sites or monuments.

¹³ An Indigenous tourism visitor is one who participates in at least one Indigenous tourism activity during their trip. International visitors may participate in any of the following:

- Visit an aboriginal site or community
- Experience aboriginal art/craft or cultural display
- Attend aboriginal performance
- Other tourism activities

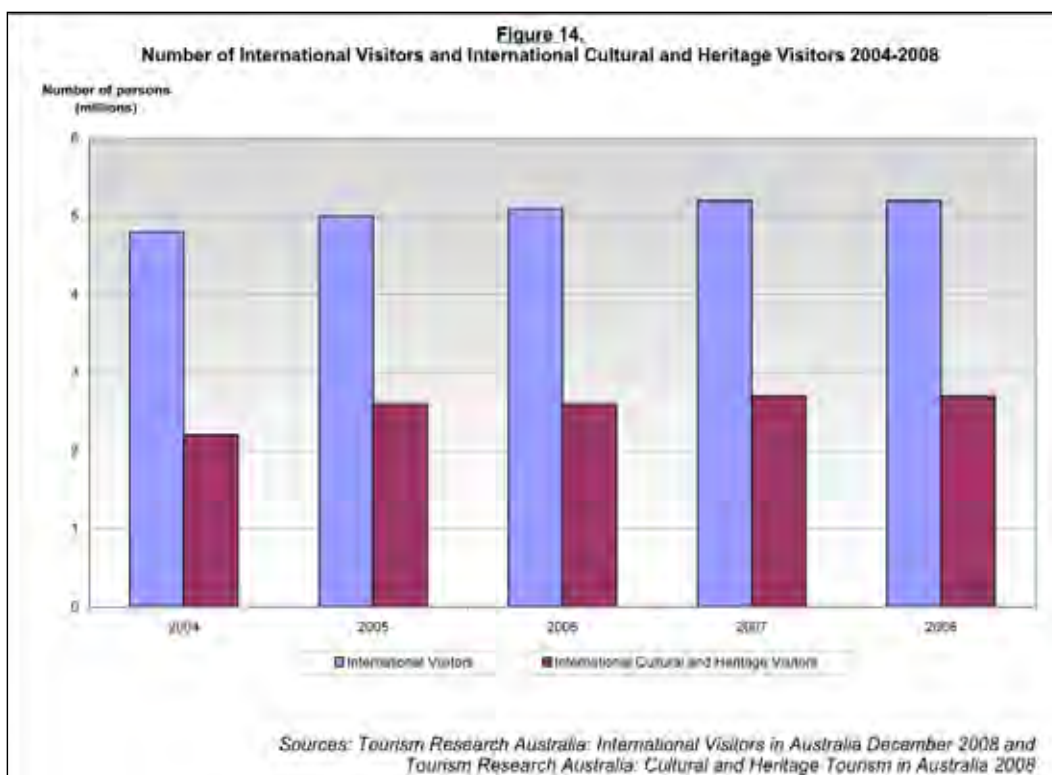


Table 2.
Expenditure by International Cultural and Heritage Visitors, per person - 2008

	\$ per Trip
Accommodation, food & beverages	1861
Shopping	530
Domestic airfares	413
Other transport	1995
Organised tours	542
Education	8854
Entertainment	195
Other transport	1631
Total spend per person	6355
Total spend per night	148

Source: Tourism Research Australia: Cultural and Heritage Tourism in Australia 2008

Table 3.
International Visitors Who Participated in Indigenous Activities, 2005-2007

	Visitors '000	Proportion %
2005	915	18
2006	842	17
2007	837	16
%Change 2006 - 2007	-1%	

Source: Tourism Research Australia: Indigenous Tourism Visitors in Australia 2007

Table 4.
Expenditure by International Indigenous Tourism Visitors and Non-Indigenous Tourism Visitors 2007

	Expenditure Per Visitor \$	
	Indigenous Tourism Visitors	Non-Indigenous Tourism Visitors
Accommodation, food & beverages	2013	1168
Shopping	504	391
Domestic airfares	150	44
Other transport	439	198
Organised tours	388	80
Education	551	474
Entertainment	110	58
Other transport	211	186
Total per visitor	4366	2578

Source: Tourism Research Australia: Indigenous Tourism Visitors in Australia 2007

Table 5.
Domestic Overnight Visitors who Participated in Indigenous Activities, 2005-2007

	Visitors '000	Proportion %
2005	584	0.8
2006	696	1.0
2007	677	0.9
% Change 2006-2007	-3%	

Source: Tourism Research Australia: Indigenous Tourism Visitors in Australia 2007

Table 6.
Expenditure by Domestic Overnight Indigenous Tourism Visitors and Non-Indigenous Tourism Visitors 2007

	Expenditure Per Visitor \$	
	Indigenous Tourism Visitors	Non-Indigenous Tourism Visitors
Accommodation, food & beverages	595	292
Shopping	145	61
Domestic airfares	182	71
Other transport	249	91
Organised tours	98	6
Education	14	2
Entertainment	45	15
Other transport	377	42
Total per visitor	1706	580
Total expenditure (\$ million)	1155	42390

Source: Tourism Research Australia: Indigenous Tourism Visitors in Australia 2007

Discussion

International cultural and heritage visitors comprised more than half (52%) of all visitors in 2008, and there has been an average annual growth of 3% in this market from 2000 (Figure 14). These visitors stay longer and spend more. While how much they directly spend on arts and cultural goods and services cannot be specified, they do tend to consume goods and services in industries which generate higher levels of gross value added (Table 2). Over the years 1997–1998 to 2000–2001 cultural and heritage visitors also supported the employment of 146,200 Australians and contributed \$4.3 billion per annum to Australia's wages.¹⁴

In 2007, 16% of all international visitors participated in Indigenous activities, a decline of 1% from 2006 (Table 3). The majority of international Indigenous tourism visitors came from the UK, USA and Japan, although European visitors were more likely to participate in Indigenous activities. These visitors were typically aged between 15 and 29 years (35%), and often travelled alone (43%) or as part of an adult couple (31%).

International Indigenous tourism visitors spent more per person (\$4366) than other international visitors (\$2578) (Table 4). This is most likely because Indigenous tourism visitors stay longer on average than other international visitors (49 nights compared to 27 nights).

Data for domestic visitor attendance and visitor spend is collected for domestic overnight Indigenous tourism visitors only. Domestic participation in Indigenous tourism activities has increased since 2005 to involve 677,000 Indigenous tourism visitors in 2007. This growth largely occurred between 2005 and 2006. There was a slight decline in 2007, yet the overall trend is positive. While there has been growth in the number of visitors participating in Indigenous tourism activities, only a very small proportion (less than 1%) of all domestic overnight visitors participated in these activities (Table 5). Domestic overnight Indigenous tourism visitors stay twice as long as other domestic overnight visitors; consequently, their expenditure per trip is higher. They also spent more per night than other visitors (\$205 compared to \$150) over their entire trip (Table 6).¹⁵

The key characteristic of cultural tourism is that it needs destinations. The importance of destinations is recognised in regional economic strategies, such as the Australian Government's Jobs Fund, a \$650m initiative to support and create jobs and skills development through projects that build community and social infrastructure. The Jobs Fund forms part of the Australian Government's Jobs and Training Compact and has been established to support families and communities most affected by the global economic recession. The fund's \$300m Local Jobs stream supports community infrastructure projects with a focus on the promotion of environment-friendly technology and heritage. It is designed to stimulate projects that employ local people in the short term, while creating or enhancing destinations that provide communities with long-term employment opportunities.¹⁶ Due to its affinities with land care and heritage, Indigenous cultural tourism is well-placed to take advantage of such initiatives and help shift local economies and communities onto a more sustainable footing.

More comprehensive data on Indigenous people's participation in cultural occupations and industries would allow us to fully describe their importance to tourism-led economic development.

¹⁴ Tourism Research Australia: Cultural Tourism in Regions of Australia 2005

¹⁵ Tourism Research Australia: Indigenous Tourism Visitors in Australia 2007

¹⁶ Source: Department of Education, Employment and Workplace Relations <http://www.deewr.gov.au/Employment/Pages/JobsFund.aspx>

Indicator 1.4 – Government support for culture

Definition

This indicator represents total government financial support for the arts and cultural sector. It includes funding support from all three tiers of government.

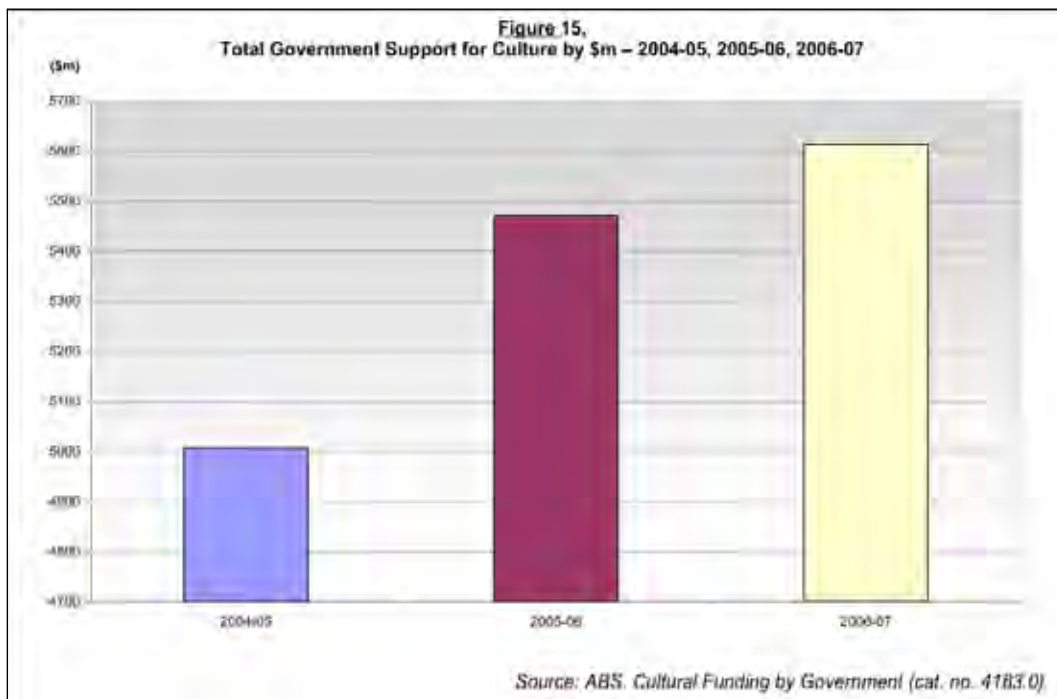
Rationale

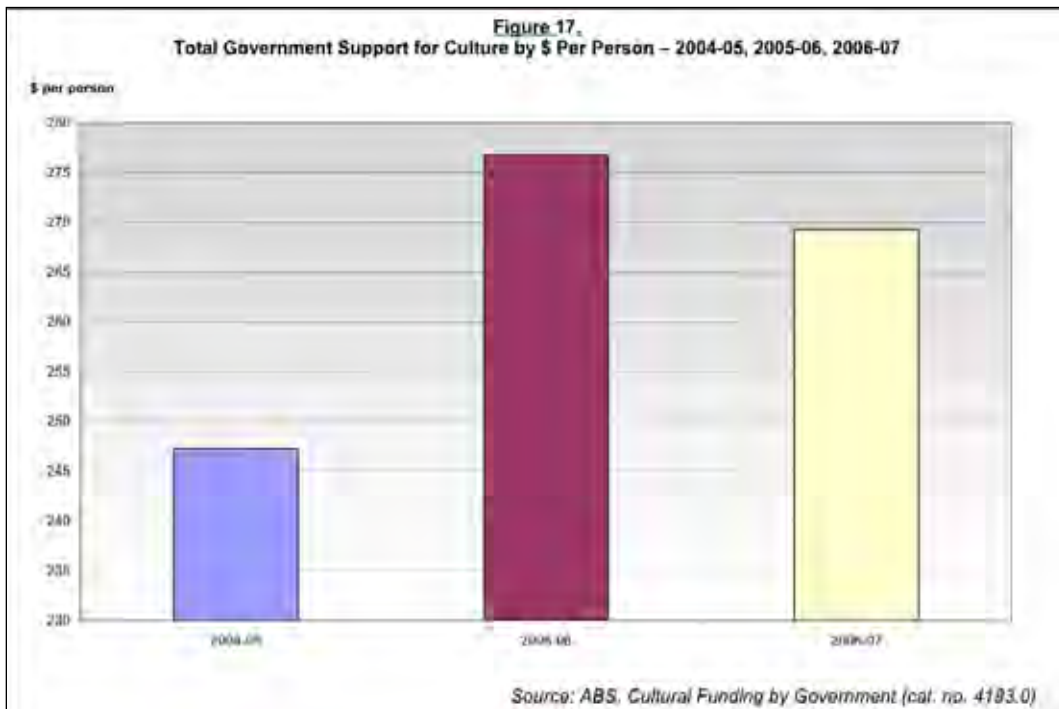
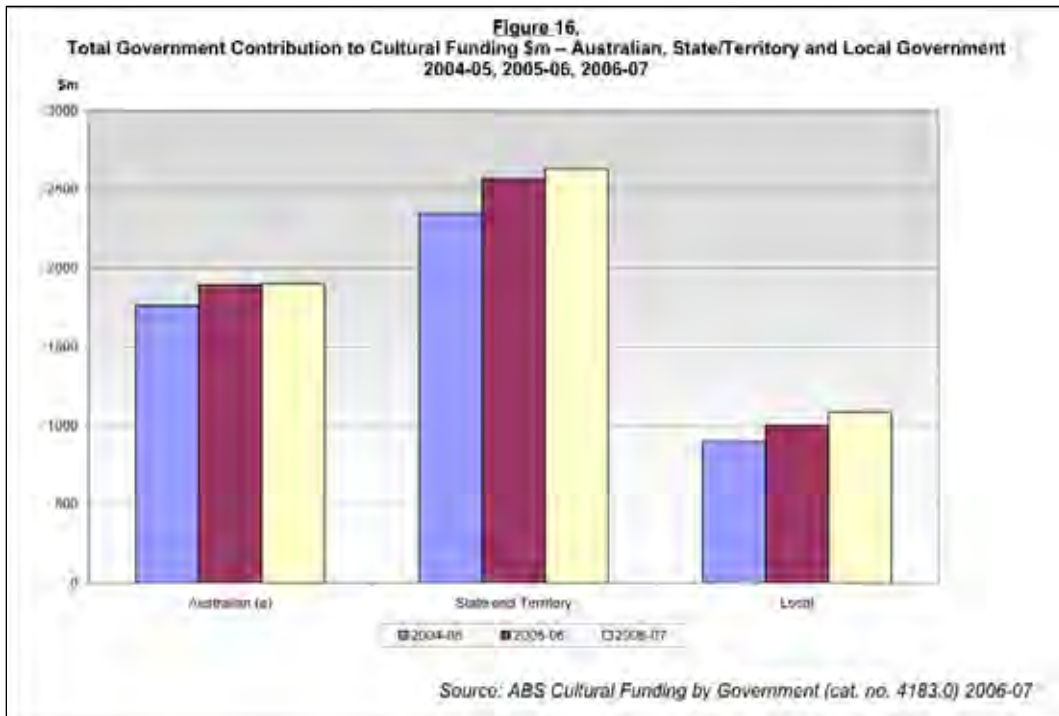
Public investment in arts and culture includes recurrent and capital expenditure by all three tiers of government. This data includes expenditure on nature parks and reserves, as well as arts and heritage activities.

Data items

The ABS collects information about government funding for culture.

- Total Government (Australian, State/Territory and Local) Support for Culture by \$m – 2004–2005, 2005–2006, 2006–2007
- Total Government Contribution to Cultural Funding \$m – Australia, State/Territory and Local Government Expenditure – 2004–2005, 2005–2006, 2006–2007
- Total Government Support for Culture by \$ Per Person – 2004–2005, 2005–2006, 2006–2007





Discussion

All three tiers of government contribute financial support for culture. In 2006–2007, the Australian Government allocated \$1901m for cultural activities. The largest share of Australian, state and territory funding went to broadcast and film, followed by nature parks and reserves. Nature parks and reserves and performing arts have received increased funding, while libraries and archives, art museums and literature and print media have seen declines in funding. Libraries receive funding from all levels of government but local government, provides more than half of this.¹⁷

Between 2005–2006 and 2006–2007 the total government contribution to cultural funding increased by \$142.3m, a rise of 2.6% (Figure 15). Contributions consisted of \$1.901m (33.9%) from the Australian Government; \$2628.8m (46.8%) from the state and territory governments and \$1083.7m (19.3%) from local governments (figure 16). During the previous period (2004–2005 to 2005–2006) total cultural funding increased by \$463.6m, a percentage increase of 9.26%. The Australian Government contribution increased by \$135.0m (7.7%) while the contribution by the state and territory governments rose \$222.1m (9.5%).¹⁸ Despite these increases in funding, total Government support for culture in terms of dollars per person declined from \$276 per person in 2005–2006 to \$269 per person in 2006–2007 (Figure 17).

In 2006–2007 recurrent expenditure¹⁹ was \$5044.1m or 89.9% of total cultural funding. The Australian Government allocated \$1870.9m (98.4%) of its cultural funding towards recurrent activity, while state and territory governments allocated \$2225.1m (84.6%) and local governments allocated \$948.1m (87.5%). The total capital expenditure²⁰ by all levels of government was \$569.4m in 2006–2007, a fall of 9.0% on the \$625.6m reported in 2005–2006. In 2006–2007 the majority of government capital expenditure came from the state and territory governments which collectively outlaid \$403.7m (70.9% of the total). Local governments spent \$135.6m (23.8%) on capital and the Australian government outlaid \$30.1m (5.3%). Note that annual funding for cultural activities can be affected by high levels of one-off capital expenditure.²¹

Indicator 1.5 – Private sector support for culture

Definition

This indicator represents private sector (individual and organisational) financial support for the arts and cultural sector. It includes funding support from corporate sponsorships, and philanthropic giving.

Rationale

Corporate sponsorship and philanthropic giving are growing sources of private sector support. The Australia Business Arts Foundation (AbaF) includes all monetary and in-kind sponsorship, corporate donations, grants from foundations and trusts, and contribution from individual members of the community in its sample surveys of arts and cultural organisations.

¹⁷ ABS, Cultural Funding by Government (cat. no. 4183.0).

¹⁸ ABS, Cultural Funding by Government (cat. no. 4183.0).

¹⁹ Recurrent expenditure refers mainly to expenditure on wages and salaries, purchases of goods and services, and current grants and subsidies.

²⁰ Capital expenditure is mostly expenditure on the creation of fixed assets and on the acquisition of land, buildings and intangible assets.

²¹ ABS, Cultural Funding by Government (cat. no. 4183.0).

Data items

AbaF provides information on private sector support for the arts.

- Value of Sponsorship and Donations for The Arts – 1996, 2000–2001, 2003–2004 and 2006–2007

Unpopulated data items

- Tax Arrangements

Table 7.
Value of Sponsorship and Donations for the Arts – 1996, 2000-01, 2003-04 and 2006-07

Reporting Agency	Sponsorship \$m	Donations \$m	Total \$m
1996 (AC/ABS)	29.2	7.9	37.1
2000-01 (ABS)	46.7*	22.8	69.9
2003-04 (GA)	83.6	219.9	303.5
2006-07 (AbaF)	84.4	86.7	171.1

*Includes \$6.3 million given by businesses in the support of community projects.
Note: Comparison of data is not recommended due to different data collection and extrapolation methodologies and the significant variation in scope, coverage and definitions of the reporting agencies.

*Source: Data from Australia Council 1996; ABS 1999, 2002; DFACS 2005 compiled by AbaF
see AbaF Survey of Private Sector Support for the Arts 2008, p. 8*

Discussion

In recent years, concerted efforts have been made to encourage private sector support for arts and culture to supplement public funding. AbaF was established to encourage sponsorship and donations, and to build partnerships between business and arts organisations and practitioners. These partnerships enable professional development and sharing expertise. Annual AbaF surveys of arts and cultural organisations document the success of these initiatives.

The figure for the amount of total support determined by the AbaF survey is lower than has been reported previously in the Giving Australia report (DFACS 2005), which estimated that total business giving to arts and culture amounted to \$303.5m in 2003–2004. This does not necessarily imply that private support for the arts has diminished over the past three years. Methodological differences preclude the usefulness of drawing comparisons between Giving Australia and AbaF's survey.

Table 7 shows that in 2006–2007 private sector support for the arts amounted to \$171.1m. Sponsorship comprised \$84.4m of this total and donations accounted for the remaining \$86.7m.

The equivalence discovered between sponsorship and donations was interesting given the findings of earlier studies, which have variously suggested that arts organisations receive substantially less donations than monetary sponsorship (Australia Council 1996; ABS 1999, 2002) or alternatively a great deal more (Giving Australia) (Table 7). Different data collection and extrapolation methodologies have given rise to these discrepancies, which are far more pronounced for the value of donations than they are for sponsorship.²²

²² *AbaFBAF Survey of Private Sector Support for the Arts 2008.* The AbaF survey measures private sector support of all monetary and in-kind sponsorship, corporate donations, grants from foundations and trusts, and contributions from individual members of the community. The 2006-07 period is inclusive of company reporting periods from both the 2006-07 financial year and the 2007 calendar year.

For information about survey methodology see http://www.abaf.org.au/files/Research/AbaF_Survey_of_Private_Sector_Support_for_the_Arts_2008_Final_Report.pdf p.7

Tax arrangements can support the development of human capital in the arts and cultural sector by encouraging donations of cash, property, assets and bequests. The benefits for organisations receiving these donations include an increased capacity to provide professional development activities for artists and other cultural workers. The Australian Government has a system of tax incentives of this kind. It includes the Cultural Gifts Program, which provides tax benefits to donors who give significant cultural items to public collecting institutions such as museums, galleries, libraries and archives. Since 1978, gifts to the value of approximately \$440m have been given to these institutions. In addition, there is the Register of Cultural Organisations. Over 1000 cultural groups appear on this register, which is used to attract tax-deductible gifts from donors. Since 1991, registered cultural groups have received approximately \$390m to support their activities.²³

Indicator 1.6 – Voluntary work in arts and culture

Definition

This indicator measures the proportion of the population who volunteer in the arts and culture sector, as well as the count of full-time equivalent sector volunteers.

Rationale

Voluntary work is a measure of in-kind support for arts and cultural organisations. The arts and culture sector has one of the highest rates of volunteering of any sector of the Australian economy. Volunteering helps the sector deliver goods and services that would otherwise have to be paid for or withheld; they represent a hidden economic value.

Data items

The ABS collects information about voluntary work in the sector.

- Proportion of People who Volunteer for Arts/Cultural Organisations – 2006
- Proportion of People who Volunteer for Arts/Cultural Organisations by Sex and Median Age – 2006

²³ Generally, the value of donations is more difficult to accurately measure than the value of corporate sponsorship, with individuals and giving entities in the community representing a much larger cohort more prone to sampling errors than registered businesses. AbaF's figures for donations have been determined solely from the receiving perspectives of the balance of arts organisations rather than the giving perspectives of a broad selection of individuals and philanthropic entities in the community.

Source: Department of Foreign Affairs and Trade http://www.dfat.gov.au/facts/arts_support.html

Table 8.
Proportion of People Who Volunteer for Arts/Cultural Organisations - 2006

	2006	
	('000)	%
Undertook voluntary work for an arts/heritage organisation in the last 12 months	207.2	1.4
Undertook voluntary work for any organisation (incl. arts/heritage) in the last 12 months	5226.5	34.1
All persons aged 18 years and over	15307.1	100.0

Source: ABS - Voluntary Work, Australia (cat. no. 4441.0)

Table 9.
Proportion of People Who Volunteer for Arts/Cultural Organisations by Sex and Median Age - 2006

	2006			
	('000)	%	hours (million) (a)	median age (b)
Males	76.1	1.0	13.7	55
Females	131.0	1.7	*16.9	44
Total	207.2	1.4	30.6	49

(a) annual hours of voluntary work
(b) median age of volunteers in years
* estimate has a relative standard error of 25% to 50% and should be used with caution

Source: ABS - Voluntary Work, Australia (cat. no. 4441.0)

Discussion

Arts and cultural organisations rely on large numbers of volunteers to assist their paid workforce. The number of full-time equivalent volunteers in arts and cultural organisations was 16,800 people. In 2006, the typical arts and culture female volunteer was 44 years of age and the median age of male volunteers was 55 (Table 9).

The 2006 Voluntary Work Survey was conducted throughout Australia from March to July 2006 as part of the General Social Survey (GSS). A volunteer is defined as 'someone who willingly gave unpaid help in the form of time, services or skills, through a club, organisation or association'. In 2006, the proportion of people who volunteered for arts/cultural organisations was 1.4% (Table 8). While the rate of volunteering for arts/cultural organisations is lower than the four most common types of organisation (sports/recreation, education/training, community/welfare, and religious groups), arts and culture volunteers work longer hours for more organisations, indicating a strong commitment to the sector (see Appendix B for details). Volunteering benefits the organisations, the individual voluntary workers, the users of the organisations' goods and services, and society at large. On the other hand, the reliance on volunteers also demonstrates the financial fragility of the sector: a situation that contrasts with the design intensive 'creative industries', for example, where wages are higher and unpaid work has a lower profile (ABS *Voluntary Work Australia* cat. no. 4441.0).

Indicator 1.7 – Economic contribution of cultural industries

Definition

This indicator represents the economic impact of cultural industries.

Rationale

The contribution of cultural industries to the Australian economy can be measured by the value of production of goods and services and industry outputs. The value of cultural industries output and income-value added can be compared to other industries to establish the significance of the sector.

Data items

ABS information on national economic activity is published in the Australian National Accounts (ANA).²⁴

- Value of Production of Cultural Goods and Services – 2001–2002 and 2004–2005
- Output and Value Added, Selected Cultural Industries – 2001–2002 and 2004–2005

Table 10.
Production of Cultural Goods and Services (a) (b) - 2001-02 and 2004-05

Product item	2001-02		2004-05	
	Australian production	% of total cultural goods and services produced	Australian production	% of total cultural goods and services produced
	\$m	%	\$m	%
Publishing, recorded media and publishing	4825	9.5	6143	10.5
Motion picture, radio and television services	10006	20.6	13871	23.8
Libraries, museums and the arts	5665	11.7	6997	12.0
Other cultural products	28261	58.2	31367	53.7
Total	48557	100.0	58378	100.0

(a) At basic values – the net price received by the producer (after deducting any indirect taxes).
 (b) Excludes products primary to: the Recorded media manufacturing and publishing industry; the Book and magazine wholesaling industry; the Newspaper, book and stationary retailing industry; and the Recorded music retailing industry (details for these industries are not available separately).

Source: ABS Publication – Australian National Accounts; Input-Output Tables (Product Details) (cat. no. 5215.0.55.001)

²⁴ Data from the ANA are available on both an industry basis (the value of output of firms in the industry) and a product basis (the value of commodities typically produced by the industry). The difference between the industry and product data arises because some firms produce products which are typically not made by firms in their industry.

The industries in the ANA are defined using the *Australian and New Zealand Standard Industrial Classification (ANZSIC) 2006* (cat. no. 1292.0). The Classification combines industries into economically significant classes which are then the basis for statistical output.

A small number of cultural goods and services produced by non-cultural industries have been excluded from the calculation of cultural output because they cannot be separately identified from non-cultural products.

Table 11.
Output and Value Added, Selected Cultural Industries (a) (b) – 2001-02 and 2004-05

Industry	2001-02		2004-05	
	Australian production (b)	Value added	Australian production (b)	Value added
	\$m	%	\$m	%
Motion picture, radio and television services	10043	3229	14078	3887
Libraries, museums and the arts	5874	2498	7606	3900
Publishing, recorded media, etc.	9879	4498	7736	4482
Total for selected cultural industries (a)	25796	10225	29420	12269
Total for all industries	1417756	671872	1727435	821860

(a) Those for which value added data are available.
(b) These figures differ slightly from those that could be obtained by summing the relevant categories in the previous table. This table shows the value of output produced by firms belonging to the industry, whereas the previous table shows the value of products typically produced by the industry, regardless of whether they were produced by firms in this industry (the difference arises because some firms have non-core activities which belong to a different industry to their core activities). Source: ABS Publication - *Australian National Accounts: Input-Output Tables (Product Details)* (cat. no. (5215.0.55.001))

Source: ABS Publication - *Australian National Accounts: Input-Output Tables (Product Details)* (cat. no. (5215.0.55.001))

Discussion

Economic studies of culture and the arts normally gauge their value in one of two ways: as a percentage of GDP or through the calculation of multiplier effects. The former method involves adding together the amounts patrons pay for items like artworks and tickets to performances. By contrast, multipliers measure the economic value of cultural and arts spending by calculating the financial flow-on effects of this expenditure on related activities and employment. In Australia, there are presently no comparable data collections that would make multiplier measurements meaningful at a national level. The Australian indicator framework is therefore confined to representing the value of output and income-value added.

In 2004–2005 the value of cultural goods and services produced in Australia was \$58,378m (Table 10). This is a gross measure which includes the value of output produced by other industries that are used by the cultural industries in producing their output. The value of the output of the cultural industries in 2001–2002 was \$48,557m, approximately the same as that of the ‘other’ construction industry (\$46,286m), the scientific research, technical and computer services industry (\$43,551m), the education industry (\$43,952m) and the health services industry (\$43,928m).

The value of an industry’s output after deducting the value of goods and services used in producing them is termed ‘value added’. This is equivalent to the return received by the factors of production (labour and capital). This is a net measure of the size of the industry’s output and allows the production of different industries to be added together without the risk of double counting.²⁵

Value added data are only available on an industry basis, and not by individual products. The value of the goods and services produced by the cultural industries for which value added data were available in 2004–2005 was \$29,420m, an increase of 14.05% from 2001–2002 (Table 11). The value added component of these cultural industries was \$12,269m, which indicates that 42% of the value of goods and services produced by the cultural industries was paid to factors of production (labour and capital). The remaining \$17,151m (58%) was paid to other industries for their output, which was used in producing the cultural goods and services. These selected cultural industries account for 1% of the total value added for all industries.²⁶

The value of Australian production for these selected cultural industries was approximately the same as that of electricity supply (\$27,349m) and banking (\$32,726m).²⁶

²⁵ ABS, *Arts and Culture in Australia: A Statistical Overview, 2008 (Second Edition)* cat. no. 4172.0, p.39

²⁶ ABS, *Arts and Culture in Australia: A Statistical Overview, 2008 (Second Edition)* cat. no. 4172.0, p.40

Theme 2: cultural value

Overview

'Cultural value' has become a topic of interest for a range of people with an interest in the arts and culture. Researchers and agencies working in the arts and culture sector have developed methods for identifying and measuring cultural value, as well as for understanding its relationships with other kinds of value. The cultural values associated with the arts and culture exist along a continuum, from the most intimate and hard to articulate, to those that are the objects of public policy and civic debates. Comprehensive models of arts and culture try to account for a full range of these cultural values, alongside economic and social values.

Some international researchers have addressed the topic of cultural value by unpacking 'the arts' into specific art forms or disciplines and by distinguishing different kinds of participation. Alan Brown and Associates, for example, has developed an 'involvement framework' that uses a matrix of four disciplines – music, theatre, dance and visual arts – and five modes of involvement. These modes are distinguished by levels of creative control exercised by participants, and range from active to passive. Active involvement in a creative practice is designated 'inventive' and is assumed to be most intense. Interpretive participation is described as 'a creative act of self-expression that brings alive and adds value to pre-existing works of art'; this might include performance or criticism. Curatorial participation – 'selecting, organising and collecting art to the satisfaction of one's own artistic sensibility' – can apply to private or public collections of books, music or artworks. Observational participation includes experiences an individual 'selects or consents to, motivated by some expectation of value'. The lowest level of involvement is described as 'ambient' and covers experiences that are not 'purposely selected': this might include attendance at exhibition openings or street performances (Brown & Associates 2004, p. 12).

In the UK, John Holden has developed a model of cultural value by drawing on a variety of sources. From anthropology, he takes the recognition of the importance of non-economic values. This allows for discussion of historical, social, symbolic, aesthetic and spiritual values, alongside economic ones. From the environmental sciences, he takes the idea that we have a duty of care for finite and threatened resources. This is allied to the idea of sustainability and the insight that diversity is as vital for healthy and resilient cultural and social systems as it is for ecosystems. From the practice of intangibles accounting, Holden draws the lesson that things that are difficult to measure can be just as important as things that are easy to measure, but that when we do measure intangibles we need to agree on definitions and use consistent approaches. Finally, from the models of 'public value' that have been developed and applied in many public policy settings in recent years, Holden takes the argument that for public institutions to be effective, responsive and efficient, they must recognise that how they operate is as important as what they seek to achieve. For the arts and culture, this means developing a new understanding between funders and funded that favours the creation of value recognised by the public; it means showing cultural leadership, rather than being led; and it means basing that expert authority on transparency, accountability and sound judgment (Holden 2004, pp. 34–45).

In the theme of cultural value as presented in this report, the authors have been mindful of the approaches that focus on individuals – approaches such as Brown's 'Involvement Framework' – while making the major concern the evidence of cultural value in the public domain. Some of the data items use measures currently available from sources such as the ABS or government arts and culture agencies or departments, while other items are not comprehensive but indicative

only. Developing the indicators further would require a collection process that would capture the data currently gestured to in these indicative or aspirational categories.

Indicator 2.1 – Cultural assets

Definition

This indicator represents Australia's material cultural assets: the built and natural cultural inheritance valued by Australians.

Rationale

The indicator uses data on the number of significant buildings, sites, monuments and shipwrecks in Australian territory to represent the size and diversity of the nation's material cultural heritage. It also includes aspirational items: data on capital expenditure on buildings; and programs to add cultural value to natural resources, to conserve and expand access to the major heritage collections, and to support Indigenous art centres.

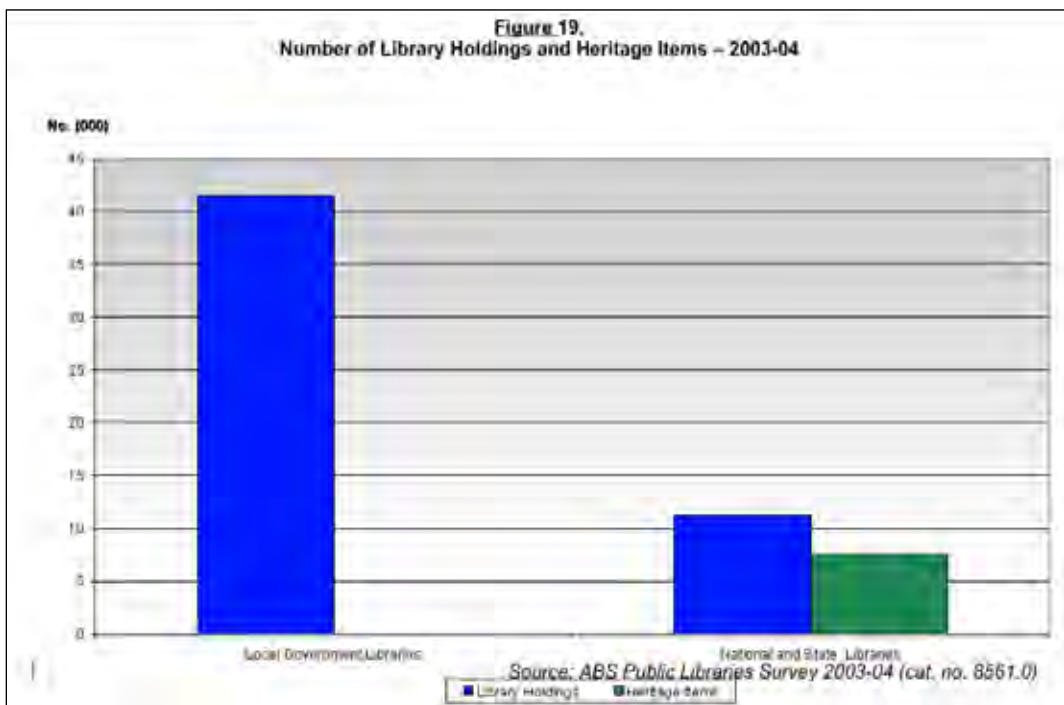
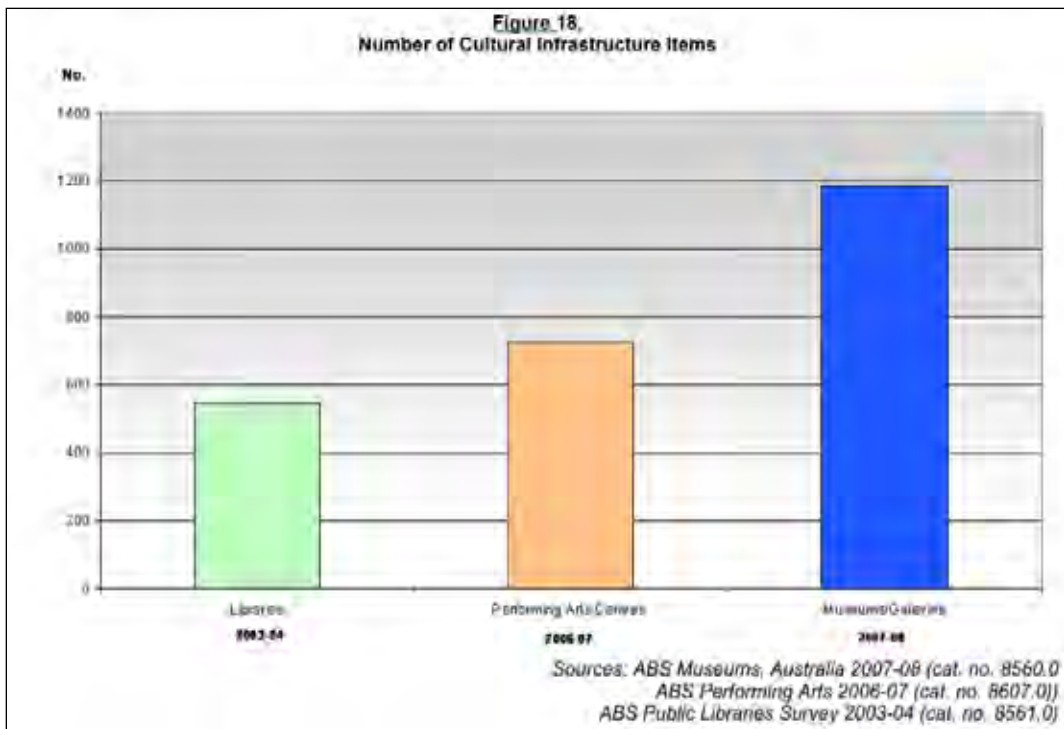
Data items

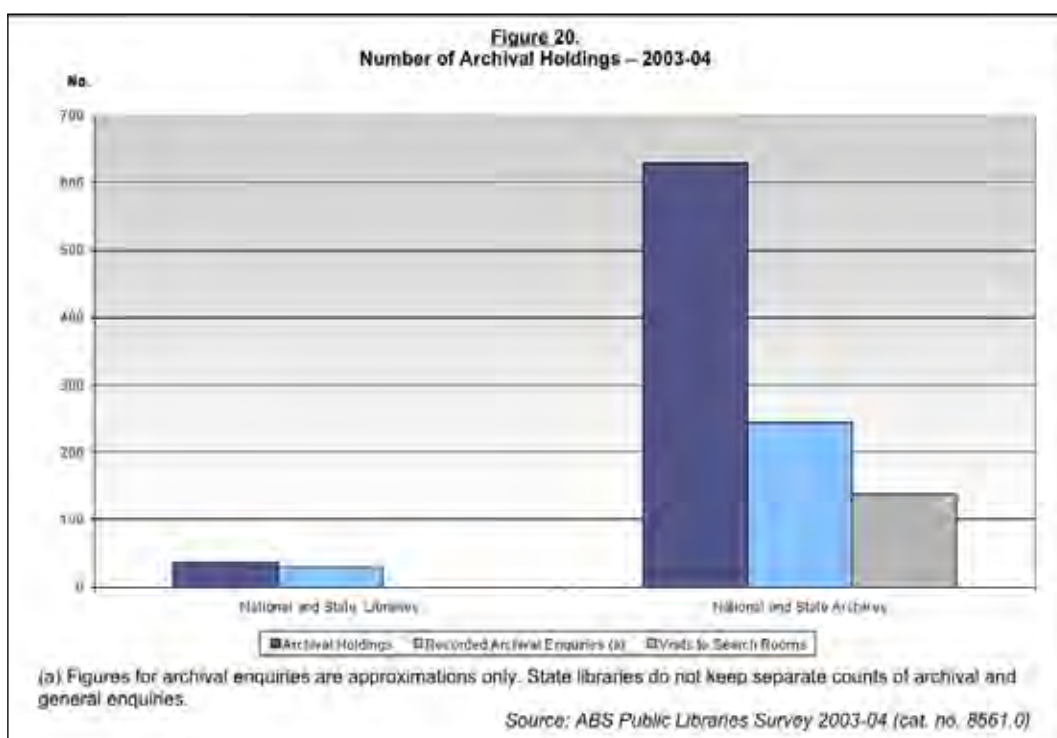
The ABS collects information on cultural infrastructure, archives and library holdings using a range of surveys conducted at different time intervals. Heritage listings and sites are registered and managed by Australian, state and territory government departments.

- Number of Cultural Infrastructure Items
- Number of Library Holdings, Heritage Items and Archives
- Heritage Listings and Sites

Unpopulated data items

- Programs Adding Cultural Value to Natural Resources
- Indigenous Art Centres





Cultural infrastructure

The ABS surveys on museums and galleries, performing arts businesses and organisations, public libraries and archives provide a basic measure of the overall size of Australia's cultural infrastructure (Figure 18). They also show the size of each category of cultural infrastructure assets.

Library holdings and archives

Existing cultural facilities gain additional cultural value through expansion or by increasing public access. National and state library holdings at the end of June 2004 totalled 11.3m items (Figure 19). Since June 2000, state libraries increased their archival holdings by 2.7% per annum, rising from 33,100 metres to 36,800 metres in June 2004. At the end of June 2004, heritage items held in state libraries totalled 7.6m, including 106,390 items acquired through purchases, donations and bequests during 2003–2004.

At the end June 2004, state archives had 629,100 metres of archival holdings (Figure 20). During 2003–2004, there were 137,000 visits to the search rooms of these archives, an increase of 43,000 since June 2000. For the same period, the number of recorded archival enquiries increased by 27,000 from 218,000 to 245,000. There were 10 special exhibitions held at state archives premises during 2003–2004.²⁷

Heritage listings and sites

Each state and territory in Australia has its own register of heritage places that are valued by its people. There are also specific registers of Indigenous heritage, movable cultural heritage and registers of overseas places of particular significance to Australians. In addition to these state and territory registers, the Department of the Environment, Water, Heritage and the Arts (DEWHA) compiles and manages the National Heritage List, comprising natural, Indigenous and historic

²⁷ ABS Public Libraries 2003–2004. (cat. no. 8561.0)

places of outstanding heritage value to the nation. As of March 2008, there were 70 places included on the National Heritage List. Of these, 38 were of historic importance, 25 of natural importance, and seven of Indigenous importance.²⁸ In addition to the National Heritage List, there is the Commonwealth Heritage List, which includes natural, Indigenous and historic places on Commonwealth lands and waters or under Australian Government control, and identified by the Minister for the Environment, Heritage and the Arts as having Commonwealth Heritage values.²⁹ The National Shipwrecks database records 7665 registered Australian shipwrecks, excluding many smaller vessels that remain unaccounted for.³⁰

When combined, the data on these heritage listings and sites measure the size and variety of the stock of Australia's built and natural places with recognised significant heritage value.

Programs adding cultural value to natural resources

Natural places gain added cultural and economic values in a variety of ways: the National Heritage List interpretive signage project helps visitors understand and appreciate the heritage value of the places on the list; the National Landscapes program adds cultural and economic values by publicising the listed landscapes in the domestic and international cultural tourism markets and by contributing to conservation initiatives; and an Indigenous majority Board of Management uses sustainable tourism master planning to add cultural and economic values to the natural resources of Kakadu National Park (Garrett 2008).

There are no currently available national data on programs to add cultural value to natural resources. The data are instead collected and held by individual federal, state and local government departments and agencies, private enterprises and community organisations.

Indigenous art centres

Indigenous art centres provide vital cultural, social and economic resources for Indigenous communities, particularly those in regional and remote areas of Australia. They are also of significant cultural value to the wider Australian community. Currently available national measures of the centres' value include the numbers of domestic and international cultural and heritage visitors they attract.³¹ While most of the data are not currently collected or held at a national level, they include data on the contributions Indigenous art centres make to visual and performing arts events and tours.

In recognition of the importance of Indigenous art centres, DEWHA supports Aboriginal and Islander visual arts activities through the National Arts and Crafts Industry Support (NACIS) program. This program provides approximately \$8m in funding each year to Indigenous art centres, to develop their governance and business management practices and provide Indigenous artists and arts workers with professional development opportunities.³²

²⁸ For further information, see the DEWHA website at www.environment.gov.au

²⁹ For further information, see <http://www.environment.gov.au/heritage/places/commonwealth/index.html>

³⁰ For further information, see: http://www.environment.gov.au/cgi-bin/heritage/nsd/nsd_list.pl?text=&state=&status=&type=&fromyear=&toyear=&do=y

³¹ Tourism Research Australia, *Cultural and Heritage Tourism in Australia*, 2007

³² Department of Foreign Affairs and Trade http://www.dfat.gov.au/facts/arts_support.html

Discussion

The value of built and natural cultural heritage items is assessed from a variety of perspectives: cultural, economic, spiritual or social. Heritage items can also have more than one kind of value. They can be measured in terms of their *direct use* value, in which case their value is assumed to be able to be traded in or captured by markets. In this way of determining the value of a heritage item, ticket sales or contributions to the local employment market might be used as measures. The value of material cultural heritage items can also be assessed according to their *indirect use* value: the contributions they make to a sense of cultural identity, the promotion of social interactions, or their recreational health benefits. There are aspects of national parks and shipwrecks open to recreational diving that can be valued in this way.

A third way to assess the value of physical heritage items is according to their *non-use* values. These are not traded in or captured by markets and are therefore difficult to express in terms of price. They include *existence value*: the altruism of individuals who value the items for their existence, irrespective of whether they themselves experience or consume them directly; *option value*: a wish to preserve the option of experiencing arts or cultural activities at a future time; and the *bequest value* of cultural heritage: the desire to bequeath an arts or cultural asset to future generations (Throsby 1995, 2003; de la Torre and Mason 2002). Australia's material cultural assets have significant non-use values, in addition to their direct and indirect use values.

This indicator does not identify the range of values associated with the items in question; it simply presents a snapshot of the current stock of buildings, sites, monuments and shipwrecks deemed to be significant in heritage terms. Events such as declarations of new national parks or development of existing historical sites may expand the size of Australia's stock of material cultural assets and change their values. Since accurate and comprehensive data on these assets can guide investment decisions and help ensure heritage values are maximised for current and future generations, it would be useful to have a national database. Further qualitative research involving stakeholders would identify the various heritage values attached to the items and build a value map to accompany the current indicator.

Indicator 2.2 – Talent (human capital)

Definition

This indicator represents development and support for artists and their creative practice.

Rationale

The indicator includes data on the ways in which human capital is currently developed. In the absence of a single national collection of human capital data, the indicator uses a range of data items as proxies for the development of human capital in the Australian cultural context.

Unpopulated data items

- Support/Grants for Individuals
- Tax Arrangements
- Programs Encouraging Public Art
- Training/Professional Development
- Fellowships
- Indigenous Arts and Culture Development

Support/grants for individuals

Australian governments support the development of many kinds of arts and cultural expressions. The Australia Council for the Arts (Australia Council) is the nation's primary arts funding and advisory body. It uses a peer review assessment system to provide approximately \$150m annually in grants to individual artists and arts organisations.³³ Projects for young and emerging artists typically have two aims: to help the artists develop their careers; and to engage young audiences in the arts. The federal government is presently providing \$6.6m over four years to fund projects supporting young and emerging artists as they develop their skills, expertise and professional networks.³⁴ The audience development component of these projects includes a focus on encouraging best practice in youth arts and the use of new technologies.

The Australia Council provides approximately \$8m in support for Australian literature each year. This includes grants to individual writers.³⁵ The human capital of Australian literary writers is also fostered through the Prime Minister's Literary Award. The award was established with a grant of \$1.5m over four years. Beginning in 2008, recipients were awarded \$100,000 in each of two categories: published fiction book of the year and published non-fiction book of the year. There are also a number of state-based awards. All of these professional awards have a role in publicly affirming the value of human capital, in this case, the value of skills in literary writing.³⁶

The Australian Government's Visual Arts and Crafts Strategy began in 2003 with a \$39m investment to foster creativity, innovation, diversity and excellence among Australia's contemporary visual arts and crafts practitioners. In 2007, an additional \$24.7m was committed to the strategy, to be matched by the state and territory governments.³⁷ In addition to the Australia Council's various art form boards, which administer programs to support the talents of individual artists, there is a variety of public and private prizes and other initiatives that benefit individuals.

Tax arrangements

Australia's tax arrangements provide direct support for individual professional artists. Like other employees of an organisation, artist employees are eligible to claim certain work-related expenses as tax deductions. Artists who are conducting their art practice in their own capacity, and who are not deemed to be 'carrying on a business' are not required to declare the receipts from the sale of their work as income (Freudenberg 2008, p. 6). Some self-employed artists who are carrying on a business (business-artists) who experience fluctuations in income are able to average out their income for tax purposes. There are also various ways in which business-artists can reduce their tax liabilities, such as by operating as a company (in which case the artists may be employees) (Freudenberg 2008, p. 9).

Programs encouraging public art

There are programs in place at state and local government levels to encourage the inclusion of public artworks in property developments. For example, the Queensland State Government's art+place program uses funding from a dedicated Queensland Public Art Fund to commission

³³ Department of Foreign Affairs and Trade http://www.dfat.gov.au/facts/arts_support.html

³⁴ In order to encourage and support efforts to present more innovative works, performing arts companies also share in this funding. The funds are used to offset the income that would otherwise be earned from presenting better known or more commercial works. Australian Government One year Progress Report November 2008 http://www.pmc.gov.au/publications/one_year/docs/one_year_progress_low.pdf

³⁵ Department of Foreign Affairs and Trade http://www.dfat.gov.au/facts/arts_support.html

³⁶ Australian Government One year Progress Report November 2008 http://www.pmc.gov.au/publications/one_year/docs/one_year_progress_low.pdf

³⁷ Department of Foreign Affairs and Trade http://www.dfat.gov.au/facts/arts_support.html

public artworks. The program was established in 2007 with a grant of \$12m for the first three

financial years 2007–2010. The first round of funding supported 10 state government projects, eight local government projects, six projects by arts and cultural organisations and two projects by private developers. Of this first round, 42% of the projects were to benefit Queenslanders in regional centres.³⁸

Training/professional development

The training and professional development of arts and cultural professionals is undertaken in a network of specialised publicly funded educational institutions such as the National Institute of Dramatic Arts (NIDA), the Australian Film, Television and Radio School (AFTRS), and the Australian National Academy of Music (ANAM). In addition to these national training institutions, many universities host professional arts training centres such as conservatoriums, film schools and art schools.

The Australia Council provides one-off skills and arts development grants for professional artists and arts workers, as well as grants to organisations for projects fostering skills development. Activities supported by these grants include: mentorship programs between emerging artists and established artists; attendance at professional artist residencies, masterclasses and conferences; exchanges between regional and metropolitan-based artists and arts workers; and professional development opportunities for instrument makers, musicians or arts workers.³⁹

In addition, Australia's larger performing arts venues, art galleries, museums and archives offer a variety of professional development programs. The National Film and Sound Archive, for example, has an artist-in-residence program for academics, performers, artists, audiovisual industry and archive professionals.⁴⁰ Artist-in-residence programs enable industry professionals to receive skills training in a sustained manner and give them opportunities to expand their professional networks. A comprehensive national database of training and professional development schemes would measure the professional development opportunities available to Australian artists and cultural workers.

Fellowships

Fellowships are another way for artists and other cultural workers to develop their skills and professional networks, as well as to explore their interests and undertake specific projects. Fellowships play an important part in research and development in the arts. They also provide a degree of employment stability, not only for emerging artists seeking to establish themselves in their chosen careers, but for professional artists at all stages of their careers. Some are administered by government agencies, while others, such as the Tanja Liedtke Foundation's Fellowship for Australian dancer/choreographers between the ages of 20 and 35 years, or the Ian Potter Cultural Trust for emerging artists, are offered by private foundations.⁴¹

Indigenous arts and culture development

DEWHA administers programs providing Aboriginal and Torres Strait Islander arts and cultural professionals with opportunities to develop their human capital. In addition to the National Arts and Crafts Industry Support (NACIS) program (see the Cultural assets indicator on p. 30), the Indigenous Culture Support (ICS) program encourages Indigenous cultural activities at the community level. In the area of the performing arts, DEWHA administers the National Aboriginal

³⁸ Louise Dauth, Craft Australia <http://basement.craftaustralia.org.au/articles/20080929.php>

³⁹ Australia Council for the Arts http://www.australiacouncil.gov.au/grants/grants/skills_and_arts_development_-_music

⁴⁰ Australia Council for the Arts http://www.australiacouncil.gov.au/the_arts/dance/danceskillsdevelopment

⁴¹ Australia Council for the Arts http://www.australiacouncil.gov.au/the_arts/dance/danceskillsdevelopment

and Islander Skill Development Association (NAISDA), which selects and develops Indigenous

artists in traditional and contemporary dance.⁴² A database of these national programs would provide a measure of the development of Indigenous human capital in the arts and cultural sector.

Discussion

Public policies and programs support the arts and culture. Data on the numbers and variety of these policies and programs can therefore be used as measures of public support (Jackson et al. 2006, p. 20). The term ‘human capital’ refers to human talents or skills. It differs from ‘cultural capital’, which is about *what* we know. Talent or human capital is both an input and an output of arts and cultural activities. Human capital preserves and reinterprets cultural traditions. It also creates new works and new ways of expressing and participating in culture. As such, it can be understood and measured as an input into cultural activities. Human capital can also be understood and measured as an output, in that it is created and supported by a variety of activities, including arts and cultural ones.

Human capital has become a standard feature of international efforts to understand and measure arts and cultural activities. In *Hong Kong Arts and Cultural Indicators* (2005) – a report prepared for the Hong Kong Arts Development Council – human capital is identified as one of four forms of capital that are significant for the arts and culture. The others are social, cultural and structural/institutional capital. The human capital concept has been especially useful for understanding the public value of the arts and cultural sector. Mark H Moore wrote *Creating Public Value* (1995) to help public managers seek out and maximise public value. His ‘strategic triangle’ model identifies the relationships an organisation must maintain to create public value. At one corner is *operational capacity* (internal capacities like human capital and organisational processes, or external ones like partnerships and co-producers). A second corner is the *authorising environment* (political superiors, media, interest groups, and courts providing the organisation with authority and support). The final corner comprises the *public value* created. It is produced when the relationships between organisations and their authorising environments are operating effectively. Moore’s public value model is now applied in the arts and cultural sector, most notably among state arts agencies in the US, where it is used to improve their services to the public (Yoshitomi 2004). Public value enables arts and cultural organisations to deliver better public outcomes through the arts and cultural activities they provide: outcomes that include the human and cultural capital people accumulate when they participate in those activities.

Taken together, the data items included in this indicator are a measure of cultural development in Australia. They are measures of activities that produce or encourage human capital.

Indicator 2.3 – Cultural identity

Definition

This indicator represents our opportunities to experience and express ourselves as Australians.

⁴² Department of Foreign Affairs and Trade http://www.dfat.gov.au/facts/arts_support.html

Rationale

The data items appearing in this indicator of cultural identity include data on opportunities to experience a shared sense of belonging. They include measures of intangible cultural heritage – the living cultural expressions and traditions we inherit from our ancestors, reinterpret in our own lifetimes and transmit to future generations – and the ways in which we care for and conserve it. Also included in this indicator are data on the regulating of Australian content levels in television, cinema and radio broadcasting. The data items making up this indicator together represent the ways in which Australian cultural identity is encouraged, protected, stimulated and showcased.

Unpopulated data items

- Conservation of Heritage Assets
- Maintenance of Indigenous Languages
- Prizes/Awards
- Copyright and Intellectual Property
- Showcases of Cultural Identity

Data items

The Australian Communications and Media Authority (ACMA) collects information on Australian television, television advertising and commercial radio. Screen Australia provides data on cinema and the Australian Film Commission produces reports on share of retail video.

Australian content

- Television
- Indigenous Broadcasting
- Television Advertising
- Cinema
- Radio

Conservation of heritage assets

Intangible cultural heritage items can be fragile and require careful conservation methods. In July 2008, the National Film and Sound Archive (NFSA) was established as a separate statutory authority, with responsibilities for the development, preservation, maintenance and promotion of the national audiovisual collection. The NFSA received \$25.2m in 2008–2009.⁴³

Maintenance of Indigenous languages

Language diversity is an important concern for international efforts to maintain intangible cultural heritage. The federal government's Maintenance of Indigenous Languages and Records program received \$8.9m in 2009–2010 to maintain a network of Indigenous language centres across Australia. These centres document, record and revive Indigenous languages and develop language resources and teaching programs.⁴⁴

⁴³ Australian Government One year Progress Report November 2008
http://www.pmc.gov.au/publications/one_year/docs/one_year_progress_low.pdf

⁴⁴ The Hon Peter Garrett MP
Minister for the Environment, Heritage and the Arts, media release 16 July 2009 <http://www.environment.gov.au/minister/garrett/2009/pubs/mr20090716a.pdf>

Prizes/awards

Some prizes and awards in the arts and cultural sector are given for the particular purpose of encouraging distinctively Australian cultural expressions. In literature, the Miles Franklin Literary Award is presented for ‘the novel of the year which is of the highest literary merit and presents Australian life in any of its phases’.⁴⁵ In the visual arts, the Archibald Prize is awarded for the best portraits of an Australian man or woman who has distinguished themselves in art, letters, science or politics.⁴⁶ The inclusion of ‘Australian-ness’ in these kinds of prizes and awards makes them different from those judged according to criteria such as excellence alone, or age, or religious theme. This distinction means they can be used as measures of Australian cultural identity.

Copyright and intellectual property

Copyright and intellectual property laws and the agencies administering them protect the rights of Australian arts and cultural workers. In doing so, they enable all Australians to enjoy access to Australian voices and stories. In the particular case of Indigenous artists working in traditional styles, the protections afforded by copyright and intellectual property laws have been adapted in response to the distinctive features of traditional cultures. Traditional custodial cultures restrict the use of certain designs and stories to particular groups; individuals are seen as the custodians of these designs and stories, not their originators. Australian law accommodates the rights of Indigenous artists working in traditional styles while also acknowledging Indigenous communal moral rights.⁴⁷

As the number and variety of technologies and platforms using images and stories expand, it is becoming more important for creative people to be able to protect their intellectual property rights and receive fair payment for their works. Legislation passed in 2009 will establish an agency to collect resale royalties for Australian visual artists. This recent addition to Australia’s arts infrastructure is included here as a data item in anticipation of it being able to provide ongoing measures of support for the visual arts.

Showcases of cultural identity

Australia has an extensive network of museums, galleries, historical villages and other kinds of heritage venues and places that are dedicated to showcasing distinctively Australian stories. They include the National War Memorial, the Museum of Australia, the National Portrait Gallery, and the Ian Potter Centre of the National Gallery of Victoria in Melbourne’s Federation Square. At the state level, there are showcases for particular themes in Australian history, such as Port Arthur in Tasmania, or the museums of migration in Adelaide and Melbourne. Rural and regional areas have showcases for local stories, such as Flagstaff Hill in Warrnambool (the story of shipping along the western Victorian coastline), or Sovereign Hill in Ballarat (the story of the 19th century Victorian gold rushes).

Australian content

In addition to venues or places dedicated to showcasing Australian stories, the Australian Broadcasting Corporation is mandated to produce and commission Australian television and radio broadcasting content. In cinema, Australian federal and state governments have their own funding agencies for encouraging and supporting Australian voices and stories in cinema. In July 2008, the federal government established Screen Australia as its primary funding agency for the

⁴⁵ Miles Franklin Literary Award Trust, http://www.trust.com.au/awards/miles_franklin/

⁴⁶ The Archibald Prize, <http://www.thearchibaldprize.com.au/prizes>

⁴⁷ Janke & Quiggin 2006, http://www.austliacouncil.gov.au/_data/assets/pdf_file/0013/2704/jcip.pdf

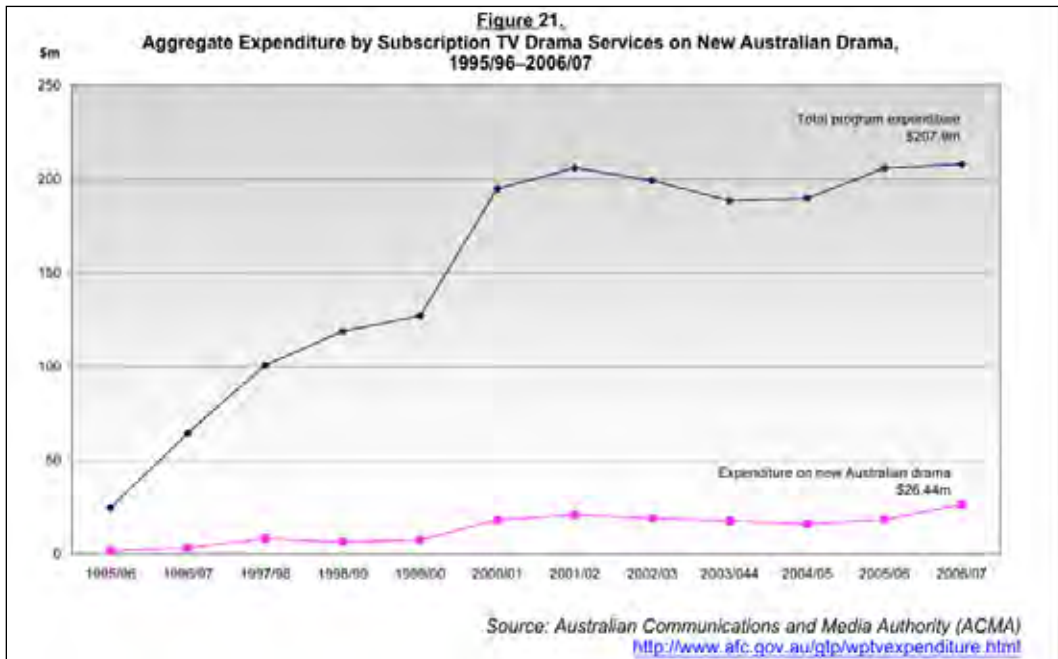
film industry. Screen Australia received \$102.9m from the federal government in 2008–2009.⁴⁸

The value Australians place on opportunities to express and share their diverse experiences of being Australian can also be measured by data on local content in television, television advertising, cinema and commercial radio broadcasting.

Table 12.
Proportion of Australian Content Airing on Australian Free to Air Television: Commercial Networks 2005 – 2008

Metropolitan Commercial Licences	2005	2006	2007	2008
	Aust Content (%)	Aust Content (%)	Aust Content (%)	Aust Content (%)
Seven Licences				
SAS Adelaide	55.44	56.04	57.89	64.79
BTO Brisbane	55.92	55.89	58.26	64.46
HSV Melbourne	55.90	55.98	58.07	64.70
TVW Perth	55.31	56.55	58.74	64.98
ATN Sydney	55.06	55.79	57.46	63.83
Nine Licences				
QTQ Brisbane	65.74	66.92	65.45	61.39
GTV Melbourne	64.56	66.26	63.76	60.07
TCN Sydney	65.47	66.61	65.65	61.73
Ten Licences				
ADS Adelaide	59.54	59.93	57.76	56.76
TVQ Brisbane	59.02	59.94	57.33	56.24
ATV Melbourne	59.57	60.02	57.62	56.63
NEW Perth	59.26	59.78	57.99	56.75
TEN Sydney	58.84	59.33	57.30	55.74

Source: Australian Communications and Media Authority (ACMA)
http://www.acma.gov.au/WEB/STANDARD_PC/pc=PC_100862



⁴⁸ Australian Government One year Progress Report November 2008
http://www.pmc.gov.au/publications/one_year/docs/one_year_progress_low.pdf

Television

The Australian Broadcasting Corporation (ABC) is charged with broadcasting programs that contribute to a sense of national identity and which inform, entertain and reflect the cultural diversity of the Australian community. The ABC Code of Practice sets out the major principles which apply to ABC content. The code stipulates that significant cultural practices of Indigenous Australians should be observed in content and in the reporting of the people of Australia. ABC1 has averaged 53.6% Australian content over the last three years. ABC2 airs a higher proportion of Australian content than ABC1 and has averaged 63.7% Australian content over the last three years.⁴⁹

The Special Broadcasting Service (SBS) is an independent national broadcaster operating under its own Act of Parliament (*Special Broadcasting Service Act 1991* – SBS Act). Under the Act, SBS has sole responsibility for determining its content. The principal function of SBS is to provide multilingual and multicultural radio and television services that inform, educate and entertain all Australians and, in doing so, reflect Australia's multicultural society.⁵⁰ The proportions of Australian content aired on SBS television from 2004–2008 were: 24.5% (2004–2005); 28% (2005–2006); 23.3% (2006–2007); and 25% (2007–2008).⁵¹

The Broadcasting Services (Australian Content) Standard 2005 sets minimum levels of Australian programming to be broadcast by commercial television networks. The minimum annual requirement of Australian content airing on Australian free to air commercial television networks between 6 am and midnight must be at least 55%.⁵² As shown in Table 12, all commercial stations consistently exceeded the minimum Australian content level over the period 2005–2008.

Subscription television is also subject to content requirements. *The Broadcasting Services Act 1992* requires subscription TV licensees broadcasting drama channels, and drama channel package providers, to invest at least 10% of their total program expenditure on new Australian drama. In meeting its obligations under the new eligible drama expenditure scheme, the subscription television industry spent \$20.06m on Australian and New Zealand drama programs in the 2007–2008 financial year (Figure 21). These investments enabled Australians to participate in the production of feature films and drama series such as *The King*, *Balibo 5* and *Satisfaction*. The investments were also used to support new Australian film or animation opportunities such as *Tropfest*, the *Optus one80* project competition, and *Nick Shorts*, where selected new animation short films are broadcast nationally on Nickelodeon Australia's media platforms.⁵³

Indigenous broadcasting

The voices and stories of Aboriginal and Torres Strait Islander peoples are distinctive features of Australia's cultural identity. Indigenous broadcasting plays a key role in creating an inclusive Australian community. As well as enabling Australia's Indigenous peoples to experience, affirm and share their own artistic and cultural expressions, Indigenous broadcasting delivers health, education and training services, especially to people in regional and remote areas. It is also a source of employment in these communities. In recognition of the significance of Indigenous broadcasting, the federal government provided \$14.5m to establish the Indigenous Broadcasting Program, supporting 59 Indigenous community broadcasting projects in metropolitan, regional and remote Australia.⁵⁴

⁴⁹ Data from 2005–2007 compiled by the Australian Film Commission (AFC) from Australian Broadcasting Corporation annual reports. Data from 2007–2008 compiled by Screen Australia from Australian Broadcasting Corporation annual reports.

⁵⁰ SBS Codes of Practice 2006

⁵¹ Compiled by Screen Australia from Special Broadcasting Service Corporation Annual Reports.

⁵² For further details see: <http://www.acma.gov.au/webwr/aba/tv/content/documents/broadcasting%20svces%20-%20australian%20content%20standard%202005.pdf>

⁵³ http://www.acma.gov.au/WEB/STANDARD/pc=PC_310687

⁵⁴ The Hon Peter Garrett MP, Minister for the Environment, Heritage and the Arts, media release 16 July 2009 <http://www.environment.gov.au/minister/garrett/2009/pubs/mr20090716a.pdf>

Television advertising

Television advertising is a source of creative employment for Australian actors, directors, writers and many other kinds of cultural workers. It also provides training and professional opportunities that have launched and sustained careers in cinema, theatre and literature.

The objective of the *Television Program Standard for Australian Content in Advertising* (TPS 23) is to ensure that the majority of advertisements on television are Australian-made. The standard requires at least 80% of advertising time broadcast each year by commercial television licensees, between the hours of 6 am and midnight, to be used for Australian produced advertisements.⁵⁵ In 2007, foreign advertising represented 4.5% of the total number of all commercials, and 6.2% of all new commercials, down from 5.1% and 7.4% respectively in 2006.

Cinema

On average, 10% of the films released in Australian cinemas between 1984 and 2008 were Australian (Appendix C, Schedule 4). The majority (63%) of films released in Australian cinemas during that period originated from the US. Since 2003, the number of films from Asia has increased significantly, accounting for 13% of releases in 2008, 5 percentage points above the 25-year average (See Appendix C, Schedule 4).⁵⁶

Australian-produced feature films earned \$35.5m or 3.8% of the total Australian box office in 2008 (which includes all Australian films earning box office in 2008, irrespective of their original year of release) (Appendix C, Schedule 5). This represents a fall from 4% the previous year and is below the 10-year average of 4.4%. In 2001, a record \$63.4m was earned by local features, including *Moulin Rouge*, *Lantana*, *The Man Who Sued God* and *Crocodile Dundee in LA*, but this represented only 7.8% of the total box office that year (Appendix C, Schedule 5).⁵⁷

Although local share of domestic box office is commonly used as an indicator of a film's performance, other formats, such as DVD retail sales, also play a significant role in financial returns and overall audience exposure to Australian stories and voices in film.

Screen Australia has analysed the top 1000 DVD titles sold. Australian-produced titles accounted for 7.9%, or \$49.5m, of the retail value of the top 1000 titles sold on DVD and Blu-ray during 2008 (ranked by value rather than unit sales) (Figure 22). This is down from the previous year, when the Australian share was 8.5% (almost \$52m). However, it is close to the five-year average of 8% (\$48m) due to annual fluctuations. Unit sales of Australian productions in the top 1000 also dropped (both in number and share), while the number of Australian titles fell for the fourth successive year. There were 65 Australian titles in the 2008 list, compared to 77 in 2007 and 111 in 2004. In 2008, for the first time, the highest selling title on video in Australia, in terms of total retail value, was Australian – the television series *Underbelly: Series 1*.⁵⁸

Commercial radio

The *Australian Music Performance Code* uses minimum Australian content levels, in line with the objectives of the *Broadcasting Services Act 1992*, to promote the role of broadcasting services in developing and reflecting a sense of Australian identity, character and cultural diversity. The

⁵⁵ Since 1981, New Zealand commercials have qualified as 'Australian'.

⁵⁶ Motion Picture Distributors Association of Australia (MPDAA), compiled by Screen Australia.

⁵⁷ Screen Australia, <http://www.afc.gov.au/gtp/wcboshare.html>

⁵⁸ Screen Australia, <http://www.afc.gov.au/gtp/mrvideoall.html>

Australian content requirements are based on five categories, from A to E, into which all stations

fit. Typically, stations playing the most popular kinds of music – such as mainstream rock and contemporary hits – are found in Category A and are subject to the highest quota of 25%.⁵⁹

Discussion

Society acts as a custodian of cultural heritage for present and future generations (Throsby 1995). To fully participate in our communities and in society at large, we need the sense of belonging that comes from understanding ourselves. For these reasons, this indicator includes a variety of interconnected ways in which cultural identity is encouraged (prizes and awards), protected (local content regulations, copyright and intellectual property laws), stimulated (tax concessions), and showcased (national exhibition venues).

Intangible cultural heritage is what enables us to have a sense of cultural identity. Its significance is recognised internationally, in the United Nations *Convention for the Safeguarding of the Intangible Cultural Heritage*.⁶⁰ The convention calls intangible cultural heritage the mainspring of our cultural diversity and a source of continuing creativity; it also identifies particular types of intangible cultural heritage: oral traditions and expressions; performing arts; social practices, rituals and festive events; knowledge and practices concerning nature and the environment; and traditional craftsmanship.⁶¹ As a signatory to the convention, Australia acknowledges the importance of maintaining and recording intangible cultural heritage for present and future generations.

One way in which intangible cultural heritage is protected is by regulating broadcasting content. A commitment to local content is built into the mandates of public broadcasters and meeting minimum targets for local content is a condition of holding a commercial broadcasting licence. These and other attempts to regulate local content levels express Australians' desire to be able to see and hear our own voices and stories represented in culture. Affirming and sharing these publicly gives us a sense of our rich diversity and common identity as Australians. Local content regulation is also sometimes justified on the grounds that without it, broadcasters will replace local productions with cheaper foreign imports and creative Australians will be denied employment.

Commitments to cultural identity and to the market in cultural goods are not, however, necessarily mutually exclusive principles. Fears about employment and cultural expression have not always been borne out by experience; for example, market demand has seen the commercial television broadcasters exceed their minimum local content requirements. By contrast, the situation of local content in the Australian film industry is more precarious. While the desire to see and hear Australian voices and stories has been a factor in public film financing, it has not always translated into box office returns; in the film industry, the supply of local content has generally exceeded demand. The reasons for this imbalance are currently issues of public debate. The public policy outcomes that emerge from these debates will have to accommodate the sometimes conflicting principles of the market and cultural identity.

⁵⁹ For further information see www.acma.gov.au

⁶⁰ UNESCO, http://portal.unesco.org/culture/en/ev.php-URL_ID=34325&URL_DO=DO_TOPIC&URL_SECTION=201.html

⁶¹ UNESCO, <http://www.unesco.org/culture/ich/index.php?pg=00002>

Indicator 2.4 – Innovation (new work/companies)

Definition

This indicator represents support for innovation in the arts and culture.

Rationale

The indicator uses a variety of data items as proxies for the fostering of innovation in the arts and culture in Australia. The items include supports for the creation of new works, programs to establish arts incubators, industry development initiatives such as subsidies and tax arrangements, and moral rights and intellectual property initiatives to support innovation in the arts and cultural sector.

Unpopulated data items

Support for the creation of new works

- Number of Project Companies and Artists Funded
- Support for Innovation in Indigenous Arts and Culture

Industry development

- Arts Incubators
- Subsidies to the Film Industry
- Tax Arrangements

Support for the creation of new works

The Australia Council for the Arts

The Australia Council's *Creative Innovation Strategy* (2006) provides a coordinated policy framework supporting innovation in the arts. The initiatives identified in the strategy are not confined to grants programs; they also include programs to promote new partnerships and pathways between artists and creative practitioners and organisations, government, cultural agencies and industry. These initiatives are organised into four categories: those designed to promote arts education in schools; those promoting cross-disciplinary research in the arts and culture; those developing creative leaders and international exchanges; and supports for creative enterprises and innovation (by improving artist access to information about the Council's resources and by developing a model of digital content distribution).⁶²

The Australia Council has a variety of grant programs aimed at supporting innovation in the arts. They include: Infuse, which funds forums, workshops and critical debates on hybrid and interdisciplinary arts practice – particularly outside major capital cities – and seeks to connect leading artists with those early in their careers; and Artlab, which brings together artists in new creative interdisciplinary collaborations that cross-fertilise ideas and artforms.⁶³

⁶² The Australia Council for the Arts Creative Innovation Strategy 2006 http://www.australiacouncil.gov.au/__data/assets/pdf_file/0004/5629/Creative_Innovation_Strategy.pdf

⁶³ The Australia Council for the Arts <http://www.australiacouncil.gov.au/grants/initiatives>

New works are also supported by the federal government's \$6.6m funding of projects to support the professional development of young and emerging artists. Performing arts companies have access to these funds to encourage and support their efforts to present more innovative works. The funds are used to offset the income that would otherwise be earned from presenting better known or more commercial works.⁶⁴

Number of project companies and artists funded

Data on support for innovation are collected at state level. For example, Arts Victoria's targets for its arts development and access strategies include funding of 300 project companies and artists.⁶⁵ Arts Victoria's performance data could be used as measures of support for innovation in the arts. Where similar data are not available from the other states, the Victorian data collection system could be used as a model for emulation.

Support for innovation in Indigenous arts and culture

Support for indigenous cultural and intellectual property involves 'acknowledgment of local community authority, communal rights over cultural heritage material, and engagement of Indigenous people through consultation and prior informed consent mechanisms' (Janke & Quiggin 2006, p. 8). When government agencies acknowledge these special features of traditional Indigenous cultures, they must also recognise the authority of individual Indigenous artists and encourage creativity and innovation. The encouragement of innovation is a goal of the ICS program administered by the DEWHA.⁶⁶ This community level program promotes innovative new cultural expressions and exchanges.

Industry development

Arts incubators

Incubators fill a gap in the arts and cultural sector by helping creative entrepreneurs achieve maximum value and return from their existing creative assets. Because of their size, small creative enterprises have problems accessing the resources they need to achieve sustainable growth rates. Incubators offer subsidised rent within a flexible office or warehouse space and access to centralised management support, training and professional development opportunities. Once creative enterprises are sufficiently established, they leave the incubator and move into their own premises. An example is the Auspicious Arts incubator in Melbourne. This is a creative hub for artists and visitors in the independent performing arts sector in Melbourne. It provides spaces for training, meeting and business skills development, rehearsal space and a venue for the presentation of new creative content, extended seasons and hold-over performances.⁶⁷

The Australian Government supports incubators through its AusIndustry Building Entrepreneurship in Small Business program.⁶⁸ Data from this program can be used to measure support for innovation in the arts and culture.

⁶⁴ Australian Government One Year Progress Report November 2008 http://www.pmc.gov.au/publications/one_year/docs/one_year_progress_low.pdf

⁶⁵ *Business Plan 2008-09*, Arts Victoria 2008. Melbourne. p. 9

⁶⁶ Department of Foreign Affairs and Trade http://www.dfat.gov.au/facts/arts_support.html

⁶⁷ <http://www.auspicious.com.au/incubator.html>

⁶⁸ http://artsyakka.com/resources/developing_creative_industries/arts_incubators

Subsidies to the film industry

The Australian film industry receives funding from government and private investors. In 2008–2009, Screen Australia, the federal government's primary funding agency, received \$102.9m in government funding.⁶⁹ Between 1994–1995 and 2006–2007, federal and state film agencies spent a combined total of around \$2.55 billion supporting Australia's audiovisual industry. On average, this equates to \$196.75m per year. Federal film agencies contributed 80.5% to overall expenditure over the 13-year period, while state and territory film agencies contributed another 19%. In the same period, the agencies spent \$106.03m on project development, \$28.18m on marketing support, \$11.2m on interactive media, and \$10.91m on research.⁷⁰

Tax arrangements

Among the Australian Government's package of measures aimed at boosting support for the Australian film and television industry is the Australian Screen Production Incentive, comprising the Producer, Location and PDV (post, digital or visual effects) Offsets. These became available during 2007–2008 and provide for a percentage of expenditure to be refunded through the Australian tax system once an eligible project is completed and certified. One of the aims of the incentive is to increase production levels.⁷¹

Discussion

Skills in creative thinking, interpretation and cultural understanding are of increasing importance in the 21st century. Innovation in the sciences, industry and the arts and cultural sector is now widely recognised as being central to economic, social and cultural prosperity. Innovation releases creative resources. How creativity is understood has therefore taken on a new importance in the new innovation agenda.

The arts and cultural sector can face problems in being accepted into the innovation agenda. This is largely because innovation is commonly understood to be driven by science: the idea that 'knowledge comes from scientific discovery and is applied in commercial and social contexts, mostly through technological development.'⁷² Without better ways to understand and measure creativity in the arts and culture – creativity that is typically linked to aesthetic, expressive and content-specific concerns – the differences between forms of creativity can become overstated and it becomes harder to acknowledge that 'all forms of creativity are needed to serve the innovation agenda.'⁷³ This indicator of innovation responds to that need.

International examples of comprehensive innovation strategies include Britain's NESTA (the National Endowment for Science, Technology and the Arts). This was established in 1998 to develop funding, support and policy development in the arts and cultural sector, as well as between that sector and the science, engineering, technology and medicine (STEM) sector. In Australia, we do not yet have such a comprehensive innovation strategy. Moves to join the international efforts to integrate arts and culture into a national innovation strategy were signalled in May 2008, when the Minister for Innovation, Industry, Science and Research announced a plan to establish Industry Innovation Councils 'to act as key advisory bodies to government and as innovation advocates.'⁷⁴ By engaging with the councils, the arts and cultural sector can have a voice in the evolving innovation agenda.

⁶⁹ Australian Government One Year Progress Report November 2008, http://www.pmc.gov.au/publications/one_year/docs/one_year_progress_low.pdf

⁷⁰ Screen Australia, <http://www.afc.gov.au/gtp/govtfundsummary.html>

⁷¹ Screen Australia, http://www.screenaustralia.gov.au/news_and_events/2008/mr_081202_nds.asp

⁷² Haseman & Jaaniste 2008, pp 32–33

⁷³ Haseman & Jaaniste 2008, p. 31

⁷⁴ Kim Carr, quoted in Haseman & Jaaniste 2008, p. 32

Meanwhile, within the Australian arts and cultural sector, innovation is framed by the Australia

Council's Creative Innovation Strategy and supported in a variety of ways: by supporting the creation of new works that reinterpret existing traditions and appeal to a wider variety of audiences – through research, incubator programs, targeted subsidies and tax arrangements that help develop the sector in ways that respond to current and future needs; and by tailoring intellectual property regimes to the requirements of the changing technological environments within which artists and other cultural workers now operate.

Indicator 2.5 – Global reach

Definition

This indicator represents Australia's ability to project its arts and culture internationally.

Rationale

The indicator uses data on the economic value of cultural exports as proxies for the international competitiveness of the arts and cultural sector. Australia's global cultural reach as a nation whose distinctive artistic and cultural expressions, creative skills and expertise are valued by others can also be represented by support for tours by Australian artists and companies and for overseas residencies and international cultural exchanges available to Australian artists.

Unpopulated data items

- Touring
- Residencies
- Exchanges

Data items

Information about international trade in cultural goods is collected by the ABS. State government departments also collect this type of material.

- Value of Cultural Exports

Touring

The Australia International Cultural Council (AICC) was founded in 1998 to promote Australia's arts and culture internationally. It is a consultative group, with representatives from government, the arts and cultural sector, and business. The AICC is an agency of cultural diplomacy; it is administered by the Department of Foreign Affairs and Trade (DFAT) and seeks to project a positive image of Australia that enhances our foreign and trade policy interests, while also promoting and enhancing the export of Australian cultural products.⁷⁵

One of the AICC's main functions is to provide grants to facilitate international touring by Australian artists and companies. In the second round of funding in 2008, 13 grants of between \$10,394 and \$44,000 were awarded for touring purposes. Examples include: \$44,000 to the Australian Dance Theatre to take its show *G* to Chicago, New York and Pittsburgh; \$10,394 to

⁷⁵ Department of Foreign Affairs and Trade, <http://www.reckless.on.net/shanghai2002/AICCInformation.pdf>

Way out West to take this cross-cultural music group on a tour of Indonesia, South Korea and

Japan; and \$31,516 to the Snuff Puppets for a creative development residency in Indonesia, with the aim of creating a new work in collaboration with Indonesian artists.⁷⁶

The Australia Council provides funding to Australian artists and arts organisations to tour works overseas and attend important international markets and forums. These include the International Pathways program, which awards grants of up to \$20,000 to support touring, networking and market development activities by Australian musicians.⁷⁷

The artists and companies receiving these grants represent a wide range of art forms and traditions; some are well-established, while others are yet to make a reputation internationally; they include large and small companies. The funding is used to build on existing links and to establish new ones; it supports the touring of traditional works and the creation of new ones. Data on the Australia Council's and the AICC's grants programs to support overseas tours are measures of Australia's ability to project its diverse arts and cultural expressions internationally.

Residencies

Australian governments, educational institutions, arts organisation, and private philanthropists fund a variety of international residencies for Australian artists and other cultural workers.

In Paris, the Cité Internationale des Arts is an arts complex of 260 studios. There are six Australian visual arts residency studios at the Cité where artists, curators and art writers can live and work for three to six months at a time: the Moya Dyring studio and the Denise Hickey studio, which are managed by the Art Gallery of New South Wales; the Power Institute studio, managed by Sydney University; the COFA studio, managed by the University of New South Wales; the Rosamond McCulloch studio, managed by the University of Tasmania; and the Australia Council studio.⁷⁸

The University of Melbourne and the Myer Foundation fund Asialink, a centre promoting business and cultural relations between Australia and its Asian neighbours. The Asialink Arts Management Residency program provides opportunities for Australian arts managers to experience working with an arts organisation in an Asian country for up to four months. Residencies are open to arts managers in the areas of visual arts and crafts, performing arts, literature, multimedia, technical production and festivals.⁷⁹

There is currently no central database of international residencies available to Australian artists and other cultural workers.

Exchanges

The Australia Council administers a variety of international cultural exchange programs. For example, for theatre there is the Australian–German Dramaturg Exchange. Managed by PlayWriting Australia and the Goethe Institut, this program offers a six-week residency to an Australian dramaturg to undertake professional development with a German theatre company. A German dramaturg attends the National Play Festival in exchange.⁸⁰

There is currently no central database of international cultural exchanges.

⁷⁶ Department of Foreign Affairs and Trade, http://www.dfat.gov.au/dept/grants/aicc_grants.html

⁷⁷ The Australia Council for the Arts, <http://www.australiacouncil.gov.au/grants/initiatives>

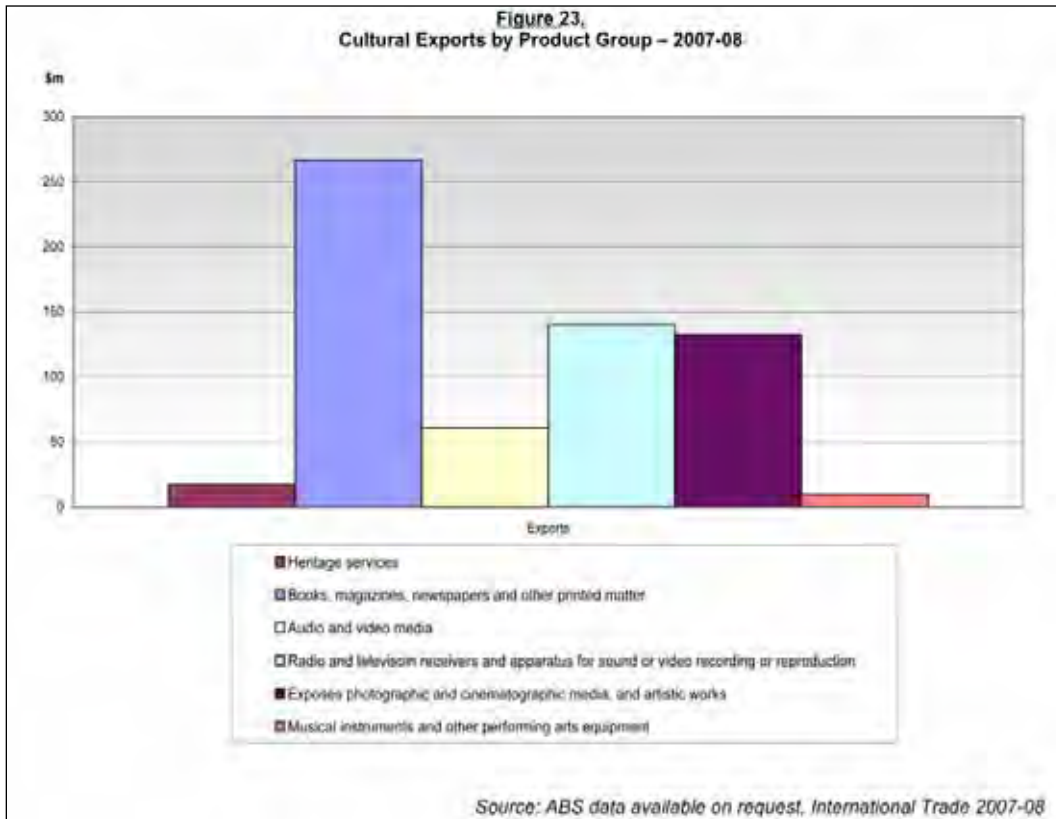
⁷⁸ *Australian Art Review*

<http://www.artreview.com.au/art/collecting/paris-artist-residencies.aspx>

⁷⁹ Asialink, <http://www.asialink.unimelb.edu.au/>

⁸⁰ The Australia Council for the Arts, <http://www.australiacouncil.gov.au/grants/initiatives>

Value of cultural exports



At the national level, the ABS collects data on international trade in cultural goods. Books, magazines, newspapers and other printed material were the largest exports of cultural goods (43%) in 2007–2008 (Figure 23).⁸¹ At state level, the data are collected by state arts agencies and government departments. For example, Arts Victoria’s *Business Plan 2008–09* contains data on international markets accessed by Victorian artists and art companies. It sets a target of 20 international markets.⁸²

Discussion

The public value of global cultural reach is not always appreciated. In a recent report for the Demos think tank in the UK, Kirsten Bound and colleagues note that, while leaders and countries have always used culture to confirm their identities, assert power and build relationships, the worth of cultural diplomacy is still typically overshadowed by that of the ‘harder stuff’, such as military capability, international laws and treaties. However, when such channels are absent, under-developed or too rigid to ensure effective communication, cultural exchange still ‘gives us the chance to appreciate points of commonality and, where there are differences, to understand the motivations and humanity that underlie them.’⁸³

It is the ability of the arts and culture to forge resilient social relationships below the levels of national or state governments that give them an advantage over state diplomacy. However, the arts and culture need not be tools of state diplomacy to have public value; in fact, their ‘soft power’ is actually derived from their relative distance from political direction. Today’s high-stake encounters between the local and the global pose serious dangers, as well as offer great rewards.

⁸¹ ABS Arts and Culture in Australia: A Statistical Overview 2008 Second Edition (cat. no. 4172.0)

⁸² *Business Plan 2008–09* 2008, Arts Victoria p.9

⁸³ Bound & Others, *Cultural Diplomacy* (London: Demos, 2007), p.11

Many of the pressing problems we now face – from climate change to terrorism and border security – cannot always be relied on to respond readily to the old ‘hard power’ solutions. In the 21st century, the ‘soft power’ of a country’s global cultural reach is gaining a new importance.⁸⁴



⁸⁴ Bound & Others, pp.12–13.

Theme 3: engagement and social impact

Overview

Participation in arts and cultural activity has its most positive impact when it has an actively creative element.⁸⁵ Some degree of creativity is present in all kinds of arts involvement, from practice in a discipline to building a personal collection.

Apart from being rewarding for individuals, active engagement contributes to community wellbeing and quality of life. Participation connects people with others, fostering varied and open social relationships and promoting social inclusion.

Researchers and cultural agencies have suggested that sustainable development is supported by four pillars: social relationships of trust and reciprocity; efficient and innovative economies; diverse and healthy ecosystems; and high levels of participation in cultural activities.⁸⁶

Opportunities to participate will be enhanced by wider educational provision, support for emerging arts practice, identification of barriers to participation and provision of programs to regional areas.

Indicator 3.1 – Cultural attendance

Definition

This indicator represents the frequency of Australians' attendances at cultural venues, events and sites.

Rationale

Data on attendance figures at cultural venues, events and sites are measures of public access to these resources. By breaking down the attendance figures according to sex, age, country of birth and disability it is possible to know how often different groups within Australia's diverse population are accessing cultural venues and events. Breaking down the figures according to types of events attended shows the events' relative shares of total cultural attendances.

In addition to ABS data, this indicator includes data from Tourism Research Australia on domestic cultural and heritage visitors – including visits to Indigenous sites, events and communities – and unpopulated data items on non-attendance and the size of online audiences. The inclusion of these data items creates a more comprehensive picture of cultural attendance than is available from the current ABS data. It is important to be able to measure different kinds of attendance if policies and activities aiming to increase public access to the full range of the nation's cultural resources are to be further developed and accurately assessed.

⁸⁵ Brown 2004, Brown 2006

⁸⁶ Hawks 2001

Data items

The ABS surveys on Attendance at Selected Cultural Venues and Events (cat. no. 4114.0) provide information about attendance at: art galleries, museums, zoological parks, aquaria, botanic gardens, libraries, classical and popular music concerts, cinema, theatre and dance performances, musicals, operas or other performing arts venues or events. The ABS has also collected data on cultural attendance by persons with a disability. Tourism Research Australia provides data on domestic tourism.

Attendance

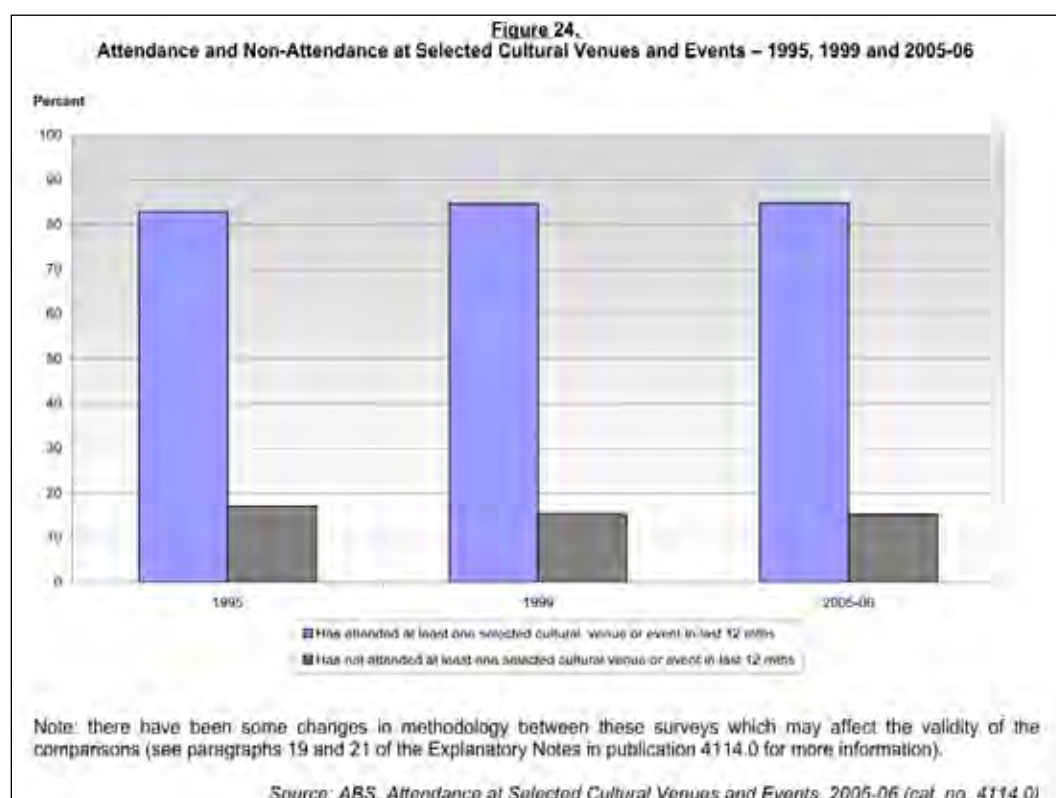
- Attendance and Non-Attendance at Selected Cultural Venues and Events – 1995, 1999 and 2005–2006
- Attendance at Selected Cultural Venues and Events by Sex – 2005–2006
- Attendance at Selected Cultural Venues and Events by Age – 1995, 1999 and 2005–2006
- Attendance at Selected Cultural Venues and Events by Country of Birth – 2005–2006
- Attendance at Selected Cultural Venues and Events by Persons with a Disability – 1998 and 2003

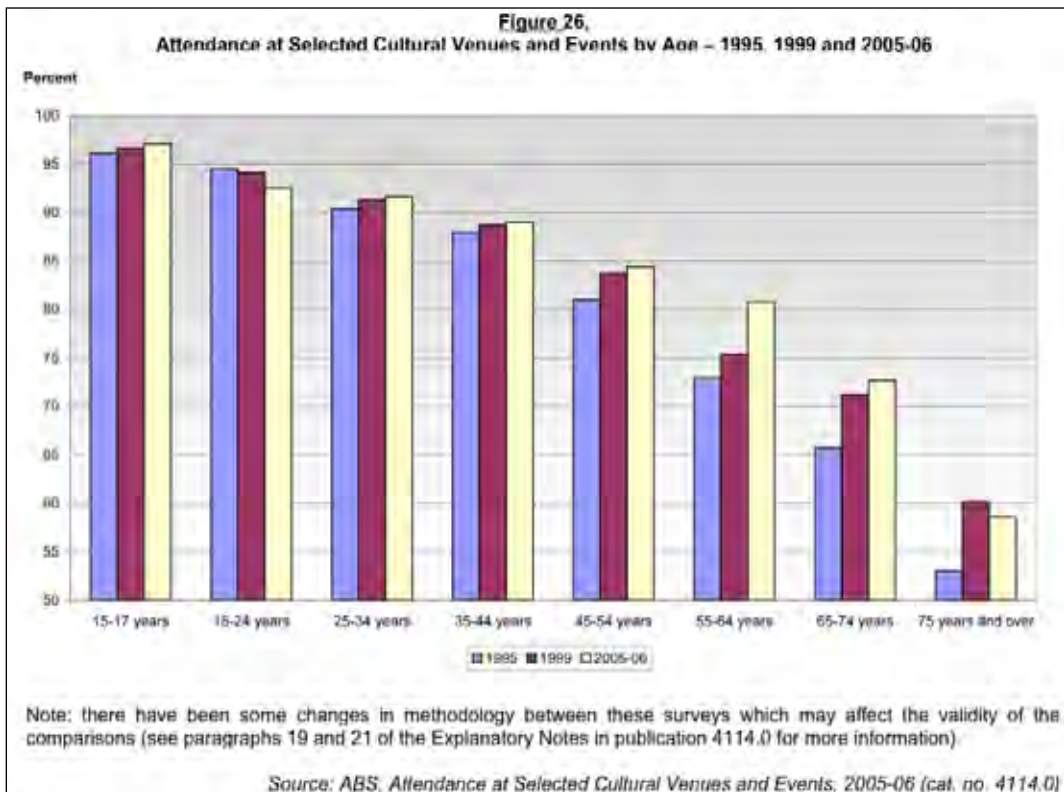
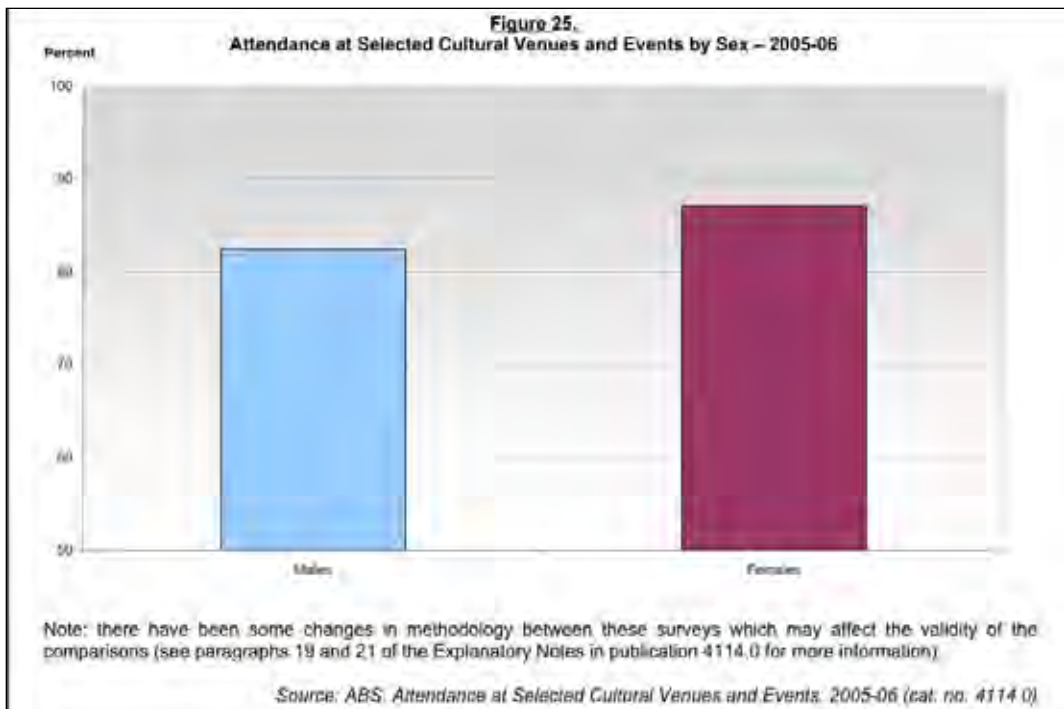
Domestic visitors

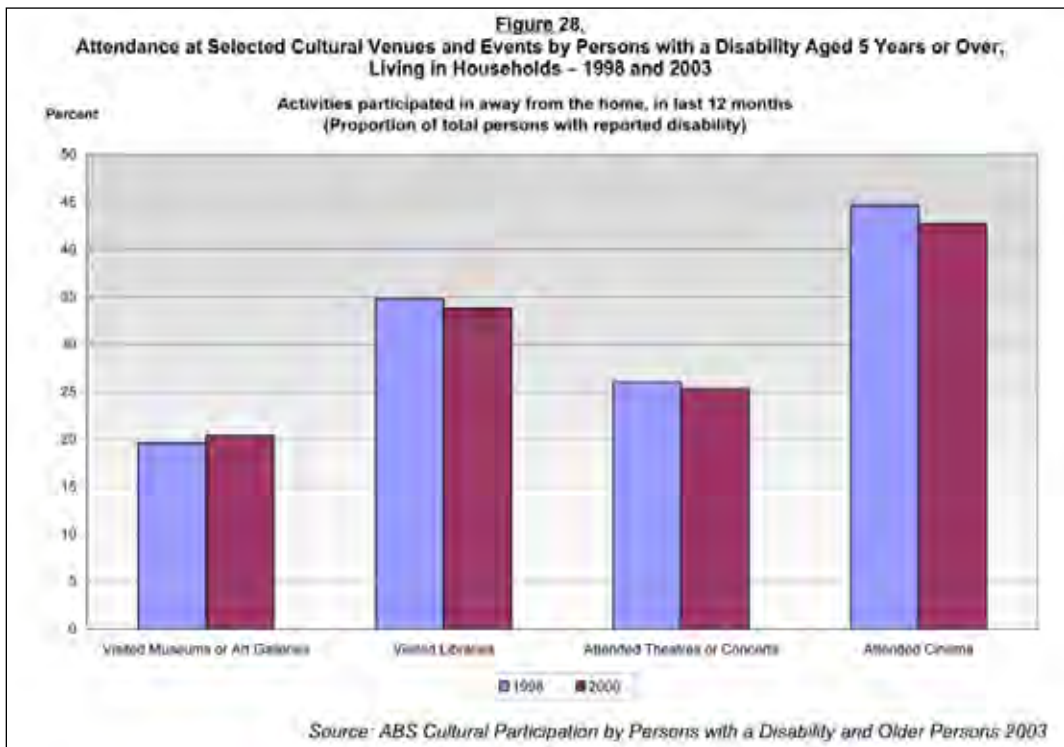
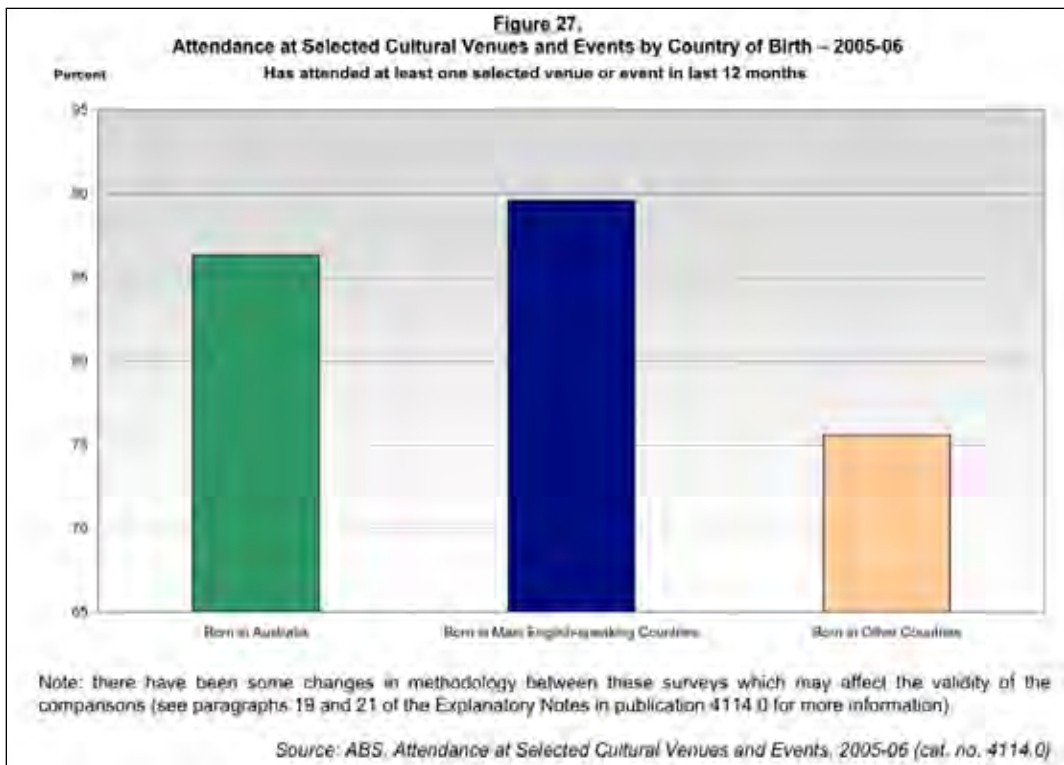
- Domestic Cultural and Heritage Visitors – 2000 to 2008
- Domestic Cultural and Heritage Visitors by Activity Type – 2008

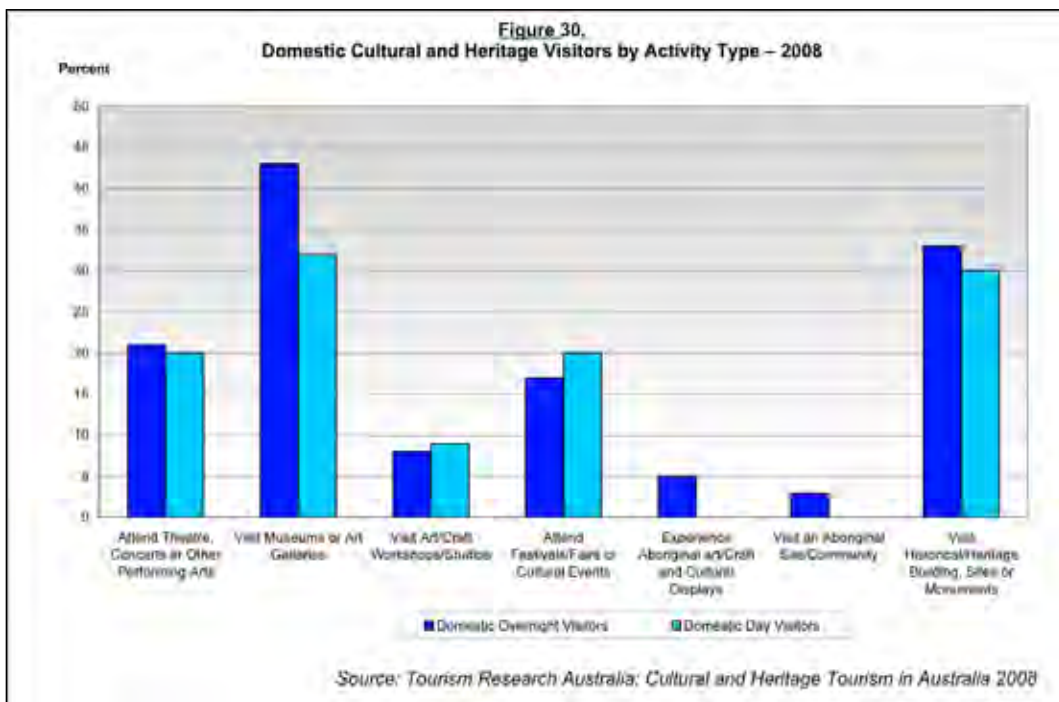
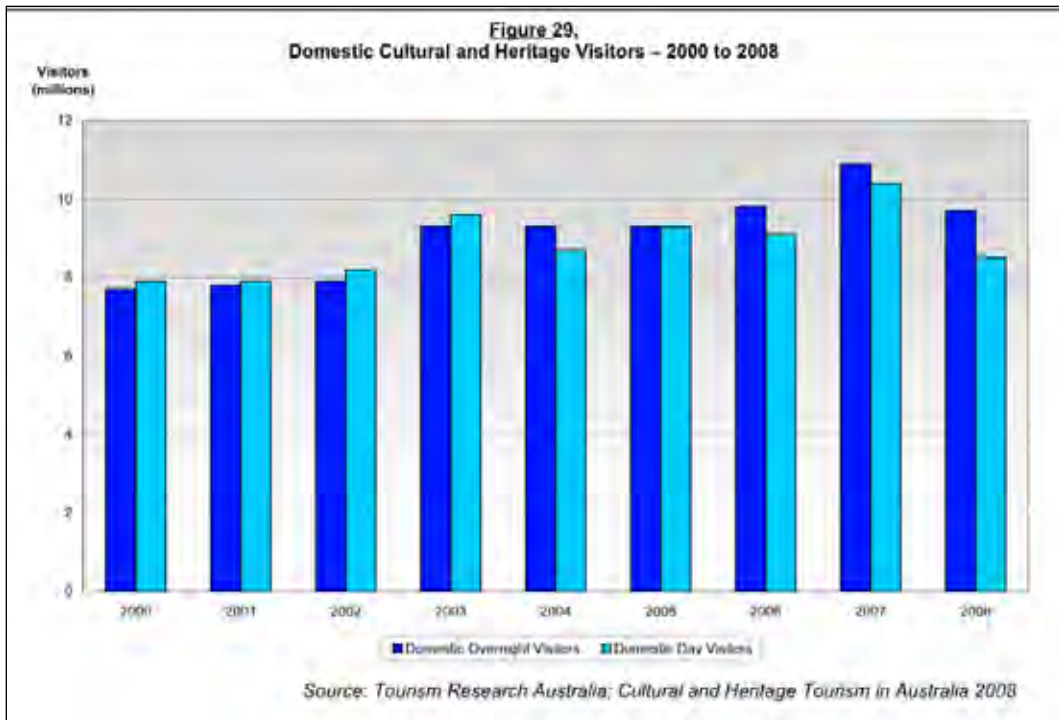
Unpopulated data items

- Online Audiences









Discussion

Data on attendance indicates a strong public interest in cultural venues and events. Figure 24 shows the comparison of attendance rates recorded for the years 1995, 1999 and 2005–2006. Attendance rates in 2005–2006 were similar to earlier years and all attendance levels are located in the 80 percentile bracket.⁸⁷ Appendix D, Schedule 6 shows the range of cultural activity including visits to galleries, museums and libraries, as well as zoos and botanic gardens. It also discloses some preferences: cinema is most popular across all age groups, but more young people attend popular music concerts, while older people prefer classical music, opera and musicals (Figure 26 and Appendix D, Schedule 7 for details). Women are more likely to attend than men, a difference that is most significant for libraries and performing arts venues (Figure 25 and Appendix D, Schedules 8 and 9 for details). People born in main English-speaking countries were most likely to attend at least one selected cultural venue and event in the 12 months prior to survey (Figure 27).

People with disabilities also have relatively high levels of attendance at arts and cultural venues. Of particular note is their level of participation away from the home (45%). Most frequently, they attend the cinema or visit a library, followed by attendance at theatres and concerts. They least often visit galleries and museums (Figure 28).

The number of domestic cultural and heritage visitors fluctuated over the period 2000 to 2008, recording a peak in 2007 (Figure 29). This declined by 13% in 2008, although interest in domestic cultural tourism remains strong. Tourism Research Australia 2008 findings conclude that couples and families are strongly represented among visitors to cultural and heritage sites, and that visiting museums and art galleries and visiting heritage buildings and sites were the most popular cultural and heritage activities (Figure 30).⁸⁸

Data on non-attendance cannot reveal whether this is an indicator of different preferences in leisure activities, lack of opportunity to attend for financial or geographic reasons, tastes that are not met by existing programming, a preference for domestic consumption of aesthetic goods, competing demands on time from work and family commitments or other factors that may inhibit attendance.

Non-attendance is not necessarily an indicator of indifference to arts and cultural activity, nor is it a measure of lack of public support. People routinely express their appreciation for places they rarely if ever visit or activities they do not currently engage in. This 'non-use value' cannot be captured by existing data or by markets. However, this term incorporates existence value (the altruism of individuals who value arts and culture regardless of whether they experience them directly), option value (the knowledge that those experiences will be available at a future time) and bequest value (the preservation of heritage for future generations).

This indicator includes an unpopulated data item: online audiences. Data on the numbers of people visiting arts and cultural websites is not currently collected. However, technological developments have expanded the market for arts and cultural goods. Many transactions are enabled by the web: purchase of tickets and goods, downloading music and films, accessing media sites. In addition, websites enable interaction between performers, arts organisations and venues and their audiences. The development of the national broadband network will further extend access to arts and cultural goods and services.

⁸⁷ Note there have been some changes in methodology between these surveys which may affect the validity of the comparisons (see paragraphs 19 and 21 of the Explanatory Notes in publication 4114.0 for more information).

⁸⁸ *Tourism Research Australia, Culture and Heritage Snapshot 2008.*

Indicator 3.2 – Cultural participation

Definition

This indicator represents the extent of community participation in arts and cultural activities.

Rationale

Community involvement in arts and cultural activity is difficult to measure using existing national data sources. The Time Use survey has been drawn on to provide some information about the time adults spend on cultural activities. Children's participation in cultural activities has been consistently surveyed every three years since 2000. In addition, data has been collected on the participation of Indigenous groups and people with disabilities. This data provides an uneven and incomplete picture of the extent of community participation. The ABS is currently developing an adults cultural participation survey, with data being available by 2011.

Data items

Information about how people use their time is reported in the ABS Time Use survey. The ABS also provides information about the participation of children aged 5 to 14 years in cultural, sporting and other leisure activities, reports on the wellbeing and social circumstances of Aboriginal and Torres Strait Islanders, and collects information on cultural participation by persons with a disability.

Adult participation in cultural activities

- Average Time Spent on Selected Culture and Leisure Activities – 2006

Children's participation in cultural activities

- Children's Participation in Selected Cultural Activities⁸⁹ – 2000, 2003 and 2006
- Children's Participation in at Least One Selected Cultural Activity by Sex – 2000, 2003, 2006
- Children's Participation in at Least One Selected Cultural Activity by Age – 2000, 2003, 2006
- Children's Participation in at Least One Selected Cultural Activity by Country of Birth – 2000, 2003, 2006

Indigenous participation in cultural activities

- Indigenous Participation in Indigenous Cultural Activities – 1994 and 2002
- Indigenous Participation in Indigenous Cultural Activities by Age Group – 2002

Unpopulated data items

- Social Benefits of Cultural Participation

⁸⁹ The ABS collects information about the participation of children aged 5 to 14 years in selected organised cultural activities outside of school hours in the 12 months prior to interview. Selected organised activities include: playing a musical instrument, singing, dancing and drama.

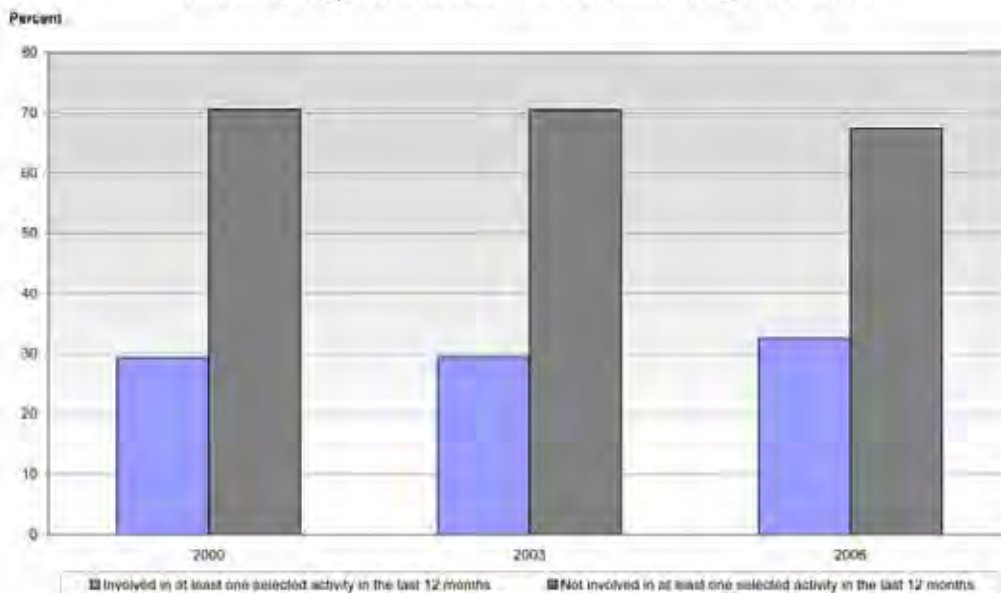
Table 13.
Adult Participation: Average Time Spent on Selected Culture and Leisure Activities - 2006

	Participants average	Participation rate %	Total time spent by all Australians	Average % of day spent on activity by all Australians
	Minutes per day	%	Million of person hours per day	%
Visiting entertainment and cultural Venues	114	4.3	1.3	0.3
Attendance at sports events	127	7.6	0.5	0.1
Religious activities/ritual ceremonies	91	5.1	1.3	0.3
Sport and outdoor activity	88	25.6	6.2	1.5
Games/hobbies/sports/clubs	100	17.7	4.9	1.2
Reading	76	43.7	8.9	2.3
TV watching/listening	179	67.4	42.0	10.8
Video/DVD watching	709	8.2	2.4	0.6
Listening to radio	123	47.9	15.8	4.1
Listening to records/tapes/CDs and other audio media	71	5.6	1.1	0.3
Attendance at courses (excluding school and university)	113	0.6	0.2	-
Audio/visual media nec(c)	83	22.7	5.8	1.3

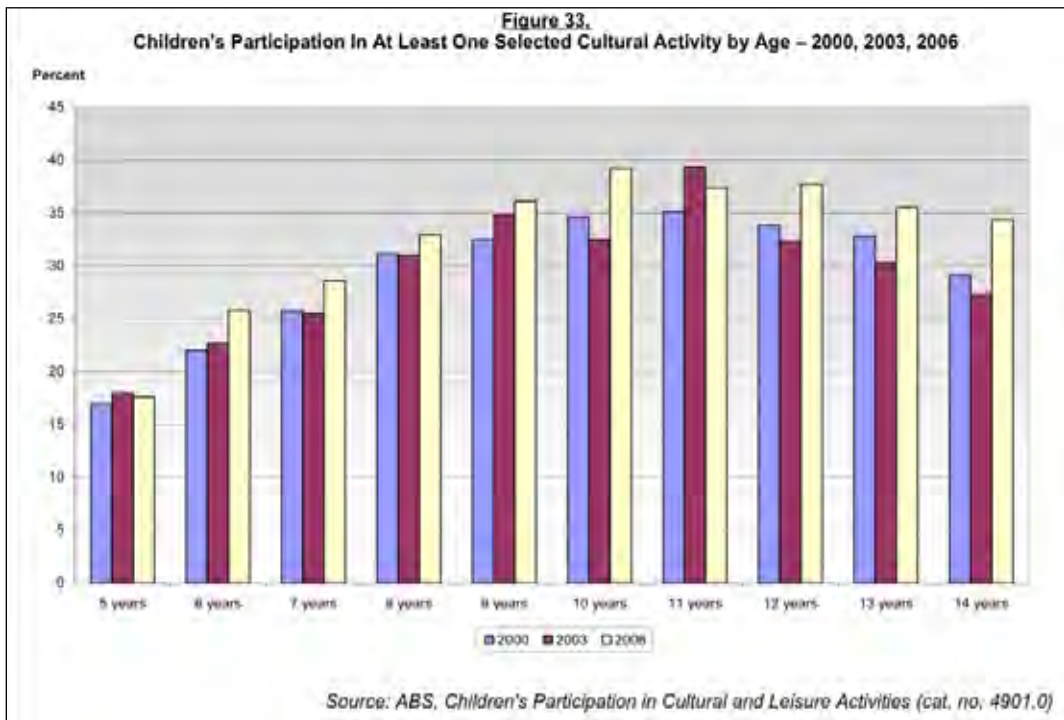
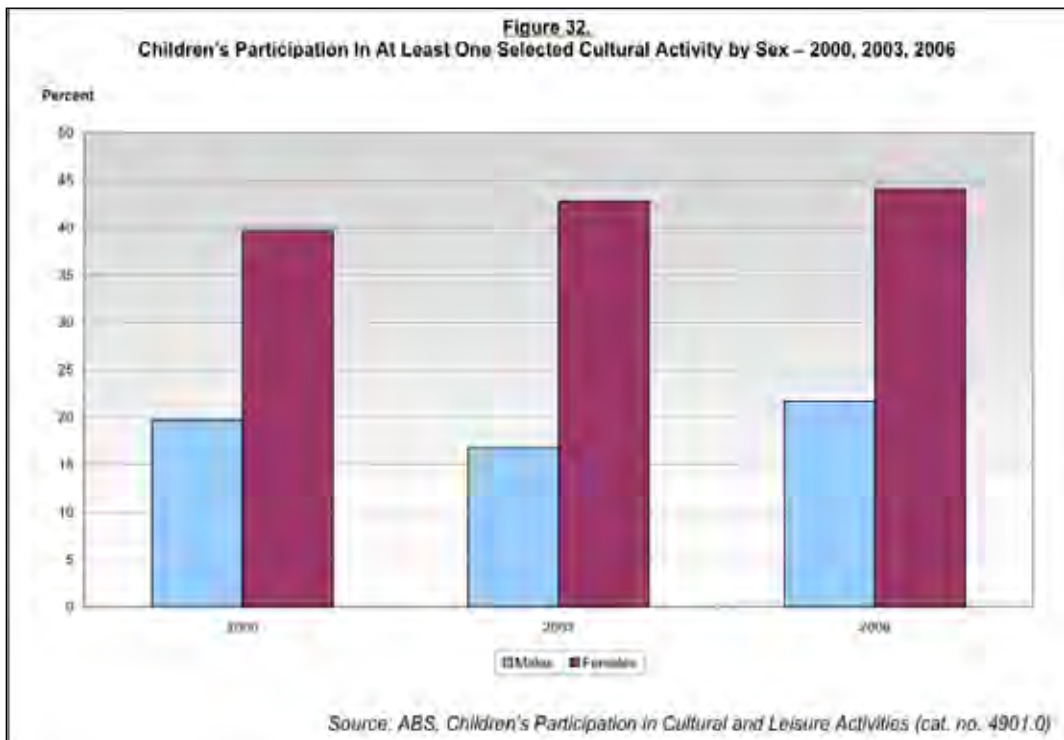
- (a) or rounded to zero (including all null cells)
 (a) Includes only those that have taken part in the activity.
 (b) Includes cultural activities that were undertaken as a secondary activity.
 (c) Computer and Internet use other than for games.

Source: ABS, *How Australians Use Their Time, 2006* (cat. no. 4153.0)

Figure 31.
Children's Participation in Selected Cultural Activities - 2000, 2003 and 2006



Source: ABS, *Children's Participation in Cultural and Leisure Activities* (cat. no. 4901.0)



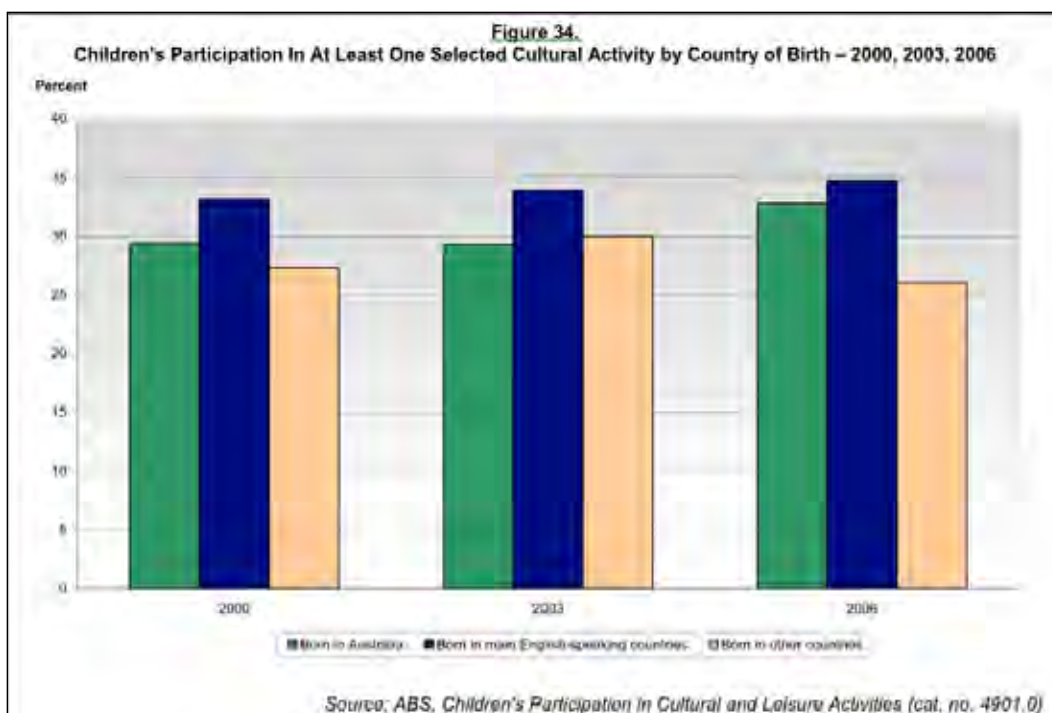
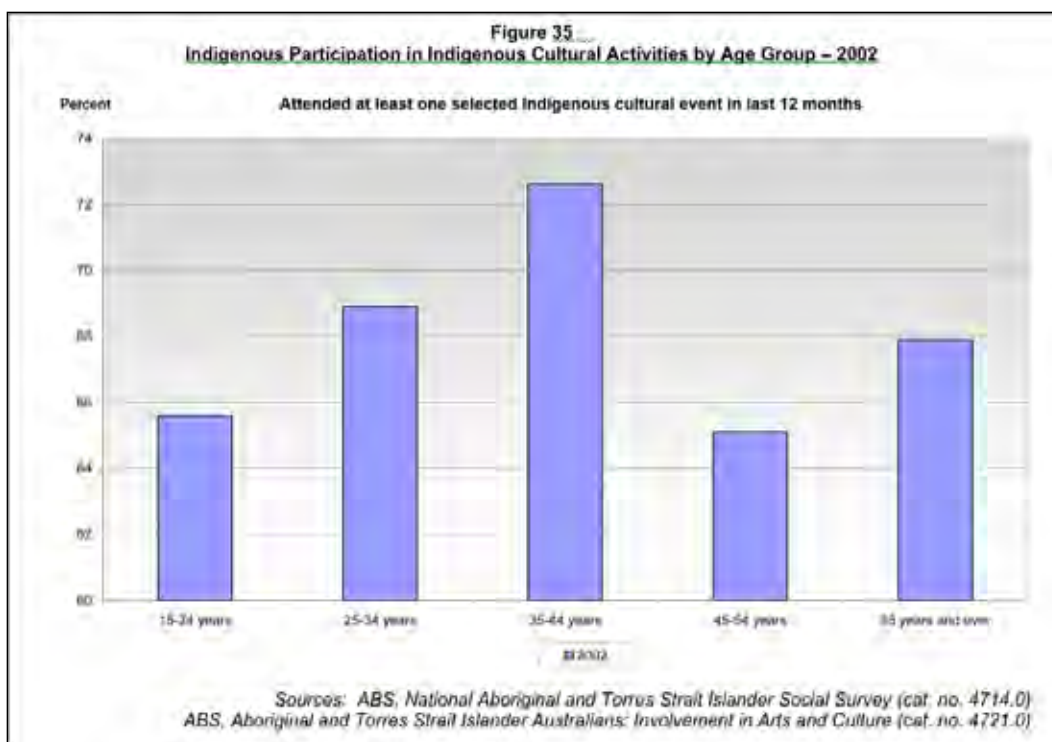


Table 14.
Indigenous Participation in Indigenous Cultural Activities - 1994 and 2002 (a)

Whether attended at least one selected Indigenous cultural event in last 12 months	1994 %	2002 %
Has attended at least one selected Indigenous cultural event in last 12 months	(a)70.7	(a)68.1
Has not attended at least one selected Indigenous cultural event in last 12 months	(a)29.3	(a)31.9
Total Indigenous population aged 15 years and over	100.0	100.0

(a) difference between the 1994 NATSIS and the 2002 NATSIS data is not statistically significant

*Sources: ABS, National Aboriginal and Torres Strait Islander Social Survey (cat. no. 4714.0)
ABS, Aboriginal and Torres Strait Islander Australians: Involvement in Arts and Culture (cat. no. 4721.0)*



Discussion

Data on cultural participation do not allow any conclusions to be drawn about the positive or negative social impacts of that participation.

Time use data indicates the range of Australians' cultural and leisure activities and also suggest that they spend more time indoors – watching television, listening to the radio and reading – than they do in sport and outdoor activity (Figure 28). Data does not disclose whether these activities are undertaken alone or as part of a family or social group. It is not possible to draw conclusions about positive benefits of this pattern of participation.

Children do not display high levels of cultural participation as part of leisure activities, as distinct from participating in organised classes (Figure 31). Of the 30% of children who do take part, girls are twice as likely as boys to participate (Figure 32). Participation rates are highest in the pre-teen years, particularly from ages 9 to 12 (Figure 33). Children born in Australia and the main English-speaking countries are much more likely to participate (Figure 34). This suggests that there may be more limited provision and opportunities for children from NESB backgrounds.

Indigenous participation in Indigenous cultural activities is a measure of the continuing vitality of Indigenous cultural heritage. Participation rates are consistently high. In 1994, 70% of Indigenous people attended at least one selected Indigenous cultural event in the 12 months prior to survey, declining slightly to 68% in 2002 (Table 14). The highest participation rates are among Indigenous people aged 35–44 years (Figure 35). Forms of participation include attendance at ceremonies, attendance at events and festivals, and membership of organisations. This suggests that participation involves wider social and family networks and that it is a significant means of maintaining group membership and cultural identity, as well as a means of preserving traditions.

The 2002 National Aboriginal and Torres Strait Islander Social Survey reveals that about 75% of Indigenous Australians live in non-remote areas. The survey found that young Indigenous people, aged 15–24 years, were more likely than those aged 55 years or older to attend mainstream cultural venues, such as the movies, theatre or a concert (61% compared to 21%).

This indicator includes an unpopulated item, social benefits of cultural participation. Suggested data items include: information on the provision of infrastructure (e.g. legal graffiti walls and skate parks, mobile libraries and recording studios), targeted programs (arts programs and classes in prisons, youth organisations and aged care facilities), and on the use of community resources by organisations such as choirs, reading groups and people with disabilities. This kind of data could support conclusions about positive social impacts of participation in areas such as crime prevention, overcoming social isolation and promoting productive ageing.

Indicator 3.3 – Access

Definition

This indicator represents the provision of regional programs in arts and culture.

Rationale

There are many arts and culture programs enabling and supporting participation by people living in regional Australia, where local provision is limited by distance and economic considerations. These programs ensure that people who live in regional areas have access to a variety of arts experiences.

Data items

Regional cultural touring program statistics are recorded by the DEWHA.

Regional programs

- Regional Cultural Touring Programs: Number of Metropolitan and Regional Locations Visited by Touring Exhibitions and Productions in 2007–2008
- Regional Cultural Touring Programs Statistics – 2007–2008

Unpopulated data items

- Outreach

Table 15.
Regional Cultural Touring Programs: Number of Metropolitan (M) and Regional (R) Locations Visited by Touring Exhibitions and Productions in 2007-08

Program	ACT		NSW		VIC		SA		QLD		NT		WA		TAS	
	M	R	M	R	M	R	M	R	M	R	M	R	M	M	M	R
Contemporary Music Touring Program	17	0	25	126	21	41	13	11	23	32	3	16	7	41	3	6
Playing Australia	14	0	40	165	39	136	5	22	30	105	20	18	8	109	19	6
Vision of Australia	8	0	9	32	5	16	10	16	3	13	3	17	6	5	7	2

Source: Department of the Environment, Water, Heritage and the Arts

**Table 16.
Regional Cultural Touring Programs Statistics**

Program	Playing Australia	Contemporary Music Touring Program	Festivals Australia	Visions of Australia
2007-08	43	22	85	33

Source: Department of the Environment, Water, Heritage and the Arts.

Discussion

The key elements of access to arts and cultural activities, and to enjoyment of the benefits that may be derived from engagement, are opportunity and capacity to participate.

Substantial support has been provided for regional cultural touring programs to provide audiences across Australia with access to high quality arts experiences. Table 15 shows the number of metropolitan and regional locations visited by touring exhibitions and productions in 2007–2008. In addition, the Australian Government allocated \$11.8m to the Regional Arts Fund to enable ongoing cultural development in regional and remote communities, and to assist the professional skills development of regional artists. Table 16 shows the number of funded regional cultural activities in 2007–2008.

This indicator includes an unpopulated item, 'Outreach'. Data on programs designed to engage with particular segments of the population (e.g. the aged), hard to reach communities (e.g. recent immigrants) and disadvantaged groups could be included in this item.

Indicator 3.4 – Education in arts and culture

Definition

This indicator represents the take-up of educational opportunities in arts and culture.

Rationale

The provision of non-school qualifications in culture-related fields embraces training that includes, but is not confined to, creative arts disciplines. Formal educational opportunities are provided at all levels of post-secondary education. People who undertake this training may do so to prepare for a career in creative fields or for personal development. Arts education can also inspire a lifelong love of arts and culture. It also helps to develop valuable cognitive, emotional and social skills.

Data items

Information about the educational experience of persons aged 15–64 years is available from the ABS Survey of Education and Work.

Education

- Persons Aged 15–69 Years Enrolled in a Course of Study: Level by Selected Main Field of Education – 2005

- Proportion of People Currently Studying Towards a Non-School Qualification
- Proportion of People Currently Studying Towards a Culture Related Non-School Qualification by Sex – 2006, 2007 and 2008
- Proportion of People Currently Studying Towards a Culture Related Non-School Qualification by Age Group – 2006, 2007 and 2008
- Proportion of People Currently Studying Towards a Culture Related Non-School Qualification by Country of Birth – 2006, 2007 and 2008

Unpopulated data items

- Arts education in primary and secondary schools

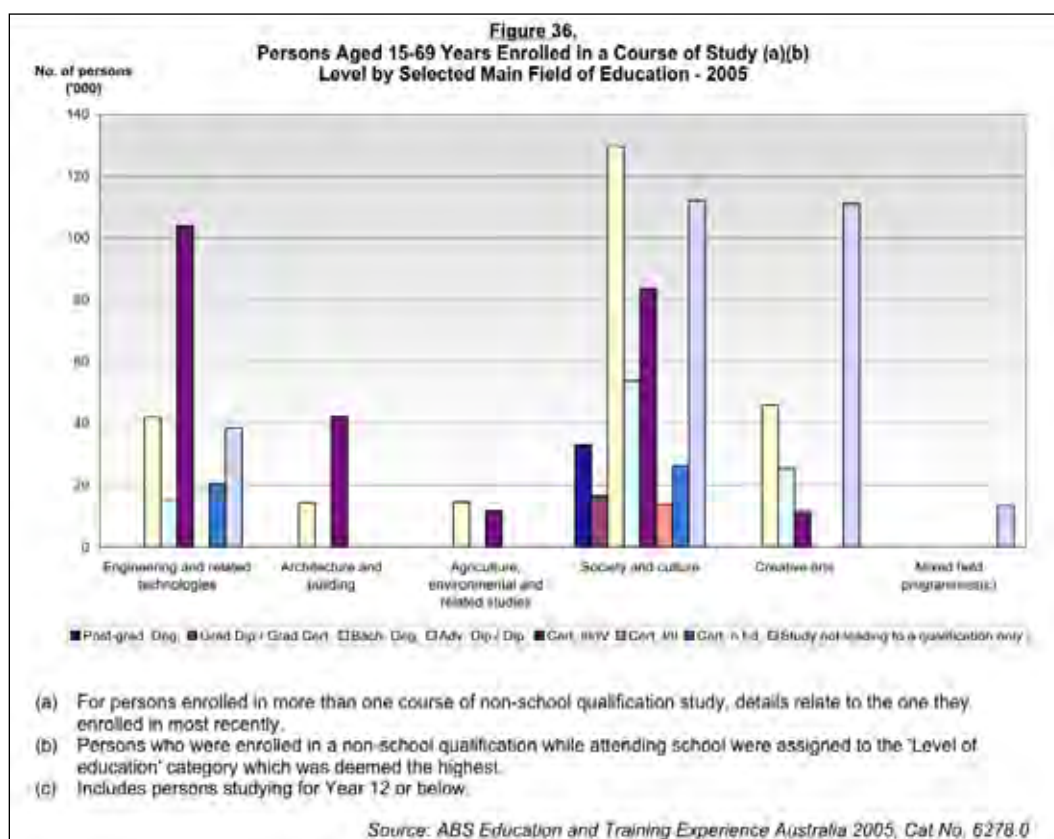
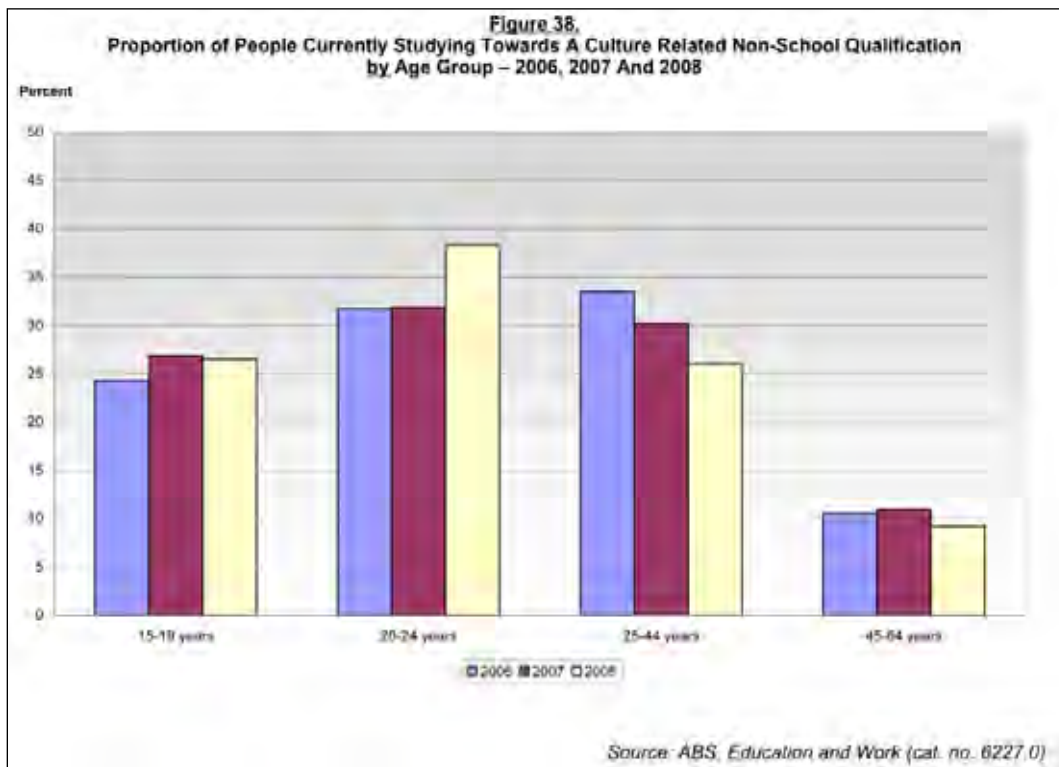
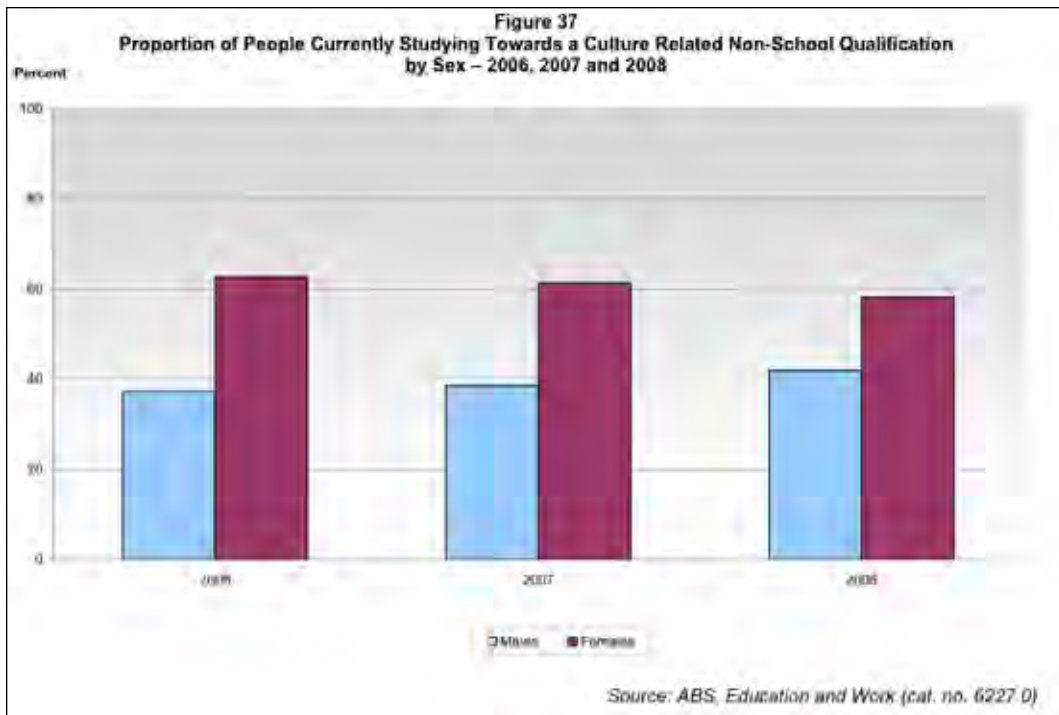
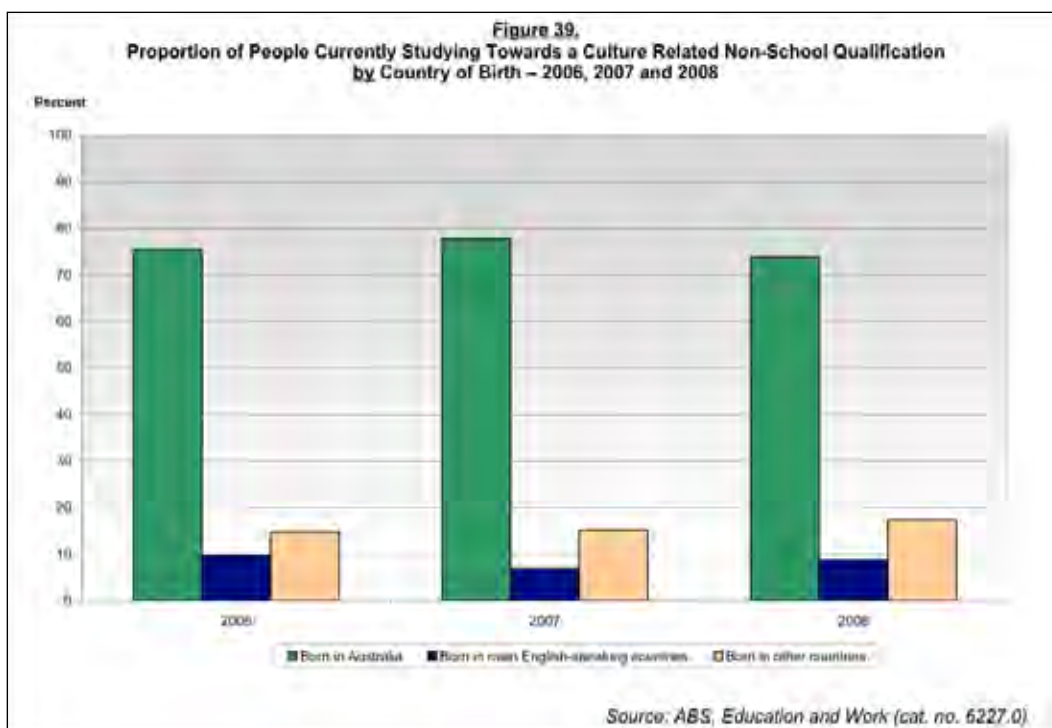


Table 17.
Proportion of People Currently Studying Towards A Non-School Qualification

Currently studying towards a non-school qualification	2006 %	2007 %	2008 %
Currently studying towards a culture related non-school qualification	5.2	4.8	5.3
Currently studying towards a non-culture related non-school qualification	94.8	95.2	94.7
Total	100.0	100.0	100.0

Source: ABS, Education and Work (cat. no. 6227.0)





Discussion

The count of people currently studying towards a culture-related qualification cannot be easily measured because culture-related qualifications traverse a number of main fields of education. Culture-related qualifications are based on the Australian Standard Classification of Education (ASCED, 2001)⁹⁰ and include a broad range of learning areas such as architecture, music, drama, film, literature and anthropology. These learning areas are classified into main fields of education based on vocational outcomes and disciplinary content. So even though architecture is a culture-related qualification, it is classified in the field of Architecture and Building. Similarly, literature is classified in the field of Society and Culture. Music and drama are classified as Creative Arts. Figure 36 shows the number of people aged 15–69 years enrolled in a course of study in a variety of culture-related areas.

More accurate data on the take-up of educational opportunities are limited to non-school qualifications. We do not have data on arts education in Australian schools. Nevertheless, the arts have been included in Australia's national curriculum. Apart from the intrinsic value of developing creativity, this initiative has been promoted on the basis of ancillary benefits, including assisting cognitive development, overcoming learning difficulties, positively influencing learning in other areas and promoting social inclusion.

In 2008, the proportion of the population undertaking non-school qualifications in culture-related areas was 5.3% (Table 17). Women are more likely to be undertaking non-school qualifications in culture-related areas than men (Figure 37) and most people currently studying are aged 20–24 (38.3%) (Figure 38). However, there are significant numbers in older ages groups, which suggests that culture-related study is a significant vehicle for lifelong learning. Overwhelmingly, people born in Australia (over 70%) undertake culture-related study (Figure 39). This compares markedly to those born in main English-speaking countries (8.8% in 2008) and people born in other countries (17.4% in 2008).

⁹⁰ Culture-related qualifications (2001 ASCED) include: Architecture, Urban Design and Regional Planning, Landscape Architecture, Interior and Environmental Design, Architecture and Urban Environment, Anthropology, Archaeology, Librarianship and Information Management, Curatorial Studies, Australian Indigenous Languages, Literature, Language and Literature, Society and Culture, Music, Drama and Theatre Studies, Dance, Performing Arts, Fine Arts, Photography, Crafts, Jewellery Making, Floristry, Visual Arts and Crafts, Graphic Arts and Design Studies, Textile Design, Fashion Design, Graphic and Design Studies, Audio Visual Studies, Journalism, Communication and Media Studies, Creative Arts.

Appendix A

Indicator 1.4: Visitor expenditure on cultural goods and services

Schedule 1, International Visitor Survey Collection Methods

The International Visitor Survey is the most comprehensive source of information on international visitors to Australia. The International Visitor Survey samples 40,000 departing, short-term international travellers over the age of 15 years who have been visiting Australia. The survey is conducted by Computer Assisted Personal Interviewing (CAPI) in the departure lounges of the eight major international airports; Sydney, Melbourne, Brisbane, Cairns, Perth, Adelaide, Darwin and the Gold Coast.

The data collection is based on a proportionate stratified sample. The total number of interviews conducted with residents of each country or region is distributed among airports by selecting monthly samples of departing flights and visitors on those flights to achieve acceptable sample sizes in various categories. Surveying is conducted every day of the year. When field work is concluded for the day, the CAPI databases are up-loaded and stored on a central database. At the end of each quarter the data is downloaded for cleaning, weighting and processing.

The International Visitor Survey is weighted to the **Overseas Arrivals and Departures (OAD)** data supplied by the Department of Immigration and Citizenship (DIAC), with the assistance of the Australian Bureau of Statistics (ABS). OAD data are published by the ABS on a monthly basis. By weighting the International Visitor Survey to the OAD data, the estimates are more reflective of the actual target population.

For further information see Tourism Research Australia website:
<http://www.tra.australia.com/international.asp?lang=EM&sub=0038>

Schedule 2, National Visitor Survey Collection Methods

The National Visitor Survey (NVS) is the major source of information on the characteristics and travel patterns of domestic tourists. It measures travel for all reasons, including holiday and leisure travel, business travel and travel to visit friends and/or relatives.

Each year, interviews are conducted with approximately 80 000 Australian residents aged 15 years and over. Interviews are undertaken continuously throughout the year, using computer assisted telephone interviewing. The NVS is an origin-based survey. In simple terms, this means that respondents are interviewed in their homes and details are collected about their recent travel.

Details are obtained of all travel in Australia — travel involving nights away from home, as well as day trips — and travel by Australians overseas.

The NVS has been designed to optimise the reliability of regional estimates. Respondents interviewed in the NVS are representative of the Australian population, based on place of residence, age and sex.

For further information see Tourism Research Australia website:
<http://www.tra.australia.com/content/documents/IVS/travel%20in%20australia%20results%20of%20the%20international%20and%20national%20visitor%20survey%202003.pdf>

Appendix B

Indicator 1.5: Support for culture

**Schedule 3,
Proportion of People Who Volunteer for Arts/Cultural Organisations Compared with Other Organisational Sectors – 2006**

Volunteering, Organisation Type, summary measures (a) - 2006						
Type of organisation	Volunteers (b) '000	Volunteer rate (c) %	Volunteering involvements (d)	Volunteering involvements %	Annual hours of voluntary work hours (million)	Median age of volunteers years
PERSONS						
Arts/heritage	207.2	1.4	223.7	2.9	30.6	49
Community/welfare	1123.1	7.3	1264.8	16.3	134.9	53
Education/training	1385.7	9.1	1506.3	19.4	72.2	40
Emergency services	175.0	1.1	178.6	2.3	26.2	43
Environment/animal welfare	175.2	1.1	192.6	2.5	14.0	44
Health	476.1	3.1	534.0	6.9	47.7	50
Parenting/children/youth	308.5	2.0	310.8	4.0	26.0	41
Religious	1022.9	6.7	1060.3	13.6	121.9	49
Sport/physical recreation	1712.8	11.2	1944.7	25.0	187.2	43
Other recreation/interest	249.2	1.6	262.2	3.4	26.0	49
Other (e)	279.2	1.8	303.6	3.9	20.0	45
Total	5226.5	34.1	7781.5	100.0	706.7	44

(a) For any one volunteer information is collected for up to three involvements with different organisations. In 2006, 4% of volunteers worked for more than three organisations.

(b) Volunteers who work for more than one organisation of the same type are only counted once for that type.

(c) Number of volunteers as a percentage of all persons aged 18 years and over.

(d) Volunteering involvements exceed the number of volunteers because individual volunteers may work for organisations of different types and for any given type of organisation may work for more than one organisation; each involvement is counted separately.

(e) Other includes: Business/professional/union, International aid/development, Law/justice/political, and 'Other' unspecified.

Source: ABS, *Voluntary Work, Australia, 2006* (cat. no. 4441.0)

Appendix C

Indicator 2.3: Cultural identity

**Schedule 4,
Number of Australian and Overseas Films Released in Australian Cinemas – 1984 to 2008**

Year	Europe						North America			Total
	Aust.	NZ	Asia	France	UK	Rest	Canada	US	Other	
1984	25	1	–	9	22	12	4	146	4	223
1985	17	–	1	4	25	5	4	136	2	194
1986	30	2	6	8	25	10	–	155	3	239
1987	31	1	7	12	18	14	5	168	3	259
1988	36	2	6	10	31	22	3	167	4	281
1989	39	–	13	14	35	19	3	163	5	291
1990	22	3	7	26	20	14	6	153	1	252
1991	22	1	8	16	21	16	3	149	4	240
1992	29	1	5	9	28	15	6	135	1	229
1993	22	3	8	14	13	17	5	172	5	259
1994	26	2	12	17	22	13	6	153	1	252
1995	14	1	6	17	23	13	3	171	5	253
1996	25	1	9	12	25	10	3	190	6	281
1997	30	2	8	17	21	13	8	184	2	285
1998	20	–	5	12	29	5	3	189	10	273
1999	24	3	3	5	28	11	5	174	2	255
2000	22	–	8	14	29	6	1	167	3	250
2001	27	–	13	11	15	9	–	163	7	245
2002	22	1	10	12	24	12	1	170	6	258
2003	23	4	5	11	24	17	1	178	5	268
2004	16	1	27	17	21	19	6	200	11	318
2005	27	1	47	17	29	20	4	175	9	329
2006	29	5	41	17	28	18	7	184	4	333
2007	26	2	40	22	32	13	5	172	5	317
2008	33	0	40	20	24	15	7	158	4	301
Proportions										
2008	11%	0%	13%	7%	8%	5%	2%	52%	1%	
average	10%	1%	5%	5%	9%	5%	1%	63%	2%	

Source: Motion Picture Distributors Association of Australia (MPDAA), compiled by Screen Australia

**Schedule 5,
Proportion of Australian Content Showing in Australian Cinemas: Australian Film's Share of the Australian Box Office 1998-2007**

Year	Total box office in Australia (\$m)	Australian films' box office gross (\$m)	Australian films' box office share (%)
1998	629.3	25.6	4.1
1999	704.1	21.1	3.0
2000	689.5	54.2	7.9
2001	812.4	63.4	7.8
2002	844.8	41.8	4.9
2003	865.8	30.3	3.5
2004	907.2	11.9	1.3
2005	817.5	23.1	2.8
2006	866.6	40.0	4.6
2007	895.4	36.0	4.0
10 year average	803.3	34.7	4.3

Source: AFC analysis of MPDAA data, figures are to 31/12/07 as reported on 11/01/08. For results back to 1977 see [Get the Picture www.afc.gov.au/get_the_picture/webshare.htm](http://www.afc.gov.au/get_the_picture/webshare.htm)

Appendix D

Indicator 3.1: Cultural attendance

Schedule 6.
Attendance at Selected Cultural Venues and Events (a) - 1995, 1999 and 2005-06

	1995	1999	2005-06
	Attendance Rate (%)		
Art galleries	22.3	21.2	22.7
Museums	27.8	19.9	22.6
Local, state and national libraries	38.4	38.1	34.1
Classical music concerts	7.7	8.8	9.4
Popular music concerts	26.9	25.4	25.2
Theatre performances	16.6	16.5	17.0
Dance performances	10.0	9.0	10.2
Musicals and operas	19.3	16.3	16.3
Other performing arts	18.7	17.8	16.6
Cinemas	62.1	67.0	65.2

(a) In the 12 months before interview.

Source: ABS, Attendance at Selected Cultural Venues and Events, 2005-06 (cat. no. 4114.0)

Schedule 7.
Persons Attending Cultural Venues and Events (a), by age — 2005-06

PERSONS	AGE GROUP (YEARS)								Total
	15-17	18-24	25-34	35-44	45-54	55-64	65-74	75+	
	ATTENDANCE RATE(%)								
Art galleries	23.1	17.6	22.5	23.4	26.6	25.8	21.5	15.6	22.7
Museums	25.2	15.7	23.6	27.2	25.1	24.9	19.2	11.0	22.6
Libraries	45.8	33.9	32.7	37.3	33.6	30.3	33.6	29.9	34.1
Classical music concerts	6.4	6.0	7.0	8.3	12.4	12.8	11.8	9.6	9.4
Popular music concerts	31.2	40.0	30.9	25.1	26.5	18.7	12.9	6.5	25.2
Theatre performances	24.5	15.8	15.4	15.5	20.3	20.1	16.8	7.6	17.0
Dance performances	18.9	8.2	9.4	12.3	12.8	8.5	6.7	4.3	10.2
Musicals and operas	18.1	13.7	13.6	17.0	19.0	19.9	16.0	11.5	16.3
Other performing arts	20.0	16.1	19.0	19.3	17.3	15.9	11.7	7.1	16.6
Cinemas	93.1	84.5	75.7	68.6	62.7	55.6	44.8	26.7	65.2
event	97.1	92.5	91.6	89.0	84.4	80.8	72.7	58.6	84.8

(a) Number attending in the 12 months before interview as a percentage of the population in the relevant age group.

Source: ABS, Attendance at Selected Cultural Venues and Events, 2005-06 (cat. no. 4114.0)

**Schedule 8,
Persons Attending Cultural Venues and Events, by age & sex— Females 2005–06**

	FEMALES								Total
	15–17	18–24	25–34	35–44	45–54	55–64	65–74	75 >+	
	ATTENDANCE RATE (%)								
Art galleries	26.9	22.8	23.2	26.5	30.5	27.9	22.4	16.7	25.4
Museums	26.4	18.1	24.6	30.4	26.0	23.0	18.6	10.2	23.4
Zoological parks and aquariums	46.1	42.0	49.6	46.4	32.3	32.1	25.1	12.3	37.5
Botanic gardens	25.8	32.0	38.9	39.8	37.8	40.2	36.4	24.9	36.3
Libraries	52.9	41.7	40.4	50.4	40.4	35.0	37.4	30.0	41.2
Classical music concerts	11.2	6.5	7.3	10.2	13.9	13.7	11.6	11.0	10.6
Popular music concerts	35.3	43.9	29.1	25.3	28.1	19.4	11.9	6.5	25.6
Theatre performances	30.5	21.3	17.8	20.1	24.1	24.3	19.6	10.1	20.8
Dance performances	29.6	11.2	11.1	15.6	16.4	11.8	8.4	6.1	13.3
Musicals and operas	24.5	21.2	17.4	21.7	24.0	22.5	17.3	14.1	20.6
Other performing arts	23.6	21.7	21.0	20.3	18.3	17.9	12.9	6.5	18.3
Cinemas	94.5	87.5	77.6	72.1	66.7	58.1	49.1	28.9	67.7
At least one venue or event	97.7	95.3	93.3	91.7	88.3	82.0	76.6	61.7	87.1

Source: ABS, Attendance at Selected Cultural Venues and Events, 2005–06 (cat. no. 4114.0)

**Schedule 9,
Persons Attending Cultural Venues and Events, by age & sex— Males 2005–06**

	MALES								Total
	15–17	18–24	25–34	35–44	45–54	55–64	65–74	75 >+	
	ATTENDANCE RATE (%)								
Art galleries	16.9	12.6	21.7	20.1	22.7	23.8	20.5	14.1	19.9
Museums	24.0	13.5	22.8	23.9	24.2	26.8	19.7	12.1	21.7
Zoological parks and aquariums	37.7	29.2	43.4	45.6	31.6	29.9	20.2	9.4	33.7
Botanic gardens	15.9	25.6	36.2	31.9	32.5	34.6	33.4	21.5	31.0
Libraries	38.3	26.6	25.0	23.9	26.7	25.5	29.6	29.7	26.7
Classical music concerts	1.2*	5.6	6.6	6.3	10.9	12.0	11.9	7.6	8.2
Popular music concerts	26.8	36.3	32.9	24.8	24.9	17.9	14.0	6.4	24.8
Theatre performances	18.2	10.7	13.0	10.8	16.4	15.9	13.8	4.2	13.1
Dance performances	7.5**	5.4	7.7	8.9	9.1	5.2	5.1	1.9**	6.9
Musicals and operas	11.3	6.8	9.8	12.1	13.8	17.3	14.7	8.1	12.0
Other performing arts	16.2	11.0	17.1	18.4	16.3	14.0	10.4	7.8	14.8
Cinemas	91.7	81.7	73.8	65.0	58.7	53.1	40.3	23.6	62.5
At least one venue or event	95.6	89.9	89.8	86.2	80.4	79.6	68.6	54.4	82.4

* estimate has a relative standard error greater than 50% and is considered too unreliable for general use.

** estimate has a relative standard error of

Note: there have been some changes in methodology between these surveys which may affect the validity of the comparisons (see paragraphs 19 and 21 of the Explanatory Notes in publication 4114.0 for more information).

Appendix E

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