



## **Information Paper**

# **Arts and Cultural Heritage - An Information Development Plan**

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**Arts and Cultural Heritage  
- An Information  
Development Plan**

**Australia**

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## PREFACE

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This information paper, *Arts and Cultural Heritage: An Information Development Plan*, has been developed by the Australian Bureau of Statistics' (ABS) National Centre for Culture and Recreation Statistics (NCCRS) in consultation with the Cultural Ministers Council Statistics Working Group (CMCSWG). The aim of the Information Development Plan (IDP) is to guide future directions for statistical data development and research relevant to arts and cultural heritage. It is based on a shared understanding of the key policy imperatives and agreement on the areas of priority.

The ABS recognises that it has an important but limited role as a provider of data and that many other researchers and agencies have a significant role to play in undertaking research and meeting data needs. Many of the policy research questions highlighted in this plan cannot be addressed by statistical data alone. It is envisaged that the IDP will assist other researchers and agencies to develop projects and directions.

This plan identifies some actions which may be pursued by the ABS in partnership with the CMCSWG. Actions identified in this plan are subject to sufficient resources being available to support the work being undertaken.

The Cultural Ministers Council (CMC) provides a forum for the exchange of views on issues affecting cultural activities in Australia. It comprises the ministers responsible for arts and cultural heritage at the federal, state and territory levels, and also the New Zealand minister. The partnership between the CMC and the ABS has been instrumental in encouraging standardisation and coordination of data collection and analysis, and improving the range, quality and accessibility of data.

## ACKNOWLEDGEMENTS

Development of the IDP has involved consultation with a wide range of users and stakeholders including: government arts agencies, peak bodies, community arts networks, city councils, regional bodies and researchers across Australia. Staff in these organisations have given generously of their time and their contribution to this work is gratefully acknowledged.

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# CHAPTER 1 - THE PLAN AND ITS DEVELOPMENT

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## INTRODUCTION

The Australian Bureau of Statistics (ABS) produces Information Development Plans (IDPs) to improve statistics in a particular field or for a particular subgroup of the population (e.g. health, crime and justice, education and training, rural and regional statistics, children and youth). The aim of the IDP is to guide future research and statistical work so that it continues to focus on the highest priority policy and research issues. An arts and cultural heritage IDP has been developed by the ABS' National Centre for Culture and Recreation Statistics (NCCRS) in consultation with the Cultural Ministers Council Statistics Working Group (CMCSWG).

The CMCSWG provides a forum for all government jurisdictions across Australia to discuss and address their needs for and statistics relevant to arts and culture. More information about CMCSWG is available on their website <[www.culturaldata.gov.au](http://www.culturaldata.gov.au)>.

## DEVELOPING THE ARTS AND CULTURAL HERITAGE IDP

The development of this IDP has followed a process common to IDP development in the ABS: that is, define the field of statistics; understand the policy and research context; define the desired information set; assess existing data; assess gaps or deficiencies in existing data and determine priorities. The research and policy context were informed through a literature search and engagement with key users and stakeholders. From this, a paper was prepared to present an understanding of the key policy and research issues, entitled *Discussion Paper: Arts and Cultural Heritage in Australia - Key Issues for an Information Development Plan* (cat. no. 4915.0.55.001). This paper was released by the ABS in March 2006 and is available on the ABS website <[www.abs.gov.au](http://www.abs.gov.au)>.

Significant user and stakeholder consultation has occurred throughout the process of preparing the Key Issues Paper and, subsequently, the IDP. After the Key Issues Paper was prepared, it was circulated with a feedback questionnaire to 320 government arts agencies, peak bodies, community arts networks, city councils, regional bodies and researchers across Australia. The feedback received through this process was summarised in a report for the CMCSWG and presented at a CMCSWG workshop in December 2006. At the workshop a list of policy relevant research questions identified as 'high needs' were further prioritised and a refined list of 21 research questions were produced.

It is this refined list of priority policy research questions which have been discussed in Chapter 3 and are the basis for the identification of research directions.

An investigation of both ABS and non-ABS data sources was conducted as part of the research for this IDP - some are referred to where appropriate throughout this document. A search of related current Australian Research Council (ARC) grant research projects was also conducted. However, it remains possible that this analysis of data sources may have missed relevant research projects or data sources. Researchers involved in those projects are invited to contact us.

Current ABS data sources referenced in the IDP are subject to change as there are regular reviews of the ABS household surveys program which may impact on them.

## AIMS

This IDP provides directions for future statistical development and research work to inform the ongoing development and monitoring of government policies and programs in arts and cultural heritage, as well as broader research useful to the community as a whole. The IDP directions have some implications for the ABS statistical program, but

## CHAPTER 1 - THE PLAN AND ITS DEVELOPMENT *continued*

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### AIMS *continued*

the IDP also highlights substantial research and analysis effort that could be addressed by the wider research community.

The complexity and breadth of the research directions in this plan are likely to require significant effort over many years. Given resource constraints for undertaking research it is likely that some questions may remain unanswered, or only partially addressed.

However, in some areas significant effort has already been undertaken, and there are substantial data and research findings already available. Hence, there is potential to utilise existing data and research and incrementally build on this, to establish a sound basis for policy and decision making in the arts and cultural heritage.

### CONTENT OUTLINE

Chapter 2 discusses the scope of the IDP and some definitional issues. Chapter 3 presents a discussion of the policy research questions, the data currently available, the data gaps and suggests possible research directions. Chapter 4 presents a conclusion and summary of recommended future directions for data development and research. The Appendix contains a full list of the research priority areas identified in the earlier paper *Discussion Paper: Arts and Cultural Heritage in Australia - Key Issues for an Information Development Plan* (cat. no. 4915.0.55.001).

## CHAPTER 2 - THE SCOPE OF THE IDP

### INTRODUCTION

The primary aim of this Information Development Plan (IDP) is to provide a framework for guiding research and statistical data development effort informing government policy and program directions relevant to arts and cultural heritage as well as informing the wider community. This chapter discusses the scope of this IDP in attempting to meet this broad aim.

Firstly, the broad concepts of 'culture'; 'arts' and 'cultural heritage' are defined to explain how these terms are used in the IDP.

Secondly, this chapter briefly describes the current availability of core statistical data relevant to arts and cultural heritage activity. The ongoing development of these core statistics underpins other research and data collection activities discussed in the chapters that follow. These core statistics are viewed as basic data needed to describe the activity that occurs in the arts and cultural heritage, which are a relatively stable requirement regardless of what policy direction may be in place at a given point in time.

Finally, this chapter presents a discussion of what is meant by the 'value' of arts and cultural heritage. Ultimately, policy relevant research aims to understand the 'value' that may be delivered to the community from government interventions and investments. It is a difficult task to measure value, and the extent to which this is addressed by the policy research questions posed in this IDP is discussed.

### THE SCOPE OF ARTS AND CULTURAL HERITAGE

The IDP is bounded by two principal areas, arts and cultural heritage. These two areas are often related to distinct government policy and programs, and the 'arts' has been defined as a distinct concept, different to 'culture'. A full explanation of these definitions can be found in the earlier *Discussion Paper: Arts and Cultural Heritage in Australia - Key Issues for an Information Development Plan, Mar 2006* (cat no. 4915.0.55.001).

The definition of 'culture' used in this IDP is:

*Culture is used to describe particular ways of life, whether for a group of people or a period of time. A way of life can be known as a 'culture' if there are collectively understood representations of customs, traditions, beliefs or values shared by a group or prevailing during a period. Culture may be represented in various ways including (but not limited to) art forms.*

'The arts' are defined as follows:

*The arts refers to a sphere of artistic activities (e.g. literature, radio and television, film, performing arts, visual arts and craft, design, music). The output of these activities, such as stories, paintings, music, performances and films, may be referred to as 'arts products'.*

Finally, 'cultural heritage', is defined as:

*The preservation of culture through the collection and management of objects and ideas that represent ways of life of particular groups of people. The sphere of cultural heritage activities includes activities generally associated with museums, art museums, libraries and archives.*

### THE SCOPE OF ARTS AND CULTURAL HERITAGE *continued*

By adopting these definitions, it is possible to use research questions that assess the relationship between arts and culture. Cultural heritage has a primary aim to preserve 'culture'. The arts can provide a way of communicating or sharing cultural values or traditions, thus establishing the link between arts and culture. Alternatively, the arts may be a vehicle for challenging traditional culture, perhaps contributing to the shaping of evolving culture.

### CORE ARTS AND CULTURAL HERITAGE STATISTICS

A basic description of the activities that make up arts and cultural heritage is a data need that has been identified over several decades. Since 1991, CMCSWG and ABS have been working to meet needs for core statistics with work being led by the ABS' National Centre for Culture and Recreation Statistics (NCCRS). It is an ongoing role for the NCCRS to understand core statistical data needs and develop standard concepts and definitions to assist the measurement of these core statistics in the arts and cultural heritage. Although ABS is not the only data provider, some relevant core data is collected as part of the ABS statistical program, including:

- collation of annual data on government funding for arts and heritage
- surveys of work in selected culture and leisure activities
- surveys of children's participation in selected cultural and leisure activities
- surveys of attendance at selected cultural venues and events
- selected industry surveys (e.g. film and video production and distribution; museums; libraries and archives; performing arts)

In addition to the above data collections, other data sources are mined to provide essential data. For example, data on employment in cultural occupations for a person's main job can be obtained from the Census of Population and Housing; and data on Australian film industry production can be obtained from data compiled by the Australian Film Commission.

The arts and heritage statistics that are currently available are compiled in summary form in the product *Arts and Culture in Australia: A Statistical Overview* (cat. no. 4172.0). This includes statistics from both ABS and non-ABS sources, while the majority of the statistics currently included are ABS data sources. These ABS data sources are briefly described below however more detail can be found in the *Directory of Culture and Leisure Statistics* (cat. no. 1143.0.55.001)

The existing core data has had a focus on two broad areas:

- statistics on the levels of 'involvement' by the Australian population in arts and cultural activities of various kinds (e.g. paid work; volunteering; attendance; creative participation); and
- statistics on arts and cultural heritage industries including data on the supply, distribution and consumption of arts and cultural heritage goods.

### *Involvement in arts and cultural heritage*

There are a myriad of ways that people may be involved in arts and cultural heritage, and various types of involvement need to be clearly defined as the basis for statistical collection. The ABS has progressively been developing household data collections to provide statistics on various levels of involvement. The main ABS collections that have provided information about arts and cultural heritage involvement are:

- Survey of Attendance at Selected Cultural Venues and Events

### *Involvement in arts and cultural heritage continued*

- Provides data on physical (on-site) attendance at arts or cultural heritage events or venues, (including art galleries, museums, libraries, music concerts, performing arts, and cinemas). A need has been identified to expand these core statistics to encompass other ways of 'attending' - via downloading digital content or on-line access, for example.
- Survey of Work in Selected Culture and Leisure Activities (WSCLA)
  - Provides data on involvements in various arts activities including writing, publishing, performing, drawing and painting. The survey distinguishes between activity that is 'paid' and 'unpaid' and further distinguishes 'hobby' activities (for the exclusive use of self, friends and/or family). In doing so, there is a good attempt to distinguish between work and leisure, but more robust conceptual definitions are needed. It is difficult to define unpaid work as distinct from leisure involvement in the arts or cultural heritage.
- Survey of Children's Participation in Cultural and Leisure Activities (CPCLA)
  - Provides data about the participation of children aged 5-14 years in selected cultural and leisure activities. This includes activities such as: playing musical instruments, singing, dancing and drama; attending cultural venues such as art galleries, museums and libraries; involvement in leisure activities such as skateboarding, bikeriding and watching television; and participation in organised sports outside of school hours.
- Census of Population and Housing
  - The *Australian Culture and Leisure Classifications* (cat. no. 4902.0) provides an occupation classification that defines cultural occupations. Therefore it is possible to produce sound statistics relating to employment in a main job in a cultural occupation with data available from the Census. This data is particularly valuable in that it is robust enough to produce small area data.
- General Social Survey (GSS)
  - The GSS collects data on a range of social topics including involvement in volunteering. Information is available on the characteristics of people aged 18 years and over who did voluntary work in the 12 months prior to interview and the types of organisations they did unpaid work for (with arts/heritage being one of the 12 categories). For the purposes of the GSS, voluntary work is defined as the provision of unpaid help willingly undertaken in the form of time, service or skills, to an organisation or group, excluding work done overseas.
- Survey of Disability, Ageing and Carers (SDAC)
  - Provides information about people with a disability and older people (those aged 60 years and over) and their participation in selected cultural and leisure activities during the 12 months prior to interview.
- National Aboriginal and Torres Strait Islander Social Survey (NATSISS)

### *Involvement in arts and cultural heritage continued*

- This survey collects data about cultural participation in the 12 months before interview for Indigenous people. The last NATSISS survey in 2002 collected information from persons aged 15 years and over, while the 2008 survey will also collect information for children aged 3 years and over. The NATSISS doesn't ask about as many activities as the Attendance at Selected Cultural Venues and Events and Work in Selected Culture and Leisure Activities surveys, and the activities are grouped together on the NATSISS survey. For example, one question on the NATSISS asks about attendance at 'movies, theatres or concerts' whereas the Attendance at Selected Cultural Venues and Event survey asks about attendance at the cinema, theatre performances and music concerts in three separate questions. The NATSISS does however provide additional information about participation in Indigenous arts and cultural activities.

### *Arts and cultural heritage industry statistics*

Organisations involved in the arts and cultural heritage range from commercial businesses to not-for-profit community organisations, and government subsidised services. The types of businesses and organisations that are of interest for collection of arts and cultural heritage statistics are defined by the arts and cultural heritage industry classification of the *Australian Culture and Leisure Classifications* (cat. no. 4902.0).

In the past, the ABS economic survey program has been able to provide some core industry data relevant to at least some of the arts and cultural industries as defined in the Australian Culture and Leisure Classifications. The data that has been collected on specific cultural industries has varied according to the size of the industry, the rate at which it is changing and the extent to which data are required to inform government decision-making. The cultural industries that have been surveyed since 1999–2000 are listed below:

- public libraries;
- museums;
- television services;
- commercial art galleries;
- botanic gardens;
- video hire industry;
- performing arts;
- festivals
- music and theatre production
- motion picture exhibition; and
- film and video production and distribution.

The future collection of statistics on the ABS program is reviewed annually in light of priorities and available resources, and there can be no guarantee that past cultural collections will be ongoing. However, the current suite of ABS arts and cultural heritage statistics (from household and business surveys) provide some core data on involvement in the arts and cultural heritage, and about selected arts and cultural industries.

### *Administrative Data Sources*

As the ABS continues to refine its data collections and understand and meet emerging data needs, it will continue to explore alternative ways of collecting statistical information. The ABS recognises that other government agencies have developed large administrative data bases over several decades which have potential to produce statistical

### *Administrative Data Sources continued*

information. The ABS is currently emphasising the use of government administrative data for the future enhancement of statistical collections, as this is potentially more cost efficient with minimal additional provider load. In doing so, the ABS sees a role for itself in guiding methodological development for administrative data to ensure the best possible quality of statistical information.

A recent initiative by CMCSWG and the ABS is to standardise a key set of data elements to be reported by major cultural heritage institutions. It was recognised that these institutions already collect and report on a wealth of data, however much of this data could not be compared or aggregated because of inconsistencies in data collection and reporting. By working closely with cultural heritage institutions to understand their data, NCCRS is aiming to produce guidelines that may be used by museums, art galleries, libraries and archives. If collected and reported as specified in the guidelines, the selected key items will be able to be compared with or aggregated across cultural heritage institutions. Similarly, other sources of data are being investigated for their potential to provide statistics (such as various performing arts directories and music licensing bodies).

The ABS may also play a role in collation and dissemination of some administrative data. Information about government funding of culture has been published by the ABS since 1995. This is partially collected as an administrative by-product of data which records outlays of the various levels of government in Australia. One other potential data source NCCRS plans to explore further is the use of Australian Tax Office data which has the potential to provide small area estimates for industry data.

### *Conceptual Framework for Arts and Culture Statistics*

It is part of the ABS' ongoing role to provide statistical leadership to understand data needs and develop standard concepts and definitions to assist the accurate measurement of core statistics in the arts and cultural heritage. In keeping with this role, NCCRS is about to embark on a project to develop a conceptual framework for culture and recreation statistics. The aim is to ensure that relevant concepts, definitions and terminology are applied in a consistent and practicable way across all culture and recreation collections. Some concepts are potentially quite complex, for example one of the policy research questions identified in this IDP is interested in how professional artists earn a living. To collect information to inform this need, we must first understand and define the concept of 'professional artist' and be able to apply an operational, measurable definition.

One outcome of developing the conceptual framework is that core household surveys may be reviewed and refined where possible. Improving definitions and concepts will help to more accurately measure and report on information.

### *Summary of core statistical data*

This IDP presents an opportunity to reflect on how well the currently available statistics cover the core data needs for monitoring activity in the arts and cultural heritage, in addition to informing the policy research questions discussed in Chapter 3.

There is a wide range of statistical information already available on a regular basis as a result of the work of CMCSWG and ABS over a number of years. This core information is principally directed at obtaining a picture of involvement and economic performance of the arts and cultural heritage industries as these have been the highest priority data

*Summary of core  
statistical data continued*

needs. It is in this context of an existing core information base that the data needs identified in this IDP have been cast. The policy research questions move beyond this core set of data to examine a range of wider and, in many cases, more conceptually complex, issues. Underlying the priority policy research questions identified in Chapter 3, is a need for research and statistics that assists understanding of the 'value' of arts and cultural heritage, as discussed below.

THE VALUE OF ARTS AND  
CULTURAL HERITAGE

The majority of research questions identified by major stakeholders, representing the principal unmet data needs, can be characterised as examining the overall question: "what is the value of arts and cultural heritage?". The question of value has a number of dimensions which provide the structure within which the various research questions can be considered.

Firstly, a distinction can be made in terms of the population groups and/or industries for whom value is derived. Secondly, the question of value can be considered in terms of the instrumental value of arts and cultural heritage activities and their intrinsic value. Thirdly, an aspect of value that is of particular importance to key government stakeholders is that of 'public value'. These three approaches to understanding value are discussed in turn.

Another dimension of value that could also be explored is the concept of 'cultural capital'. Cultural capital may be viewed as the stock of arts or cultural heritage assets in a society, and this may include people's skills or knowledge in the field as well as material objects such as buildings, sites, art products, heritage items and other material. This concept may provide another way to assess aspects of value, but would require more comprehensive definition and analysis, beyond the scope of this paper.

The overarching concept of understanding the value of arts and cultural heritage activities across a number of dimensions and for a range of community groups or arts industries, thus informs the set of research questions considered in the next chapter. The following concepts of value provide a framework within which each of the research issues and their associated data needs can be addressed.

*Value for whom*

The question "value for whom?" has been captured in the discussion of the research questions through the consideration of the particular community groups who may benefit or be otherwise affected by consuming or participating in arts and cultural heritage activities. Who benefits - the Australian community as a whole, or particular sub-population groups such as young people, people in remote communities, or disadvantaged people. For example, a need has been identified related to people with a disability, to assess issues of access to involvement in arts and cultural heritage (including access to employment, consumption and creative participation in the arts). Furthermore, the populations of older persons and people with a disability are increasing and involvement in the arts and cultural heritage may alleviate issues associated with social isolation and help overall maintenance of well-being. Policy research questions in this plan that relate to well-being, access and social participation thus may be concerned with particular value for older persons and people with a disability.

### *Value for whom continued*

Many cultural heritage services aim to assist in recovery, preservation and ongoing education related to Indigenous culture (including language, ways of life, and arts). Therefore policy research questions in this plan with a focus on cultural heritage may be particularly relevant for Indigenous groups, as well as various immigrant ethnic groups in Australia - where maintenance of culture is particularly relevant.

Similarly, the question "value for whom?" can be applied to different industries and varying types of arts activities (e.g. music; visual arts; performing arts; cultural heritage). The vast majority of research questions in this plan are sufficiently broad to be tailored for any different type of arts and cultural heritage activity. However, some questions may be more pertinent for some areas of the arts than others. Furthermore, different areas of the arts have varying sources of research and statistical data, often depending on how they are administered and funded. Where possible, this plan has broadly identified the priorities for research and data needs across varying arts activities. However, more detailed analysis of data needs on an industry by industry basis would be needed to more thoroughly assess the research and statistical development needs of particular arts and cultural heritage industry sectors.

### *Intrinsic and instrumental value*

In the arts and cultural heritage, there appears to be a particular dilemma in providing evidence of value, and in deciding what should be assessed. Holden 2004 articulated these issues in the following excerpt:

"Cultural organisations and their funding bodies have become very good at describing their value in terms of social outcomes. Tackling exclusion, increasing diversity and contributing to economic development are all familiar justifications in grant applications. But by talking in functional terms about the value of culture, cultural organisations have lost the ability to describe their real purpose – producing good work that enriches people's lives. Culture now delivers government policy by other means... But there is a difficulty with the language of outcomes: artists and institutions do not see themselves as creating outcomes. There is equally a difficulty in talking about the intrinsic value of culture, or 'art for arts sake'. In today's world it sounds patronising, exclusive and undemocratic."

Holden 2004 has made a distinction between 'intrinsic' and 'instrumental' value of arts and cultural heritage policy. Many Australian public arts and cultural heritage programs provide multiple aims, which encompass both instrumental and intrinsic values, and in this IDP, both aspects of value are considered relevant.

For example, the provision of an arts festival or museum by government may embrace multiple aims, where economic outcomes may be one aim, and other aims include: to provide entertainment and enjoyment; to provide opportunities for local arts employment; or to foster cultural identity and cultural education. The contribution to the local economy made by cultural tourism is an instrumental value. Economic development may also be achieved through a wide range of other government initiatives, not necessarily dependant on arts or cultural heritage. The instrumental value of 'cultural tourism' is a relevant topic for research, and one which is identified as a policy research priority for this IDP.

### *Intrinsic and instrumental value continued*

In preparation for this IDP the aims of arts and cultural policy were analysed to better understand their intended outcomes, which have been grouped as economic, cultural, social, or quality of life outcomes (Australian Bureau of Statistics (ABS) 2006). The majority of the policy research questions included in this paper centre on instrumental values which are the outcomes expressed as desirable from government arts or cultural heritage policy or programs.

In addition, some of the policy research issues identified as a priority relate to the 'intrinsic' value of arts and cultural heritage. For example, one policy research question seeks to understand the 'perceived value' of arts and cultural heritage to the Australian public. In addressing this question, perceived value may relate generically to any kind of arts or cultural heritage service, or it may relate to specific services supported by government and this depends on how the research is framed.

Throsby 2003 discusses 'cultural value' in a way that is also aligned to Holden's notion of intrinsic value, as follows:

"the characteristics of cultural goods which give rise to their cultural value might include their aesthetic properties, their spiritual significance, their role as purveyors of symbolic meaning, their historic importance, their significance in influencing artistic trends, their authenticity, their integrity, their uniqueness, and so on."

In this IDP, policy research questions categorised as dealing with 'cultural outcomes' are more closely aligned with an assessment of intrinsic value. For example, one research question seeks to understand how arts and cultural heritage provides support for maintenance of 'cultural identity'.

### *Public value*

Regardless of the debate about intrinsic versus instrumental value, a primary difficulty remains, and that is to understand the value that can be attributed to public policy - the 'public value' - as opposed to the efforts of private individuals and organisations.

In consultation for this IDP, the view was expressed that a 'policy relevant' research agenda would need to address the question of what public value is generated from arts and cultural heritage policy, and how to measure this. Governments and communities seek evidence that their investment in arts and cultural heritage is resulting in the creation of value to the community (or public value). Measurement assesses how much public value, and of what kind, has been created (Moore 1995). A fundamental concern underlying many of the data and research needs articulated in this plan is the need to both define and measure the public value of arts and cultural heritage activities.

Public value refers to the value created by governments using services, laws, regulation and other actions' (Kelly & Muers 2002). Services are often delivered through government-sponsored agencies and entities such as organisations, activities and institutions. In the arts and cultural sector, this encompasses many cultural institutions such as museums, galleries, archives and libraries, organisations including performing arts companies, film and television, activities such as festivals and individual creators such as artists, designers and craftspeople.

### *Public value continued*

To assess public value, it is useful to know the extent to which improvements in outcomes result from government investment in policy or programs, as distinct from other contributions made by business or community. Much of the core statistical data and research discussed in this IDP will not provide information about the specific value of government programs or policy.

Research can be designed to facilitate the assessment of public value. For example, evaluation research can be designed to assess the impacts of particular government policy or programs. The public sector provider is challenged to use the assets with which it is entrusted to build public value in a cost-effective manner (Moore and Khagram 2004). In addition to measurement of outcomes and/or outputs, program evaluation may assess cost effectiveness of service delivery, or undertake cost benefit analyses comparing different policy or program options.

The questions posed in this IDP may be applied to government services or the consumption of those services, or may be applied across all arts and cultural heritage activity regardless of government involvement. If an assessment of public value is specifically required, then this would require research being designed to focus only on the government activity implied in the question. In this IDP there are a range of approaches to research and statistics some of which may solely be designed to address public value, while others are more general. Both kinds of research were considered useful and relevant to this plan.

## CHAPTER 3 - POLICY AND RESEARCH QUESTIONS

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### INTRODUCTION

This chapter outlines the 21 policy related research questions that have been identified as high priority through consultation with users and stakeholders. The policy issues relevant to each research question are briefly outlined to provide a contextual basis for how the questions were initially developed. However, the primary focus of this plan is on an assessment of data gaps, and possible future research directions, including statistical data needs. More detailed discussion of policy issues was presented in an earlier paper *Discussion Paper: Arts and Cultural Heritage in Australia - Key Issues for an Information Development Plan* (cat. no. 4915.0.55.001). This earlier paper outlined over a hundred possible policy research questions (listed in *Appendix 1*). Of these, 21 were chosen as the focus for this plan, and these questions were subsequently refined to clarify their meaning. A summary listing of these questions (and their associated research directions and data development actions) is provided in Chapter 4.

All but two of the policy research questions have been categorised under the following broad headings: economic, cultural, social, and quality of life. Some research questions within these categories are relevant to multiple outcomes (e.g. questions within the 'social' domain may also relate to 'cultural' or 'economic' outcomes). The broad categorisation of the research questions allows some indication of which outcomes the questions are most relevant to, but not exclusively related to.

In addition, this chapter begins with two policy research questions that could not be readily classified as either economic, cultural, social, or quality of life. The first relates to development of a suite of indicators to monitor arts and cultural heritage activity, and the second relates to perceived value of arts and cultural heritage.

Many of the policy research questions discussed here are complex multifaceted questions, that would be best informed by utilising both statistical sources, either from ABS or other data collections, as well as other forms of research and analysis. Many statistical data sources provide useful information which may be a starting point for analysis or research to address the questions identified here. So, for example, to answer a research question about access to arts services, it is useful to begin with statistical information that describes the level and types of involvement in the arts. However, information about service availability, reasons for access (or non access), and methods of access are also needed to fully address the question, which may be the subject of a specific research study.

As discussed in Chapter 2 there are a range of core statistical data that are useful to describe arts and cultural heritage activity, and these answer some policy and research questions. However, as noted by Holden 2004:

"the value of culture cannot be adequately expressed in terms of statistics. Audience numbers and gallery visitor profiles give an impoverished picture of how culture enriches us. Current forms of impact measurement are necessary, and they need to be improved, but they can never be sufficient."

A review of research and various data sources has been conducted to identify the current evidence available to address each policy research priority. Both statistical sources and other forms of research evidence have been considered. For the purpose of this paper 'statistical sources' are defined as data sources which can provide aggregate quantitative data for an industry or population of interest, usually at national or state and territory

### INTRODUCTION *continued*

level. Other forms of research may include: case study research; qualitative research methods; program evaluation research; and/or research designs testing specific causal hypotheses.

The vast majority of policy or research questions would be best informed by utilising both statistical sources, either from ABS or other data collections, as well as other forms of research. From an ABS perspective, this plan will be used to identify how statistical data may be used to provide a basic starting point for addressing more complex questions. While statistical data is often a critical first step in addressing the policy research questions posed here, the statistical data on its own does not fully address many of the questions.

In addition some of these research questions are inherently difficult to answer as they cover concepts that cannot be easily measured such as cultural identity and well-being. Therefore, there is a need for research development projects that define concepts and refine methods, as the basis for future research activity. Where conceptual work is particularly important to improve or develop research, this plan will discuss what work may be required to address this need.

In this plan, specific actions have been identified only where it is anticipated that resources might be available to undertake the work. However, the inclusion of these actions in this plan provides no guarantee that such work will be undertaken, as this is contingent upon continued availability of sufficient resources. Other potential actions or research effort are discussed as 'research directions'. It is anticipated that many of these broad research directions may be best taken forward by other researchers in the arts and cultural heritage field.

The rest of this chapter introduces the policy research questions, and discusses existing data, data gaps, data development actions and research questions under the broad headings:

- Cultural indicators
- Perceived value
- Economic outcomes
- Cultural outcomes
- Social outcomes
- Quality of life outcomes

CULTURAL INDICATORS

Governments in Australia, and many governments internationally have defined generic 'performance indicators' to assess the outputs or outcomes of government policy and programs. In Australia, the federal government has adopted *The Outcomes and Outputs Framework* (Department of Finance and Deregulation 2003). Data reports from government have been in development over many decades through annual reports and budget papers, and a range of other reporting mechanisms. A detailed review of these data reports from government arts and cultural heritage portfolios is beyond the scope of this paper, but a few examples are given below.

In 2006–07 the Australian Broadcasting Corporation (ABC) included performance indicators relating to the number of broadcast hours; the ratio of first run to repeat program hours; and industry ranking of ABC Online (ABC 2005). In that same year the National Gallery included indicators relating to the number of attendees at Gallery events, and set targets for these (Department of Communications, Information Technology and the Arts 2007). Similarly, each state and territory government reports on various performance indicators relevant to the arts and culture portfolio. For example, the *Arts Victoria Business Plan 2006–07* included the following indicators:

"more Victorians from more varied backgrounds will engage with cultural activities" and "more jobs will be generated in the arts" (Arts Victoria 2006).

During 2007, the Cultural Ministers Council Statistics Working Group (CMCSWG) began to develop 'cultural indicators' with an aim to monitor the health of the arts and cultural heritage sector. The 'health' of the sector is used as a generic term intended to encapsulate the many ways in which the community and policy makers may interpret the arts and cultural heritage sector to be doing well. For example, high levels of community involvement and profitable arts businesses may be considered desirable. The definition of these indicators is a crucial first step in addressing this data need.

As part of this project, CMCSWG commissioned Griffith University to review international literature and develop a draft set of cultural indicators (Griffith Centre for Public Culture and Ideas, 2007). CMCSWG have indicated an important requirement for cultural indicators is that they be internationally comparable where possible. This allows the health of the arts or cultural heritage in Australia to be compared with that of other nations, thereby providing some ability to gauge the relative strengths or weaknesses of the Australian arts and cultural heritage sector. Analysis of these indicators over time, in combination with other policy relevant contextual information, would be needed to make any assessment of value. On their own, any set of selected indicators are simply descriptive of activity in the arts and cultural heritage.

*Policy research question 1*

*What characteristics or indicators are most useful for ongoing regular reporting to monitor the health of the arts and cultural heritage in Australia?*

*Existing data*

Work on the development of cultural indicators has begun, with CMCSWG leading a project in this area. CMCSWG commissioned Griffith University (Griffith Centre for Public Culture and Ideas 2007) to review international literature and develop a draft set of cultural indicators. The review highlighted many variations on specific data items, with broad themes grouped across many countries. They recommended grouping indicators

### *Existing data continued*

under five broad themes, including: Human Capital; Investment, Assets and resources; Participation; Well-being; and Identity.

Some of the draft cultural indicators so far identified can be populated with ABS or other data sources. Examples of data items for which at least some data already exist include:

- Number of listed heritage buildings
- Number of arts and cultural facilities
- Total government support for culture
- Per capita investment in culture
- Total non-government support of culture
- Number of arts volunteers
- Total employed in the arts
- Employment in each sector
- Arts as % of labour force
- Cultural exports
- Value added contributions by cultural institutions
- Income of the cultural industries
- Number of businesses in the cultural industries
- Audience composition in terms of diversity
- Participation in all arts and by art form
- Cultural attendance and participation rates
- Number of visits to arts/cultural facilities
- Household cultural spending

It should be noted that the above list is an early draft and provides just some examples of possible indicators, which requires further discussion and refinement before a final set of indicators is selected. For each of the above draft indicators there are potentially a variety of data sources that could be utilised from ABS and other sources. Indeed, there is additional complexity in deciding whether each indicator needs to be broken down further to report for specific art forms; industry sectors; and/or sub-population groups. Even where some data exists, significant work would be required to coordinate and decide on how data would be brought together and reported against each indicator.

### *Data gaps*

Of the many draft indicators currently being explored by CMCSWG, the majority are indicators where data are unavailable or only partially available in Australia. For example; 'cultural diversity of Australian festivals', 'barriers to cultural experiences', 'philanthropy: donations, prescribed private funds, foundations', and 'new businesses formation in cultural industries'. Also, in many cases there is a need for definitions to be developed for new measures if they are to be pursued (e.g. 'perception of culture as a benefit'; 'cultural program contributions to community well being').

Even where recent data is available, international comparisons are not straight forward. Differences in the way 'arts' or 'culture' are defined and aggregated in different countries make international comparisons difficult.

### *Data development actions*

CMCSWG

Continue to develop a set of cultural indicators to support the assessment of the health of the arts and cultural heritage sector.

## CHAPTER 3 - POLICY AND RESEARCH QUESTIONS *continued*

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*Data development actions  
continued*

ABS

Continue to support the measurement of relevant cultural indicators by assisting CMCSWG to define and/or source relevant high quality data, whether from ABS or other sources.

### PERCEIVED VALUE

During consultation for this plan, key stakeholders identified a need to understand how the general community perceive the value of arts and cultural heritage services. There is interest in the perceptions of Australians who do *not* directly get involved in arts or cultural heritage activity or access relevant services, as well as those who do.

Governments allocate funds across a variety of services, and they need to understand the relative priority of arts and cultural heritage services. There is also a view among governments and communities that there is value in arts and cultural heritage services that go beyond the immediate benefits to consumers. Hence there is interest in understanding this value, and the relative priority that the public place on these services relative to others. This is one aspect of understanding the intrinsic value of arts and cultural heritage activities, as discussed in Chapter 2.

#### *Policy research question 2*

*How do the direct consumers of arts and cultural heritage services perceive the value of these services? How is value perceived by those who do not directly consume these services?*

#### *Existing data*

There have been several attempts to assess perceived value of arts and culture, using a variety of methods - from quantitative population surveys through to qualitative studies.

The ABS 1997 survey on Public Attitudes to the Arts asked questions about the perceived importance of selected arts and cultural heritage services. The survey was a joint publication with the Australia Council, who also contributed funds for the survey. The survey sought ratings for museums, performing arts venues, art galleries and libraries. Results from this survey were published in *Public Attitudes to the Arts, Australia, Nov 1997* (cat. no. 4157.0).

There are many other ways to assess perceived value on population surveys. In the 1997 ABS survey, people rated each service independently, yet another method would be to rank the relative importance, or relative value, of a range of services. Furthermore the range of services ranked need not be limited to arts and cultural heritage services, hence allowing some assessment of value relative to say, recreation parks, sporting stadia, nature reserves or walking trails.

In Western Australia the arts portfolio agency funds the *Arts and Culture Monitor* which asks questions relating to perceived value, such as: "In your opinion, on a scale of 1 to 5, where '1' is 'of no value at all' and '5' is 'very valuable', how valuable is the role of arts and culture in your life?". The survey also seeks respondents level of agreement with a number of attitudinal statements, such as: "The arts make me feel good" and "The Western Australian Government should invest in arts and cultural activities to ensure they are available to the public" (Patterson Market Research 2007).

*Australians and the Arts* reports on how much people value the arts and the personal benefits that people derive from the arts, as well as national and community benefits (Saatchi and Saatchi 2001).

Another method used in the arts and cultural heritage sector to evaluate a specific attraction or experience is Choice modelling. Users are subjected to forced-choice scenarios where they must select between two aspects of an experience and progressively ascribe value to a few features over many possible aspects. This method is

## CHAPTER 3 - POLICY AND RESEARCH QUESTIONS *continued*

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### *Existing data continued*

currently being used to identify the factors that most affect repeat visitation to museums in Australia through an ARC project involving the Powerhouse Museum, the National Maritime Museum, the National Museum of Australia, the War Memorial, Museum Victoria and the Australian Museum. Recent research by Scott 2007 has used qualitative research with the visiting and non-visiting public to identify perceived value across four dimensions and three beneficiary groups in relation to museums in Australia.

It should be noted that perceived value can also be analysed by quantifying the dollar amount that people are prepared to pay for services, particularly non-market or free public goods. This is discussed separately under policy research question 3.

### *Data gaps*

There have been some recent studies of perceived value in the arts and cultural heritage area, and some data has been collected for some state and territory jurisdictions. Methodologies for data collection vary greatly.

There has been no recent national population survey data relating to perceived value of the arts and cultural heritage services. However, before embarking on any further population survey research in this area, work would need to be done to better define the concepts of perceived value that are relevant and appropriate for quantitative measurement.

### *Research directions*

Develop definitions and standards for measures of perceived value of the arts and cultural heritage, which may be appropriate for use on population surveys. Undertake a national survey of perceived value of the arts and cultural heritage.

### ECONOMIC OUTCOMES

Arts and cultural heritage industries are a mix of privately owned enterprises such as television and radio broadcasters; partially subsidised enterprises such as some performing arts companies, and fully government owned and operated services including many libraries and museums. Cultural industries may receive support from both government and private sector sources and there may be variation in this among industries. Similarly, those employed in arts and heritage occupations may be fully self supporting, reliant to at least some extent on government or private sector grants and subsidies or may be government employees. Many of those who work in arts and cultural heritage industries provide unpaid services, and cultural industries also vary in the extent to which they are reliant on volunteer labour. The range of economic issues requiring supporting data is thus very broad, and varies depending on the industry of interest (e.g. film, visual arts, music, literature, libraries, museums).

The following are covered in this Economic outcomes section:

- Willingness to pay for arts and cultural heritage services
- Private sector support for arts and cultural heritage services
- Economic viability of arts industries
- Impact of technology on supply of arts and cultural heritage services
- Supply of skills for arts industries
- The contribution of arts and cultural heritage services to innovation
- Cultural tourism
- Payment for arts involvement

The following section covers the research questions related to the above broad issues, which were considered to be a priority for this plan, due to their relevance to current government policy debate. It should be noted that fundamental needs for core economic data to describe the arts and cultural heritage industries and their change over time are important for any examination of economic issues. These core data needs were discussed in Chapter 2.

### WILLINGNESS TO PAY FOR ARTS AND CULTURAL HERITAGE SERVICES

Many arts and cultural heritage services are provided with taxpayer subsidy, and often free of charge. Some of these government subsidised arts and cultural heritage services charge fees for access to the service. Policy debate centres on whether these fees limit opportunities for access for some people and/or whether these fees appropriately decrease the cost burden on the rest of the community (non-consumers). In establishing fees and charges, governments need to weigh up the potential for cost recovery over access and equity issues.

To inform these decisions, there is a need to understand whether and how the use of arts and cultural heritage services may change when and if fees are imposed. Who is willing to pay for these services, and how does this vary across the population?

For those services that are clearly provided for free, governments are interested in the potential market price that may apply to these public services. By estimating the dollar value of these services, it may be possible for governments to evaluate their worth in comparison to other services. This may then influence decisions about government spending. Navrud and Ready 2002 reviewed a range of case studies estimating the dollar value of cultural heritage and observed that these studies have been used to inform decisions about what level of investment governments make in these services (including

## CHAPTER 3 - POLICY AND RESEARCH QUESTIONS *continued*

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WILLINGNESS TO PAY FOR  
ARTS AND CULTURAL  
HERITAGE SERVICES  
*continued*

their preservation and restoration) and whether fees need to be charged and what fees might be feasible.

### *Policy research question 3*

*What are people prepared to pay for public cultural heritage services and public arts programs? What are the implications for access to services when fees are imposed?*

### *Existing data*

There are a number of methodologies that can be used to address this question. Some research studies have assessed the impact of introducing or reducing fees on consumers of arts or cultural heritage services.

There are many case studies examining museum or library services conducted in Australia and internationally. A study of attendance at Britain's national museums was undertaken by Martin 2003 to examine the impact on attendance after fees were scrapped in 2001. Closer to home, a study was undertaken for the Melbourne Museum to assess the impact of free entry on visitor characteristics (Meehan 2002).

Some Australian studies have used contingent valuation methodologies to assess willingness to pay, and provide an estimate of the dollar value of free cultural goods. An example of this is Throsby and Withers 1983 which sampled adult inhabitants of Sydney. Using the contingent valuation method, people directly or potentially interested in a service are asked to rate value in financial terms, expressed by their willingness-to-pay, e.g. What would you pay for maintaining this museum? (Aabo 2005). Another study estimated the economic value of services for Old Parliament House and the National Museum of Australia, utilising research on users and non-users willingness to pay for these services through taxes (Choi, Ritchie and Panadrea 2007).

The *time costs* method is based on the assumption that users invest time and effort in order to use services. The value that they place on that use must be at least as high as their sacrifice of time. Time costs are calculated by multiplying users' time spent with museum services with the average salary costs of the population served by that museum. The method has been used in library value assessments (Poll and Payne 2006). Throsby 2003 has more recently questioned the appropriateness and feasibility of contingent valuation methods in valuing cultural goods, and based on this assessment there are no research directions provided here which seek to utilise this method. Clearly, research methodologies in this field are in development.

### *Data gaps*

In the brief review of literature undertaken for this IDP, most 'willingness to pay' studies uncovered were in the area of cultural heritage, relating to museums and libraries. There were few studies of public arts services, such as free performances provided as part of arts festivals, or funding of public sculptures. These services are perhaps more difficult to research, even on a case study basis, given that the nature of the service provided may vary over time, let alone the decision about whether to charge fees.

*Data gaps continued*

For some arts services, such as concerts or performances provided for free, the government can more easily estimate their dollar value by study of the market price for these goods. However, in other cases, there is no equivalent market good, and an analysis of changes in fee structures is not possible (e.g. it may not be feasible to charge fees or there may be no intention to introduce fees).

The methodologies used to address this question have commonly utilised case study analyses relevant to particular arts and cultural heritage services. When policy decisions are made by government in relation to service provision and use of fees, this is usually done on a case by case basis. Hence research in this field is likely to be most valuable if done as case study research, for those services which are seen as the highest priority to assess.

Case study research may be assisted by the review and development of a guide to methodologies that assess willingness to pay for public services in the arts and cultural heritage. In doing so, it is important to recognise that such methodologies are also in development in other fields where public services are provided (recreation services; environmental services).

*Research directions*

Develop a guide for researchers in the arts and cultural heritage to assist them with research design and methodologies when undertaking case study research to assess willingness to pay for these services.

PRIVATE SECTOR  
SUPPORT FOR ARTS AND  
CULTURAL HERITAGE  
SERVICES

Governments have a need to know how much private sector support is going to the arts and cultural heritage services, as this has implications for government decisions about the level of public funding required. Good data is already available on government funding to arts and cultural heritage, but it was viewed as a priority to find out more about the levels of private sector support.

In addition to basic statistical data on the levels and types of private support, a need has been identified to understand more about the reasons that people or organisations give. In particular, what influences their decisions to support the arts and cultural heritage? Some government policies and programs aim to provide incentives for private support; through tax incentives. A greater understanding of the reasons for giving, may assist governments in better targeting incentive programs.

*Policy research question 4*

*What is the level of private sector support for arts and cultural heritage? Is private support of the arts and cultural heritage increasing or decreasing over time? How does it compare with private support provided to other industries? What are the motivators and barriers for private investment in arts and cultural heritage?*

*Existing data*

The CMCSWG recently commissioned a project to review existing data and develop a framework for measuring private sector support for the arts and cultural heritage. As a result, several aspects of private sector support were identified as being of interest, as follows:

- Financial and in-kind sponsorships, including partnerships
- Donations and bequests
- Non-government grants
- Other fundraising

### *Existing data continued*

#### ■ Volunteering

The review examined a range of existing data sources, including ABS data, which are useful for assessing some aspects of private sector support. There is potential for a further report to be compiled that brings together some of the existing data on private sector support. In so doing, a more detailed examination of data gaps could be provided.

To understand the reasons for private involvement requires more in depth research with people and organisations. There is some data relating to reasons for individual volunteering from the ABS General Social Survey. In addition, the Giving Australia project gathered information about individuals' and businesses' reasons for giving, although this project was not focussed on arts and cultural heritage businesses (Giving Australia 2005).

### *Data gaps*

While some data is available, the CMCSWG review identified significant data gaps which hamper the ability to assess whether private sector support for the arts is increasing or decreasing over time. Firstly, the review identified some definition issues for the categorisation of private sector support which would need to be addressed prior to further data collection. Secondly, it is clear that data is available for some aspects of private sector support and for some industries, but not in aggregate.

In order to provide comprehensive aggregate data, large scale national surveys would be required. For example, a national survey of business giving (similar to an earlier ABS survey) which identified business contributions to arts and cultural heritage among other industry sectors. Also, a national survey of arts and cultural organisations could ask questions about what support they receive. However, such large scale surveys are costly.

In regard to reasons for private sector support for arts and cultural heritage, statistical data collected at a population level provides only a brief categorisation of pre-coded reasons, and more in depth qualitative research may provide a deeper understanding. Case study research with businesses that provide sponsorship or other forms of support may be useful in this area. In addition, it would be useful to understand what incentives may induce businesses or organisations to give more, or to influence those that are not giving to provide support.

### *Data development actions*

#### CMCSWG

Continue existing work to review and analyse existing data on private sector support, with a view to improving data collections and research in this area in future.

#### ABS

Support the work of CMCSWG in providing analyses of existing data on private sector support. Continue to provide advice regarding the options for developing data standards and meeting data needs using ABS data and other sources.

### *Research directions*

Case study research with organisations and businesses contributing private support to arts and cultural heritage could focus on gaining an understanding of their reasons for giving, and the impact of government incentives. Case study research may also be conducted with non supporting businesses to understand what incentives (if any) may influence decisions to give to arts or cultural heritage.

### ECONOMIC VIABILITY OF ARTS INDUSTRIES

Many arts industries do not operate on a fully commercial basis, and depend on various forms of support (private donations; government support; volunteers; etc.). For example, governments provide various kinds of support for Australian film production; television and radio content; public broadcasting; performing arts organisations (musicians, orchestras, theatre and opera); and for individual Australian artists. One reason for providing this subsidy is a concern that Australian content would not survive if this were left to the free market; as well as a concern that there is insufficient demand within Australia to support some local arts services.

Governments and communities are concerned that Australian arts industries need to be able to survive in the face of international competition in order to maintain the opportunities for Australian cultural involvement. For example, at the time that the Australian government negotiated the Australia-United States Free Trade Agreement 2005 community concern was raised about the ongoing viability of the Australian film industry (Winikoff 2004). Government continues to support the Australian film industry to ensure its viability. In addition to direct funding, government support may be in the form of regulations or tax incentives (e.g. the regulation of free to air television content to include Australian content (Australian Communications and Media Authority 2005), and the requirements for Australian support acts to perform with international musicians in Australia (Musicians' Union of Australia (MUA) and the Australian Entertainment Industry Association (AEIA) 1995).

In supporting these policy decisions, governments need basic industry data on income and expenses and profitability of these businesses and organisations in the arts industries. In addition to this, there is a need for detailed knowledge of the wider market, consumer behaviour, and industry development. The analysis of industry viability is a major task, requiring market research (e.g. research about consumption and demand), industry intelligence (e.g. qualitative data from industry participants about their perceptions of productivity and viability), as well as core industry statistics (e.g. business size, employment, income, expenditure, profitability).

In examining the economic viability of arts industries, it is important that sub-sectors be analysed, since their viability and markets vary. Thus separate studies need to be undertaken for performing arts (music; theatre; dance); visual arts and crafts (painting; sculpture; pottery; photography); film; television production; and literature. Even within these sectors there is a wide variation of products and markets (e.g. within music there are different genres with potentially different audiences, including popular music; orchestras; folk music). A range of research and statistical data are needed to support analyses of the viability of these arts industries into the future.

#### *Policy research question 5*

*How profitable are the arts industries? To what extent is income derived from direct sales to consumers compared with other avenues (such as private sponsorship, government subsidy, tax relief, indirect revenue such as intellectual property rights)? What competition is faced by Australian arts industries? Is there sufficient market for Australian arts industries to permit them to operate on a fully commercial basis?*

### *Existing data*

The federal government has funded some major reviews of particular industries, which have provided insight into their viability and needs for government intervention. Two examples are: the *Report of the Contemporary Visual Arts and Craft Inquiry* (Myer 2002), which resulted in the Cultural Ministers Council Visual Arts and Crafts Strategy (Cultural Ministers Council 2003); and *Securing the Future: Inquiry into the Major Performing Arts* (Nugent, Chaney, Gonski and Walter 1999), which resulted in the establishment of the Major Performing Arts Board of the Australia Council. CMCSWG has also commissioned a report to review data needs for the music industry (Hoegh-Guldberg and Lets 2005).

Each of these reports used core industry statistics on income and expenses, as well as other data sources, research and industry intelligence. The ABS Service Industries Surveys program has collected data on income and expenses of selected arts industries, which have been utilised in the above reports where relevant. The provision of industry statistics by the ABS was discussed in Chapter 2, and shows that there is irregular and incomplete coverage of some arts industries from this program. Some industries have a significant time series of data, yet the ABS cannot guarantee collection into the future.

More recently, basic income and expense data can be sourced from the Australian Taxation Office (ATO), and an analysis of this data source is underway for the arts and cultural heritage industries (initiated by the previous Department of Communications Information Technology and Arts in 2007). The ATO data is a source that warrants further investigation to ascertain whether it may be used for regular reporting of core industry statistics.

Some industries are well organised to collect their own data, through regular surveys or administrative processes dealing with organisations and businesses in their sector. Examples of industry administrative data that may be used, or have been used, in analysis of arts industry viability, are:

- The Australian film and television production industry is relatively well served, with the availability of ongoing industry surveys run by the Australian Film Commission (Australian Film Commission (AFC) 2007b).
- Audience research is undertaken for the television sector through OzTAM (Australian Television Audience Measurement (OzTAM) 2008).
- Data on the cinema industry is available from the Motion Picture Distributors Association, which produces box office data weekly (Motion Picture Distributors Association of Australia (MPDAA) 2008). Cinema attendance data has been provided since 1974 from Val Morgan & Co (Aust) Pty Ltd/Roy Morgan Research Centre (Australian Film Commission (AFC) 2007a).
- Data on art auction sales is available from *The Australian Art Sales Digest* (John Furphy Pty. Ltd. 2008).
- Administrative data on rental and retail video sales is collated by the Australian Visual Software Distributors Association (AVSDA) and has been analysed in the report *What Australians are Watching* (Australian Film Commission (AFC) 2007c).
- The Australian Entertainment Industry Association (AEIA) provides data from their Ticket Attendance and Revenue Survey (Australian Entertainment Industry Association (AEIA) 2004)
- Data on sales in the recorded music industry is available from Australian Recording Industry Association (ARIA) 2008.

### *Data gaps*

Aside from the data sources listed above, it appears that the arts industries tend to rely on the periodic major 'inquiries' initiated by government to provide analysis of industry viability. If there is a need for particular industries to initiate more ongoing analysis of their industry viability, then some enhancement in research and statistics would support this goal.

To improve industry research and statistics, there are a number of options which each industry might consider:

- ABS industry statistics - develop and/or utilise ABS statistical data for particular arts industries through the Service Industries Survey program and/or other industry related data (employment; household expenditure data; imports and exports). It should be noted that there is significant cost in ABS undertaking Service Industries Surveys and the ABS would be seeking industry funding to provide ongoing data;
- Administrative data - there is a need for arts industries to further develop their own administrative data collections to produce data on a regular basis;
- Use of Australian Tax Office (ATO) data - this requires further investigation to see whether better use can be made of this data source to produce regular statistics for arts industries; and
- Industry research - undertake more industry specific market research and/or research to gather industry intelligence

Different arts industries will have different needs for industry research and statistical data. In order to provide a comprehensive assessment of data needs, a separate study would need to be done in more detail for each arts industry, preferably led by that industry.

### *Data development actions*

#### ABS

Continue to work with CMCSWG and relevant arts industry peak bodies to understand the priority for arts industry statistics. In particular, explore the potential for improved use of Australian Tax Office (ATO) data in future.

### *Research direction*

Individual arts industries could review their needs for improved administrative data, market research or other industry research, and enhance their data collection and research capacity to address these needs on an ongoing basis.

### IMPACT OF TECHNOLOGY ON SUPPLY OF ARTS AND CULTURAL HERITAGE SERVICES

Like many other industries, arts and cultural heritage services are being impacted by changing technology. Many new goods and services are emerging which are in turn impacting on the ways in which Australians consume or participate in arts and cultural heritage. For example, recent data shows increases in the number of adults involved in photography, possibly due to the availability of digital photography equipment. Cultural heritage organisations are 'digitising' their content, with more of this being available on-line. Musicians have access to computer aided sound recording equipment that may enable home music recording. Computer technology may enable artists, musicians, performers and writers to find alternative ways to produce, exhibit, promote and sell their work.

Governments are interested in monitoring change in the industry in relation to impacts of technology, for a number of policy reasons:

### IMPACT OF TECHNOLOGY ON SUPPLY OF ARTS AND CULTURAL HERITAGE SERVICES *continued*

- governments themselves are suppliers of some services, and need to adapt to technological change;
- governments regulate copyright and intellectual property, which may be uniquely impacted by technology in the arts industry (e.g. music and image reproduction for artists, and text copyright for authors);
- government policies promote arts industry development, and there is a need to assess how well the industry is developing with new technology since governments may invest in assisting with research and development for arts or cultural heritage services.

In order to understand the impact of changing technology in the arts and cultural heritage industries, data on the technology used in the supply of products or the consumption of products would be required.

#### *Policy research question 6*

*How is new technology impacting on the supply and consumption of arts and cultural heritage goods and services?*

#### *Existing data*

From ABS core industry statistics, a good deal is known about some aspects of the Australian arts and cultural heritage service industries, as discussed earlier in Chapter 2.

The ABS Household Expenditure Survey provides data on the particular products that are purchased by households, but this does not necessarily pick up technological change. When a new product using new technology first enters the market, this may be separately identified in the product classification used by the ABS (e.g. when televisions first enter the market they are separately identified, or more recently videos and video players). However, as the technology develops for these products these changes in technology are not separately identified, since the product is in general terms the same. For example, videos are now predominantly provided using DVD technology, and televisions are slowly converting to 'digital' technology, but this cannot be distinguished in the data. Similarly the purchase of 'cameras' can be identified through the Household Expenditure Survey and this has increased over time. It is likely that recent increases relate to sales of digital cameras, rather than analog cameras, however, the product classification does not identify the type of camera.

The ABS Survey of Attendance at Selected Cultural Venues and Events analyses consumption of a range of services, but this only includes physical (on-site) attendance at cultural venues and events. Hence, access to services on-line, via mobile phone or via other broadcasting or communications technology is not measured.

Many cultural heritage institutions such as museums and libraries analyse their attendance data (both physical and on-line) and conduct visitor surveys to assess how consumption of their cultural heritage products are changing over time. This data is available from individual institutions and often published in annual reports. Aggregate data are published annually by the Council of Australasian Museum Directors (Council of Australasian Museum Directors (CAMD) 2008).

## CHAPTER 3 - POLICY AND RESEARCH QUESTIONS *continued*

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*Data gaps* Although some data is available about industry supply and access to a range of cultural goods, there are large data gaps about how technology has impacted on the supply and use of these services. Research studies that focus on specific industries to assess technological change and impacts on consumption are therefore required to address this policy research question.

*Data development actions* ABS  
Review the survey of Attendance at Selected Cultural Venues and Events to assess whether improved data could be provided in regard to a wider scope of consumption of arts and cultural heritage services, while separately identifying consumption that uses various technologies.

*Research direction* Future research could focus on industry case studies in particular areas of the arts or cultural heritage to understand how supply and consumption are changing due to technological change.

SUPPLY OF SKILLS FOR ARTS INDUSTRIES One major goal of post school and tertiary arts education is to provide artistic skills that are relevant to the arts industry. Governments design policies to meet skill shortages, and they need to know what arts education is being provided and to ensure that this meets the needs of local arts industries.

*Policy research question 7* *Do arts industries have an adequate supply of skilled people to allow them to remain viable or develop and grow?*

*Existing data* There are a range of data sources that relate to educational services, and enrolment in those services. From these data it is possible to get some information about the education courses that are relevant to arts (music, visual arts, etc.). It should be noted here that the 'arts' in education terms is usually defined more broadly than the specific definition used in this IDP. For example, the Creative arts field of education, defined as per the *Australian Standard Classification of Education (ASCED), 2001* (cat. no. 1272.0) include performing arts, visual arts and crafts, as well as graphic and design studies, and communication and media studies.

The National Centre for Vocational Education Research Ltd. (NCVER) produces a publication which provides a snapshot of Australia's publicly funded vocational education and training (VET) sector for 2006. It includes information about students and participation, courses and qualifications, module/unit of competency enrolments, and hours of delivery for each state and territory (NCVER 2007a).

In addition, NCVER produces the Student Outcomes Survey which focuses on students' employment outcomes and satisfaction with VET in Australia. This survey gathers information on students, including: their employment situation, their reasons for undertaking their training, the relevance of the training to their employment, their level of satisfaction, any further study aspirations (graduate only) and reasons for not undertaking further training (module completes only). (NCVER 2007b)

## CHAPTER 3 - POLICY AND RESEARCH QUESTIONS *continued*

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### *Existing data continued*

*Students: Selected Higher Education Statistics* contains statistics relating to students enrolled in higher education courses in each Australian Higher Education Provider including the number of students enrolled in Creative Arts (Department of Education, Science and Training 2007). Data in each publication is reported in numbers and Equivalent Full-time Student Load (EFTs).

There is some ABS data on arts qualifications from the Survey of Education and Training, the Census and the Survey of Work in Selected Culture and Leisure Activities. The Survey of Education and Work collects information about participation in education in the year prior to the survey, and in the survey month; labour force characteristics; type of educational institution; level of education of current and previous study; highest year of school completed; level of highest non-school qualification; level of highest educational attainment; unmet demand for education in current year; and selected characteristics of apprentices.

The 2007 Survey of Work in Selected Culture and Leisure Activities asked persons involved in selected activities whether they had any qualifications relevant to that activity.

The Census of Population and Housing collects both field of education and level of education for each person's highest completed non-school qualification.

Each of these data sources use the *Australian Standard Classification of Education (ASCED), 2001* (cat. no. 1272.0) to code field and level of education.

### *Data gaps*

There are some population level statistical data sources in the education area that may help to inform this research question, but these only provide a starting point for analysis. In order to find out what qualifications or skills the arts industries require, consultation with arts businesses or employing organisations would be necessary. This need is best addressed via case study research with particular industries.

### *Data development actions*

ABS

Review education statistics data sources to assess the potential for enhanced dissemination of statistics relevant to enrolment and completion of arts related education. Identify opportunities to enhance the development of these data sources to provide improved data where possible.

### *Research directions*

Research studies could be undertaken with particular arts industries to determine whether employing organisations have enough skilled people available, and to understand what skill gaps exist (if any).

### THE CONTRIBUTION OF ARTS AND CULTURAL HERITAGE SERVICES TO INNOVATION

The concept of an 'innovation economy' is now widely discussed in Australian industry policy, and the need for research in this area has been encapsulated in the *National Research Priorities* developed by the then Department of Education, Science and Training, which state:

### THE CONTRIBUTION OF ARTS AND CULTURAL HERITAGE SERVICES TO INNOVATION *continued*

"Understanding the factors that lead to highly creative and innovative ideas and concepts, and the conditions that lead to their introduction, transfer and uptake is critical for any nation that aspires to lead the world in breakthrough science, frontier technologies, and in other forms of innovation. Promoting an innovation culture and economy requires research with a focus on developing and fostering human talent, societal and cultural values favourable to creativity and innovation, and structures and processes for encouraging and managing innovation."  
(Department of Education, Science and Training 2002)

Governments have expressed increasing interest in 'creative industries' as a source of innovation and growth for local economies. In the arts and cultural heritage field, policies such as the Victorian Arts' policy *Creative Capacity +... Arts for all Victorians*, (Arts Victoria 2003a) Queensland's *Creativity is big business: A framework for the future* (Queensland Government State Development 2003), *Priorities for the Arts: NSW Ministry for the Arts Strategic Plan 2007-2011*, (Arts NSW 2007) and Arts SA's *Arts +... Investing in the Arts & our artists* (Arts SA 2000) all highlight the links between arts and cultural heritage and creativity, innovation and economic development.

Most definitions of creative industries include arts industries, but many also include other industries or activities (e.g. software development; industry research and development activity). The notion of creative industries is somewhat vexed, in that it could be argued that many aspects of human endeavour have some creative element and potential for innovation. Indeed, it could be argued that all industries employ human creativity. The concept of a 'creative industry' is thus not easy to apply statistically, due to definitional issues with the concept of 'creativity'. These definitional issues have been highlighted in a recent report by Holden 2007, who states that:

"the creative industries are still, in spite of all the attention they have received, not fully explained, conceived, narrated or understood" (p2).

Holden 2007 and Throsby 2007 have identified some directions that research could take in looking at the links between arts/cultural heritage industries (or what they term cultural industries) and creative industries, with particular reference to cultural policy issues. One of these directions is to look at the macro-economic issue of "inter-industry relationships: interaction between cultural and other industries in the economy and the diffusion of creative ideas: how does this happen?" (Throsby 2007). This avenue of research fits with a more generic interest of governments in innovation, and is reflected in this policy research question.

It is of particular interest to know whether arts and cultural heritage industries inspire or support innovation in other areas of the economy. That is; in addition to assessing the value added contribution of the arts and cultural heritage services, it would be useful to know how they contribute to downstream products (which may not be cultural products). This is seen as important because many arts and cultural heritage services provide ideas and offer educational opportunities - which may then be taken up and used by other industries.

For example, many arts and cultural goods are vital sources of information and education for society, covering news, film, books, television series, museum exhibitions, and information services of libraries and archives. Journalists, authors, archivists, curators, novelists and artists are a source of knowledge and ideas which may be important for the

### THE CONTRIBUTION OF ARTS AND CULTURAL HERITAGE SERVICES TO INNOVATION *continued*

wider economy. Without them, an argument could be made that the economy as a whole would suffer for lack of knowledge and ideas (Holden 2007).

As with previous questions relating to industry viability (policy research question 5) and use of technology (policy research question 6), it is likely that the best approach would be to focus research on particular sectors of the arts or cultural heritage industries (performing arts; visual arts and craft; film; television; radio; literature; etc.), since each of these make very different products and are likely to have qualitatively different contributions to innovation and the wider economy.

#### *Policy research question 8*

*How does arts and cultural heritage contribute to innovation in the wider economy? What are the links, flows or value chains between the arts and cultural heritage and other industries (e.g. what are the downstream impacts of cultural products, including knowledge, education or ideas)?*

#### *Existing data*

As discussed under policy research question 5, a range of industry data is available to analyse the viability of arts industries. In addition, policy research question 6 looked at use of technology in the arts and cultural heritage industries and identified this as an area with significant data gaps. The data and research required to address these earlier questions would also provide a good starting point for analysis of innovation - but only in describing particular arts or cultural heritage industries.

An important first step is to assess the contribution of arts and cultural heritage to the wider economy (% contribution to Gross Domestic Product (GDP)). Core industry statistical data can be used to analyse the contribution to GDP, and this is considered a core statistical data need. As discussed in Chapter 2, this requires ongoing collection and improvement of these core statistics. However, this core data does not provide any insights into contribution to *innovation* in the economy.

A number of research studies have been undertaken to understand the creative industries and their contribution to the economy. The Centre of Excellence for Creative Industries has undertaken a Creative Industries Mapping Study (Higgs and Cunningham 2007). In South Australia, a creative industries mapping study is also being undertaken, but results have not yet been published. These studies only go so far as to provide descriptive data about the size and scope of the creative industries, and their employment and economic contribution.

#### *Data gaps*

There is significant effort being directed to understanding the creative industries and their contribution to the wider economy, and creative industries usually include the arts industries, and may also include cultural heritage services. However, these studies do not seek to understand the way in which arts and cultural heritage industries contribute to *innovation*, which is potentially a difficult task. Research of a more qualitative nature would be needed to assess how cultural products (including ideas, information and knowledge) are used by other areas of the economy to support innovation. Case study research with particular industries would be required to address this question.

#### *Research directions*

Case study research with specific arts or cultural heritage industries is needed to understand the way in which they contribute to innovation in the wider economy. This need has not been specifically addressed with existing creative industries studies.

### CULTURAL TOURISM

Promoting local cultural heritage and arts activity can boost tourism and generate economic benefits. This is of interest to commonwealth, state and territory governments, and is also seen as very important to regional and remote communities and local government.

The Arts and Cultural Tourism Strategy for Western Australia states that:

"There is a vital relationship between culture and the arts and the tourism market. Tourists are interested in what is distinctly local and authentic." (Department of Culture and the Arts and Western Australian Tourism Commission 2004)

The Busselton Shire Council Cultural Development Policy includes the policy goal statement:

"To acknowledge the importance and advantages to the local community and to the environment of cultural tourism." (Busselton Shire Council 2007)

The majority of arts and cultural heritage government portfolios have an interest in 'cultural tourism', and this often fits within a wider context of government tourism policy in general. Similarly policy research questions that apply to cultural tourism may also be applied to tourism in general, and could potentially be addressed in tandem.

#### *Policy research question 9*

*How significant are arts and cultural heritage related tourism to an area's economy, either for Australia as a whole or for cities, regions or towns within Australia? How many tourists visit, or extend their stay to an area, in order to consume arts or cultural heritage services? What proportion of all tourists to an area consumes arts or cultural heritage services during their visit?*

#### *Existing data*

Tourism Research Australia conducts regular surveys on domestic and international visitors. The International Visitor Survey contains questions about, among other things, number of nights in Australia; travel arrangements; reasons for visiting; places visited; information sources about Australia prior to leaving home country; impressions of aspects of Australia; income earned and expenditure on the trip. (Tourism Research Australia 2008b)

The National Visitor Survey is Australia's primary measure of domestic tourism activity being the major source of information on the characteristics and travel patterns of domestic tourists within Australia. The survey collects details about respondents recent travel, for day trips, trips involving overnight stays and overseas travel. National Visitor Survey definitions are based on those provided by the World Tourism Organisation and therefore interviews people who have travelled for purposes including holiday, visiting friends and relatives, business, education and employment. (Tourism Research Australia 2008a).

Tourism Research Australia was commissioned by CMCSWG to provide analysis of their international and domestic visitor data for 'cultural visitors' at a regional level (Hossain, Heaney and Carter 2005).

### *Existing data continued*

The ABS Survey of Attendance at Selected Cultural Venues and Events collects data about where people attended a museum or art gallery. The questions on the survey ask if the respondent attended the museum or art gallery in their own state or interstate and whether it was located within the capital city or outside of the capital city.

In addition, many cultural heritage institutions collect data about the numbers of international and domestic visitors, and undertake visitor research. These institutions also conduct touring exhibitions to regional areas and record visitor numbers to those touring exhibitions. Hence some tourism data could be compiled from individual institutions. Some aggregate data including the numbers of interstate and overseas visitors are compiled annually by the Council of Australasian Museum Directors (Council of Australasian Museum Directors (CAMD) 2008).

Local governments conduct research to understand the local demands and supply for tourism. For example the City of Melbourne conducts a city visitor survey and analyses the number of visitors, their origin, and their purpose for visiting (including arts or cultural activities) (Casey 2007).

The Byron Shire Council undertook a local tourism management study in 2002 which highlighted concerns about the impact of growing tourism numbers in the area, but also highlighted opportunities for sustainable tourism in future, including cultural tourism. Data were utilised from various sources, including data collected by the local Tourism Information Centre. The study discussed data limitations, stating that:

"available data relates either to the wider region in which Byron Shire exists, is out of date, or the survey methodology used was unreliable in terms of extracting relevant data for the purposes of this report. In addition, much of available data and past surveying has often utilised commercial accommodation to gather statistics. Whilst this data can be extremely useful for illustrating many areas relating to tourism, it does not provide information relating to tourists only visiting for the day, nor does it include tourists not utilising commercial accommodation (i.e. Visiting Friends and Relatives)" (Tonge, Fletcher and Backer 2002)

Another approach to cultural tourism analysis has been to examine the impacts of particular events (e.g. a major arts festival), or to examine the way that particular cultural products may promote tourism (e.g. movies that heighten popular interest in particular locations; or tourism branding through Australian cultural icons or celebrities). In addition, Australian Indigenous arts and culture provide extensive linkages with the tourism market.

Examples of research studies related to arts events (and other kinds of events, such as sporting events) can be found in a bibliography published by Australian Event Management (Allen, Harris and Huyskens 2001). Hence there is a fairly major field of research that is relevant to cultural tourism which looks at issues related to event management. A bibliography of research relevant to Australian Aboriginal tourism includes many studies relevant to Aboriginal arts and culture (Zeppel 1999).

There are also some examples of research on 'film tourism'. For example, The Lord of The Rings film location in New Zealand is well known for having promoted tourism, and studies have shown that TV series (e.g. Sea Change), can also have an impact on tourism (Barton 2005).

## CHAPTER 3 - POLICY AND RESEARCH QUESTIONS *continued*

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### *Existing data continued*

There is quite a vast field of research underway in the study of tourism in general, and some of this research is relevant to cultural tourism.

### *Data gaps*

As 'cultural tourism' is one component of wider tourism study, the existing statistical data, while very useful, has limitations when applied to cultural tourism. In 2001, the NCCRS undertook a review of data sources relevant to cultural tourism and concluded that there was limited potential to further develop comprehensive statistical data sources without great expense (NCCRS 2001). The most promising national statistical data source is the International and Domestic Visitor Surveys undertaken by Tourism Research Australia, and it will be important to continue to utilise this data source as far as possible, as has been done in the past.

Regional case study research is likely to be needed to understand the significance of cultural tourism to a local economy, and each study may require different research design tailored to the local area. Some regional studies have been undertaken, but methods and data sources vary considerably. It is likely that any such local area studies will need to collect their own data, via a visitor survey or local community research. In supporting this need, the CMCSWG recently developed a guide for local governments to assist them in undertaking such studies, with an emphasis on cultural tourism (CMCSWG 2008). Where similar data sources are used (such as questions asked on visitor surveys; or visitor information centre statistics), standardisation of collection methods may be useful.

Many analyses of tourism rely on research or data collections that look at all forms of tourism, and are not limited to 'culture' related tourism. In looking at cultural tourism, it is probably useful to understand this broader tourism context, since many tourists will have a multiplicity of recreational and other tourism needs. Hence, in meeting data gaps it will continue to be important to utilise those broader tourism analyses.

### *Data development actions*

#### CMCSWG

Evaluate the use of the CMCSWG guide which aims to assist local areas with cultural tourism research studies.

### *Research directions*

Investigate the potential for development of common sources of small area data, relating to arts and cultural heritage tourism (such as visitor information centres; local cultural institutions; visitor surveys; community surveys). Develop standard methodologies for collection of common regional data where feasible.

### PAYMENT FOR ARTS INVOLVEMENT

Past research studies have found that Australian professional artists have incomes lower than that of the general workforce, and that many have to support their arts practice with other employment (Throsby and Hollister 2003 and Australian Taxation Office (ATO) 2005). In recognition of this issue, many government policies and programs are directed towards supporting artists to undertake their arts practice, in an effort to support reasonable incomes for artists (e.g. through grants; lending rights payments; resale royalties; tax relief; and copyright and intellectual property rights). Governments have a need to monitor the ability of professional artists to make a living from their arts practice, to enable them to review the level of support they need to provide.

PAYMENT FOR ARTS  
INVOLVEMENT *continued*

In undertaking research in this area, the notion of a 'professional artist' requires some definition, since it is not the aim of governments to provide income support for leisure participation. However, there are definitional issues in counting 'professional artists' which hamper the ability to measure their income. Artists may produce arts work without ever intending to sell it, while doing paid work in other non-arts occupations. This may simply be leisure or hobby activity. On the other hand, their arts work may be deemed of wider cultural significance and/or may be of some 'professional' standing (which is difficult to quantify) that may attract public support for its development or preservation (via government or community investment). A recent tax ruling recognised that artists may not be able to earn income from their arts practice (at least for a period of time), but the ruling requires that artists demonstrate their intention to earn a living (Australian Taxation Office (ATO) 2005). As discussed in Chapter 2, the delineation of what constitutes professional versus leisure involvement in the arts is a vexed issue, which ABS is intending to address through the development of a conceptual framework.

Furthermore, the experiences and income viability of artists may vary considerably across the different art forms, and for different population groups (such as Indigenous artists). Thus, research studies may be needed which have a focus on particular art forms and industry sectors (music, visual arts, performing arts, etc.) or sub-population groups of interest.

*Policy research question*  
10

*To what extent is creative arts involvement the main job or a secondary job for artists in Australia? How do professional creative artists earn a living, if not from their creative arts work? How would they prefer to earn a living, and do artists perceive that it is feasible for them to earn a living from their arts work?*

*Existing data*

Several ABS surveys provide information about the income of people doing arts work whether as a main job (through Census data) or not as a main job (ABS Survey of Work in Selected Culture and Leisure Activities). For those people who do arts work not as a main job, the survey does not distinguish 'professional' artists from 'leisure' artists. Hence statistics may report on leisure artists who happen to be able to earn a little income to subsidise their arts interests.

The report entitled *Don't give up your day job: an economic study of professional artists in Australia* provides data on the income and employment preferences of professional artists in a range of fields (musicians, visual artists, performers, etc.) (Throsby and Hollister 2003).

More targeted research has been undertaken for some artists, with one example being a qualitative study commissioned by the Australia Council regarding the experiences of Indigenous musicians in earning a living and gaining work in the music industry (Australia Council (pending publication)).

*Data gaps*

There is a need for new research in this area, as the Throsby and Hollister 2003 report is beginning to become outdated. Furthermore, while the study provides some useful qualitative insights, issues with methodology mean that this study could not be used for robust statistical reporting (due to a small sample size with questionable representativeness).

## CHAPTER 3 - POLICY AND RESEARCH QUESTIONS *continued*

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### *Data gaps continued*

It may be possible for the ABS Survey of Work in Selected Culture and Leisure Activities to measure characteristics which permit an improved identification of professional artists, and at least estimate their total number in the Australian population. However, it is likely that the sample of professional artists on an ABS survey would be too small to analyse the income and employment preferences of this group in any depth, so complementary research that is more qualitative in nature may also be needed.

### *Data development actions*

#### ABS

Develop a definition of what characteristics may be used to identify 'professional artists', which can be operationalised through survey research. If feasible, develop ABS surveys to provide data for relevant characteristics of arts involvement that may permit a count of the total number of professional artists and assessment of their sources of income. The feasibility of doing this is yet to be assessed.

### *Research directions*

Research on the career choices and motivations of artists is needed, perhaps employing more qualitative methods, targeting artists in a variety of income and employment situations.

### CULTURAL OUTCOMES

In discussing the research priorities related to 'cultural' outcomes of arts and cultural heritage policy, there are some common definitional issues that pervade this discussion. The key concepts of interest are 'cultural identity'; 'cultural awareness' and 'cultural relevance'. Refinement of these concepts would be needed to support research in this area. For the time being, a loose description of these concepts is provided here to assist readers in interpreting the discussion that follows in this IDP. In doing so, it is important to remind readers that the definition of 'culture' used in this IDP is an anthropological one related to way of life (as described in Chapter 2), and that 'arts' and 'cultural heritage' are related to specific activities (e.g. literature, film, visual arts, library and museum services).

#### Cultural identity

- Cultural identity is the extent to which an individual has affinity with a particular culture, or cultural group, as demonstrated by either conscious affiliation or as demonstrated by behaviours associated with sharing a particular way of life. Referring back to the definition of culture provided in Chapter 2, a particular culture or cultural group is distinguished as the 'way of life' or a particular group or period of time. This may be related to ethnic origin, nation state and/or a certain period of time. A person who has an ongoing feeling of association with a particular culture may be able to identify and symbolically label this as an 'identity' (as in being 'Greek'; 'Muslim'; 'Australian' or 'Australian Muslim'). However, cultural identity is also something that may develop over a lifetime, and works at more subconscious levels. Thus, some Australian born residents who have been brought up with an Australian way of life may not actually be able to say what it is that makes them 'Australian', and some may not perceive they have an 'Australian identity'. Hence cultural identity may not always reside in the self-awareness of individuals, but can be seen in their behaviours and way of life. To complicate things further, a person may claim to belong to some particular cultural group, but their behaviours may not necessarily fit with the norms for that group, and they may not necessarily be accepted as a member of that cultural group.

#### Cultural awareness

- Cultural awareness is the extent to which a person is aware of their own cultural identity and/or has an understanding of other cultures, different from their own. As discussed above, even one's own cultural identity may not be something that an individual is conscious of. Indeed, it is often an aim of Australian writers, artists and filmmakers to provide arts products that help Australians to see themselves, to understand and reflect on their 'Australian culture' as well as that of other cultural groups. It may be that it is only when people of different cultures meet together that people become aware of their unique cultural identities.

#### Cultural relevance

### CULTURAL OUTCOMES *continued*

- Cultural relevance is a term used in this IDP to describe whether the content of arts or cultural heritage products or services relates to or reflects particular cultures. That is, a painting by an Indigenous artist may be relevant to Indigenous culture (telling a story relevant to Indigenous beliefs or way of life). On the other hand, Indigenous artists may also be profoundly connected to some other cultural influence (e.g. Christian religion) and their art work may be linked to those influences. Furthermore, it should not necessarily be assumed that all art works that relate to Indigenous culture are produced by Indigenous people, since non-Indigenous Australians may be involved in production of art work that has cultural relevance to Indigenous cultures. Thus, cultural relevance is a question of evaluating the content of arts or cultural heritage goods or services to see how it fits with various categorisations of culture. A major issue for curators and commentators on culture is - who determines the relevance of a particular artwork or film to a particular culture? This is not a question that can be answered here.

The following are covered in this Cultural outcomes section:

- Impacts of arts and cultural heritage on cultural identity
- Cultural relevance and diversity of cultural heritage collections
- Impacts of arts and cultural heritage on cultural awareness and tolerance

### IMPACTS OF ARTS AND CULTURAL HERITAGE ON CULTURAL IDENTITY

The policy and literature in this field indicates that the arts and cultural heritage are important to our sense of identity. For instance, the charter of the Australian Broadcasting Corporation (ABC) aims to provide:

"broadcasting programs that contribute to a sense of national identity and inform and entertain, and reflect the cultural diversity of, the Australian community". (Australian Broadcasting Corporation (ABC) 2005)

Arts and cultural heritage policies around Australia have some focus on both Indigenous arts and cultural preservation, as well as 'multicultural' arts and heritage relating to various ethnic groups within Australia. A priority question has been identified about how arts and cultural heritage relate to cultural identity (policy research question 11). As policies commonly emphasise Indigenous, or ethnic group identities, the first part of this research question has also been given this focus. Maintenance of Australian identity is also considered important in arts and cultural policy, so this is included as part of policy research question 11. Australian identity may be relevant across all Australian residents, regardless of their Indigenous status, or ethnic cultural group identity.

In addition to arts and cultural heritage activity, many other aspects of people's lives impact on cultural identity, including religion, family relations, social activities, work and lifestyle. Hence a priority question has been identified about how important the arts and cultural heritage are to cultural identity, compared to a wide range of other activities (policy research question 12).

Governments develop programs and policies to develop and protect arts and culture, with one aim being to maintain a sense of cultural identity for all Australians, and to satisfy the needs of a diverse Australian community. To inform this policy direction, it is important to understand the role that arts and cultural heritage plays in the development and maintenance of cultural identity.

Policy research question  
11

*When people become involved in or consume arts and cultural heritage services does this involvement assist them to develop or maintain affinity with a particular cultural group, particularly for Indigenous or ethnic population groups? Does involvement in arts and cultural heritage services foster an Australian sense of identity?*

Existing data

Existing data provides only a starting point for answering these questions about cultural identity.

A useful first step may be to assess people's level of involvement with arts or cultural heritage, and this can be done with existing data. Data is available from ABS surveys about the level of involvement of the Australian population in various arts and cultural heritage activities, as discussed in Chapter 2. It would be useful to know what involvement people of different Indigenous and ethnic groups have with arts and cultural heritage. A description of how existing data sources may be used to assess involvement for Indigenous people and ethnic groups is discussed below, but further research would be needed to understand whether this involvement was important for cultural identity.

Involvement in or consumption of arts and cultural heritage services by Aboriginal and Torres Strait Islanders

- The ABS National Aboriginal and Torres Strait Islander Social Survey (NATSISS) collects some data about involvement in the arts for Indigenous people aged 15 years and over in the 12 months before the interview. This survey asks respondents if they went to any Aboriginal or Torres Strait Islander festivals or carnivals involving arts, craft, music or dance or if they've been involved with this type of organisation. Other questions on the survey ask whether respondents have made any Aboriginal or Torres Strait Islander arts or crafts, performed any Aboriginal or Torres Strait Islander music or dance, or told or written any Aboriginal or Torres Strait Islander stories in the last year. An ABS publication entitled *Aboriginal and Torres Strait Islander Australians: Involvement in arts and culture, 2001 and 2002* (cat. no. 4721.0) provides summary data from this source, as well as other sources where possible. The NATSISS also collects some data about level of identification with Indigenous culture, e.g. 'Whether identifies with clan, tribal or language group', 'Whether speaks an Indigenous language' and 'Recognition of homelands'. There may be potential for further analysis of this data.

Involvement in or consumption of arts and cultural heritage services by ethnic groups

- While ABS surveys collect data on involvement in arts and cultural heritage, it is difficult to disaggregate this data for ethnic groups. Information is available on respondents' country of birth, so there is some potential to analyse level of involvement for larger groupings, such as Region of birth (e.g. born in South-East Asia; North-West Europe; Oceania and Antarctica). Analysis could also be done for people born in countries where the main language is English compared to those born in non-main English speaking countries. However, these are very crude measures of ethnic group. For Indigenous groups, survey respondents self-identify as Aboriginal or Torres Strait Islanders. However, the country of birth of an individual may have no bearing on how a person identifies with a particular cultural or ethnic group. For example, people born in England may be of Indian ethnicity.

### *Data gaps*

While it may be possible to gauge the level of involvement and consumption in arts or cultural heritage, albeit with some limitations for ethnic groups, further research would be needed to understand whether this involvement or consumption is linked to maintaining an affinity with a particular cultural group, or to an Australian identity or sense of belonging.

Another data gap relates to the adequacy of data on the involvement of different ethnic groups in arts and cultural heritage. Generally, the ABS collections don't provide enough detailed data about arts and cultural heritage involvement for these smaller sub-populations.

### *Research directions*

Definitional work is required to better understand the concept of cultural identity, as a precursor to research that investigates the role the arts and cultural heritage plays in development or maintenance of cultural identity.

Further research could be undertaken to assess the level of involvement of people from different ethnic groups in arts and cultural heritage.

### *Policy research question* 12

*Of all the things that contribute to cultural identities, how important are involvement in and/or consumption of arts and cultural heritage services? How do people come to understand or share their cultural identities? In particular, how important are the arts and cultural heritage services for cultural maintenance or development within a cultural group (i.e. via television, radio, going to live performances, reading, going to a museum)?*

### *Existing data*

In order to address this question it would be necessary to know how important various activities are to individual cultural identity, and this is difficult to assess due to the fact that people may not even be aware of these influences. For example, is sport an important aspect to being Australian, and is this as important as Australian movies or books? The ABS collects data about how much time people allocate to particular activities, which may provide a useful starting point. The ABS Time Use Survey measures the amount of time respondents spent on social and community activities (e.g. religious activities/ritual ceremonies and community participation) and recreation and leisure (e.g. games, hobbies, arts or crafts, reading, or audiovisual media). Time Use Survey data was last collected in 2006, and published in *How Australians Use Their Time* (cat. no. 4153.0).

However, the time spent on an activity provides no indication about how significant the activity may be to cultural identity. Separate research that permits a more in-depth exploration of cultural identity with small groups is likely to be needed. An example of such research was a study undertaken by the European Commission, released in June 2006, which explored European cultural identity and included a discussion of arts consumption and how this relates to identity, along with other aspects of society (food, travel, fashion, sport, education, etc.) (European Commission (Belgium) 2007).

### *Data gaps*

As discussed earlier, definitional work is required to better understand the concept of cultural identity, as a precursor to research that investigates the role the arts and cultural heritage plays in development or maintenance of cultural identity.

*Data gaps continued*

Data regarding the involvement in and consumption of arts and cultural heritage services is well covered by current ABS surveys. Data regarding people's involvement and time spent in a wide range of activities is available from the ABS Time Use Survey and could be used to examine how people allocate time to different activities, and this could be done for different country of birth groupings. However, this ABS data provides no indication of the cultural group that people self-identify with (if that is considered relevant to identity), nor the cultural associations of their involvement (e.g. whether they are involved in ethnic arts festivals of various kinds).

In preparation for this IDP no Australian research was uncovered that explores what aspects of life contribute to the formation or maintenance of cultural identity, including but not limited to arts and cultural heritage activity.

*Research directions*

Definitional work is required to better understand the concept of cultural identity, as a precursor to research that investigates the role the arts and cultural heritage plays in development or maintenance of cultural identity.

Future research could focus on the role of arts and cultural heritage in development and maintenance of cultural identity, relative to other activities (family, work, sport, etc.). Such research would be likely to be breaking new ground, and would require development of appropriate research methods, as well as concepts and definitions.

Analysis of the arts and other activities of different country of birth groups using the ABS Time Use Survey may provide a starting point for understanding the potential links between involvement in arts and cultural identity, even though this data source cannot fully address the issue.

CULTURAL RELEVANCE  
AND DIVERSITY OF  
CULTURAL HERITAGE  
COLLECTIONS

As noted earlier cultural heritage services are thought to be important for the preservation and development of cultural identity, which covers a multiplicity of cultures. The policy *Multicultural Australia: United in Diversity*, states that:

"Australian multiculturalism is the philosophy, underlying Government policy and programs, that recognises, accepts, respects and celebrates our cultural diversity. It embraces the heritage of Indigenous Australians, early European settlement, our Australian-grown customs and those of the diverse range of migrants now coming to this country...subject to the law, all Australians have the right to express their own culture and beliefs and have a reciprocal obligation to respect the right of others to do the same." (DIMIA 2003)

The priority research question identified below relates to the diversity of content of Australian cultural heritage collections, covering material relevant to Indigenous and ethnic group cultures living within Australia, as well as to all Australians and their evolving culture. It is of interest for governments, communities, and those managing heritage collections, to know that the collections being maintained are those most relevant to Australia's multifaceted cultures - past and present - as well as for developments into the future. There is an element of professional judgement involved in making decisions about the relevance of cultural content, which is usually the domain of professional curatorial staff and collection managers. Decisions about the relevance of heritage collections to cultural identity may be supported by research which addresses the broad question posed below.

Policy research question  
13

*Does the cultural content of Australian heritage collections reflect the evolution of Australian cultural identity (or identities) over time, as well as the cultural diversity of Australian society, inclusive of Indigenous culture and various ethnic community cultures?*

Existing data

Anecdotally it is possible to point to many examples of exhibitions and collections that cover a diverse range of content relevant to this question. However, it is much more difficult to quantify the amount and type of cultural content using statistical data.

A report commissioned by the Australia Council in 2003 includes some data on Australian art gallery exhibitions in the previous 12 months and the proportion of Indigenous material in these exhibitions (Australia Council 2003). While this may provide some useful information for management of art museum collections, it does not address the question of the relevance of this material to Indigenous people, nor to the wider Australian community, in terms of its 'cultural identity'.

It was beyond the scope of this paper to undertake a detailed review of how cultural institutions and researchers in this field address such questions, but such a review may assist future development of research in this field.

Data gaps

There is currently no nationally consistent data coverage on the types of cultural content of Australian heritage collections (held in museums, art museums, libraries and archives). The cultural content of Australian heritage collections could potentially be sourced from administrative collections from museums, art museums, libraries and archives who maintain an inventory of the content of their collections. However, complex conceptual and definitional issues would need to be resolved before there would be value in such a collection. In particular, questions of defining what would be meant by content relating to individual cultural groups would need to be answered.

In order to understand the diversity of cultural heritage collections and their relevance to cultural identity, some further conceptual development of this question itself would be needed, in consultation with the collections sector. There is a need for a more detailed review of the current research than was possible in preparing this plan.

Research directions

More specifically identify the policy research needs that deal with the question of the cultural relevance of heritage collections, in consultation with the collections sector. Undertake a review of research activity that investigates the associations between heritage collections and cultural identity.

IMPACTS OF ARTS AND  
CULTURAL HERITAGE ON  
CULTURAL AWARENESS  
AND TOLERANCE

According to UNESCO "respect for cultural diversity, tolerance, dialogue and cooperation are an important way of achieving community harmony and international peace and security." (United Nations Educational, Scientific and Cultural Organisation (UNESCO) 2002). Many arts and cultural heritage policies and programs aim to promote understanding and acceptance of diversity. For example, the Western Australian policy, *Creative Connections: An Arts in Education Partnership Framework 2005–2007*, describes arts education as a way of reconciling apparent differences:

## CHAPTER 3 - POLICY AND RESEARCH QUESTIONS *continued*

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### IMPACTS OF ARTS AND CULTURAL HERITAGE ON CULTURAL AWARENESS AND TOLERANCE *continued*

"In arts learning young people become adept at dealing with high levels of ambivalence and uncertainty, and they become accustomed to discovering internal coherence among conflicting experiences. Since young people live in worlds that present them with different beliefs, moralities, and cultures, schools should be the place where learning fosters the reconciliation of apparent differences." (Department of Culture and the Arts and Department of Education and Training 2004)

#### *Policy research question* 14

*Do people develop more tolerant attitudes to different cultures within society through their involvement in or consumption of arts or cultural heritage services? To what extent do people consume arts or cultural heritage services outside their own cultural group (e.g. Indigenous or ethnic festivals)?*

#### *Existing data*

There are no known data sources relevant to this question.

#### *Data gaps*

This is a complex question, which will be difficult for research to address. In order to collect this data, it would be important to know people's individual ethnic identity or cultural group identity and to assess their involvement in arts or cultural heritage activity outside their own group. In addition, data would need to be collected to assess the impact of this exposure to arts or cultural heritage activity on their understanding of the other cultural group, and indeed on their attitudes to that group. There is currently no known data source on people's exposure to arts or cultural heritage *content* relevant to cultures other than their own cultural group, let alone how this might impact on their perceptions about that cultural group.

There is currently no known data source that gives an indication about whether people develop more tolerant attitudes to different cultures through being involved in or consuming arts and cultural heritage services.

Population surveys could potentially collect information about whether people attend or consume some ethnic and/or Indigenous arts or cultural heritage activities. This would require a categorisation of arts or heritage events that can be identified as being of Indigenous or ethnic content, and the feasibility of doing this would require survey development and testing.

However, researching attitudes to cultural groups is difficult to assess from a self report survey. Rather, other forms of research or evaluation studies may be needed to investigate the effectiveness of particular programs which are designed to educate and influence attitudes. For example, Indigenous arts programs associated with reconciliation and arts or heritage programs that aim to build links across communities may undertake evaluation studies.

#### *Research directions*

Research, such as evaluation studies with longitudinal methodologies, may be useful to investigate the effectiveness of particular programs which are designed to influence attitudes, e.g. Indigenous arts programs associated with reconciliation and arts or heritage programs that aim to build links to Muslim communities.

## CHAPTER 3 - POLICY AND RESEARCH QUESTIONS *continued*

### SOCIAL OUTCOMES

The following are covered in this Social outcomes section:

- Accessibility of arts and cultural heritage services
- Impacts of arts and cultural heritage services on community networks

### ACCESSIBILITY OF ARTS AND CULTURAL HERITAGE SERVICES

Australian government policies seek to ensure that people are able to participate in the arts and access information about their cultural heritage, if they choose to do so.

Increasing access and participation in areas outside the capital cities is a common policy concern. For example, at the launch of the Victorian arts strategy in 2003, the Arts Minister at the time (Ms Delahunty) stated that:

"All Victorians, wherever they live, whatever they earn, should have access to the best of the arts in their own communities. From Myrtleford to Mildura, the State Government wants to create a culture of participation and enjoyment" (Arts Victoria 2003b) .

The research question identified here seeks to understand the level of access of different groups of Australians to involvement in arts and cultural heritage services, with a particular focus on those groups that may be more disadvantaged in gaining such access. Generally speaking, government policies aim to ensure access is provided to groups that are likely to be disadvantaged through language, distance, cost or mobility issues - such as people in regional and remote areas; Indigenous Australians; ethnic groups; and persons with a disability.

It is particularly important to research those who do not consume arts and cultural heritage services, and to understand why, since government services are intended to be accessible for all Australians. For example, is distance a barrier for people in regional and remote areas? Is cost a barrier to access for some people? Are people aware of the services available for them to access? Are some aspects of the way services are provided a barrier for persons with a disability?

#### *Policy research question* 15

*How many people participate in or consume the arts and cultural heritage services in Australia? What are their characteristics? What levels of involvement occur in regions? What are the levels of involvement for specific population groups, such as: Indigenous Australians; ethnic groups; and persons with a disability?*

#### *Existing data*

Data regarding consumption or participation in arts and cultural heritage services is generally well covered by current surveys. The ABS surveys of Work in Selected Culture and Leisure Activities (WSCLA), Attendance at Selected Cultural Venues and Events and the General Social Survey (GSS) all provide information about participation and consumption of the arts and cultural heritage services in the general population. There is also some information about participation for specific population groups in the ABS National Aboriginal and Torres Strait Islander Social Survey (NATSISS), the Survey of Disability Ageing and Carers (SDAC) and the survey of Children's Participation in Culture and Leisure Activities (CPCLA). This data enables some limited comparisons between the general adult population and other population groups of Indigenous Australians, and persons with a disability. These surveys are described in Chapter 2.

These ABS surveys have some capacity to analyse data for broad regions. It is possible to compare estimates for states and territories as well as for people living in capital cities compared to those living outside capital cities.

## CHAPTER 3 - POLICY AND RESEARCH QUESTIONS *continued*

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### *Existing data continued*

Some local councils undertake community or visitor surveys, usually covering a range of issues, and sometimes including questions relevant to arts and cultural heritage access or involvement. For example the 2005 Darebin City Council Household Survey collected data on arts, sport and leisure activities (Metropolis Research 2005); and the City of Melbourne City Users Survey, 2006 collected data on city visitors' reasons for visiting, including to participate or attend arts or sports events (Nexus Research 2006).

### *Data gaps*

While there is good data for the general population and some data for smaller population groups, there are also some data gaps in this area.

Levels of involvement in regions are not currently addressed in any detail by ABS surveys because there are limitations in regional analyses due to sample size. For example, estimates are not available for local government areas. Very large sample sizes would be needed to collect small area data, which is often beyond the capacity of general purpose population surveys.

It may be possible to develop local data sources to provide some regional data. For example, use of community surveys run by local government, or collation of data from particular local arts or cultural heritage institutions (e.g. museums, libraries, art galleries, festival events) to gauge levels of involvement.

In addition, while the ABS runs surveys to collect robust data for persons with a disability, and for Indigenous persons, these surveys collect little information about access to arts and cultural heritage, compared to that which is available for the general population. There are also some difficulties with comparability of questions between the surveys, which have different scope and coverage and ask different questions.

### *Data development actions*

#### ABS

Investigate the possibility of improving the coverage and/or analysis of data in relation to arts or cultural heritage involvement for different sub-populations of interest (Indigenous; low-income groups; persons with a disability; ethnic groups).

### *Research directions*

Explore potential for regional data to be generated from common local data sources, such as local community surveys funded by local councils, or data collections from local arts or cultural heritage services. Develop standard methodologies for collection of data related to involvement in arts or cultural heritage services from these sources.

### *Policy research question*

16

*What are the characteristics of persons who do not access arts and cultural heritage services (even though they have the opportunity to)? Why don't they? What would encourage their involvement? Are they aware of the arts and cultural heritage services, and are they considered relevant or of interest? Are there different reasons for nonaccess for different population groups, such as Indigenous Australians, ethnic groups, persons with disabilities, children or older people? What are the barriers for those who want to gain more access?*

### *Existing data*

Data regarding consumption of arts and cultural heritage services is generally well covered by current national population surveys. The ABS Survey of Attendance at Selected Cultural Venues and Events provides information about consumption of the arts and cultural heritage services in the general adult population. There is also some

## CHAPTER 3 - POLICY AND RESEARCH QUESTIONS *continued*

### *Existing data continued*

information about participation for specific population groups in the ABS National Aboriginal and Torres Strait Islander Social Survey (NATSISS), the ABS Survey of Disability Ageing and Carers (SDAC) and the ABS Survey of Children's Participation in Cultural and Leisure Activities (CPCLA). These surveys are described in Chapter 2.

Some market research is also undertaken about consumption of television and radio, and film (through cinemas, and video sales and rental). A number of market research data sources are listed under Economic viability of arts industries (policy research question 5). However, generally these industry data sources provide information only about consumers, and are unable to assess non-consumers. Thus, population surveys are the best methodology for collecting information about non-consumers.

### *Data gaps*

Data regarding the consumption of arts and cultural heritage services is well covered from population surveys, and it would be possible to identify people who do not consume arts and cultural heritage services. Some analysis has been undertaken using ABS data, which describes the characteristics of non-attendees. Further analyses could be undertaken as new data becomes available. However, a correlation between variables on these surveys does not provide any indication about the subjective reasons why people attend or not.

For those who do not access arts and cultural heritage services, there is currently no data that gives an indication about people's opportunity to access arts and cultural heritage services. Data is needed to understand whether lack of involvement in arts and cultural heritage is due to choice or some other reason for not being involved (such as having no arts or cultural heritage services nearby, cost, or transport).

There is currently no data that gives an indication about why people do not access arts and cultural heritage services. Existing ABS surveys could potentially collect information about why people do not become involved in or consume arts and cultural heritage services. It should be noted that if people were to report that they had no access to arts or cultural heritage services in their area, this may reflect a lack of awareness of existing services, and hence awareness of services could also be the subject of research.

### *Data development actions*

#### ABS

Investigate the possibility of adding data items onto relevant ABS surveys to identify those respondents who want more involvement in the arts or cultural heritage and if so, whether they experience 'barriers' to their involvement such as cost, travel, information, etc. While ABS could scope the potential to provide this data, additional funding would be required to implement new data collection in this area.

### IMPACTS OF ARTS AND CULTURAL HERITAGE SERVICES ON COMMUNITY NETWORKS

Many arts and cultural heritage policies and programs aim to bring people together, enhancing community networks and fostering 'social capital'. The concept of social capital has been gaining greater attention from governments for some time. The ABS recently produced an information paper on its measurement (Australian Bureau of Statistics (ABS) 2004) and in 2000 the Department of Health and Ageing released a strategic paper linking social factors to mental health (Department of Health and Ageing 2000). Factors such as a "strong cultural identity and ethnic pride" were found to protect against mental illness, while outcomes - including a "sense of connectedness"

## CHAPTER 3 - POLICY AND RESEARCH QUESTIONS *continued*

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IMPACTS OF ARTS AND  
CULTURAL HERITAGE  
SERVICES ON  
COMMUNITY NETWORKS  
*continued*

and "attachment to and networks within the community" - could be strengthened through involvement in activities such as community arts programs.

Government programs often aim to support groups with particular issues relating to potential social isolation - such as long term unemployed, homeless persons, Indigenous persons, new migrants to Australia, isolated older persons, isolated persons living in regional areas, and persons with a disability. For example, the report *Making the Journey: Arts and disability in Australia* presents 12 case studies showing initiatives from the arts, health and education sectors and responses by cultural organisations that remove barriers to participation (Hutchison 2005).

While many Australians may benefit from community based arts or other programs, disadvantaged groups are more likely to be targeted by government policy and programs. In framing this question, it is not assumed that all long term unemployed persons are isolated nor that all persons with a disability are isolated. Some persons with a disability may be fully engaged in the workforce, and/or with families, and/or within their communities. However, these groups may be at some disadvantage in establishing such social networks (for example due to mobility issues, or absence of a network of work colleagues), so this question has a focus on the extent to which arts or cultural heritage activities may help to reduce social isolation.

*Policy research question*  
17

*What impact does involvement in arts and cultural heritage have on development and maintenance of community networks and community support?*

*Existing data*

The ABS General Social Survey collects data about involvement in social groups and community support groups or involvement in activities organised by these groups. There are also questions about contact with family and friends, trust of people and institutions, and whether they have done any unpaid voluntary work, in addition to data about involvement in and consumption of arts and cultural heritage services. Analysis could be undertaken to investigate the characteristics of persons who are members and actively involved in arts or heritage groups.

There is also some data available on the participation in arts/cultural heritage activity for Indigenous persons (ABS National Aboriginal and Torres Strait Islander Social Survey (NATSISS)), and persons with a disability (ABS Survey of Disability Ageing and Carers (SDAC)).

The CMCSWG commissioned a literature review to explore what studies had been undertaken to assess the social impacts of participation in the arts and cultural activities, with one impact being increased 'community identity' (Australian Expert Group in Industry Studies of the University of Western Sydney 2004). This review analysed 87 studies internationally and concluded that "the biggest single group of studies addressed cognitive skills and educational attainment or self-esteem while almost as many addressed community pride/identity and or mood respectively". For example, a case study approach cited in this report (Sandell 2002) looked at the positive effect of museum visits at the individual and community level.

*Data gaps*

Current data only addresses basic information needs about whether people are members of arts or cultural heritage groups and do not fully address the research question.

## CHAPTER 3 - POLICY AND RESEARCH QUESTIONS *continued*

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### *Research directions*

Research could explore the relationship between arts or cultural heritage involvement and social networks. Research may investigate the nature of involvement in the arts and its social dimension and how socially significant this is to people.

## CHAPTER 3 - POLICY AND RESEARCH QUESTIONS *continued*

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### QUALITY OF LIFE OUTCOMES

The following are covered in this Quality of life outcomes section:

- Impacts of consumption of the arts and cultural heritage services on learning
- Motivators for leisure consumption of arts and cultural heritage services
- Career paths for artists
- Impacts of leisure involvement in the arts and cultural heritage services on general well-being

### IMPACTS OF CONSUMPTION OF THE ARTS AND CULTURAL HERITAGE SERVICES ON LEARNING

The arts and cultural heritage have a place, as curriculum content, within our formal school education system for children and youth. All stages and tiers of education include arts courses dealing with arts practice, and the interpretation of society and culture through arts practice or arts appreciation (e.g. the study of literature or mass media). The benefits of this arts involvement for learning are espoused by arts and education policies, as highlighted by the *National Education and the Arts Statement* (Ministerial Council on Education, Employment, Training and Youth Affairs and the Cultural Ministers Council 2007).

The learning needs of children and young people are a common focus of arts and cultural heritage policies. In addition to children learning to participate as young artists, writers, dancers or musicians, children are consumers of arts and cultural heritage services. Children and school groups are a large audience for many cultural heritage institutions and arts services, and it is important to research the extent to which children and young people learn from their consumption, and the benefits derived from this learning.

'Children's Voices', a 3 year study by UniSA, the SA Department of Education and Children's Services (DECS), and Windmill Performing Arts, investigated children's perception of live arts performance and their impact on children. Between 2003 and 2005, 140 five to 12-year-olds attended Windmill performances at the Festival Centre. The children, from four schools, were interviewed individually and in groups, both before and after each performance (Schiller 2006).

Also, some schools utilise arts programs particularly to assist 'youth at risk', so as to create a more attractive and amenable learning environment suitable for some young people. For example, in the Youth Arts Pilot Project 2007, selected students from Years 8 and 9, who were at risk of disengaging from mainstream education but had an interest in art, participated in the Youth Arts pilot project which ran from March to May 2007. The students participated in the arts-based learning experience for two days per week for 12 weeks (State of Tasmania Department of Education 2007).

### *Policy research question* 18

*What impact does arts education (including opportunities to consume and participate in arts and cultural heritage activities) have on school attendance, academic outcomes, life skills and other capacities of children and young people?*

### *Existing data*

The ABS Survey of Children's Participation in Cultural and Leisure Activities provides data about some arts learning undertaken outside of school hours (music lessons, dance lessons, art and craft lessons, and singing lessons). The 2006 survey also included data on children's attendance at museums, art galleries and libraries, outside school hours.

### *Existing data continued*

The 2008 ABS National Aboriginal and Torres Strait Islander Social Survey will collect information about Indigenous children's participation in Indigenous arts and cultural activities.

The CMCSWG commissioned a literature review to explore what studies had been undertaken to assess the social impacts of participation in the arts and cultural activities, with one impact being 'the impact on cognitive skills and educational attainment' (Australian Expert Group in Industry Studies of the University of Western Sydney 2004). One longitudinal study using a sample of 25,000 students after ten years of surveys and testing (Catterall 1997) claimed that participation in the arts increased educational outcomes.

The Australia Council commissioned research to explore the nature of children's reading, published in the report *Young Australians Reading: from keen to reluctant readers* (Woolcott Research Pty. Ltd. 2001). The study explored children's reading behaviour and access to books as well as attitudes to reading as perceived by young people themselves. However this study did not examine outcomes of reading behaviour.

The Longitudinal Survey of Australian Children (LSAC) began in 2004 with the first wave of data collection. The second wave was conducted in 2006 and the third wave is due to take place in 2008. The survey aims to provide insights into child development outcomes (including learning outcomes) linked to a wide range of social, educational and family influences. One of the research questions specifically intended to be addressed in this study is "What is the impact of the child's exposure to books, storytelling and other literacy-related experiences at home/in care/in pre-school or other children's service?" (Sanson et al. Melbourne, Vic: AIFS 2002). This LSAC study will also provide some data about children's cultural attendance (e.g. going to live performances, such as concerts or plays, going to the movies, visiting the library, museum or art gallery) and arts participation (eg. musical instruments, singing, ballet and other dance). Hence there is potential to utilise this survey to analyse the associations between involvement in arts or cultural heritage and learning and development.

The Australian government commissioned a study through the Australia Council and the Department of Communications, Information Technology and the Arts (Bryce, Mendelovits, Beavis, McQueen and Adams 2004) to conduct an evaluation of school-based arts education programmes in Australian schools. The study evaluated four arts programmes and although specific benefits were found, the overall conclusion was that involvement in arts programmes had a positive impact on students' engagement with learning.

### *Data gaps*

While some data is available relating to post secondary school education in the creative arts field of study, there is no data available on primary or secondary school curricula as they relate to arts education.

A number of studies have investigated impacts of the arts on learning (for adults and children), but a recent literature review concluded that "there are difficulties associated with the quality of the evidence produced in most of the studies covered" (Australian Expert Group in Industry Studies of the University of Western Sydney 2004). Research in this area is difficult due to the complexity of influences that impact on a broad outcome such as learning or educational attainment. It is very difficult to establish causal

## CHAPTER 3 - POLICY AND RESEARCH QUESTIONS *continued*

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### *Data gaps continued*

relationships between artistic involvement and learning outcomes. Australian Expert Group in Industry Studies of the University of Western Sydney 2004 suggest that research in this area should focus on understanding the mechanisms that operate to enhance learning (or other outcomes).

### *Data development actions*

ABS

Explore the potential for collation of statistical data from existing education data sources that may be relevant to participation in arts education programs by children and young people.

### *Research directions*

Utilise the Longitudinal Survey of Australian Children (LSAC) to analyse the relationship between arts and cultural heritage involvement of children and their learning and development outcomes.

There is a need for case study research that evaluates the mechanisms that mediate between arts or cultural heritage education and learning outcomes and/or educational achievements for children and young people. This includes evaluation research that has a focus on particular government arts education programs for 'youth at risk'.

### MOTIVATORS FOR LEISURE CONSUMPTION OF ARTS AND CULTURAL HERITAGE SERVICES

As governments provide support for arts and cultural heritage services, they need to know how the community perceives the value of these activities (covered earlier in policy research question 2 about 'perceived value'). Another way to tackle the question of perceived value is to ask what motivates people to engage in these activities. Asking about motivations may provide insights about the perceived benefit of these activities, and it is likely that there are a range of motivations involved (from enjoyment, expression, spiritual through to community welfare goals).

In this section a question has been posed about what preferences exist for involvement in arts and cultural heritage. Information may be required at a broad level about people's leisure choices, and their level of interest in arts and cultural heritage services in comparison with other leisure opportunities.

### *Policy research question* 19

*Why are people involved in consumption of creative arts and cultural heritage services during leisure time? What are their motivations, and what are the perceived benefits of this involvement?*

### *Existing data*

As outlined in Chapter 2, core statistics on involvement provide a reasonable amount of data on the levels of consumption of arts and cultural heritage services in the general population. These surveys provide some indication of what is 'leisure' participation, and a conceptual framework is being developed to improve the ability to distinguish leisure participation from other forms of involvement. None of these data sources seek information about motivations for this involvement.

However, some service providers (including government funded providers) in the arts and cultural heritage undertake research with their consumers, and sometimes seek information about consumer motivations. These organisations have an ongoing need to monitor their own clients, and understand their needs, including leisure choices and preferences.

## CHAPTER 3 - POLICY AND RESEARCH QUESTIONS *continued*

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### *Existing data continued*

The Australian Museum Audience Research Centre (AMARC) has developed an understanding of audiences, their needs and their behaviour through research and evaluation projects. Reports including *Who Visits Museums?*, *What Do People Want From a Museum Visit?* and *A summary of characteristics of this audience and their carers* are available from the AMARC website <[www.amonline.net.au](http://www.amonline.net.au)>.

Saatchi and Saatchi 2001 asked people about how the arts rate in relation to other life activities, such as sport and gardening (Saatchi and Saatchi 2001).

### *Data gaps*

While extensive market research has been undertaken by individual businesses and organisations providing arts or cultural heritage services, much of this research is focussed on their existing client base. Many of these organisations do not have the capacity for wider population research, although some work has been done privately in this area.

While ABS data provide population estimates of consumption, current surveys do not directly ask respondents why they choose one leisure activity over another.

### *Research directions*

Research could focus on consumers or others involved in arts or cultural heritage to understand why they undertake particular activities, and what benefit they get from the experience. Such research may need to be more qualitative in nature, as it is unlikely that any depth of understanding could be gleaned from population surveys.

### CAREER PATHS FOR ARTISTS

Many arts policies and programs seek to support the career development of artists, including musicians, visual artists, actors, writers, singers, and dancers. In the arts and cultural heritage field, policies such as the Victorian Arts' policy *Creative Capacity +... Arts for all Victorians*, (Arts Victoria 2003a) Queensland's *Creativity is big business: A framework for the future* (Queensland Government State Development 2003), NSW's *Arts NSW Strategic Plan 2007-2011*, (Arts NSW 2007) and Arts SA's *Arts +... Investing in the Arts & our artists* (Arts SA 2000) all highlight the need to promote career development for artists.

The Contemporary Music Touring Program is an example of a program assisting with career development. This program supports touring opportunities for Australian musicians (Department of the Environment, Water, Heritage and the Arts 2006).

The research question posed here seeks to understand what creative skills are developed through arts practice and training, and how these may be applied in the workplace, and in particular in arts practice. Anecdotally, it has been observed that the career paths of creative artists are not usually a straight forward progression from formal training to paid work. Some may not have formal training initially, while others do. Some may not find paid employment, and may do unpaid work to practice skills and gain exposure. Many careers may involve experience in a range of different jobs, some of which may not be arts related. Given that government arts programs seek to support career development for artists, this question seeks to understand the career paths of artists.

In particular, it may be useful for this question to focus on examining how artists have succeeded, and what are the factors that lead to success. It may be equally useful to follow-up artists who had formal training, but have not pursued an arts career, and uncover what factors led to this decision to opt out of an arts career.

Policy research question  
20

*What are the career paths of artists (e.g. musicians, actors, visual artists, singers, dancers, writers)? What are the factors that contribute to a successful career, from the artists perspective? For those artists with formal training, but who subsequently do not pursue an artistic career, what factors contribute to this outcome?*

Existing data

A useful starting point in addressing this question would be statistical data on how many people are professional artists and how many people undertook formal arts training.

The Census of Population and Housing provides data on a person's highest qualification, which permits some analysis of persons qualified in the creative arts field. However, this will be limited because there may be many individuals with arts training for whom this is not their highest formal qualification (e.g. a Diploma of Art may be superseded by a subsequent degree in another field).

ABS data provides basic statistics on the numbers of people involved in creative arts through the ABS Survey of Work in Selected Culture and Leisure Activities, and this survey includes a question about whether a person has any qualification relevant to their arts work. It is not possible to identify who are professional artists from this survey, and the definition of a 'professional' artist requires further work (as discussed in Chapter 2).

The ABS undertakes several surveys on education and training, which provide data on qualifications and training in the creative arts field. The Creative arts field of education is defined in the *Australian Standard Classification of Education (ASCED), 2001* (cat. no. 1272.0).

Information about the career paths of professional artists can be gleaned to some extent from Throsby and Hollister 2003 which explores the qualifications and career choices of artists.

*Resourcing Dance: An analysis of the subsidised Australian dance sector* includes a chapter about "The life of a dancer: Employment, training and career paths" which includes information from interviews with 25 individual dancers about their career (Australia Council 2004).

Data gaps

While some data is available, there are currently no studies that follow-up the career outcomes for people who completed formal creative arts training (e.g. tertiary study in creative arts). Information about education data sources is described under Supply of skills for arts industries (policy research question 7).

Some studies have been undertaken with professional artists to examine their career aspirations and training (Throsby and Hollister 2003), but there is potential to build on this work. In particular, it may be useful to conduct more in-depth specialised studies of the careers for particular types of artists (musicians, visual artists, etc.), since their career paths and factors of success are likely to be different.

Research directions

Research to follow-up the career outcomes of persons who have completed formal artistic training would be needed to ascertain what leads people to pursue an artistic career or not.

More in-depth research is needed to understand the career paths for particular types of artists (musicians, singers, dancers, actors, writers, etc.).

## CHAPTER 3 - POLICY AND RESEARCH QUESTIONS *continued*

### IMPACTS OF LEISURE INVOLVEMENT IN THE ARTS AND CULTURAL HERITAGE SERVICES ON GENERAL WELL-BEING

In addressing this issue, 'well-being' is referred to as the health outcomes for individuals - which encompasses both mental and physical health. In the health field, there are two broad approaches to policy - the first being to care for people who are ill; and the second being to promote and encourage well people to maintain a healthy life. In this paper the focus is on maintenance of well-being in the general population, rather than treating people who are ill.

Nonetheless, it should be acknowledged that health services have begun to explore alternative avenues to assist patients with their recovery. For example, arts activities such as listening to music and art therapy, are used to assist patient recovery. Internationally, Arts Council England recently reviewed the use of arts in healthcare and is considering policy development in this area (Staricoff 2004). While this is of interest to government policy in the arts, such clinical health research is outside the scope of this plan.

Australian policies reviewed for this paper aim to foster arts or cultural heritage consumption to provide general well-being. A recent Australia Council report, *Art and Well-being*, highlighted several case studies where general health benefits were observed (Mills and Brown 2004).

The focus of this question is on the generic health benefits that may be derived from leisure involvement in arts and cultural heritage. Leisure pursuits of all kinds provide the opportunity to simply relax and unwind, and arts and cultural heritage services make up a large component of leisure activities which may be passive consumption (listening to music, reading, watching TV, seeing movies, listening to radio, etc.) or active creative participation (hobby painting; arts and crafts activities; amateur photography). When examining potential links between arts and cultural heritage leisure activity and general well-being, it may be useful to look at this in the wider context of leisure research.

In an ageing population, there is a need to understand how well-being can be enhanced and maintained into old age, with arts and cultural heritage potentially having a role to play. There is also some interest in addressing this question for other vulnerable population groups. For example, persons with a disability may have greater potential to derive well-being benefits from arts or cultural heritage leisure involvement. Due to its government policy relevance, this question has a focus on the ageing and disabled population and their use of leisure time, including involvement in arts or cultural heritage services.

Policy research question  
21

*What impacts on health and general well-being are experienced by individuals when they consume and/or participate in arts or cultural heritage services for leisure? In particular, what is the benefit of arts and cultural heritage leisure involvement for the well-being of older persons, or persons with a disability, or for other groups that are potentially vulnerable to health problems?*

Existing data

ABS surveys provide some data on the level of consumption and participation in arts and cultural heritage for the general population, including older persons. As discussed in Chapter 2, there is some ability to analyse hobby activity for the general population. The Survey of Disability, Ageing and Carers also provides some data on arts and cultural activity, albeit limited. The ABS Time Use Survey provides information about all activities undertaken during 'free time', permitting an analysis of leisure activities, including arts

### *Existing data continued*

related activities. However, these data sources provide no information about the impacts of arts involvement on any aspects of well-being.

The CMCSWG commissioned a literature review to explore what studies had been undertaken to assess the social impacts of participation in the arts and cultural activities (Australian Expert Group in Industry Studies of the University of Western Sydney 2004). This project uncovered some research relevant to assessing wellbeing outcomes for persons involved in the arts (e.g. Everitt and Hamilton 2003), but identified few studies in Australia. A literature review undertaken by Selwood (2002) found that "while there is a large body of research, documented case studies and anecdotes, which are used to illustrate the impact of the arts, the sector is under increasing pressure to provide 'robust' evidence". As noted by AEGIS, Selwood concludes that data are mostly drawn from case studies, project evaluations, cameos, brief accounts of engagement with specific groups in the community, and anecdotal quotes from staff, project workers and project participants.

Nevertheless, there is some Australian research being undertaken to look at various aspects of wellbeing and arts involvement. Some Australian Research Council grants are being used to fund research projects into young people's participation and non-participation as audiences of live theatrical performances; children's engagement, learning and cultural belonging through involvement in art and culture; healthy adolescence through musical participation; young children's identity construction in and through music; and using cultural intervention to inform the public about disease and public health threats.

### *Data gaps*

While ABS surveys can assess the levels of involvement and time spent on arts and cultural heritage, including leisure involvement, this does not provide any direct indication of their relationship to well-being.

Additional research studies would be needed to examine the impacts of leisure involvement on well-being. A few research studies are already underway, looking at some aspects of wellbeing, and it appears that children and youth have received some attention from researchers. A case study approach may be employed for looking at other groups of interest, such as older people or people with a disability.

### *Research directions*

Research on the impacts of arts and cultural heritage leisure involvement on well-being for the elderly and disabled would be most relevant to inform future policy directions. Research that sought to understand how arts and cultural heritage benefited groups in maintaining a healthy life would be of particular relevance to assist the formulation of government policy in this area.

## CHAPTER 4 - SUMMARY OF FUTURE DIRECTIONS

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### INTRODUCTION

A number of broad research directions and some more specific data development actions have been identified in this plan, as described in the previous chapter. The summary below provides an overview of these directions.

The data development actions link are intended to be incorporated on the work programs of the Australian Bureau of Statistics (ABS) and the Cultural Ministers Council Statistics Working Group (CMCSWG) where feasible. However, the inclusion of these actions in the plan is no guarantee that these needs can be met, since this is contingent upon the continued availability of resources, and the feasibility of the project. At the time of preparing this plan, the actions identified are those that were most likely to be feasible for the ABS' National Centre for Culture and Recreation Statistics (NCCRS) and/or CMCSWG to implement.

In regard to the many broad research directions highlighted in this plan, it is anticipated that there are some useful topics that could be undertaken by the wider research community. The research directions that have been identified in the summary below are not the only options for research in addressing the research questions. These research directions are those that were thought to be most useful, at the time of writing. Ideally, a more comprehensive research review is needed for each question, including consultation with the wider research community, but this was beyond the scope of this plan. Therefore, a more comprehensive review of existing research for each question may reveal a new or improved focus for research. As far as possible, ABS and CMCSWG will encourage and support other researchers who elect to assist in pursuing these research directions and/or in formulating more focussed directions for research to address these questions.

### POLICY RESEARCH QUESTION 1

*What characteristics or indicators are most useful for ongoing regular reporting to monitor the health of the arts and cultural heritage in Australia?*

#### *Data development actions*

#### CMCSWG

Continue to develop a set of cultural indicators to support the assessment of the health of the arts and cultural heritage sector.

#### ABS

Continue to support the measurement of relevant cultural indicators by assisting CMCSWG to define and/or source relevant high quality data, whether from ABS or other sources.

### POLICY RESEARCH QUESTION 2

*How do the direct consumers of arts and cultural heritage services perceive the value of these services? How is value perceived by those who do not directly consume these services?*

#### *Research directions*

Develop definitions and standards for measures of perceived value of the arts and cultural heritage, which may be appropriate for use on population surveys. Undertake a national survey of perceived value of the arts and cultural heritage.

### POLICY RESEARCH QUESTION 3

*What are people prepared to pay for public cultural heritage services and public arts programs? What are the implications for access to services when fees are imposed?*

## CHAPTER 4 - SUMMARY OF FUTURE DIRECTIONS *continued*

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<i>Research directions</i>	Develop a guide for researchers in the arts and cultural heritage to assist them with research design and methodologies when undertaking case study research to assess willingness to pay for these services.
POLICY RESEARCH QUESTION 4	<i>What is the level of private sector support for arts and cultural heritage? Is private support of the arts and cultural heritage increasing or decreasing over time? How does it compare with private support provided to other industries? What are the motivators and barriers for private investment in arts and cultural heritage?</i>
<i>Data development actions</i>	CMCSWG Continue existing work to review and analyse existing data on private sector support, with a view to improving data collections and research in this area in future.  ABS Support the work of CMCSWG in providing analyses of existing data on private sector support. Continue to provide advice regarding the options for developing data standards and meeting data needs using ABS data and other sources.
<i>Research directions</i>	Case study research with organisations and businesses contributing private support to arts and cultural heritage could focus on gaining an understanding of their reasons for giving, and the impact of government incentives. Case study research may also be conducted with non supporting businesses to understand what incentives (if any) may influence decisions to give to arts or cultural heritage.
POLICY RESEARCH QUESTION 5	<i>How profitable are the arts industries? To what extent is income derived from direct sales to consumers compared with other avenues (such as private sponsorship, government subsidy, tax relief, indirect revenue such as intellectual property rights)? What competition is faced by Australian arts industries? Is there sufficient market for Australian arts industries to permit them to operate on a fully commercial basis?</i>
<i>Data development actions</i>	ABS Continue to work with CMCSWG and relevant arts industry peak bodies to understand the priority for arts industry statistics. In particular, explore the potential for improved use of Australian Tax Office (ATO) data in future.
<i>Research direction</i>	Individual arts industries could review their needs for improved administrative data, market research or other industry research, and enhance their data collection and research capacity to address these needs on an ongoing basis.
POLICY RESEARCH QUESTION 6	<i>How is new technology impacting on the supply and consumption of arts and cultural heritage goods and services?</i>
<i>Data development actions</i>	ABS Review the survey of Attendance at Selected Cultural Venues and Events to assess whether improved data could be provided in regard to a wider scope of consumption of arts and cultural heritage services, while separately identifying consumption that uses various technologies.

## CHAPTER 4 - SUMMARY OF FUTURE DIRECTIONS *continued*

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<i>Research direction</i>	Future research could focus on industry case studies in particular areas of the arts or cultural heritage to understand how supply and consumption are changing due to technological change.
POLICY RESEARCH QUESTION 7	<i>Do arts industries have an adequate supply of skilled people to allow them to remain viable or develop and grow?</i>
<i>Data development actions</i>	ABS Review education statistics data sources to assess the potential for enhanced dissemination of statistics relevant to enrolment and completion of arts related education. Identify opportunities to enhance the development of these data sources to provide improved data where possible.
<i>Research directions</i>	Research studies could be undertaken with particular arts industries to determine whether employing organisations have enough skilled people available, and to understand what skill gaps exist (if any).
POLICY RESEARCH QUESTION 8	<i>How does arts and cultural heritage contribute to innovation in the wider economy? What are the links, flows or value chains between the arts and cultural heritage and other industries (e.g. what are the downstream impacts of cultural products, including knowledge, education or ideas)?</i>
<i>Research directions</i>	Case study research with specific arts or cultural heritage industries is needed to understand the way in which they contribute to innovation in the wider economy. This need has not been specifically addressed with existing creative industries studies.
POLICY RESEARCH QUESTION 9	<i>How significant are arts and cultural heritage related tourism to an area's economy, either for Australia as a whole or for cities, regions or towns within Australia? How many tourists visit, or extend their stay to an area, in order to consume arts or cultural heritage services? What proportion of all tourists to an area consumes arts or cultural heritage services during their visit?</i>
<i>Data development actions</i>	CMCSWG Evaluate the use of the CMCSWG guide which aims to assist local areas with cultural tourism research studies.
<i>Research directions</i>	Investigate the potential for development of common sources of small area data, relating to arts and cultural heritage tourism (such as visitor information centres; local cultural institutions; visitor surveys; community surveys). Develop standard methodologies for collection of common regional data where feasible.
POLICY RESEARCH QUESTION 10	<i>To what extent is creative arts involvement the main job or a secondary job for artists in Australia? How do professional creative artists earn a living, if not from their creative arts work? How would they prefer to earn a living, and do artists perceive that it is feasible for them to earn a living from their arts work?</i>

## CHAPTER 4 - SUMMARY OF FUTURE DIRECTIONS *continued*

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### *Data development actions*

ABS

Develop a definition of what characteristics may be used to identify 'professional artists', which can be operationalised through survey research. If feasible, develop ABS surveys to provide data for relevant characteristics of arts involvement that may permit a count of the total number of professional artists, and assessment of their sources of income. The feasibility of doing this is yet to be assessed.

### *Research directions*

Research on the career choices and motivations of artists is needed, perhaps employing more qualitative methods, targeting artists in a variety of income and employment situations.

### POLICY RESEARCH QUESTION 11

*When people become involved in or consume arts and cultural heritage services does this involvement assist them to develop or maintain affinity with a particular cultural group, particularly for Indigenous or ethnic population groups? Does involvement in arts and cultural heritage services foster an Australian sense of identity?*

### *Research directions*

Definitional work is required to better understand the concept of cultural identity, as a precursor to research that investigates the role the arts and cultural heritage plays in development or maintenance of cultural identity.

Further research could be undertaken to assess the level of involvement of people from different ethnic groups in arts and cultural heritage.

### POLICY RESEARCH QUESTION 12

*Of all the things that contribute to cultural identities, how important are involvement in and/or consumption of arts and cultural heritage services? How do people come to understand or share their cultural identities? In particular, how important are the arts and cultural heritage services for cultural maintenance or development within a cultural group (i.e. via television, radio, going to live performances, reading, going to a museum)?*

### *Research directions*

Definitional work is required to better understand the concept of cultural identity, as a precursor to research that investigates the role the arts and cultural heritage plays in development or maintenance of cultural identity.

Future research could focus on the role of arts and cultural heritage in development and maintenance of cultural identity, relative to other activities (family, work, sport, etc.). Such research would be likely to be breaking new ground, and would require development of appropriate research methods, as well as concepts and definitions.

Analysis of the arts and other activities of different country of birth groups using the ABS Time Use Survey may provide a starting point for understanding the potential links between involvement in arts and cultural identity, even though this data source cannot fully address the issue.

### POLICY RESEARCH QUESTION 13

*Does the cultural content of Australian heritage collections reflect the evolution of Australian cultural identity (or identities) over time, as well as the cultural diversity of Australian society, inclusive of Indigenous culture and various ethnic community cultures?*

## CHAPTER 4 - SUMMARY OF FUTURE DIRECTIONS *continued*

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### *Research directions*

More specifically identify the policy research needs that deal with the question of the cultural relevance of heritage collections, in consultation with the collections sector. Undertake a review of research activity that investigates the associations between heritage collections and cultural identity.

### POLICY RESEARCH QUESTION 14

*Do people develop more tolerant attitudes to different cultures within society through their involvement in or consumption of arts or cultural heritage services? To what extent do people consume arts or cultural heritage services outside their own cultural group (e.g. Indigenous or ethnic festivals)?*

### *Research directions*

Research, such as evaluation studies with longitudinal methodologies, may be useful to investigate the effectiveness of particular programs which are designed to influence attitudes, e.g. Indigenous arts programs associated with reconciliation and arts or heritage programs that aim to build links to Muslim communities.

### POLICY RESEARCH QUESTION 15

*How many people participate in or consume the arts and cultural heritage services in Australia? What are their characteristics? What levels of involvement occur in regions? What are the levels of involvement for specific population groups, such as: Indigenous Australians; ethnic groups; and persons with a disability?*

### *Data development actions*

ABS

Investigate the possibility of improving the coverage and/or analysis of data in relation to arts or cultural heritage involvement for different sub-populations of interest (Indigenous; low-income groups; persons with a disability; ethnic groups).

### *Research directions*

Explore potential for regional data to be generated from common local data sources, such as local community surveys funded by local councils, or data collections from local arts or cultural heritage services. Develop standard methodologies for collection of data related to involvement in arts or cultural heritage services from these sources.

### POLICY RESEARCH QUESTION 16

*What are the characteristics of persons who do not access arts and cultural heritage services (even though they have the opportunity to)? Why don't they? What would encourage their involvement? Are they aware of the arts and cultural heritage services, and are they considered relevant or of interest? Are there different reasons for non-access for different population groups, such as Indigenous Australians, ethnic groups, persons with disabilities, children or older people? What are the barriers for those who want to gain more access?*

### *Data development actions*

ABS

Investigate the possibility of adding data items onto relevant ABS surveys to identify those respondents who want more involvement in the arts or cultural heritage and if so, whether they experience 'barriers' to their involvement such as cost, travel, information, etc. While ABS could scope the potential to provide this data, additional funding would be required to implement new data collection in this area.

### POLICY RESEARCH QUESTION 17

*What impact does involvement in arts and cultural heritage have on development and maintenance of community networks and community support?*

## CHAPTER 4 - SUMMARY OF FUTURE DIRECTIONS *continued*

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### *Research directions*

Research could explore the relationship between arts or cultural heritage involvement and social networks. Research may investigate the nature of involvement in the arts and its social dimension and how socially significant this is to people.

### POLICY RESEARCH QUESTION 18

*What impact does arts education (including opportunities to consume and participate in arts and cultural heritage activities) have on school attendance, academic outcomes, life skills and other capacities of children and young people?*

### *Data development actions*

ABS

Explore the potential for collation of statistical data from existing education data sources that may be relevant to participation in arts education programs by children and young people.

### *Research directions*

Utilise the Longitudinal Survey of Australian Children (LSAC) to analyse the relationship between arts and cultural heritage involvement of children and their learning and development outcomes.

There is a need for case study research that evaluates the mechanisms that mediate between arts or cultural heritage education and learning outcomes and/or educational achievements for children and young people. This includes evaluation research that has a focus on particular government arts education programs for 'youth at risk'.

### POLICY RESEARCH QUESTION 19

*Why are people involved in consumption of creative arts and cultural heritage services during leisure time? What are their motivations, and what are the perceived benefits of this involvement?*

### *Research directions*

Research could focus on consumers or others involved in arts or cultural heritage to understand why they undertake particular activities, and what benefit they get from the experience. Such research may need to be more qualitative in nature, as it is unlikely that any depth of understanding could be gleaned from population surveys.

### POLICY RESEARCH QUESTION 20

*What are the career paths of artists (e.g. musicians, actors, visual artists, singers, dancers, writers)? What are the factors that contribute to a successful career, from the artists perspective? For those artists with formal training, but who subsequently do not pursue an artistic career, what factors contribute to this outcome?*

### *Research directions*

Research to follow-up the career outcomes of persons who have completed formal artistic training would be needed to ascertain what leads people to pursue an artistic career or not.

More in-depth research is needed to understand the career paths for particular types of artists (musicians, singers, dancers, actors, writers, etc).

### POLICY RESEARCH QUESTION 21

*What impacts on health and general well-being are experienced by individuals when they consume and/or participate in arts or cultural heritage services for leisure? In particular, what is the benefit of arts and cultural heritage leisure involvement for the well-being of older persons, or disabled persons, or for other groups that are potentially vulnerable to health problems?*

## CHAPTER 4 - SUMMARY OF FUTURE DIRECTIONS *continued*

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### *Research directions*

Research on the impacts of arts and cultural heritage leisure involvement on well-being for the elderly and disabled would be most relevant to inform future policy directions. Research that sought to understand how arts and cultural heritage benefited groups in maintaining a healthy life would be of particular relevance to assist the formation of government policy in this area.

## APPENDIX 1 FULL LIST OF RESEARCH QUESTIONS

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### INTRODUCTION

The table below outlines the full list of research questions from the discussion paper *Arts and Cultural Heritage in Australia - Key Issues for an Information Development Plan, March 2006* (cat. no. 4915.0.55.001). The 'old' number refers to the numbering system used in the discussion paper. The 'new' numbering has been applied to simplify the information presented in this Information Development Plan.

## APPENDIX 1 FULL LIST OF RESEARCH QUESTIONS *continued*

Old number	New number	Research question
1		CULTURAL POLICY ISSUES
1.1		Cultural relevance and diversity of heritage collections Cultural heritage
1.101		What types of cultural content are included in the collections of Australia's heritage institutions?
1.102	13	Does the cultural content of Australian heritage collections reflect the cultural diversity of Australian society, including Indigenous culture and various ethnic community cultures?
1.103		What proportion of cultural content included in cultural heritage collections relates to contemporary culture or a projection of the future society, compared with historical material? Does the contemporary cultural content of Australian heritage collections reflect aspects of Australian contemporary society that will be important to preserve for future? Arts
1.104		To what extent do people contribute to the maintenance of cultural traditions and/or the development or interpretation of culture through their involvement in arts (or is it mainly done for recreation, entertainment or business reasons which are less concerned with a cultural dimension)?
1.105		Does the level of participation in the arts represent our diverse community (including Indigenous people and different ethnic or cultural groups)?
1.106		Does Australian arts output (with a cultural content) adequately represent the cultural diversity of Australia, including Indigenous culture?
1.2		Balance between Australian and foreign cultural content
1.201		To what extent are Australians consuming Australian arts compared with overseas-sourced arts? How do Australians access foreign arts content?
1.202		What proportion of cultural heritage collections include non-Australian content or represent overseas cultures?
1.203		Do Australians have reasonable access to Australian arts content?
1.204		What level of access to Australian arts and cultural heritage content do Australians want, compared with access to other foreign content?
1.205		To what extent can people in ethnic groups in Australia gain reasonable access to arts and cultural heritage services relevant to their cultural background?
1.3		Impacts of arts and cultural heritage on cultural identity
1.301	11	Do people become involved in or consume arts and cultural heritage services in order to develop or maintain affinity with a particular cultural group? Does this contribute to a healthy sense of belonging?
1.302		What impact does involvement in or consumption of arts and cultural heritage have on the development and maintenance of cultural group networks?
1.303		What do Australians think an Australian cultural identity is, and how important is this to Australians? To what extent do Australians belong to multiple cultural groups with multiple cultural identities, and how important are these? How do these Australian and other multiple cultural identities relate to arts and cultural heritage involvement or consumption?
1.304	12	Of all the things that contribute to cultural identities, how important is involvement in and/or consumption of arts and cultural heritage services? How do Australians come to understand or share their cultural identities (i.e. via TV, radio, going to live performances, reading, neighbours, friends, family history, going to a museum)?
1.4		Impacts of arts and cultural heritage on cultural awareness and tolerance
1.401		How much arts or cultural heritage content deals with or expresses cultural issues (such as diverse religious or moral beliefs and values, diverse ways of life of ethnic cultures or nation-state cultures)?
1.402		What do people learn about culture from their involvement in or consumption of arts or cultural heritage services?
1.403		What impact does involvement in or consumption of arts and cultural heritage services have on Indigenous reconciliation objectives?
1.404	14	Do people develop more tolerant attitudes to different cultures within society through their involvement in or consumption of arts or cultural heritage services?
1.405		To what extent do the arts and cultural heritage facilitate the maintenance of 'traditional' cultural identities, in addition to shaping new or evolving culture?
2		SOCIAL POLICY ISSUES
2.1		Accessibility of arts and cultural heritage services Cultural heritage
2.101	15	How accessible are cultural heritage services in Australia? Who has access and how do they access these services? What level of access is available in regional, rural and remote areas?
2.102		Do the characteristics of consumers of cultural heritage services represent our diverse community? How often do they access services and how do they access them (e.g. on-line, visits)?

## APPENDIX 1 FULL LIST OF RESEARCH QUESTIONS *continued*

<i>Old number</i>	<i>New number</i>	<i>Research question</i>
2.103	16	What are the characteristics of persons who choose not to access cultural heritage services (even though they have the opportunity to)? Why don't they? What would encourage their attendance? Are they aware of the services, and are they considered relevant or of interest? Are there different patterns of consumption for different population groups, such as Indigenous Australians, ethnic groups, older people or different family types? Arts
2.104	15	How accessible are opportunities to participate in or consume the arts in Australia? Who has access? What levels of access are available in regions?
2.105		In what ways does consumption of the arts and/or creative arts participation vary for different people across Australian regions and for different population groups? Are there different patterns of consumption for different population groups, such as Indigenous or ethnic groups?
2.106	16	What are the characteristics of persons who choose not to participate in or consume arts services (even though they have the opportunity to)? Why don't they? What 'arts' are they aware of, and are they considered relevant or of interest? Are there different patterns of participation and consumption for different population groups, such as Indigenous Australians, ethnic groups, older people or different family types?
2.2		Impacts of arts and cultural heritage services on community networks
2.201		Do people become involved in cultural heritage or arts in order to meet people or be with other people?
2.202		What kinds of arts or cultural heritage activities provide positive social interactions?
2.203		Are longer-term friendships or social relationships formed from participation in creative arts (other than paid work) or volunteer involvement in cultural heritage activities?
2.204	17	What impact does involvement in arts and cultural heritage have on development and maintenance of community networks and community support?
2.205		What impact does consumption of arts and cultural heritage services have on development and maintenance of community networks and community support?
2.206		Of all the things that contribute to social capital (i.e. social networks which facilitate cooperation within or among groups, such that this cooperation is a resource available within communities), how important is involvement in and/or consumption of arts and heritage services?
2.3		Impacts of arts and cultural heritage on civic participation
2.301		How much arts or cultural heritage content deals with or reflects on political or civic issues (such as political history, civic decision making, government or international affairs)? Is this changing over time? If so, why?
2.302		What impacts do arts and heritage services have on community awareness and debate about current political or civic issues?
2.303		To what extent are multiple points of view about social, political and economic issues put forward to the community through the arts and cultural heritage services? Are these views balanced and fairly represented? (This issue predominantly applies to mass media.)
2.304		What are the benefits of international exchange of arts and cultural heritage?
2.4		Impacts of arts and cultural heritage on social responsibility
2.401		How much arts or cultural heritage content deals with or reflects on social issues (such as crime, education, family relationships)? What do people learn about social issues from their involvement with or consumption of arts or cultural heritage?
2.402		Do people develop more adaptive behaviour or constructive attitudes to social situations within society through their involvement with arts or cultural heritage (e.g. a movie, novel or music with a social theme or message)? Under what circumstances do destructive attitudes or behaviours arise from arts or cultural heritage activity (such as violence on TV)?
2.403		What are community attitudes regarding the balance between freedom of expression and minimisation of socially undesirable outcomes for artistic expression or arts censorship decisions (e.g. film and television regulation)?
2.404		What impact does involvement in or consumption of arts and cultural heritage services have on crime or anti-social behaviour?
3		QUALITY OF LIFE ISSUES FOR PERSONS INVOLVED IN THE ARTS
3.1		Barriers and motivators for arts involvement as a leisure activity
3.101		How much time do Australians spend on involvement in the arts for recreation or leisure, and how does this compare to other leisure activities? Is arts involvement increasing or declining as a leisure pursuit for Australians? Why? What particular activities are increasing or declining and why?
3.102		Why are people involved in arts activities during leisure time? To what extent is leisure participation motivated by a desire to relax and unwind, and/or to make a contribution to the culture of community, or to help others?
3.2		Quality of life for arts professionals
3.201		How many Australians are involved in the arts as 'professionals' regardless of whether this is their main job?
3.202		How much time do professional creative participants spend on their creative practice? Would they like to spend more time or less time? What other activities compete for their time?
3.203		How does the requirement to earn an income change the nature of the creative practice (i.e. production of 'commercial' products to meet demand)? Is this perceived negatively or positively by professionals?

## APPENDIX 1 FULL LIST OF RESEARCH QUESTIONS *continued*

Old number	New number	Research question
3.204		Why are people involved in arts as professionals? To what extent are professional artists motivated by a desire to contribute to the cultural life of the community, and/or for their own enjoyment and self-expression, and/or to earn a living as a recognised artist?
	3.3	Artists' skills acquisition
3.301		How do professional and amateur/leisure artists learn their artistic skills (from peers or mentors, arts education, self teaching through experience and practice)? What are the best learning methods for particular kinds of artists or art forms?
3.302		To what extent is arts education needed to support skill development and learning for professional and amateur/leisure artists? How effective is arts training?
3.303		What are the skill gaps for amateur/leisure artists (if any)?
3.304		What are the skill gaps for professional artists (if any)? Are professional arts practitioners 'skilled' to the degree required to earn a living from their arts practice? Do they have the business skills that they need in addition to the arts skills? Do they have the skills they need to utilise 'new' technology in the arts production process?
3.305		To what extent does school based arts education equip people to be involved in creative arts (on a professional basis) later in life?
	3.4	Impacts of arts involvement on learning
3.401		Does creative arts participation on a professional or amateur/leisure basis, lead to the development of other skills (e.g. organisational skills, communication skills, critical thinking skills, conceptual skills)?
3.402	20	Does participation in creative arts, either on a professional or amateur/leisure basis, lead people to be more creative and innovative in other areas of their lives, and at work (whether it be work in the arts or non-arts work)?
	3.5	Impacts of arts involvement on sense of achievement
3.501		What recognition do professional or leisure artists achieve for their work?
3.502		To what extent does external recognition contribute to a sense of personal achievement in professional or leisure artists?
3.503		To what extent does a sense of achievement in involvement in the arts contribute to enhanced self esteem, a positive sense of self identity, or related aspects of mental wellbeing and adjustment?
	3.6	Impacts of arts involvement on general wellbeing
3.601		What impacts (both positive and negative) on health and general wellbeing are experienced by individuals when they are involved in the arts, either on a professional or leisure basis?
3.602		What are the underlying mechanisms that result in health benefits (e.g. self esteem derived from arts achievement, sense of belonging derived from participation in a group arts project)?
3.603		Are there any health risks for people who are involved in the arts professionally, and how could these be mitigated (e.g. occupational health issues, financial stress, mental health risks associated with isolation or demands of creative work)?
	4	QUALITY OF LIFE ISSUES FOR CONSUMERS
	4.1	Barriers and motivators for leisure consumption of arts and cultural heritage services
4.101		How much time do Australians spend on the consumption of arts or cultural heritage for recreation or leisure, and how does this compare to other leisure activities? Is this consumption increasing or declining as a leisure pursuit for Australians? Why? What particular activities are increasing or declining, and why?
4.102	19	Why are people involved, or not involved, in consumption of creative arts and cultural heritage services during leisure time? What are the barriers and motivators?
	4.2	Impacts of consumption of the arts and cultural heritage services on general wellbeing
4.201	21	What impacts on health and general wellbeing are experienced by individuals when they consume arts or cultural heritage services?
4.202		What are the underlying mechanisms that result in health benefits (e.g. relaxation derived from listening to music)?
	4.3	Impacts of consumption of the arts and cultural heritage services on learning
4.301		What impact does consumption of arts or cultural heritage services have on individuals' learning?
4.302	18	What impact does an arts-rich education (including opportunities to consume and participate in arts and cultural heritage activities) have on attendance, academic outcomes, life skills and other capacities of children and young people?
	5	ECONOMIC POLICY ISSUES
	5.1	Economic viability of arts industries and cultural heritage services
5.101	8	What are the links, flows or value chains between the arts and cultural heritage and other industries (e.g. what are the upstream and downstream industries)?
5.102		Do people and services involved in local creative arts practice and cultural heritage benefit from co-locating with each other in particular areas (e.g. different art forms, groups of artists, or multiple cultural heritage services co-locating)? That is, are there arts/cultural heritage hubs and are these more viable?
5.103		How much do consumers spend on arts and cultural heritage products and services? How does this compare to consumer spending on other items? Is total spending on arts and cultural heritage increasing or declining? Why? Spending on which particular items is increasing or declining and why?

## APPENDIX 1 FULL LIST OF RESEARCH QUESTIONS *continued*

<i>Old number</i>	<i>New number</i>	<i>Research question</i>
5.104	4	To what extent do arts industries and cultural heritage services compete with each other and with other industries (e.g. sport) for private (individual and corporate) sponsorship or donation dollars? Is private philanthropy of the arts and cultural heritage increasing or decreasing over time? How does it compare with total private philanthropy? What are the motivators and barriers? Arts industries
5.105		How much do arts industries contribute to Australian domestic production (Industry Value Added or Gross Domestic Product)? How is the contribution of arts industries changing over time, and why?
5.106		What would be the impact on the economy of a change in demand for arts products?
5.107	6	How is the demand for arts products changing, and why? For example, how is new technology impacting on consumption and demand for these products? How are changing age profiles, family structures and settlement patterns impacting on consumption and demand?
5.108		What are the main risks to industry growth or viability for particular arts industries, and what are the strengths?
5.109	5	How profitable are the arts industries? To what extent is income derived from direct sales to consumers compared with other avenues (such as private sponsorship, government subsidy, tax relief, indirect revenue such as intellectual property rights)? What are the expenses and are any of these increasing at a greater rate than income or other costs? How much is being spent on marketing?
5.11		To what extent does the 'image' or 'branding' of Australian arts influence consumption of arts products?
5.111		Is employment in arts industries growing over time?
5.112		To what extent are the arts reliant on volunteers compared to paid employment?
5.113		For those industries that are reliant on volunteers, what impact does this have on the services provided? Does the level of volunteer work present any risks to the viability of particular arts industries or is this a strength?
5.114	7	Do arts industries have an adequate supply of skilled people to allow them to remain viable or develop and grow?
5.115		Are there advantages in co-locating or otherwise clustering arts and other creative industries with related industries?
5.116		How do key economic indicators (e.g. levels of employment, income, expenditure) for Australian arts industries compare with arts industries overseas? Cultural heritage services
5.117		How much do cultural heritage services contribute to Australian domestic production (Industry Value Added or Gross Domestic Product)? How is the contribution of cultural heritage services changing over time, and why?
5.118		What would be the impact on the economy of a change in demand for cultural heritage services (i.e. what are the multipliers)?
5.119	6	How is the demand for cultural heritage services changing, and why? For example, how is new technology impacting on consumption and demand for these services? How are changing age profiles, family structures and settlement patterns impacting on consumption and demand?
5.120		What are the main risks to industry growth or viability for cultural heritage services, and what are the strengths?
5.121		How profitable are cultural heritage services? To what extent is income derived from direct sales to consumers compared with other avenues (such as private sponsorship, government subsidy, tax relief)? What are the expenses and are any of these increasing at a greater rate than income or other costs? How much is being spent on marketing?
5.122		What is the size of the collections maintained by cultural heritage services? Are values attributed to the collections, and if so, how is 'value' determined?
5.123		Is employment in cultural heritage services growing over time?
5.124		To what extent are cultural heritage services reliant on volunteers compared to paid employment? What proportion of organisations has more volunteers than paid employees?
5.125		For those services that are reliant on volunteers, what impact does this have on the services provided? Does the level of volunteer work present any risks to the viability of particular cultural heritage services or is this a strength?
5.126		Do cultural heritage services have an adequate supply of skilled people to allow them to remain viable or develop and grow?
5.127	6	What impact is information technology having on the supply of cultural heritage services? Does IT change the nature or viability of these services? To what extent is cultural material held by institutions digitised?
5.128		How do key economic indicators (e.g. levels of employment, income, expenditure) for Australian cultural heritage services compare with cultural heritage services overseas?
5.2		Support for Australian content
5.201		How important are Australian content quotas and the Australian expenditure conditions of tax incentive schemes in maintaining arts industries and employment in Australia?
5.202		What competition exists for arts industries, particularly competition from foreign businesses? To what extent is competition from foreign arts businesses a threat to the viability of Australian arts production?
5.203		What is the impact of the Australia - United States Free Trade Agreement on Australian arts industries, and production of Australian arts content?
5.3		Government funding of arts and cultural heritage services

## APPENDIX 1 FULL LIST OF RESEARCH QUESTIONS *continued*

Old number	New number	Research question
5.301		How much do the three levels of government pay in the form of grants or operational funding to support the arts and cultural heritage services? What level of support is provided for each category of funding?
5.302		What level of government support is provided to arts and cultural heritage services through less direct means, such as tax incentives and the inclusion of art and design in public works projects?
5.303	1,2	What public value is generated from government subsidised arts and cultural heritage services? How do the direct consumers of these services perceive the public value of these services? How is public value perceived by those who do not directly consume these services?
5.304		Which arts and cultural heritage services get government support, and which do not? Why and why not? What proportion of their overall income is from government, compared to other sources? Which arts and cultural heritage services are sustainable as businesses or self-employment without government subsidy? What are the income sources for these self-employed people or businesses?
5.305		Does a market approach that is required to generate revenue result in a different quality or type of arts practice or cultural heritage service, compared to government subsidised services? What are the differences, and do these match government policy objectives?
5.306		How does Australian government funding for the arts and cultural heritage services compare with government funding provided in other countries?
5.307	3	What are people prepared to pay for public cultural heritage services and public arts programs, either in taxes and/or on a fee for service basis, or by other means (e.g. TV licensing or other arrangements)? Which kinds of payments do people view as appropriate for which public services?
5.308		What publicly funded arts education infrastructure is provided in Australia? How many institutions and staff are there, what art forms are covered, and what are their graduate outcomes?
5.4		Payment for arts involvement
5.401		How much do people involved in the arts in Australia receive for their work? How does the income of professional creative artists compare with the earnings of other employed Australians?
5.402	10	To what extent is arts involvement the main job or a secondary job for artists in Australia? How do professional creative artists earn a living, if not from their creative arts work?
5.403		If people involved in arts are not earning a living for their work, why do they do it? How important is income from creative arts practice, relative to other benefits of creative participation and/or involvement?
5.404		If incomes from creative arts practice are low (see RQ 5.401), are low incomes from creative arts practice a barrier to participation in creative arts? Is this detrimental to the wider arts industry?
5.405		How significant are lending rights payments to Australian writers in terms of the numbers affected and the amounts of the payments?
5.406		Would resale royalties increase the incomes of visual artists and how many artists would be affected?
5.407		What impacts do copyright and intellectual property rights regulations and collection agencies have on the incomes and costs of artists? To what extent are artists commercialising intellectual property?
5.5		Cultural tourism
5.501	9	How significant are arts and cultural heritage related tourism to an area's economy, either for Australia as a whole or for cities, regions or towns within Australia? How many tourists visit, or extend their stay to an area, in order to consume arts or cultural heritage services? What proportion of all tourists to an area consumes arts or cultural heritage services during their visit?
5.502		Which cities, regions or towns within Australia do people associate with arts or cultural heritage services (i.e. arts/cultural heritage may be an important factor influencing the decision to visit the area)?
5.503		How is Australia viewed internationally as a tourist destination, and what is the significance of arts and cultural heritage in how Australia is viewed?
5.504		Do people and services involved in local creative arts practice and cultural heritage benefit from co-locating to areas that attract general tourism (not associated with arts/cultural heritage)?
5.505		Are there any particular types of arts or cultural heritage services that are most likely to be attractive to tourists? To what extent are tourists an important market for these activities? What types of arts or cultural heritage services are most attractive and to what kinds of tourists (i.e. tourism market analysis)?
5.506		For those types of arts and cultural heritage services that depend on tourists for income, and/or as a major service population, how does this impact on creative production or cultural heritage services provided? Does a market or customer service approach targeted to appeal to tourists result in changed (reduced or enhanced) quality of arts practice or cultural heritage services? What changes result?
5.507		How do arts and cultural festivals and events compare to other kinds of festivals and events, in terms of their overall success in attracting visitors, economic impact and economic viability?
5.6		The arts and innovation
5.601		Do arts activities project an image of innovation to the Australian community and internationally?

## APPENDIX 1 FULL LIST OF RESEARCH QUESTIONS *continued*

<i>Old number</i>	<i>New number</i>	<i>Research question</i>
5.602		Do Australian artists create high quality new works, expressing original insights, innovative ideas, and/or using new media or technology? How much content is new and original? How many new artists and new arts products have arisen because of new technology?
5.603		To what extent do arts industries and practitioners utilise new technologies?
5.604		Where artists and/or arts businesses collaborate with other industries, does this lead to greater productivity or innovation?
5.605	20	Does participation in creative arts, or other regular involvement in or consumption of the arts, lead people to be more creative and innovative in other areas of their lives, and at work (whether it be work in the arts or non-arts work)?
5.7		International trade in arts and cultural heritage
5.701		What is the level of international trade with Australia in arts and cultural heritage products and services? What countries do we trade with? What particular products are increasing or declining in trade in arts and cultural heritage services? Why?
5.702		To what extent do Australian arts and cultural heritage services receive international recognition?
5.703		To what extent are Australian arts and cultural heritage representing 'Australia' by portraying Australian culture overseas? Does trade in Australian arts and cultural heritage services promote an awareness of Australia and an understanding of Australian culture to other countries? What impact does this have on general levels of international investment in Australia?
5.704		What is gained from programs that assist professional artists to achieve exposure in international exhibitions and markets, or from overseas study? Does this enhance artists' careers and provide flow on benefits to Australian arts generally?

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