



A NEW APPROACH

Insight research series
Report two

TRANSFORMATIVE: IMPACTS OF CULTURE AND CREATIVITY

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About A New Approach

A New Approach (ANA) is an independent think tank championing effective investment and return in Australian arts and culture. We aim to foster a more robust discussion about cultural policies, underpinned by good data, informed by shared understandings, and through a non-partisan and independent approach. ANA was established in 2018 with a \$1.65 million commitment by The Myer Foundation, the Tim Fairfax Family Foundation and the Keir Foundation. The Australian Academy of the Humanities is the lead delivery partner for this initiative.

For further information visit www.humanities.org.au/new-approach or contact us via newapproach@humanities.org.au

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EXECUTIVE SUMMARY

Executive summary

Individuals, communities, businesses, philanthropists and governments invest in and engage with arts and culture. Australian Bureau of Statistics data shows that almost all of us (82.4%) are attending cultural venues and events, and households are spending more than \$25 billion a year on cultural goods and services. What are the impacts of this participation and investment? What benefits do they generate? What do we need to do to ensure these investments of time and money are sustained, relevant and effective into the future?

As part of our work to explore these questions, A New Approach (ANA) is releasing a series of reports focused on:

- * investment
- * impacts
- * changes in production, consumption and distribution
- * attitudes
- * ensuring Australia's creative and cultural future.

This is our second report, *Transformative: Impacts of culture and creativity*. It recognises some of the challenges Australia faces as a nation and asks, 'what if creative and cultural activity could make a transformative contribution towards solving them?'

In exploring this question, we ask:

- * What are impacts of cultural and creative activity and participation?
- * What are some examples of impacts from around the world?
- * What is Australia already doing and what could we do better?

The report provides a snapshot of current research and findings about the positive impacts of artistic, creative and cultural activity on different parts of our lives. Participation takes many different forms, and we take a broad definition of culture, one which includes but is not limited to, galleries, libraries, archives and museums, music, screen, radio, video gaming and digital arts, performance, literature, visual art, community-engaged practice, hybrid and experimental artforms, language, festivals, craft, heritage, design, and live art.

We have reviewed a range of evidence on the most commonly researched impacts in the fields of:

1. Society and place
2. Economy
3. Innovation
4. Health and wellbeing
5. Education and learning
6. International engagement
7. Culture.

The research paints a very clear picture: a rich cultural life delivers significant economic and social benefits to the Australian community. Opportunities to be involved in arts and culture can be, and often are, transformative in both general and specific ways. Arts and culture inspire and enable meaningful change across our diverse communities and within individual lives, including in the areas of some of Australia's biggest public policy challenges.

We also found evidence that participation in creative endeavours contributes to:

- * a strong cultural life
- * a resilient and innovation-driven national economy
- * advancing Australia's position on the global stage.

In developing this snapshot, the report draws on material from Australia and around the world. This report prioritises studies that employ robust methodologies, as well as drawing on relevant policy literature.

The evidence presented in this report shows that Australians' high rate of participation in creative and cultural activities helps us develop a sense of belonging, forges social cohesion, stimulates curiosity and the ability to engage with different perspectives, and can have a range of beneficial effects on health, wellbeing, economic, employment and educational outcomes.

In sharing the strong evidence of these impacts, our aim is to better inform contemporary discussions about the value that is being generated, and could be intensified, through more effective policy settings, strategic investment and stimulus.

Known challenges, proven impacts: What the research shows

This is a summary of the key evidence that emerged from the research. The body of this report outlines the evidence for these statements and includes references to the substantial body of international and Australian work on which they are based.



	Challenges facing Australia	Proven impacts of cultural and creative activities
Society and place	Almost 50% of Australians report feeling that society is broken. 36% feel like a stranger in their own country. One in four Australians report frequent feelings of loneliness, and the risks of premature death due to loneliness and social isolation have been found to be as big or bigger than obesity, smoking up to 15 cigarettes a day, or air pollution.	A range of studies have found that deliberately focusing cultural and creative activities on social cohesion impacts helps to build community, belonging, and trust; enhances empathy and inclusion; helps combat the growing issues of loneliness and isolation; assists individuals and communities to recover from disasters and trauma; and makes cities, suburbs and regions more liveable. OECD research has shown that a more cohesive society often also has a stronger and faster-growing economy.
Economy	Australia has one of the biggest creative trade deficits in the world. For every dollar that we export in creative goods, we import \$8, and for every dollar of creative services we export, we import \$2. This suggests Australia is not effectively identifying and leveraging our comparative advantages in creative goods and services for the global market.	Cultural and creative activities already make a significant contribution to Australia's Gross Domestic Product (GDP) [6.4%] and Gross Value Added [5.6%], as well as employing 5.5% of the total workforce. Given that creative services such as design and game development are in hot demand globally—and these are areas in which Australia excels—there are significant opportunities for growth.

Challenges facing Australia

Proven impacts of cultural and creative activities

Innovation

Australia is lagging behind many economic peers in innovation and future indicators, including economic complexity (from 57th in 1995 to 93rd in 2017); research and development expenditure (half the per capita spending compared to the top performing country, Switzerland), and innovation inputs and outputs (currently 22nd in the world, down from 17th in 2014).

Creative capability is demonstrably the driving force behind innovation-driven, economically-diversified economies. Preparing Australia for the future of work in the Fourth Industrial Revolution requires workers to develop skills in creativity. Engaging in creative and cultural activities has been found in global studies to help build the skills needed for these rapid changes.

Health and wellbeing

Australia has an aging population. Conditions like dementia are becoming increasingly common, with estimated costs of more than AUD\$1 trillion over the next 40 years. Australia has strong policies about using arts and culture to influence the social determinants of health— that is, the conditions in which we grow, live, work and age, including how strong our social networks are, lifestyle factors, and our psychological states, which have been strongly linked to health, wellness, and life expectancy. However, these policies are often not being systematically implemented.

There is substantial evidence that, when art and culture are used in clinical settings, they consistently deliver improved physical, mental and emotional health outcomes. Engaging with arts and cultural activities impacts the social determinants of health and has been found to mitigate the risks of dementia. In 2016, Australian researchers produced the first dose-response style study of arts and mental health, showing that 2-hour “doses” of creative activities per week could enhance mental wellbeing in a general population.

Education and learning

Australia has been steadily declining in our mean scores in international education measures over the last 20 years, according to the OECD’s PISA test. In an analysis of the fall in results between the 2009 and 2015 PISA tests the economic cost of this decline was estimated at close to AUD\$120 billion.

Arts and culture-based education has been found to be beneficial in developing intellectual skills and enhancing educational impacts. Not only does it help future-proof Australia’s workforce, it also helps mitigate disadvantage, particularly with students who are “at-risk”: who are socio-economically disadvantaged, at risk of prematurely disengaging from schooling, and/or expressing anti-social or non-coping behaviours.

	Challenges facing Australia	Proven impacts of cultural and creative activities
<p>International engagement</p>	<p>Australia has long traded on our positive reputation worldwide, but we have been falling in global reputation rankings since 2013. In one index, for example, we slipped from 4th (2013) to 6th (2018). Global reputation has an impact on tourism and trade with a one-point increase in country reputation predicting a 0.9% increase in the proportion of tourists per capita, and a 0.3% increase in export rates (\$).</p>	<p>Arts and culture have successfully been used by other countries to achieve diplomatic soft power objectives, improving relations—and trust—between countries. This has been shown to generate increased levels of trade, investment, security and exchanges of talent. Australia is active in this area, but there is a need to strengthen our efforts, especially in the Asia-Pacific region.</p>
<p>Culture</p>	<p>Australians are losing trust in many of their social institutions and some currently believe that the arts and culture are “not for people like them” or cannot see themselves reflected in national narratives. The discrepancies in allocation of cultural resources between urban and regional Australia is widening, with the cost of mainstream cultural consumption 200–1,300% higher in regional and remote locations. These fissures have the potential to widen societal divides and weaken our cultural fabric. The evidence across a range of measures and domains shows that a strong and inclusive cultural life is central to a strong society.</p>	<p>Despite these factors, Australians demonstrate through their actions that they see culture and creativity as a relevant and valued part of life. 82.4% of us attended cultural venues in 2017-18 and household expenditure reached AUD\$25.5 billion in 2015-16. An increasing number of us—31.4% in 2017-18—are active in our own personal creative pursuits. Involvement with arts and culture, from active production through to passive consumption, has been found to increase feelings of wellbeing, belonging and happiness; help individuals process trauma and overcome conflicts with others; and help develop intellectual and social skills, as well as building social and cultural capital in urban, regional and remote areas.</p>

For Consideration

While the evidence of the range of impacts delivered by cultural and creative activity and participation is clear, there is insufficient recognition of the role they could (and do) play in addressing some of Australia's most pressing challenges. There is currently no mapping of these benefits across policy portfolios, and no mechanism through which to encourage strategic investment to further these impacts. If Australians are to better benefit from the rich and deep impacts of creative and cultural activity, it will require commitment and courage from all stakeholders—from philanthropists, businesses, non-government organisations, creators and consumers—as well as from all levels of government.

The research in this second Insight Report follows on from ANA's first Insight Report, *The Big Picture: Public Expenditure on Artistic, Cultural and Creative Activity in Australia*. It reinforces that, without strategic and coordinated effort, Australia risks deterioration in our cultural fabric and loss of the benefits it provides. In light of this, we suggest the following options for consideration.

FC 1

Establish a cross-portfolio policy inquiry, modelled on the APS200 projects, to map current investment in and impacts of cultural and creative spend and identify the policy areas that would most benefit from strategic investment. This should include a strategy and mechanism for better coordination between the three levels of government. At a federal level, grow the impact of - and effective collaboration between - the Commonwealth National Cultural Institutions, by establishing a clear and cooperative framework within which government expectations can be communicated, enabling collaborations to be incentivised and reported upon.

Federal, state, territory and local governments, with a cross-department approach at each level; Cultural sector including cultural institutions

FC 2

Identify areas of potential comparative advantage and incorporate the creative, cultural and digital sectors in industry development programs such as the Industry Growth Centres, Industrial Transformation Scheme and Cooperative Research Program. This will assist in diversifying Australia's economic base and addressing our trade deficit in creative goods and services.

Department of Industry, Innovation and Science; Australian Research Council; Universities; Chambers of Commerce; Industry leaders

FC 3

Recognise the positive impacts of arts and cultural interventions in treating loneliness and mitigating the risk of dementia, and prioritise research and investment in randomised-controlled trials for Australia-specific interventions.

Department of Health; Universities; Health care providers; Australian Research Council; Health insurers

FC 4	Prioritise new investment in cultural participation programs and arts-based initiatives that bring together communities and give individuals both skills and a greater sense of agency to encourage greater social inclusion and cohesion.	<i>Philanthropists and other private supporters; Government agencies; Local, state and territory governments; Religious institutions; Not-for-profits</i>
FC 5	Support research that explores the specific, causal effects of arts and culture on students' academic performance and long-term outcomes, to assist in identifying cost-effective strategies.	<i>Government agencies; Departments of Education; Australian Research Council; Unions; Parent groups</i>
FC 6	Ensure arts and culture are a central pillar of Australia's soft power diplomatic activity. Include opportunities for collaboration and exchange in research and practice between Australia and our regional neighbours.	<i>Department of Foreign Affairs and Trade; AusTrade; Australian businesses with international ties; Chambers of Commerce; Industry bodies; Diaspora communities</i>
FC 7	Prioritise initiatives for regional and remote Australia to benefit from the particular impacts and value of cultural infrastructure (both built and human) for economic diversification, community wellbeing and population attraction and retention.	<i>Federal, state, territory and local governments; Businesses based in or focused on regional Australia [including through corporate social responsibility activities].</i>



INTRODUCTION

Introduction

Australia has had a record-breaking run into the 21st century, weathering global economic shocks and performing strongly in Organisation for Economic Co-operation and Development (OECD) measures of national wellbeing. But now qualitative and quantitative research tells us there is a sense of deep unease in our nation. Our economy is showing signs of faltering. Our health and education systems are struggling to cope. The drought is seen by many as a metaphor for the prevailing zeitgeist. More people than ever question whether they belong here. We worry about the future of our children and whether our parents and grandparents will receive the care they need and want. We wonder if our money will be safe in the bank. There's unfinished business with the oldest cultures in this land, and unease with new arrivals. The divide between metropolitan and regional Australia stretches and strains. Our trust wavers in democracy, in leaders, in expertise and in each other.

A big, hopeful vision of Australia as a prosperous and inclusive liberal democracy galvanised both sides of politics in the early years of the 21st century. Our unique position in the Asia-Pacific, our enviable natural resources and our successful multiculturalism were embraced as the foundation for a turbo-charged future. But now, that vision seems lost to the Australian people.

Critique, quips and outrage are plentiful, but solutions seem further away than ever.

But what if there *were* solutions to some of our most pressing problems?

What if there were effective, achievable and evidence-based strategies to achieve some of these solutions?

What if other countries around the world were already trying these strategies, with demonstrable success?

This second Insight Report provides a snapshot of current research and findings about the positive impacts of artistic, creative and cultural activity on different parts of our lives. We have reviewed a range of credible research, drawing on material from around the world as well as recent Australian studies. The report prioritises studies that employ robust methodology, and also draws on relevant policy literature. You can read more about the methodology and sources on page 90.

Our review of the research found evidence that arts and culture inspire and enable meaningful change across our diverse communities and within individual lives, including in the area of some of Australia's biggest public policy challenges.

Culture can play a key role in meeting each of these challenges.¹ But Australia is yet to fully galvanise culture's power for good.

Our review found strong evidence that participating in arts and culture generates both general [community] and individual [personal] benefits. It also found that support of creative endeavours contributes to:

- * the promotion of a strong cultural life
- * the development of a resilient and innovation-driven national economy
- * the advancement of Australia's position on the global stage.

Australia has a strong tradition of striving for a society that is prosperous, fair and inclusive for people no matter where they live. This tradition finds contemporary expression in efforts to ensure there are opportunities for all sorts of people to participate in, and contribute to, a rich cultural and creative life, and honouring the many stories of this country—both ancient and more recent.

We have a powerful tool for enhancing social harmony, engagement and community connectivity but it is currently underutilised in Australia. In making the evidence of the positive impacts of arts and cultural participation more accessible, our aim is that relevant contemporary discussions—particularly about the value that could be generated with more effective policy and regulatory settings, and strategic investment in this area—will be better informed.

In our first Insight Report we highlighted that the vast majority of us engage in artistic, creative and cultural activities in our everyday lives. For some, it might mean listening to music during a workout, laughing out loud at a film, learning a new drawing technique or watching their child dancing in an end of year concert. For others it means reading a book, learning a new language, talking about last night's comedy show with friends or performing in the town's annual festival. Perhaps it's a trip to the city to see a big show, working in a museum, practising a new song or watching a new Australian drama on television. Maybe it's playing a game on a smartphone, listening to the radio while driving, or visiting a gallery. It might involve enrolling in a course, learning from a mentor, or teaching a new generation about the cultural artefacts that we enjoy the most. For some people, the focus of their career is creating.

What impacts does this report look at?

We engage with arts and culture in diverse and complex ways—and the benefits of engaging in arts and culture are equally diverse and complex. As a result, current research into how arts and culture generate or deliver these impacts covers a lot of ground.

For this report, we have focused on the most commonly researched impacts, including those on:

1. Society and place
2. Economy
3. Innovation
4. Education and learning
5. Health and wellbeing
6. International engagement
7. Culture.

These categories do not cover all the potential impacts of investment in or engagement with arts and culture. Instead, these categories indicate the impacts most commonly explored or identified within current national and international research.

Recognising issues of equity and access

In conducting our research review, we recognised the arguments that arts and culture do not always play a positive or emancipatory role,² and that the benefits of artistic, creative and cultural activity are not always equitably accessible.³ While recognising these issues, this report remains focused on the body of evidence pertaining to the critical and beneficial roles played by arts and culture in helping us to live meaningful lives.

Why is it useful to understand the impacts?

Creating a vibrant creative environment requires input from individuals, governing authorities, businesses, communities, philanthropic organisations, public and private institutions. ANA is working to strengthen bipartisan, business and wider community understanding of the contribution made by arts and culture to all of our lives.

ANA wants to ensure that the range of positive impacts generated by a rich creative and cultural life are clearly articulated and better understood. There has been a substantial global effort to understand these positive impacts over several decades. However, much of the most rigorous work can be difficult to find and access quickly or easily. By offering a snapshot, this report aims to make this strong evidence base more accessible to the wide range of people who make decisions about investing in arts and culture, including individuals, governments, philanthropists and businesses.

Understanding these impacts is part of our agenda to help secure a future in which:

- * people who live in and visit all parts of Australia have opportunities to experience, enjoy and value artistic, creative and cultural activities that are relevant to them in their daily lives
- * our elected representatives and their advisors have access to relevant, reliable research to help ensure public investment across Australia in arts and culture is effective, confident, innovative, fair and globally competitive
- * Australia's creators and researchers, cultural institutions and organisations operate in a public environment that recognises and invests in the benefits of cultural activity and celebrates creative achievements
- * private investors—including philanthropic, corporate and cultural entrepreneurs—have easier access to rigorous and contemporary information about the benefits of effective investment in arts and culture in Australia.

Findings from the research

Challenges facing Australia

Society and place

Almost 50% of Australians report feeling that society is broken. 36% feel like a stranger in their own country. One in four Australians report frequent feelings of loneliness, and the risks of premature death due to loneliness and social isolation have been found to be as big or bigger than obesity, smoking up to 15 cigarettes a day, or air pollution.

Economy

Australia has one of the biggest creative trade deficits in the world. For every dollar that we export in creative goods, we import \$8, and for every dollar of creative services we export, we import \$2. This suggests Australia is not effectively identifying and leveraging our comparative advantages in creative goods and services for the global market.

Innovation

Australia is lagging behind many economic peers in innovation and future indicators, including economic complexity (from 57th in 1995 to 93rd in 2017); research and development expenditure (half the per capita spending compared to the top performing country, Switzerland), and innovation inputs and outputs [currently 22nd in the world, down from 17th in 2014].

Proven impacts of cultural and creative activities

A range of studies have found that deliberately focusing cultural and creative activities on social cohesion impacts helps to build community, belonging, and trust; enhances empathy and inclusion; helps combat the growing issues of loneliness and isolation; assists individuals and communities to recover from disasters and trauma; and makes cities, suburbs and regions more liveable. OECD research has shown that a more cohesive society often also has a stronger and faster-growing GDP.

Cultural and creative activities already make a significant contribution to Australia's Gross Domestic Product (GDP) [6.4%] and Gross Value Added [5.6%], as well as employing 5.5% of the total workforce. Given that creative services such as design and game development are in hot demand globally—and these are areas in which Australia excels—there are significant opportunities for growth.

Creative capability is demonstrably the driving force behind innovation-driven, economically-diversified economies. Preparing Australia for the future of work in the Fourth Industrial Revolution requires workers to develop skills in creativity. Engaging in creative and cultural activities has been found in global studies to help build the skills needed for these rapid changes.

Challenges facing Australia

Health and wellbeing

Australia has an aging population. Conditions like dementia are becoming increasingly common, with estimated costs of more than AUD\$1 trillion over the next 40 years. Australia has strong policies about using arts and culture to influence the social determinants of health—that is, the conditions in which we grow, live, work and age, including how strong our social networks are, lifestyle factors, and our psychological states, which have been strongly linked to health, wellness, and life expectancy. However, these policies are often not being systematically implemented.

Education and learning

Australia has been steadily declining in our mean scores in international education measures over the last 20 years, according to the OECD's PISA test. In an analysis of the fall in results between the 2009 and 2015 PISA tests the economic cost of this decline was estimated at close to AUD\$120 billion.

Proven impacts of cultural and creative activities

There is substantial evidence that, when art and culture are used in clinical settings, they consistently deliver improved physical, mental and emotional health outcomes. Engaging with arts and cultural activities impacts the social determinants of health and has been found to mitigate the risks of dementia. In 2016, Australian researchers produced the first dose-response style study of arts and mental health, showing that 2-hour “doses” of creative activities per week could enhance mental wellbeing in a general population.

Arts and culture-based education has been found to be beneficial in developing intellectual skills and enhancing educational impacts. Not only does it help future-proof Australia's workforce, it also helps mitigate disadvantage, particularly with students who are “at-risk”: who are socio-economically disadvantaged, at risk of prematurely disengaging from schooling, and/or expressing anti-social or non-coping behaviours.

Challenges facing Australia

International engagement

Australia has long traded on our positive reputation worldwide, but we have been falling in global reputation rankings since 2013. In one index, for example, we slipped from 4th (2013) to 6th (2018). Global reputation has an impact on tourism and trade, with a one-point increase in country reputation predicting a 0.9% increase in the proportion of tourists per capita, and a 0.3% increase in export rates [\$].

Culture

Australians are losing trust in many of their social institutions and some currently believe that the arts and culture are “not for people like them” or cannot see themselves reflected in national narratives. The discrepancies in allocation of cultural resources between urban and regional Australia is widening, with the cost of mainstream cultural consumption 200%–1,300% higher in regional and remote locations. These fissures have the potential to widen societal divides and weaken our cultural fabric. The evidence across a range of measures and domains shows that a strong and inclusive cultural life is central to a strong society.

Proven impacts of cultural and creative activities

Arts and culture have successfully been used by other countries to achieve diplomatic soft power objectives, improving relations—and trust—between countries. This has been shown to generate increased levels of trade, investment, security and exchanges of talent. Australia is active in this area, but there is a need to strengthen our efforts, especially in the Asia-Pacific region.

Despite these factors, Australians demonstrate through their actions that they see culture and creativity as a relevant and valued part of life. 82.4% of us attended cultural venues in 2017-18 and household expenditure reached AUD\$25.5 billion in 2015-16. An increasing number of us—31.4% in 2017-18—are active in our own personal creative pursuits. Involvement with arts and culture, from active production through to passive consumption, has been found to increase feelings of wellbeing, belonging and happiness; help individuals process trauma and overcome conflicts with others; and help develop intellectual and social skills, as well as building social and cultural capital in urban, regional and remote areas.



1.
**SOCIETY AND
PLACE IMPACTS**

The research at a glance

The evidence reviewed shows that a strong artistic, cultural and creative life helps strengthen society. Communities flourish when their members work together, and collaborative projects serve to reinvigorate a collective sense of identity and social cohesion.

We looked at research examining how this collective sense of identity comes into play when communities face challenges,⁴ and we looked at studies exploring how a sense of place can combat the growing issues of loneliness and isolation.⁵ Further, we looked at how culture may help define the identity and enhance the quality of places, to make them more attractive, liveable, and better able to accommodate population growth.⁶

We found a substantial international body of research showing that cultural and creative engagement does indeed enhance social inclusion and community cohesion.⁷

- * Australians feel increasingly isolated from their communities, with almost 50% feeling that society is broken, and 36% feeling like a stranger in their own country.
- * Celebrations, festivals and other public arts and cultural activities bring people together and bridge social barriers, which decreases loneliness and increases social cohesion.
- * Arts and culture help create a more cohesive multicultural society. They “act as a ‘catalyst’ for empathy and understanding across national divides”, reducing bias by enabling people to see and imagine themselves in the shoes of “the stereotypical ‘other’”.
- * Engaging with the arts enhances empathy and increases civic participation, while also helping individuals to overcome trauma and mediate conflict.
- * Australia is world-leading at using arts and culture to sustain urban, peri-urban, regional and rural development.

What the research shows

1.1 Engaging with cultural activities strengthens our communities

We live in an era of significant social unrest; a period in which almost 50% of Australians report feeling that society is broken, and 36% feel like a stranger in their own country.⁸ In times like these, arts and cultural activities have been found to make a real contribution to societal development, enhancing social inclusion and community cohesion and bringing people together in pursuit of common aspirations, sometimes despite ideological differences.⁹

That artistic, creative and cultural activities play a significant role in the development of a sense of civic pride and community identity has been confirmed by a range of international studies. These activities are also particularly effective in bringing together different people and building social cohesion. In a comprehensive audit of New York City neighbourhoods, a 2017 study found that cultural participation, and the presence and accessibility of cultural assets such as arts organisations, creative community groups and resident artists, significantly predicted better neighbourhood social wellbeing.¹⁰ This, they concluded, was because social connection is the key to a neighbourhood's collective wellbeing, and social connection could effectively be fostered through cultural participation. Although they pointed out that involvement in any kind of community or

recreational group could promote social connection, they also demonstrated that the arts and culture are particularly effective in creating social networks among different sorts of people who would not otherwise have come together, therefore providing cohesion across otherwise divergent demographic groups.

The process of “creative place-making” that occurs through creative enterprise and community-based arts and culture, such as festivals or installations of public art, has been found to connect disparate members of a community. These kinds of celebrations can bridge social barriers, fostering a sense of communal pride.¹¹ A quantitative comparative analysis of three cities (Montreal, Sydney and Milan) that had held major cultural events showed that, when cultural participation and community engagement was a deliberate focus, social cohesion was enhanced via the development of social capital (social networks and relationships) and human capital (knowledge, skills and competencies).¹²

Arts and culture can bring Australians—all Australians—together

Indigenous leaders including Noel Pearson and Marcia Langton have called for a national narrative that encompasses all Australians—including First Peoples, descendants of the early colonisers, and those who are more recently arrived, whose families landed in Australia post-WWII.¹³

Research focused on rural and regional Australia has found that engagement with the complexity of national narratives can be effectively developed at a community level through the lens of creative storytelling, including through dance, theatre, music and visual arts, as well as through oral sharing of stories and through literature.¹⁴

Arts and culture offer powerful tools to explore our 60,000-year history in a nuanced and accessible way, as well as opportunities to reflect the present and look to the future.¹⁵ The research shows that arts are not only about creating—they are about connecting.

There is a strong interaction between the arts and successful multiculturalism

The potential for arts and culture to bring people together is of particular relevance in Australia, where immigration is a leading source of population growth. As of 2016, almost half of Australia's population was either born overseas or had at least one parent who was.¹⁶ However, some recent polls and reports indicate decreasing support for immigration and multiculturalism.

The 2018 Scanlon Report, for example, found a significant jump between 2017 and 2018 in the number of respondents who believed there were too many immigrants being accepted into Australia, although support for multiculturalism remained steady around the 83–86% range.¹⁷ A January 2019 Essential Poll in The Guardian showed that

56% of Australians believed that multiculturalism causes social division and religious extremism in Australia,¹⁸ up from 38% in 2016.¹⁹ Despite our increasingly multicultural society, Australians' views on immigration may reflect a rising cultural anxiety that "migrants will not assimilate, and that multiculturalism will harm Australia's culture."²⁰

Multiculturalism, at its best, has been described as "a two-way process of change, requiring adaptation by Australians to immigrants and immigrants to Australia."²¹ Arts and culture have been found to contribute significantly to this two-way process of learning and curiosity. The Council of Europe, for example, found that culture and the arts have "a strong effect on democratic security at several levels", including helping people to recognise the importance of diversity, increasing openness to other groups in society, bringing individuals into contact with a variety of ideas and perspectives, and potentially even reducing prejudice and engendering tolerance.²²

Similarly, a comprehensive United Kingdom report on the value of arts and culture found that the arts could "act as a 'catalyst' for empathy and understanding across national divides", reducing bias by enabling people to see and imagine themselves in the shoes of "the stereotypical 'other'".²³

Cultural participation increases civic engagement and decreases loneliness

Where arts and culture are a part of people's lives, people experience less loneliness, and are more likely to feel connected and confident within their communities.

As *Chapter 4: Health and wellbeing impacts* shows, cultural participation can significantly influence the social determinants of health²⁴— that is, the conditions in which we grow, live, work and age, including how strong our social networks are, lifestyle factors, and our psychological states.²⁵ The risks of premature death linked to loneliness and social isolation have been found in recent research to be as big or bigger than obesity, smoking (less than 15 cigarettes a day) and air pollution.²⁶ Yet these risks can be reduced via increased social interaction, particularly with others who share common goals or values.²⁷ This is where participation in arts and cultural activities can have a critical impact.

Research from the United States and United Kingdom shows that people who participate in arts and cultural activities are more likely to have stronger engagement in the political and civic domains of their communities than people who don't. This is regardless of demographic traits such as educational attainment and gender.²⁸ Demonstrated positive behaviours include increased levels of civic engagement, greater volunteerism, a more acute sense of public justice, and the development of more self-reflective individuals.

Social cohesion is good for economic prosperity

Strong social cohesion also has a direct impact on economic growth. OECD research demonstrates that a more cohesive society generally has a stronger and faster-growing GDP.²⁹ Again, there is significant research demonstrating that, in particular circumstances, this cohesion can be fostered by participation in arts and cultural activities.³⁰

A web of mutual dependency

The outcomes of individuals affect the outcomes for communities and society, and vice versa.

1.2 Arts and culture enhance individual development, which contributes to societal development

Involvement with arts and culture—irrespective of where that involvement is on the spectrum of active participation to passive consumption—has been found to increase feelings of wellbeing and happiness,³¹ encourage prosocial behaviours,³² help individuals process trauma and overcome conflicts with others,³³ and help develop a range of necessary intellectual and social skills.³⁴ In turn, the outcomes of individuals affect the outcomes for communities and society, and vice versa, in what sociologists have called “the web of mutual dependency”.³⁵ Therefore, when individual Australians feel the benefits of arts and culture in their lives, this has a positive effect on Australia at large.

Further, multiple recent reports provide strong evidence for the positive role that arts and culture have and can play in raising the quality of life for First Nations peoples.

For example, Australian Indigenous people who participated in or attended First Nations art festivals were more likely to be engaged in study, or intended to study in the future.³⁶ These participants were also more likely to feel capable of voicing their opinions within their communities, and to report feelings of happiness. These findings indicate that

engagement with First Nations arts and cultural expression is closely related to measures of subjective wellbeing associated with a sense of empowerment and community connectedness for Aboriginal and Torres Strait Islander peoples.

1.3 Arts and culture help sustain urban and regional development

Arts and culture is increasingly recognised as a strategic factor for sustained urban development. Indeed, access to arts and culture infrastructure is a significant consideration for Australians when determining their place of residence. A report for Infrastructure Australia showed that having access to arts, cultural and recreational facilities and services, as well as parks and open spaces, was critical for the 5,000 study participants in deciding where to live—as important as access to mobile telecommunications, and more so than access to public transport, health or aged care and educational facilities.³⁷

It’s a difficult balance. On the one hand, having lots of cultural activities in a central location is positive for urban development. On the other hand, this potentially excludes people who live outside of those zones from participating. Care must be taken to address challenges associated with equity of access for those residing in outer-urban, peri-urban, regional and remote areas.

Creative place-making within and beyond cities

Cities that integrate their arts and cultural activities into urban development plans have been identified as critical in helping achieve the United Nations' 2030 Agenda for Sustainable Development. The UNESCO Creative Cities Network initiative, for example, connects the cities committed to integrating artistic, creative and cultural activities in urban development plans through seven key fields: crafts and folk arts; design; film; gastronomy; literature; media arts; and music.³⁸ The focus on creativity here underpins not solely the processes of economic activity and urban development, but also efforts to improve access to and participation in public life, and to strengthen civil society.

The notion of a “creative city”—a policy approach that draws upon artistic, creative and cultural activity to promote urban development—has received significant attention in Australia as a strategy for supporting local communities and economies.³⁹

This is the case not only in the city centres of our nation's capitals, where major public cultural facilities are critical elements of the social and economic landscape, but also in suburban and peri-urban areas [i.e. on the outskirts] of capital cities, regional cities, and rural and remote locations.⁴⁰

Studies on peri-urban areas of Sydney and Melbourne, for example, have shown that residents in these outer areas often feel disconnected from mainstream Australia (sometimes happily so), and that this required a different form of cultural planning and infrastructure.⁴¹ This highlights that care must be taken to address challenges associated with equity of access and relevance for those residing in outer-urban, peri-urban, regional and remote areas.

According to a 2019 report by the Regional Australia Institute, the activities associated with the creative industries often lead to greater liveability, and are therefore important for attracting people to (and maintaining the population of) regional areas.⁴²

The creative industries therefore play an important role in supporting the socioeconomic vibrancy of local communities. Indeed, most local governments in regional Australia are engaged in using arts and culture to build economically, socially and culturally vibrant and sustainable towns and regions. Over the last decade local governments have increased their per capita commitment to cultural funding by 11%.⁴³

The role of arts and culture in sustainable development

The arts and cultural activities can help communities, in both urban and rural Australia, move towards environmentally sustainable development solutions. A report by the European Co-operation in Science and Technology Association found that culture—described on this occasion as both way of life, and intellectual artistic activity and work—has a fundamental role to play if Europe is to meet its sustainability targets. As the report points out:

“Many if not all of the planet’s environmental problems and certainly all of its social and economic problems have cultural activity and decisions—people and human actions—at their roots. Solutions are therefore likely to be also culturally-based, and the existing models of sustainable development forged from economic or environmental concern are unlikely to be successful without cultural considerations.”⁴⁴

This is consistent with the findings of an Australian study of climate change as a cultural issue. This study concluded that climate change has become a social rather than merely natural phenomenon, given that humans will need to behave differently if we are to bring about change to the physical environment.⁴⁵ The paper argues that the arts and creative industries have played a critical role in social change movements throughout history, and could do so again in relation to climate change.

The Creative Recovery Network,⁴⁶ an initiative developed to support community recovery using arts-led processes in areas affected by Queensland’s natural disasters of 2011, provides a good example of how the arts can be embedded into environmental planning to influence social change. This project works with communities following natural disasters to help them recover, so that they can take the actions required to mitigate the effects of the event on their land and community. Their 12-month evaluation report found evidence that participation in the Creative Recovery activities had helped children re-engage with learning and reduced difficult classroom behaviours; helped Aboriginal elders come to terms with their own healing from the disasters; helped individuals who found themselves isolated following the disasters to find networks and connect with communities; and given participants new skills they felt were transferable outside the arts sector.⁴⁷

How could Australia be transformed if we...

- * Invested in and promoted arts and cultural activities that enable connections, understanding and the sharing of knowledge and experiences, and enhance social inclusion and cohesion in an increasingly complex, multicultural society?**
- * Created campaigns, targeting the general public, that demonstrated the clear link between arts and cultural participation and both individual and societal impacts, to encourage people to get more active in their artistic and cultural pursuits?**
- * Increased recognition of the role that local governments play as brokers with the other levels of governments and cultural agencies, to ensure options for cultural participation and contribution are available to the local communities they serve?**

For Consideration

FC 1	Establish a cross-portfolio policy inquiry, modelled on the APS200 projects, to map current investment in and impacts of cultural and creative spend and identify the policy areas that would most benefit from strategic investment. This should include a strategy and mechanism for better coordination between the three levels of government. At a federal level, grow the impact of—and effective collaboration between—the Commonwealth National Cultural Institutions, by establishing a clear and cooperative framework within which government expectations can be communicated, enabling collaborations to be incentivised and reported upon.	<i>Federal, state, territory and local governments, with a cross-department approach at each level; Cultural sector.</i>
FC 3	Recognise the positive impacts of arts and cultural interventions in treating loneliness and mitigating the risk of dementia, and prioritise research and investment in randomised-controlled trials for Australia-specific interventions.	<i>Department of Health; Universities, Health care providers; Australian Research Council; Health insurers</i>

FC 4	Prioritise new investment in cultural participation programs and arts-based initiatives that bring together communities and give individuals both skills and a greater sense of agency to encourage greater social inclusion and cohesion.	<i>Philanthropists and other private supporters; Government agencies; Local and state governments; Religious institutions; Not-for-profits</i>
FC 7	Prioritise initiatives for regional and remote Australia to benefit from the particular impacts and value of cultural infrastructure (both built and human) for economic diversification, community wellbeing and population attraction and retention.	<i>Federal, state, territory and local governments; Businesses based in or focused on regional Australia (including through corporate social responsibility activities).</i>



2. ECONOMIC IMPAIRMENTS

The research at a glance

In Australia, we benefit from world-class arts and culture infrastructure: from internationally recognised film studio facilities and exceptional arts and culture-related educational programs, to thriving design, fashion, gaming and literature industries. Despite our geographical isolation, Australia's arts and cultural sectors make significant contributions on the world stage, as well as producing creative goods and services to meet our local markets' needs.

While this is a good news story, it should be noted that Australia is falling behind the rest of the OECD in spending on arts and culture, and thus our positive outcomes in this area are not sustainable.⁴⁸ Our current arts and cultural policy settings have not adapted to the 21st century marketplace, and this is increasingly causing a range of detrimental effects to our economy.

This chapter also reviews Australia's international trade performance and the links between creativity, innovation and future jobs and productivity.

- * Cultural and creative activities make a significant contribution to the Australian economy: in 2016-17, 6.4% of GDP, or \$111.7 billion.
- * Cultural and creative industries employ 5.5% of the national workforce, and employment is growing. Many of the industries projected for fastest growth over the next five years rely on workers with creative qualifications.
- * Our creative industries exports are stagnant, and we have an increasing creative trade deficit—one of the world's largest, in fact, with a creative goods import:export ratio of 8:1. We're lagging behind many of our economic peers.
- * Australian industries invest significantly in creative goods and services, but this has been difficult to capture and measure.
- * Our arts and cultural sector has several growth industries that are performing strongly at home and abroad, particularly digital gaming, the film industry, and Indigenous visual artworks.

What the research shows

2.1 Cultural and creative industries make a clear financial contribution to Australia's economic health, and we need to take care to ensure this continues

Recent research from the Australian Government's Bureau of Communication and Arts Research (BCAR) found Australia's cultural and creative industries make a significant contribution to our national economy. In 2016–17 (the most recent available data) cultural and creative activity within Australia contributed \$111.7 billion, or a 6.4% share of Australia's GDP.⁴⁹ While the economic contribution made by cultural and creative activity increased in absolute terms between 2008–09 and 2016–17, this growth was slightly below that of the Australian economy overall. As a percentage share of GDP, cultural and creative activity has dropped from 6.9–6.4% over this period.⁵⁰

An earlier study by the Australian Bureau of Statistics found that activity in the cultural and creative industries contributed an estimated 5.6% to Australia's Gross Value Added (GVA) in 2008–09. This contribution was similar to the GVA contribution of Transport, Postal and Warehousing (5.4%) and Health Care and Social Assistance (5.8%). It was more than Agriculture, Forestry and Fishing (2.5%), Retail Trade (4.9%) or Education and Training (4.6%), but less than Mining (9.8%), Construction (9.3%) or Financial and Insurance services (10.4%).⁵¹

The BCAR research found that the GVA from cultural and creative activity was \$85.7 billion in 2016–17, an increase of 30.3% since 2008–09.⁵² The four cultural and creative activity sectors contributing most to GVA are:

- * design
- * fashion
- * film, electronic and digital media broadcasting
- * literature and print media.

Between 2008–09 and 2016–17, the BCAR research shows that the design sector contributed the largest share to this GVA figure, and also increased as a proportion of total activity, increasing from 31–38.3%. The proportional contribution of film, electronic and digital media broadcasting remained steady, while the fashion and literature/print media sectors declined by one and 8.4% respectively. Within the design sector, computer system design and related services was the main growth driver, followed by architectural services.⁵³ Copyright-based industries also continue to make a significant contribution to the Australian economy in terms of GDP, employment, and foreign trade.

2.2 Cultural and creative industries employ 5.5% of the national workforce, and employment is growing

A review of Australia's recent census data showed that Australia's cultural and creative industries employed 593,830 people in 2016, representing 5.5% of the national workforce.⁵⁴ This review found that, between 2011 and 2016, creative employment grew at an average rate of 2.2% per annum, which was nearly twice the rate of growth within the wider Australian workforce.

Clearly, creative skills already make a substantial contribution to the national economy. According to a recent working paper by the BCAR, creative skills and qualifications have been integral to fast-growing industries over the past decade. The report highlights that around a quarter of those employed in Information, Media and Telecommunications, and a fifth of those employed in Professional, Scientific and Technical services, hold a formal creative qualification. These qualifications are also significant within numerous innovation-intensive industries—of the top five most innovation-active industries, between 10% and 28% of employees hold a creative qualification.⁵⁵

Further, BCAR also notes that creative skills are likely to be vital for future employment growth, as many of the industries projected for fastest growth over the next five years rely on workers with creative qualifications. The report suggests that job opportunities for people with creative skills will grow in the future.⁵⁶ See more on this in *Chapter 3: Innovation impacts*.

2.3 Although our creative industries' exports make a significant contribution to Australia's economy, we're falling behind much of the world

Australia has a trade deficit in both creative goods and creative services—that is, we're importing significantly more creative goods (i.e. physical objects, such as a television, a CD, a book or a painting) and services (intangible items such as a pay TV subscription, or paying someone to edit a film, or commissioning a logo from a designer or an app from a software developer) than we're exporting. In fact, we have one of the world's biggest trade deficits in creative goods.⁵⁷

This suggests we may not be identifying and supporting areas of potential comparative advantage and maximising the potential benefits our creative industries could deliver to our economy.

Given the comparatively small size of our population, the fact that our creative goods trade deficit is similar to those of France, Japan, Canada and the USA is of significant concern (see Figure 1).

Figure 1: Top 10 creative goods trade surpluses and deficits, 2015, in billions of US\$. Figure adapted from UNCTAD, 2018, p. 25.

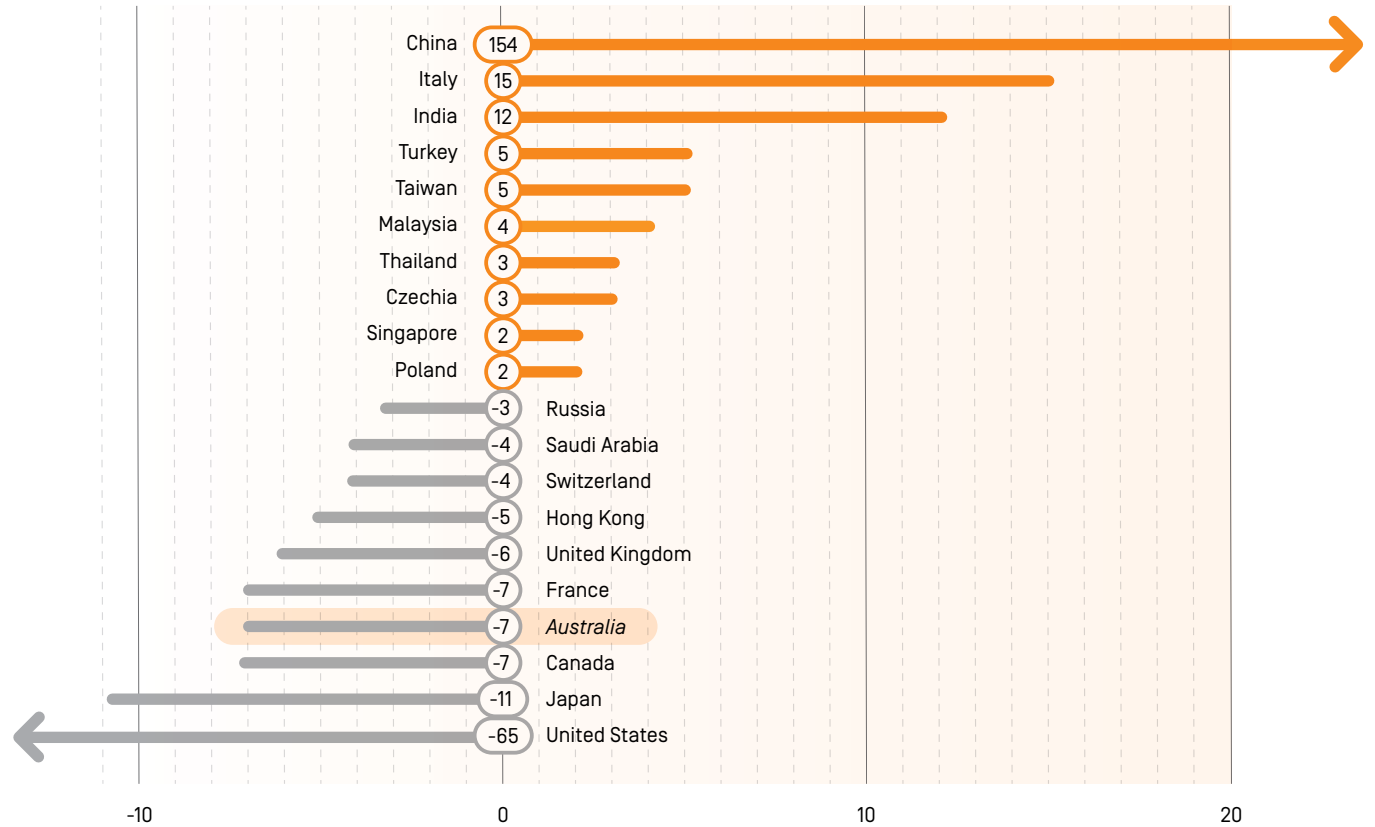


Figure 2: Australia's creative economy trade performance, 2005-2014.
Values in billions (US\$). Adapted from UNCTAD, 2018, p. 56.

Australia	2005	2006	2007	2008	2009	2010	2011	2012	2013	2014
Exports	0.97	0.98	1.13	1.06	0.89	1.03	1.48	1.33	1.20	1.09
Imports	5.00	5.23	6.93	7.83	7.15	8.00	8.30	8.23	8.20	8.60
Balance of trade	-4.02	-4.24	-5.79	-6.76	-6.25	-6.97	-6.82	-6.90	-7.00	-7.50

In a 2019 global study of the creative economy between 2005 and 2014, the United Nations Conference on Trade and Development (UNCTAD) highlighted that, for creative goods, Australia's "volume of imports was seven times higher than exports, generating a trade deficit of US\$7.5 billion in 2014."⁵⁸ The largest share of imports was made up of interior design goods worth US\$1.9 billion, fashion accessories worth US\$1.4 billion and toys at US\$1.06 billion, followed by publishing, including books at US\$434 million and newspapers at US\$197 million.⁵⁹

In 2014, we imported US\$8.60 billion worth of creative goods, and exported US\$1.09 billion. In fact, Australia was a net importer of creative goods for the entire period reviewed by UNCTAD. Our creative goods imports grew steadily between 2005 and 2014, meaning the market for these products in Australia was growing but we were unable to satisfy it locally. Further, international demand for Australian creative output has remained flat—we're not consistently generating creative products that are relevant to a growing global market. See Figures 2 and 3 for details.

Our creative services are also in a trade deficit. In 2014 we imported US\$8.5 billion of creative services and exported US\$5.1 billion—a deficit of US\$2.4 billion. See Figure 4 [over page].

It appears at the level of international trade, we're not acting effectively to realise the benefits of this key sector. This indicates that Australia needs clearer policy settings and focused industry transformation if our nation is to compete in and benefit from the global creative and cultural economy.⁶⁰

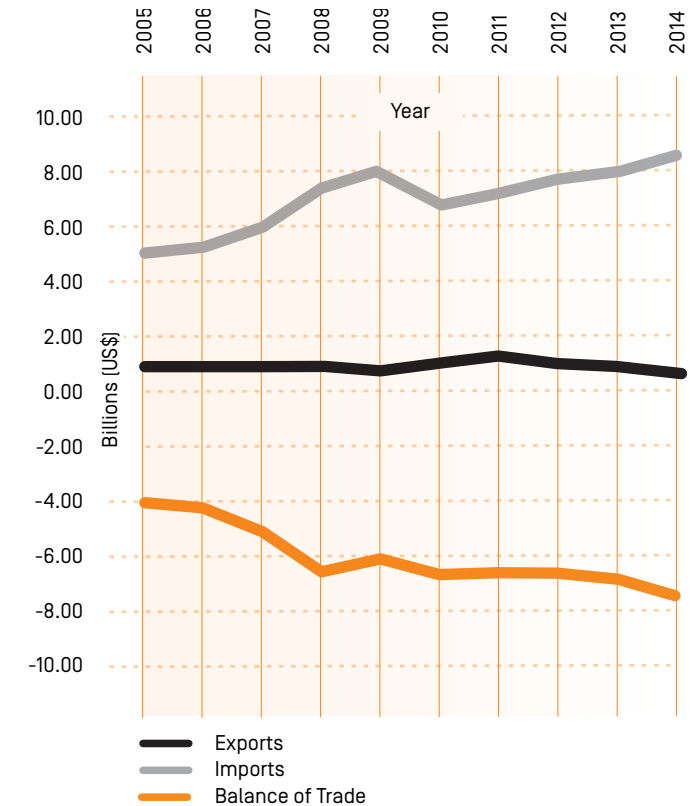
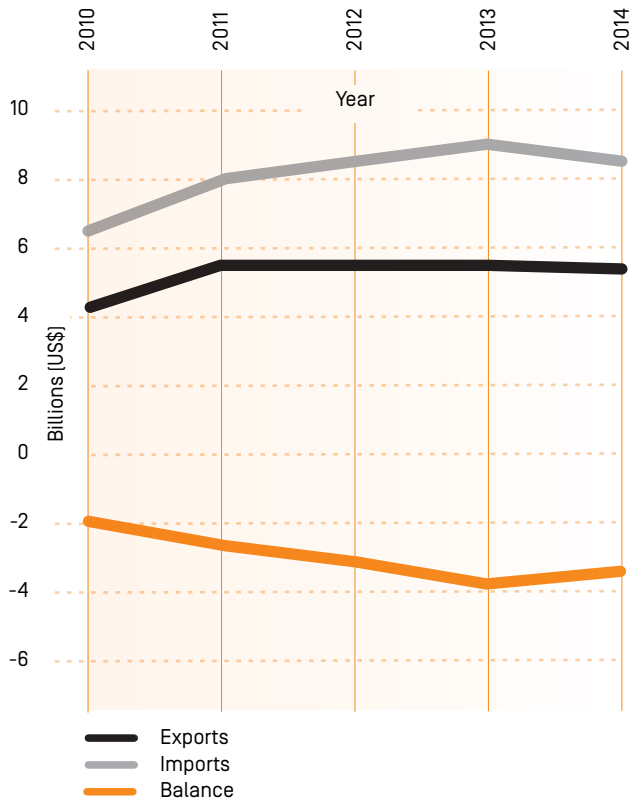


Figure 3: Australia's creative goods trade performance, showing imports, exports and our balance of trade from 2005-2014. Values in billions (US\$). Adapted from UNCTAD, 2018, p. 56.

Figure 4: Australia's creative services trade performance, showing imports, exports and our balance of trade from 2010-2014. Values in billions [US\$]. Source data from UNCTAD, 2018, p. 58.



The hidden value of creativity to production

The research easily points to direct economic contributions from dedicated cultural and creative activities. But accounting for the value generated in non-creative sectors through the use of creative goods and services is more challenging.

2.4 Australian industries invest significantly in creative goods and services, but the economic benefits of this investment have not been accurately captured

Most Australian industries, across every sector, make significant use of creative goods and services, even if the scale of the value they deliver to Australian industries is not immediately apparent.

There are two key ways that creative professionals contribute to non-creative industries. Firstly, many businesses purchase creative goods and services from specialist suppliers. For example, a business may pay a design firm to design the packaging of a new product to maximise its sales potential. The BCAR analysed the scale of these transactions, and found that Australian firms spent around \$87 billion on inputs from creative industries to produce their final outputs in 2014-15.⁶¹

The other main way non-creative industries engage creative professionals is by hiring them as specialists within their organisations. An example of this could be if a hotel chain employs an in-house photographer to capture events and produce content for their marketing and social media materials. These professionals are called "embedded creatives".⁶² One recent study showed more than 182,000 people working in creative occupations are employed

outside the creative industries in sectors such as finance, government, hospitality, education and manufacturing.⁶³

The scale of these investments in creative inputs suggests that Australian firms see great benefit from engaging with the creative industries. However, what this does not show is *how much* these contributions by creative professionals are enhancing the value of outputs. How these creative roles contribute to industry performance is an area that requires further exploration.

2.5 Our creative industries include strong performers with real growth potential

The future economic potential of this sector is evident when we consider the performance of three key cultural and creative activity areas:

- * digital gaming
- * film production
- * Indigenous arts.

Spotlight on: The serious business of digital gaming

The gaming industry is not just one of the top performing creative industries in Australia; today it is the world's leading entertainment business, generating more income on a global scale than either film or music.⁶⁴ And it is growing rapidly. A 2019 report found that the global games market is now worth approximately US\$152 billion.⁶⁵

Australia's contributions to the gaming industry are often exceptional, and this has the potential to enhance our reputation for creativity on a global scale. The Australian Government's Trade and Investment Commission reports that Australian-made games frequently top sales charts, win major industry awards and attract wide international media coverage.⁶⁶

We're real players in the international gaming market

Australian-made games frequently top sales charts, receive major industry awards and gain wide coverage in international media.

Australians' tastes for gaming are changing, and our gaming market is responding. About 60% of the earnings from our games market now comes through mobile and web games. Games for more traditional platforms, such as consoles and PCs, also represent a substantial share of local industry output.⁶⁷

Contrary to the popular image of game developers doing indie freelance work in their basements, game production is big business. Australian-based game developers generated income of \$111.1 million in 2015–16.⁶⁸ These developers are also producing more games each year, and game production values are increasing, while the average production costs per game rose from \$74,000 in 2011–12 to \$337,500 in 2015–16.⁶⁹ According to the 2019 Digital Australia report, sales of video games in Australia grew at an annual rate of approximately 15% between 2013 and 2018, and, counter to some perceptions, this is not a niche activity: two out of three Australians report playing video games with an average player age of 34 years old, and 47% of Australian video game players are women.⁷⁰

Further, Australia's contribution to what is referred to in the industry as 'serious games' is also increasing. Serious games are generally designed for use in educational or clinical environments, and are often designed to provide remedial or developmental impacts. The Visual Dementia Experience game, for example, developed by Opaque Media

Group for Alzheimer's Australia Victoria, applies gaming technology to simulate the challenges of living with Alzheimer's disease as a learning tool for aged care workers.⁷¹

The University of Melbourne employs contemporary (and serious) gaming technologies such as virtual reality within its medical curriculum, allowing medical students to perform virtual surgery with high levels of realism. Architecture is emerging as another field of application for this technology, with games used to better visualise architectural plans.⁷²

Spotlight on: The financial benefits of proactivity in film production

Film production is a creative field making a clear economic contribution to Australia's bottom line. Importantly, it is also a field where we've invested resources, energy and creativity to cultivate world-class talent, both in front of and behind the camera, and to attract international productions into our world-class production facilities.

In return, the Australian screen production industry contributed \$3 billion to the economy (as of 2014–15), and provided about 25,000 full-time equivalent jobs.⁷³

A report by the Australian Trade and Investment Commission found that Australia's talented filmmaking workforce [our universities are home to nine film and television schools⁷⁴] is supported by well-developed infrastructure, attractive incentives, a network of strong official and unofficial partnerships, and our diverse natural and urban environments.⁷⁵

The commission reports that about 50 feature films are produced in Australia each year, including around 30 Australian films, 17 international productions and three co-productions undertaken under formal agreements, with a total annual domestic production spend of \$390 million.⁷⁶

The production of foreign films in Australia is a major source of revenue: films from the Pirates of the Caribbean and

The small screen in focus

In addition to feature films, more than 450 hours of local Australian television drama are made in Australia each year, including more than 100 hours of children's programs—with an average annual production expenditure of \$274 million. And foreign TV productions in Australia contribute an additional \$21 million a year.

LEGO franchises contributed to a record-high production expenditure of \$397 million in 2014–15.⁷⁷

By sparking interest in the country's landscapes, attractions and people, screen content also draws international tourists to specific locations around Australia. Around 230,000 international tourists are estimated to visit or extend their stay in Australia each year as a result of viewing Australian films and television programs. According to Screen Australia, this equates to around \$725 million in tourism expenditure.⁷⁸

Spotlight on: Indigenous visual arts, a growing regional and remote force

Aboriginal and Torres Strait Islander (ATSI) artists have been hugely successful both within Australia and abroad, and the Indigenous visual arts sector is another significant contributor within the Australian creative economy. ATSI artists live across the whole of Australia, and are featured in both urban and regional arts contexts, including the Darwin Aboriginal Art Fair, the Cairns Indigenous Art Fair and the National Indigenous Art Fair in Sydney.

Of particular interest is the centrality of the visual art industries in remote communities. The Cooperative Research Centre for Remote Economic Participation found remote Indigenous art centres generated \$52.7 million in art sales from 2008–2012.⁷⁹ This represented a \$6 million increase in sales value, and 40,000 more art products than

the 2003–07 period.⁸⁰ In addition, Indigenous artists produce some of Australia's most valuable artworks, which generates critical sources of income in remote communities.⁸¹

ANA also notes that many Indigenous cultural festivals, performances and visual arts events are recognised internationally as a unique offering that generates economic benefits for Australia's tourism industry.⁸²

Read more about how Australia leverages its arts and cultural offerings on the world stage in *Chapter 6: International engagement impacts*.

How could Australia be transformed if we...

- * Examined our cultural and creative policies at all levels of government, to ensure that our economy is benefitting from the contributions the arts and culture have to offer?**
- * Undertook further research to determine the economic contributions of the creative industries to other industries?**

For Consideration

FC 1

Establish a cross-portfolio policy inquiry, modelled on the APS200 projects, to map current investment in and impacts of cultural and creative spend and identify the policy areas that would most benefit from strategic investment. This should include a strategy and mechanism for better coordination between the three levels of government. At a federal level, grow the impact of—and effective collaboration between—the Commonwealth National Cultural Institutions, by establishing a clear and cooperative framework within which government expectations can be communicated, enabling collaborations to be incentivised and reported upon.

Federal, state, territory and local governments, with a cross-department approach at each level; Cultural sector.

FC 2

Identify areas of potential comparative advantage and incorporate the creative, cultural and digital sectors in industry development programs such as the Industry Growth Centres, Industrial Transformation Scheme and Cooperative Research Program. This will assist in diversifying Australia's economic base and addressing our trade deficit in creative goods and services.

Department of Industry, Innovation and Science; Australian Research Council; Universities; Chambers of Commerce; Industry leaders



3. INNOVATION IMPACTS

The research at a glance

During the 21st century, stimulating and supporting innovation—that is, fresh thinking that creates value⁸³—has become a key strategic priority for governments and corporations all around the world. Innovation is crucial to economic diversification, the development of new industries, and future productivity.

Creativity has been identified as the key driver of innovation. Therefore, fostering creativity is critical for the Australian workforce's successful transition into the Fourth Industrial Revolution.⁸⁴

Our innovation-focused research looked at the role arts and culture play in the development of our creative capacity, and how a strong creative capacity impacts on innovation. We looked at research exploring how creative fields cultivate abilities and knowledge that support an innovation-driven economy.

We also explored studies indicating that leading Australian innovative enterprises effectively combine diverse skillsets—dynamically mixing humanities, arts and social sciences (HASS) with science, technology, engineering and maths (STEM) skills to explore opportunities and solve problems.

- * There is a direct correlation between innovation and economic growth, and Australia is below the OECD averages in innovation measures.
- * We currently under-invest in creative skills development. It is impacting future innovation potential.
- * In Australia, research and development (R&D)—one of the indicators of innovation—is defined narrowly as scientific and technological innovation but should be redefined to include arts and creative practices.
- * Interdisciplinary teams that include creative specialists get multiple inputs for inspiration, which drives innovation.
- * Although the creative workforce is more concentrated in capital cities, smaller populations in rural and regional Australia are “punching above their weight”.

What the research shows

3.1

There is a direct correlation between innovation and economic growth, and Australia is below average in innovation measures

Innovation today is the key to a healthy economic future. This is the message from international world-trade policy organisation, the OECD. In a 2015 policy report, the OECD said continued economic growth is reliant on the accumulation of skills, that is, on productivity gains driven by innovation and knowledge-based capital.⁸⁵ Similar views have been put forward by Australia's Chief Economist in the 2014 Australian Innovation System Report, which stated that, "innovation and skills development, driving economic growth through productivity, will be the major counter-balance to aging population, climate change and rising income inequality."⁸⁶

However, according to some common measures for evaluating a nation's capacity for innovation, Australia is lagging behind most of its economic peers.

A 2019 study about the relationship between global trade flows and economic growth, released by Harvard Univer-

sity's Centre for International Development,⁸⁷ shows that Australia dropped from 57th in the world to 93rd between 1995 and 2017, a decline that is accelerating. China, Australia's top trading partner, rose from 51st to 19th over the same period.

This study comparing the economic complexity of nations, finds the degree to which a nation diversifies its exports predicts its future growth potential. It highlights that "countries whose exports are more complex than expected for their income level, grow faster. Growth can therefore be driven by a process of diversifying knowhow to produce a broader, and increasingly more complex, set of goods and services."

Concerningly, the report goes on to identify that Australia has "diversified into too few products to contribute to substantial income growth."

Another common measure of innovation performance is a nation's R&D expenditure. Our annual per capita expenditure of US\$992 is less than two thirds of Switzerland's world-leading US\$1,697, and Australia is ranked, on average, 16th among the 36 OECD-participating countries.⁸⁸

Further, the European Global Innovation Index (GII), an international ranking tool developed by Cornell University, the European Institute of Business Administration, and the World Intellectual Property Organisation, ranked Australia 22nd out of 126 countries in 2019. This tool considers the institutional framework a country is working within, human capital, research, infrastructure and market sophistication. By these measures, we have fallen well behind Switzerland (1st), Sweden (2nd), the United States (3rd), the Netherlands (4th), and the United Kingdom (5th).⁸⁹

But it is not all bad news. According to an Australian Council of Learned Academies report, by breaking down the factors used to determine GI ranking, it's clear Australia has the capacity to become an efficient and effective innovator and claim a place as a world-leader in this field.⁹⁰ Through the remainder of this chapter, we explore how this might be possible.

Skills that make great innovators

- * *Experimental and explorative*
- * *Risk-seeking attitudes*
- * *Desire for novelty*
- * *Dislike of repetition*
- * *Tolerance of ambiguity*
- * *Willingness to try new things*
- * *Attentive observation of markets*
- * *Understanding of consumer needs*

3.2 Specialist arts and creative skills are important in an interdisciplinary team environment to enhance innovation

Creative skills are a vital force behind innovation-driven economies world-wide and are a critical component of Australia's fastest-growing industries. It stands to reason, then, that practitioners of the arts and creative industries are leaders in driving innovation. A range of studies have found significant evidence that incorporating creative professionals into multidisciplinary teams brings new perspectives and can be of major benefit in innovative problem solving.⁹¹

Artistic practice is inherently experimental, explorative and, in essence, innovative. A study from United Kingdom-based innovation foundation, Nesta, supports this position.⁹² Drawing on a survey of 500 alumni from the University of the Arts London and 40 face-to-face interviews, the study found that artists possess the specific skills and attitudes that help to foster innovation. This study found artists tend to have risk-seeking attitudes, a desire for novelty and a dislike of repetition. It also found that common traits shared among artists—including “tolerance of ambiguity” and “willingness to try new things”—demonstrate that artists are skilled innovators. Nesta also found that artists are often attentive observers of markets and audiences, and so have a “close understanding of consumer needs”. Maintaining a

keen awareness of market conditions, and thinking about how to push artistic practice further, is often how artists are able to develop innovative ideas.

Interestingly, this study also found that businesses that combine arts *and* science skills outperform those using only arts or only science skills.⁹³ Businesses that combine these skills have higher levels of employment and sales growth. Nesta found evidence that the broader the set of skills a business uses, the higher its level of innovative performance and future growth.

Australia's innovation agenda (including our nation's current approach to R&D investment) puts significant emphasis on scientific and technical innovation, and tends to exclude art and creative practices. Yet a recent paper by the Council of Humanities, Arts and Social Sciences found that the diverse skills and knowledge brought to a problem by a broadly multidisciplinary team ensure they are better equipped to think about how a product might be embraced by end users. This was found to be vital for the successful commercialisation of ideas, innovations and business concepts.⁹⁴

3.3 Developing creative skills within individuals across every industry is key to preparing Australia for the future of work

A flexible and creative workforce is a major driver of a nation's innovation.⁹⁵ Workforces made up of employees who possess flexibility, autonomy and skills diversity are better positioned to thrive in today's high-tech economies.

However, this has not necessarily always been the case. A 2018 report titled Mapping Australian Workforce Change found that, comparing 2013 to 2018, Australians now spend significantly less work time on routine and manual tasks, and more time on creative, interpersonal and decision-making tasks.⁹⁶ This is particularly the case in certain specialist occupations. For example, software programmers who have traditionally been able to rely on their technical knowhow, today must also be able to demonstrate creativity, interpersonal skills and high levels of analysis to be competitive and capable in their field.

According to a 2016 report by the Australian Council of Learned Academies, the diverse range of skills that drive innovation—skills related to creativity, communication, business management and analysis—will become increasingly in demand in the future. Furthermore, future employees will be expected to have these social, interpersonal and lateral thinking skills even if they specialise in a technical field.⁹⁷

The job descriptions of the future

- * *synthesising and articulating complex ideas*
- * *forming judgments based on evidence*
- * *making ethical decisions*
- * *solving problems with critical and creative thinking*
- * *effective communication*
- * *employing empathy and emotional intelligence*
- * *collaborating with people of diverse backgrounds*

Research undertaken in association with the Australian Academy of the Humanities' Future Humanities Workforce project reveals the kinds of multidisciplinary skills we can expect to see appearing in all kinds of job descriptions. These skills are: synthesising and articulating complex ideas; forming judgments based on evidence and making ethical decisions; solving problems with critical and creative thinking; effective communication; and employing empathy and emotional intelligence in collaborating with people of diverse backgrounds.⁹⁸ As we explore in *Chapter 5: Education and learning impacts*, opportunities for arts and cultural learning, participation and expression are critical for developing and improving these skills throughout our lives.

Arts organisations, and particularly subsidised organisations, play a critical role in training the creative workforce. A report from the Creative Industries Federation of Britain highlights how these organisations build essential skills and drive innovation across the broader cultural and creative industries.⁹⁹ The Federation argues that these are all prerequisites if these industries are to continue to grow.

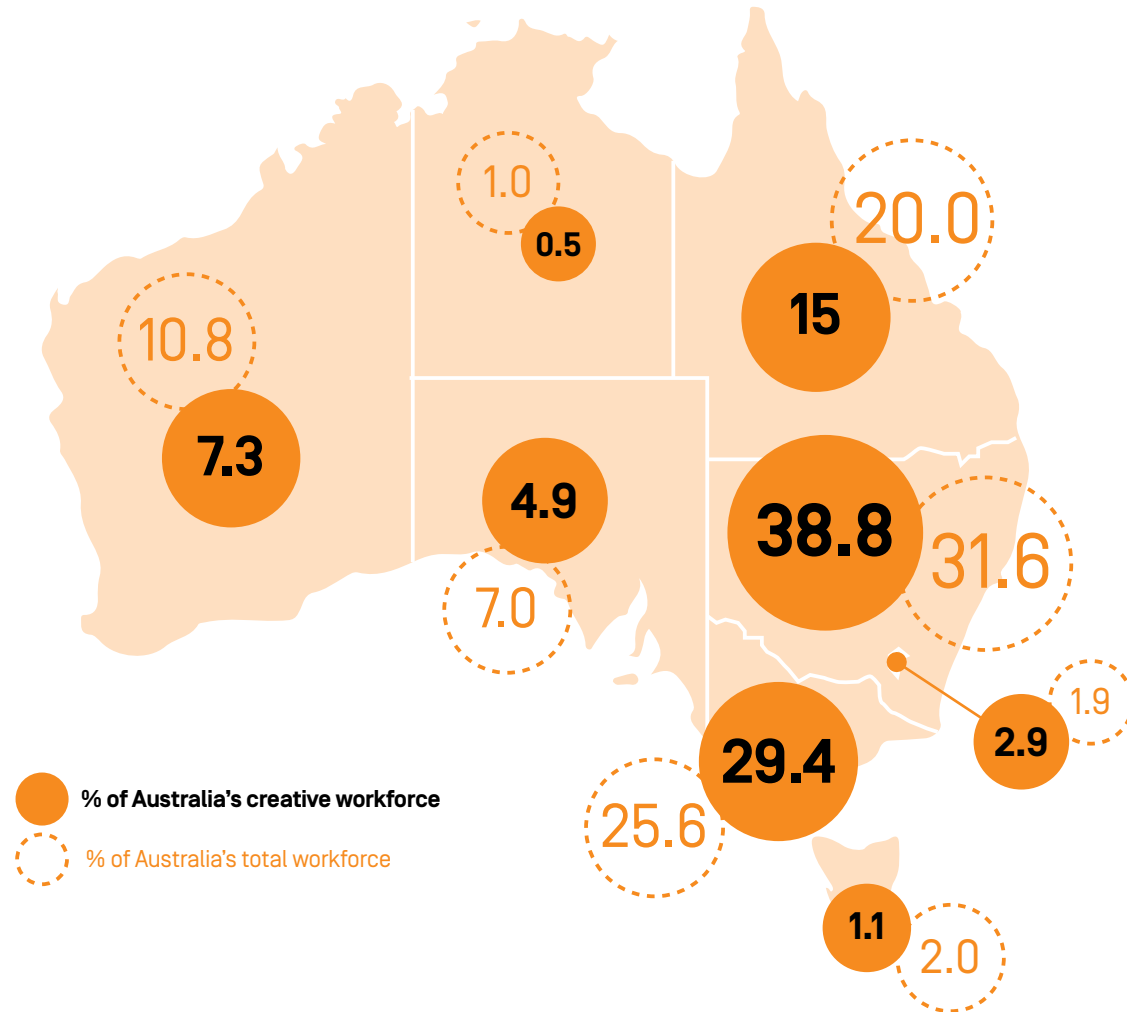
3.4 Creative careers can fuel Australia's workforce needs, nationwide

According to a recent report on Australia's creative economy, growth in creative employment is nearly twice that of employment across the broader Australian workforce.¹⁰⁰ This phenomenon becomes even stronger when looking specifically at "embedded creatives"—that is, employees who work in creative occupations, but in industries other than the creative industries. As noted, creative skills will be increasingly in demand as the Australian workforce changes, and those with creative qualifications and experience will have much to offer in this new labour force.

Importantly, while the concentration of the creative workforce is greater in areas that are closer to capital cities, data from the Regional Institute Australia demonstrates that, of 52 areas with a higher than average concentration of people working in cultural fields, 14 are located in regional Australia. This breakdown demonstrates that the creative workforce not only operates within urban centres, but that areas with small populations can "punch above their weight" when it comes to cultural and creative production.¹⁰¹

Organisations all over Australia will, increasingly, require employees with a creative skillset. Yet as of 2016, New South Wales has a significantly higher proportion of Australia's creative workforce, with 39% of all those in the nation's creative industries working there. Victoria is 2nd with 29%, with Queensland and Western Australia 3rd and 4th with 15% and 7% respectively.¹⁰² These proportions are expected to start evening out as the creative workforce continues to grow.

Figure 5: Per cent share of creative workforce per state, compared to the share of the total Australian workforce per state, 2016. Source data: Cunningham and McCutcheon 2018



How could Australia be transformed if we...

- * Reframed Australia's existing Research and Development tax incentives to intentionally include, and not (as is currently the case) explicitly exclude, humanities, arts, and social sciences research from these incentive programs?**
- * Recognised more consistently that opportunities for learning, participating in and practising arts and cultural activity throughout our lives are critical for the ongoing skills development required for innovation?**

For Consideration

FC 1	Establish a cross-portfolio policy inquiry, modelled on the APS200 projects, to map current investment in and impacts of cultural and creative spend and identify the policy areas that would most benefit from strategic investment. This should include a strategy and mechanism for better coordination between the three levels of government. At a federal level, grow the impact of—and effective collaboration between—the Commonwealth National Cultural Institutions, by establishing a clear and cooperative framework within which government expectations can be communicated, enabling collaborations to be incentivised and reported upon.	<i>Federal, state, territory and local governments, with a cross-department approach at each level; Cultural sector.</i>
FC 2	Identify areas of potential comparative advantage and incorporate the creative, cultural and digital sectors in industry development programs such as the Industry Growth Centres, Industrial Transformation Scheme and Cooperative Research Program. This will assist in diversifying Australia's economic base and addressing our trade deficit in creative goods and services.	<i>Department of Industry, Innovation and Science; Australian Research Council; Universities; Chambers of Commerce; Industry leaders</i>



4. HEALTH AND WELLBEING IMPACTS

The research at a glance

In examining the benefits of arts and culture to physical and mental health and wellbeing, we were inspired by a quote from one of Australia's leading researchers in the field of arts and health, Christina Davies, who concludes that, "if health is more than the absence of disease, pain and sickness, and is more about adaptation, understanding and acceptance, then the arts may be more powerful than anything medicine has to offer."¹⁰³

Our research sought to understand how art and culture are being applied in clinical and wellness settings, and if these applications are delivering benefits. And we consistently found that arts and culture does deliver positive health and wellbeing impacts.

Ultimately, what we found was that the relationship between arts and culture and health impacts was indirect but strong. Engaging with arts and cultural activities had a substantial impact on the social determinants of health, which can be thought of as the conditions in which we grow, live, work and age, including how strong our social networks are, our lifestyle factors, and our psychological states.¹⁰⁴ Arts and cultural activities enhance social inclusion, reduce loneliness, increase confidence and improve feelings of self-worth. These outcomes, in turn, have a direct impact on both physical and mental health.

- * Arts and culture help with the prevention of ill health and the promotion of positive health outcomes via the social determinants of health.
- * Incorporating arts and creative programs as well as innovative and creative design solutions and aesthetics within health settings improves a wide range of patient outcomes, particularly in in-patient hospital contexts.
- * Arts-based interventions have been found to help in recovery from a range of conditions, including addiction and stroke, and are used in the Australian Defence Force with personnel who have been wounded, injured or become ill during service to aid recovery, and improve self-esteem and social functioning levels.
- * Arts-based interventions have been found to reduce the risk of dementia, a disease that cost Australia \$14 billion in 2017 alone—a critical finding for the future management of Australia's aging population.
- * Arts engagement reduces depression and stress, and improves self-worth in the elderly.

What the research shows

4.1

Better health outcomes are clearly linked to engagement with, and access to, creative and cultural activities

In Australia, we're already working to harness the benefits of applying creative, participatory and receptive art interventions to health problems. Our National Arts and Health Framework (2013) was developed to promote greater integration between arts and health practices in Australia.¹⁰⁵ This framework was endorsed by the Standing Council on Health and the Meeting of Cultural Ministers.

The underlying principle of this framework is that participating in arts and cultural activities helps people to develop a sense of mastery and control over their circumstances and surroundings. These feelings of agency and autonomy have been found to be a central influence on the social determinants of health. This relationship is illustrated in Figure 6.

In Australia, the Napier Waller Art Prize offers an exemplar of how national institutions can engage in the arts as a form of healing. This national prize, administered by the Australian War Memorial and the University of Canberra, is open to all former and current Australian Defence Force (ADF) personnel, and aims to "promote artistic excellence and the healing potential of art, while raising a broader awareness of the military experience and the impact of service on the

individual". The Australian War Memorial highlights Australia's position on the use of arts for healing, stating that "art plays a critically important role in the healing and recovery of returning personnel. It is extremely important for veterans to have an outlet for how they can process what they have seen, and what they have experienced".

Research out of the University of Western Australia has also found compelling evidence for the relationship between arts and health, using participants drawn from the general Australian population.¹⁰⁶ It confirms there are direct impacts on physical health that come from increasing physical activity through creative engagements. Furthermore, participants reported significant impacts on the social determinants of health, including enhancing their sense of self, giving their life more meaning, expanding their social network, providing intellectual stimulation, and enhancing their problem solving and communication skills. Informed by this work, the researchers have developed a framework on which to base a future causal health-arts theory.¹⁰⁷

The relationship between arts and health has also been explored for different groups within Australian society, as well as internationally. First Nations peoples, both in Australia and internationally, have long argued that culture must be a critical part of any effort to address situations of Indigenous disadvantage, and for healing and strengthening individuals and communities.

How does engaging in arts and creative activities influence health and wellbeing?

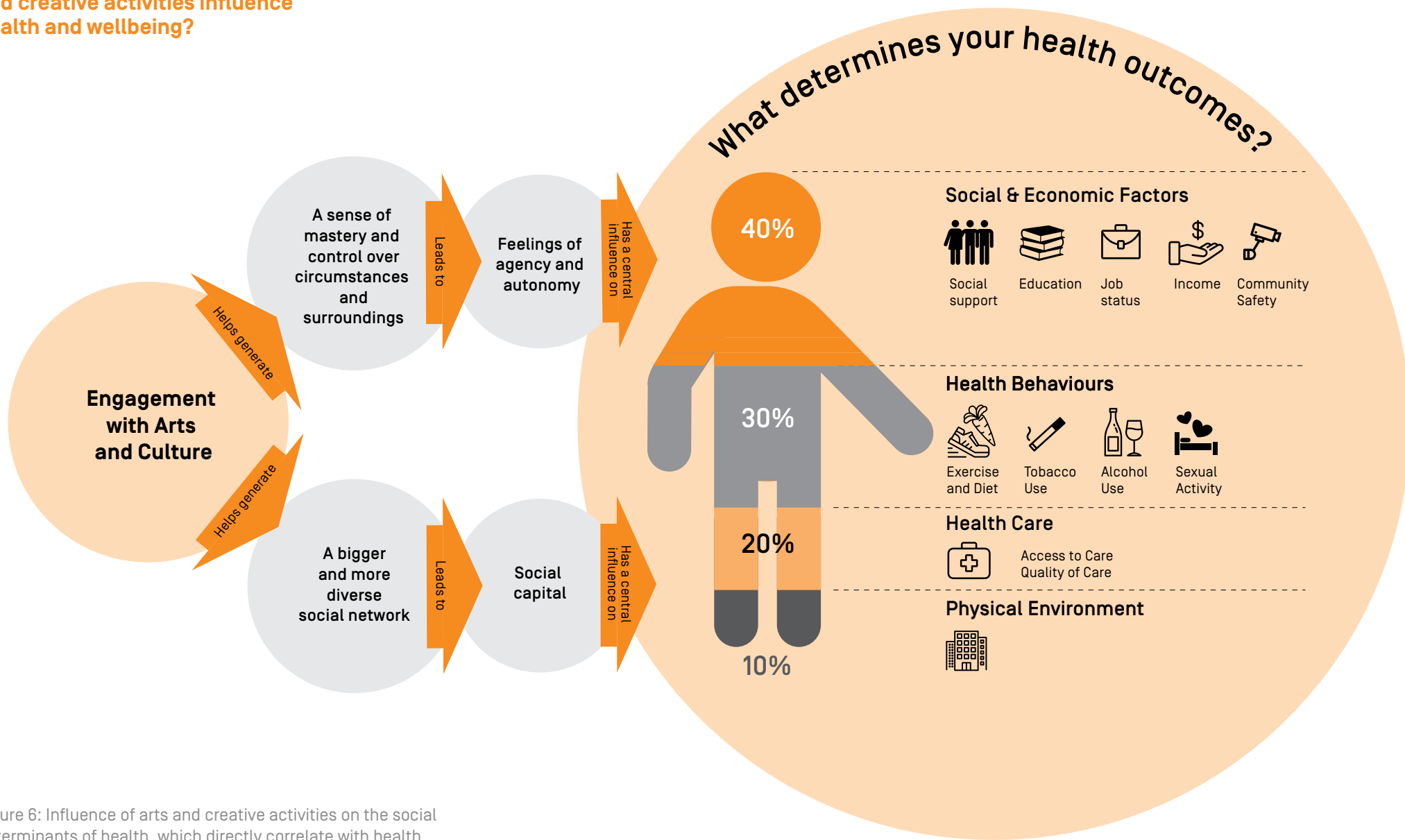


Figure 6: Influence of arts and creative activities on the social determinants of health, which directly correlate with health and wellbeing outcomes. Adapted from Davies et al., 2014, p. 6 and The Institute for Clinical Systems Improvement, 2014, <https://www.countyhealthrankings.org/explore-health-rankings/measures-data-sources/county-health-rankings-model>

Since 2008, the Australian Government has sought to deliver better outcomes for Indigenous communities through its Closing the Gap initiative. The importance of culture—in this context, meaning both ways of life and ways of creatively expressing those ways of life—is consistently highlighted in the Closing the Gap reports, demonstrating the link between participation in the arts and Indigenous wellbeing. The 2019 Closing the Gap report specifically advocates for the importance of social and recreational activities to health and wellbeing, pointing out the Australian Government’s \$24.2 million commitment to sport and recreational activities for Indigenous young people.¹⁰⁸

Further, numerous inquiries have demonstrated the link between interrupted culture and Indigenous disadvantage, and the importance of valuing culture in addressing this problem.¹⁰⁹ Again, this is tied into the social determinants of health, and the influence on physical and mental wellness. The inquiries all highlight the important role that cultural renewal and empowerment, primarily through programs based on traditional culture, have in addressing issues such as the overrepresentation of Indigenous people in custody and the high rates of suicide in these communities.

Arts engagement has also been positively linked to improved mental health outcomes in the Australian population more broadly, even taking into account other possible causes such as socioeconomic status, race, employment status and education. Davies and colleagues found in a 2016 study that the amount of time spent with the arts was important in determining the health outcomes they could predict. That is, the more people participated in arts and cultural activities, the better health outcomes they reported, up to 100 hours in a year after which the effects plateaued.¹¹⁰ This could therefore imply that two hours a week participating in cultural and creative activities has a significant and measurable positive impact on mental health.

The Napier Waller Art Prize for Defence Force Personnel

“Art plays a critically important role in the healing and recovery of returning personnel. It is extremely important for veterans to have an outlet for how they can process what they have seen, and what they have experienced.”

The Australian War Memorial

4.2 Arts and culture play a critical role in the treatment of illness and injuries

Many of the interventionist studies in arts and health—that is, research in which a baseline of health outcomes was available before an arts intervention, enabling the results of the intervention to be tested against that baseline—are related to how arts-based interventions can aid in the treatment of illnesses and injuries, often in hospital settings.

Research from the United Kingdom has shown that arts programs applied in health care settings have improved patient tolerance of symptoms and treatments, patient perceptions of care quality, patient-to-health care staff communication, and health care staff job satisfaction,¹¹¹ which is important considering the correlation between health care staff job satisfaction and patient outcomes.¹¹²

There are also economic benefits, with a 2019 inquiry by the British Parliament linking arts participation across England with savings by the National Health Service in the order of £168.8 million per year, resulting from fewer visits to general practitioners.¹¹³

Innovative and creative design solutions and enhanced interior and exterior landscaping have all been found to enhance positive patient outcomes, in particular in the context of aged care, dementia care, end-of-life care and mental health care facilities.¹¹⁴

It should be noted that different arts-based interventions have been found to be effective in different contexts and with different illnesses, but the relationship between these has not been made clear. A review by Arts Council England of 385 articles published in specialist medical journals and books found that:¹¹⁵

- * Visual art and live and recorded music have been used during chemotherapy, with these artforms being shown as effective in treating anxiety and depression, reducing stress and averting other side-effects of the treatment.
- * Music has also produced positive results in association with treatment for sufferers of heart disease, by reducing the length of hospital stays for intensive care unit patients.
- * Arts and music have been shown to be effective in the post-operative recovery period, reducing the need for sedatives.

4.3 Arts and culture help with recovery and rehabilitation following an illness or injury

Other studies have shown how the arts and cultural activities can contribute to active recovery and rehabilitation processes.

In Australia, the Australian Defence Force (ADF) includes arts-based methodologies in the ADF Arts for Recovery, Resilience, Teamwork and Skills (ARRTS) Program. This program assists ADF personnel who have been wounded, injured or become ill in service. In 2016, the Department of Defence reported that evaluations of the first two ARRTS programs revealed significant wellbeing benefits for participants, including improved self-esteem and social functioning levels.¹¹⁶

A study of an expressive arts-based intervention in an addiction rehabilitation program in the United States found the use of creative activities effectively augmented the use of traditional substance abuse talk therapy by providing clients with new ways to think about the path that brought them to addiction, their triggers and their journey to recovery. Offering an alternative means of communication was found to be particularly effective for clients who were further down their recovery track, or who were naturally self-reflective or fond of creative activities.

However, the opportunity to use these creative activities as a catalyst for discussion about their recovery from new perspectives was found to be beneficial for the majority of participants.¹¹⁷

Another study, of an arts-based intervention at an in-patient stroke rehabilitation unit in Scotland, found a wide range of benefits:¹¹⁸

- * The non-medical, social context of creating art facilitated social interaction, provided enjoyment and distraction, and re-established social identity, thereby improving mood.
- * The processes of art-making generated confidence and self-efficacy, and facilitated setting and achieving creative, communication and physical recovery goals that provided control over survivors' situations and hope for recovery.
- * Creative output involved completion of artwork and display for viewing. This enhanced self-esteem and improved mood, providing survivors with new identities through positive appraisal of the work by others.
- * These positive benefits were found to emerge out of increased self-efficacy, hope and control.

4.4 Arts and culture help the elderly and people with ongoing illness or injury to live healthier lives

Among the elderly, arts engagement has been shown to reduce feelings of depression and enhance levels of self-worth, both of which ultimately promote a positive aging experience. For example, a study of the influence of music therapy among a cohort of nursing home residents in Beijing showed that this therapy reduced psychological stress levels and enhanced overall feelings of life satisfaction.¹¹⁹

Arts-based activities for the elderly have also been found to have preventative benefits. A ground breaking 2003 study of approximately 500 individuals aged 75 and older found that “reading, playing board games, playing musical instruments, and dancing were associated with a lower risk of dementia”.¹²⁰ Follow up studies since 2003 have supported this finding: cognitive and physical activities that stimulate the brain, particularly those with a social component as many arts-based activities have, are indeed associated with a reduced likelihood of dementia.¹²¹ However, there appear to have been no randomised clinical trials to confirm this promising intervention to date. Given that dementia was found in 2017 to cost Australia \$14 billion a year, and growing,¹²² research into these preventative activities is recommended.

Other studies have found positive effects for the elderly who are already experiencing reduced wellness, aimed at improving quality of life.

Many Australian museums and galleries run programs specifically tailored to the needs of aging members of the population and older adults with dementia. These programs, often involving community activities, have been found to enable people living with dementia to have meaningful and enjoyable creative experiences. The programs also reduce participants’ social isolation.¹²³

Creative activities have also been found to bring about behavioural changes in those suffering ongoing mental illnesses, with patients shown to become more calm, attentive and collaborative.¹²⁴

How could Australia be transformed if we...

- * Promoted the health benefits of arts and cultural activities to the general public in a similar vein to the promotions of physical activity [such as ‘Find 30 [minutes of exercise] every day’], and developed new and innovative health programs that incorporate arts and culture in government run health care facilities?**
- * Invested in effective creative programs for older Australians, with the understanding that arts and culture has been shown to raise quality of life for the elderly and may play a critical role in preventing dementia?**

For Consideration

FC 1	Establish a cross-portfolio policy inquiry, modelled on the APS200 projects, to map current investment in and impacts of cultural and creative spend and identify the policy areas that would most benefit from strategic investment. This should include a strategy and mechanism for better coordination between the three levels of government. At a federal level, grow the impact of—and effective collaboration between—the Commonwealth National Cultural Institutions, by establishing a clear and cooperative framework within which government expectations can be communicated, enabling collaborations to be incentivised and reported upon.	<i>Federal, state, territory and local governments, with a cross-department approach at each level; Cultural sector.</i>
FC 3	Recognise the positive impacts of arts and cultural interventions in treating loneliness and mitigating the risk of dementia, and prioritise research and investment in randomised-controlled trials for Australia-specific interventions.	<i>Department of Health; Universities; Health care providers; Australian Research Council; Health insurers</i>



5. EDUCATIONAL AND LEARNING IMPACTS

The research at a glance

The positive relationship between exposure to the arts, arts education and student outcomes has been widely researched and documented. The impacts are twofold: firstly, having access to arts education is linked to a diverse range of long-term benefits; and secondly, creative activities are linked to educational outcomes and experiences for students.

However, the nature of this relationship has been hard to pin down. Does engagement with a formal arts education improve student outcomes? Or do students who do better in school also often enjoy the arts? And how can we separate the effects of engaging with the arts from the other factors influencing a young person's day-to-day experience? Ample research has indicated that our family's income tends to predict the kinds of social connections we have, as well as the knowledge we have of how to succeed in our particular cultural context. Given this, how can we be sure how much a student's positive outcomes in school relate directly to their arts education, and how much is linked to the money their parents have spent on their education and cultural development?

In this chapter, we identify and illustrate these relationships to make the educational benefits of engagement with arts and culture clear.

- * Arts and cultural activities help students develop personal, social and cognitive skills that transfer to, and improve performance in, a wide range of academic and social situations.
- * Arts education is particularly valuable for “at risk” students, as it increases self-esteem, improves communication skills, provides a sense of achievement and wellbeing and increases feelings of connection to teachers and the community.
- * The impacts of arts and cultural activities help improve both short-term academic outcomes and long-term life outcomes, including likelihood of attending and succeeding at university, being employed in a professional role and increasing earning potential.
- * We need to ensure that creative education is available in rural and regional areas equally to urban areas. The rise of the digital workforce means that students from all regions of Australia need to be able to develop the creative and analytical skills needed for the jobs of the future.

What the research shows

5.1 The knowledge, skills and attitudes developed through arts learning help build social and personal capabilities that aid young people throughout their lives

The research is widely conclusive around the impacts of arts and culture-based learning on the development of social and personal skills, as well as on physical skills and physical wellbeing for students.

The Australian Curriculum includes seven general capabilities—that is, knowledge, skills, behaviours and dispositions—that constitute the core of what students at every level of schooling will be able to do by the time they complete a grade. This includes capabilities in literacy, numeracy, ICT, critical and creative areas, personal and social areas, ethics and intercultural domains. The focus across all seven areas is considered essential for “equipping young Australians to live and work successfully in the twenty-first century”.¹²⁵

The United Kingdom is also taking account of the importance of building personal, social and cultural capabilities into the curriculum. The United Kingdom Office for Standards in Education, Children’s Services and Skills 2019 handbook points out that schools are now required to equip students with “the knowledge and cultural capital they need to succeed in life”, defining this as, “the essential knowledge that pupils need to be educated citizens, introducing them to the best that has been thought and said and helping to engender an appreciation of human creativity and achievement”.¹²⁶

Many studies provide evidence for the effectiveness of arts and culture-based programs and interventions. A study of 643 upper primary and high school students in 15 schools across eastern Australia found that students who actively engaged with arts and creative activities during their schooling years have higher levels of motivation and self-discipline, better self-esteem, higher life satisfaction and are better at bouncing back from academic setbacks.¹²⁷ In terms of specific creative forms, theatre, drama and dance have been found to improve young people’s social skills and emotional wellbeing.¹²⁸

Visual arts programs have also successfully been used to help students develop skills in managing their emotions and thinking critically and creatively.¹²⁹ In addition, there is a substantial body of work on the efficacy of music therapy

for improving children’s social skills, particularly for children with Autism Spectrum Disorder.¹³⁰

And active participation in more physically taxing creative activities, such as dance and circus training, has been found to positively influence children’s physical as well as mental wellbeing, aid socialisation skills, encourage enjoyment of physical activity and build resilience to adversity.¹³¹

In Australia, the Arts—incorporating Music, Dance, Drama, Visual Arts and Media Arts—is one of the key learning areas identified in the current Australian Curriculum across Foundation to Year 10. The Curriculum website highlights the capacity of the Arts to “engage, inspire and enrich all students, exciting the imagination and encouraging them to reach their creative and expressive potential.”¹³² ANA believes this is a move in the right direction for Australia. However, it should be noted that although Arts subjects are mandated across each band, the Curriculum leaves it to schools to determine which arts they will deliver, meaning that schools with more funding will have greater capacity to deliver more specialised and higher quality arts tuition. This will, in turn, affect student skill development in these areas.

5.2 Engaging with arts and culture during school may help develop intellectual skills that enhance academic outcomes

Australia's most recent PISA results (Programme for International Student Assessment—an international assessment measuring student performance in reading, mathematical and scientific literacy) showed that we have been steadily declining in our mean scores, and in our ranking among our international peers, since the introduction of the test in 2000.¹³³ A 2018 report by the Public Education Foundation found the economic cost of this decline is close to \$120 billion.¹³⁴

With this sobering challenge in mind, we have reviewed the current international understanding of how the process of creating, making, appreciating and evaluating arts may assist in the evolution of key high-order cognitive skills.

A 2013 OECD report, which involved a systematic overview of academic research, found that learning certain forms of arts instruction does indeed have an impact on the development of very specific skills, usually via what it describes as a “spillover effect”, and what other studies have referred to as transferrable skills.¹³⁵ For example, they point out that music learning involves auditory training, so music learning “spills over” into skill in speech perception. Music learning is also very similar to learning in a school environment,

involving discipline and practice and notation reading, so this spills over into the domain of academic performance. And as theatre involves character analysis, there is a spillover effect on skills in understanding the perspectives of others.¹³⁶

A 2019 United States longitudinal study of more than 30,000 students, whose outcomes were tracked from preschool through to the end of middle school, found that students who chose a creative elective (visual arts, drama, music or dance) in sixth or seventh grade had a higher grade point average in that year and following years compared with their peers, irrespective of their elementary school grade point average.¹³⁷

Another 2019 longitudinal study, this time following a nationally representative sample of 21,387 students from 1,280 United States schools through kindergarten, first grade, third grade, and fifth grade, found that learning through arts and culture can improve attainment in maths and reading, with the effects accumulating over time. The study showed that “by the time of the third- and fifth-grade assessments, students who received at least three hours of arts education a week were significantly outperforming students who received 20 minutes or less of arts education a week.”¹³⁸

An example of how this can work in the Australian context can be seen at Ashcroft High School in Western Sydney.

Three-quarters of the students are among the poorest in the country, yet many have gained high tertiary entrance scores and the school has seen marked improvements in NAPLAN results.

This has been achieved by taking a holistic approach to education, including employing an art therapist.¹³⁹

Although the research across this domain looks promising, it should be noted that, with only a small number of randomised trials or longitudinal intervention studies to understand the causal effects of arts and cultural activities on student outcomes, these results should be read as suggestive, rather than decisive. More research is needed, particularly in the Australian context, before conclusive statements can be made.

5.3 **Arts and culture-based education is particularly valuable and beneficial for students who are at risk of disengagement**

Arts and culture-based education can help address issues of disengagement, as well as anti-social, unsafe and potentially criminal behaviour.

A comprehensive systematic review of four longitudinal studies in the United States demonstrated that arts and creative learning have a strong positive effect on young people from disadvantaged backgrounds.¹⁴⁰ Participants who had engaged in arts-based activities during their schooling were more likely to have graduated from high school, attended university, achieved a high grade point average at university, and to have entered a professional rather than trade-based career (thus enhancing their earning potential), when compared with their similarly disadvantaged peers.

This research also found that arts-based learning particularly aids the development of prosocial behaviour (that is, behaviours that are intended to benefit others), with adults who had engaged with arts and cultural activities during school more likely to vote and volunteer.

In Australia, a variety of research initiatives have made very similar findings regarding the positive role of arts in the education of children deemed to be “at risk.”

For example, in a comprehensive three-year study of an Indigenous community in remote central Australia, anthropologist Inge Kral found that engagement with the arts and culture, particularly via digital and online channels, helped re-engage early school leavers and disaffected Indigenous youth with learning, and facilitated greater engagement with community.¹⁴¹ This in turn had positive impacts on their employability.

A major Australian study entitled Risky Business conducted in 2002–05 explored the use of the creative arts within diversionary programs for “at risk” youth—that is, programs that aim to divert young people away from crime, prosecution and custody.¹⁴² This four-year ethnographic study, by the University of Melbourne, and with the departments of Justice and Human Services, VicHealth and Arts Victoria, investigated the qualities and impact of effective arts programs for at-risk youth in urban and rural Victoria. The study concluded that young people who engaged in these arts programs experienced many personal and social benefits, including:

- * increased self-esteem
- * refined artistic skills
- * improved communication skills
- * a sense of achievement and wellbeing.
- * a greater connection to their communities.

Students from low-income families who take part in arts activities at school are:

- * *three times more likely to obtain a university degree.*
- * *twice as likely to volunteer.*
- * *20% more likely to vote as young adults.*

One particularly important finding was made by the Australia Council and Northern Territory Education and the Arts Partnership Initiative, in a study of Indigenous students learning English as a Second Language.¹⁴³ This study found that arts and cultural activities didn't only help students improve their academic outcomes, but also markedly improved relationships and increased trust between students and teachers. This reportedly increased positive risk-taking in the language learning context, as well as increasing student confidence and engagement.

5.4 Education that includes arts and culture helps prepare students for their future careers

As reported in *Chapter 3: Innovation impacts*, the skills developed through engagement with arts and cultural activities in school are considered especially important within our rapidly changing labour market. And adaptable skills and flexible mindsets will become increasingly important for future generations of workers.

The Foundation for Young Australians predicts that today's young people will hold as many as 17 different jobs across five different careers during their working lives.¹⁴⁴ So, these key cognitive skills will become increasingly vital if our children and young people are to successfully navigate

the various tools, tasks, specialised skills and workplace cultures they will encounter throughout their diverse working lives.

It should be noted that providing creative and arts-enriched learning environments are equally valuable in Australia's urban, regional and remote areas. Digitisation is happening across all industries, wherever they are located, and this creates more flexibility for learning and earning, regardless of location.¹⁴⁵ An employee with the right mix of skills and an internet connection can make significant contributions from anywhere and at any time. Therefore, today's students, the workforce of the future, may not even need to leave their rural homes in order to find work. This makes it more important than ever that we facilitate rural and regional students to develop higher-order cognitive skills to succeed in any occupation they wish to pursue.

As the new ways of working become further embedded in the economy, providing the right type of learning environments is critical. And these environments need to be fostered now. By providing educational environments that enable young Australians to develop both specialist knowledge—and the increasingly in-demand skills identified above—we can be confident of a future in which coming generations of Australians will hold their own on the international stage.

How could Australia be transformed if we...

- * Invested more effectively in training for primary and middle school teachers to deliver Dance, Drama, Media Arts, Music, and Visual Arts education to students at a high quality level?
- * Invested in school/teacher training programs within the GLAM sector [Galleries, Libraries, Archives and Museums] so that schools could continue to partner with cultural institutions? The GLAM sector already provides support to teachers, but capacity to continue providing these professional learning opportunities is currently threatened by constrained resources.
- * Increased our capacity as a nation to teach these skills, to support an increase in creative and arts-based education?
- * Paid greater attention to the working conditions of our creative professionals, particularly in terms of job security?

For Consideration

FC 1

Establish a cross-portfolio policy inquiry, modelled on the APS200 projects, to map current investment in and impacts of cultural and creative spend and identify the policy areas that would most benefit from strategic investment. This should include a strategy and mechanism for better coordination between the three levels of government. At a federal level, grow the impact of—and effective collaboration between—the Commonwealth National Cultural Institutions, by establishing a clear and cooperative framework within which government expectations can be communicated, enabling collaborations to be incentivised and reported upon.

Federal, state, territory and local governments, with a cross-department approach at each level; Cultural sector.

FC 4

Support research that explores the specific, causal effects of arts and culture on students' academic performance and long-term outcomes, to assist in identifying cost-effective strategies.

Government agencies; Departments of Education; Australian Research Council; Unions; Parent groups



6. INTERNATIONAL ENGAGEMENT IMPACTS

The research at a glance

Our research into how investment in arts and culture benefits international engagement included exploring how arts and culture are used to achieve soft power¹⁴⁶ diplomatic objectives.

This area has attracted significant research activity in recent years as nations seek to better understand and measure the impact of their engagement with international partners.

We looked at research exploring whether and how arts and culture provide a significant and meaningful pathway towards trust and understanding between nations. Further, we looked at research considering the role arts and culture play in improving relations—and trust—between countries.

We found that increased mutual trust has the potential to generate increased levels of trade, investment, security and exchanges of talent.¹⁴⁷

- * Australia has traditionally had a positive reputation internationally, but according to a number of international measures, our reputation is now slipping.
- * Australia is becoming increasingly isolated from our neighbours in Asia and the Pacific, leading to a soft power deficit.
- * Cultural diplomacy has been found to build international relationships and gain the trust of international partners/leaders/peoples.
- * Tourism and international diplomacy are intimately linked.
- * According to the OECD, cultural tourism is one of the fastest-growing global tourism markets, providing drivers for people outside Australia to engage with us.

Australia's reputation abroad affects both the reputations and the livelihoods of individual Australians.

Australia's reputation internationally is important for maintaining positive trade partnerships, for managing inbound exports such as international education and tourism, as well as for keeping Australians safe abroad.

What the research shows

6.1

Australia has traditionally had a positive reputation internationally, but this is slipping

According to a 2017 Department of Foreign Affairs and Trade White Paper, reputation and soft power develop through a wide range of formal and informal activities: “Soft power assets can include a nation’s education institutions, its aid program, its tourism assets and economic strength as well as other elements of national identity such as lifestyle and culture”.¹⁴⁸

Our international reputation as a prosperous, well-educated and inclusive country, based on our proficiency in those activities mentioned above, has long buoyed us in our international relations. However, in recent years, that reputation is starting to slip. In at least three different international measures, our nation brand—the sum of people’s perceptions of our country—has reduced in value over the last three to five years.

In 2019, the Portland Soft Power 30 Index, which measures annual national output across cultural, educational, scientific and economic indicators, ranked Australia 10th out of the 30 countries assessed.¹⁴⁹ Although we advanced one spot in the overall ranking compared to 2018, we are still significantly lower than in the past—in 2015, for example, when we were ranked in 6th place— and declined in every sub-index besides Enterprise.

The report recommends that, if Australia is to regain the soft power lost in recent years, it must “leverage both its cultural and educational soft power”, and continue the nation-wide conversations opened by the Foreign Policy White Paper in 2017. Australia will need to double down on our performance, and our cultural performance in particular, to ensure international perceptions about us remain positive, and to ensure our performance continues to measure up against our international peers.

Using a different set of indicators, the FutureBrand Country Index saw us decline from 8th in 2014 to 15th in 2019, based on a combined dataset of surveys and social media analyses related to 75 countries.¹⁵⁰ And the Global Reputation Rankings report for 2018 showed a similar decline.¹⁵¹ Our rank in this index slipped from 4th in 2013 to 6th in 2018 (of 55 countries ranked). Importantly, according to this report, a 1 point increase in country reputation predicts a 0.9% increase in the proportion of tourists per capita, and a 0.3% increase in export rates (\$). Our international reputation not only affects our capacity to influence on the international stage, but also impacts our nation’s bottom line.

Indicators of influence

While our engagement, government and digital performance has improved, we are in decline on education, culture and enterprise, among others. And our improvements have not been significant enough to prevent an overall ranking reduction.

A declining reputation may lead to a range of negative impacts on our nation. According to AusTrade's Australia's Nation Brand project, "in a fiercely competitive world, the degree to which a country is admired, trusted and respected can have direct economic and social impact on that nation".¹⁵²

The 2017 Soft Power Review by the Department of Foreign Affairs and Trade recognised that international collaboration in arts and cultural projects is important for building influence and international partnerships.¹⁵³ This review found culture and cultural activity to be at the heart of efforts of countries that have effectively mobilised soft power initiatives. It argued that to better harness Australia's creative potential for soft power initiatives, we need bipartisan and public confidence in, and support of, our nation's cultural life.

The Global Reputation Rankings 2018 Report indicated that the key actions a country can take to improve and maintain reputation include fostering and developing an appealing environment; creating and communicating a country "feel good" factor; and developing a consistent country narrative and cultural back story.¹⁵⁴ Given that storytelling and meaning-making are some of the key devices of many arts and cultural activities, it stands to reason that a flourishing arts and creative sector can indeed benefit Australia's soft power efforts.

6.2

Australia is becoming increasingly isolated from our international neighbours—cultural sharing could help

Despite significant rapprochement in recent decades and increased economic interdependence, the relationship between Australia and many Asian nations remains "coloured strongly by a sense of cultural distance and lack of connections—from both sides", according to a report by the Australian Council of Learned Academies about relations between Australia and our Asian neighbours.¹⁵⁵

Our relations in the Pacific are also becoming strained, with Australia increasingly perceived by our Pacific neighbours as trying to use humanitarian aid and disaster relief as a point of leverage to gain Pacific leaders' support for Australia's objectives.¹⁵⁶ Further, there have been significant tensions relating to climate change.¹⁵⁷

Reinforcing this finding, a detailed survey by the Department of Foreign Affairs and Trade (reviewed in the above-mentioned report by the Australian Council of Learned Academies) showed that most Australians feel culturally disconnected from even our closest neighbours, such as Indonesia. And this feeling is often mutual: only 11% of Indonesians said they were aware that Australia was their nation's largest aid partner. A similar sense of disconnect emerges from surveys concerning the relationship between Australia and China.¹⁵⁸

The Australian Council of Learned Academies report emphasised that Australia currently suffers a “soft power deficit”, and argues that this deficit is exacerbated by mutual ignorance and restrictive stereotypes impacting relations between nations.¹⁵⁹ Understandably, these factors are a barrier to the development of mutual trust, shared goals and collaborative activities that underpin soft power.

Cultural diplomacy can provide means for Australia to rebuild those relationships and regain the trust of Asian and Pacific leaders and peoples. According to a recent article in Quarterly Access, a publication by the Australian Institute of International Affairs, Australia has begun losing its position of influence in the Pacific region as China has ramped up its aid contributions.¹⁶⁰ Although we are currently still the highest contributor of aid in the region, Pacific nations no longer rely solely, or for some, even predominantly, on our financial support.

This, the author argues, makes it more important than ever that we build relationships with these nations through other means, particularly cultural diplomacy. This might include population-level exchanges related to food, visual art, literature, cultural exchange programs, academic exchange overseas student programs, or language classes. The goal of cultural diplomacy is “not to influence or produce immediate economic benefit, but to bridge the differences between populations through culture—be it food, art, dance,

literature—to shape the conditions within which significant advances in deepening inter-state relationships can be achieved.”¹⁶¹

It seems clear that investment in opportunities enabling cultural sharing between Australia and our neighbours will go a long way towards removing barriers created by cultural misconceptions between nations.

Soft power is not fuelled by foreign policy alone

An effective soft power agenda extends beyond the realm of foreign policy – it must also include cultural, intellectual, and educational soft power assets.

6.3 **Australia's arts and culture scene enhances our attractiveness as a holiday destination**

Tourism and international diplomacy are intimately linked. Australia's national tourism strategy is a collaboration between the Department of Foreign Affairs and Trade, Austrade and Tourism Australia, as well as industry representatives. This strategy aims to grow the competitiveness of Australia's tourism industry, in part by strengthening Australia's bilateral relationships with governments of key tourism markets.¹⁶²

According to the OECD, cultural tourism is one of the fastest-growing global tourism markets.¹⁶³ Enhancing cultural tourism in Australia creates drivers for tourists to engage with, and as suggested in the Global Reputation Rankings Report, makes Australia an attractive environment to visit, or to aspire to visit.¹⁶⁴

Cultural monuments function particularly well as prime tourist drawcards—from the long-standing appeal of the Sydney Opera House, to the recent success of Hobart's Museum of Old and New Art (Mona). So too do Australia's regional and remote areas, with areas such as Central West Queensland attracting more than 100,000 visitors per year.¹⁶⁵

In 2013, Deloitte estimated that the Sydney Opera House contributed \$775 million annually to the Australian economy, and had a total “cultural and iconic value” of \$4.6 billion.¹⁶⁶ Arts tourism in Australia has also enjoyed significant growth, with the Australia Council for the Arts reporting in 2015 that arts tourism had grown by 19%, as an estimated 2.4 million international visitors made their way to Australia in 2013–14 to engage in arts tourism.¹⁶⁷

Our arts and culture are evidently helping to keep Australia on the international tourism map. The Global Power City Index (GPCI) values and ranks major global cities according to their “magnetism” for attracting people, capital and enterprises from around the world. In 2018, the GPCI ranked Sydney in 10th place in its top-10 cities, with London, New York and Tokyo the top three.¹⁶⁸

How could Australia be transformed if we...

- * **Invested in cultural diplomacy as well as economic diplomacy—developing opportunities to share cultures between Australia and our neighbours, to reduce barriers and misconceptions?**
- * **Communicated Australia's decreasing international reputation to the Australian people? This is not commonly understood, and neither are the potential ramifications.**
- * **More systematically encouraged visitors to Australia to participate in our rich arts and cultural scene?**
- * **Incorporated arts and cultural activity more substantially into AusTrade's Australia's Nation Brand project?**

For Consideration

FC 1	Establish a cross-portfolio policy inquiry, modelled on the APS200 projects, to map current investment in and impacts of cultural and creative spend and identify the policy areas that would most benefit from strategic investment. This should include a strategy and mechanism for better coordination between the three levels of government. At a federal level, grow the impact of—and effective collaboration between—the Commonwealth National Cultural Institutions, by establishing a clear and cooperative framework within which government expectations can be communicated, enabling collaborations to be incentivised and reported upon.	<i>Federal, state, territory and local governments, with a cross-department approach at each level; Cultural sector.</i>
FC 6	Ensure arts and culture are a central pillar of Australia’s soft power diplomatic activity. Include opportunities for collaboration and exchange in research and practice between Australia and our regional neighbours.	<i>Department of Foreign Affairs and Trade; AusTrade; Australian businesses with international ties; Chambers of Commerce; Industry bodies; Diaspora communities</i>



7. CULTURAL IMPACTS

The research at a glance

As we have demonstrated, a strong cultural life generates positive impacts for individuals, communities, societies and economies.

In addition to the areas previously discussed, the research in this chapter highlights that the benefits of a strong Australian creative culture include opportunities for sharing our cultures and values, supporting existing and new forms of artistic and cultural expression, experiencing diverse voices and perspectives, and developing and maintaining our heritage.

A key tenet of contemporary liberal democracies is that our public life includes opportunities for citizens to express dissent, spark questions and articulate difference. Arts and culture is a key arena for imagining different worlds and expressing divergent views. Individual lives are enriched by engaging with arts and culture, often via an enhanced sense of self and belonging. In this chapter we give a snapshot of how Australians engage with arts and culture, explore barriers to participation and production, and show how we can keep strengthening Australian cultural life.

- * Most Australians believe that engaging with the arts makes for a richer and more meaningful life. Most of us [82.4%] attend cultural venues and events, and are willing to spend money on cultural goods and services. We bought more tickets to live arts and culture performances than to live sporting events in 2017.
- * One-third of Australians aged 15+ actively participate in [rather than just attending/observing] artistic/cultural creation or performance. This rises to 95.6% for Australians aged 5–14, who participate in at least one cultural activity outside of school hours.
- * Socioeconomic background often predicts the type of arts we enjoy, and the cultural contexts we feel comfortable in. Ensuring young people access a broad variety of arts and cultural experiences, irrespective of their family's income, can help to break down social inequities.
- * The majority of arts and culture professionals have multiple part-time jobs, which leaves them, and the sector, vulnerable. New investment models are being developed that explore social, cultural and economic impacts.
- * We need to be more systematic about ensuring our arts and culture sector represents contemporary Australia.

What the research shows

7.1 Australians readily attend cultural experiences

Australians demonstrate their belief that engaging with the arts makes for a more rich and meaningful life through a range of actions. Australians invest time, energy and money into their chosen cultural activities.

In fact, 98% of Australians, from every walk of life, participate in and engage with cultural and creative activities, according to a 2017 Australia Council report.¹⁶⁹ Similarly, 82.4% of us (those aged 15 years and over) attended live cultural venues and events during 2017–18.¹⁷⁰ To put this high level of cultural engagement in context, a 2015 study of European Union countries found only 63.7% of the adult population (aged 16 years and over) went to the cinema, attended a live performance, or visited a cultural site during the previous 12 months.¹⁷¹

And our personal investment in arts and culture is significant. During 2015–16 Australian households spent an estimated \$25.64 billion, or 3.5% of total household expenditure, on cultural goods and services.¹⁷²

It seems arts and culture effectively gets us off the couch and out enjoying experiences with others. A total of 72% of Australians reported either consuming or engaging in at least one activity, live and in person, within the art and culture domain in 2017.¹⁷³ According to a Live Performance

Australia Report, also in 2017, Australians attended more professional live performances (such as contemporary and classical music, circus and physical theatre, festivals, opera, theatre, ballet and dance, comedy and musical theatre) than live games of AFL, NRL, Soccer, Super Rugby, Cricket and NBL games combined.¹⁷⁴ All up, Australians bought 23 million live performance tickets, generating total ticket sales revenue of \$1.88 billion.¹⁷⁵ In comparison, total combined attendance at the above-mentioned sporting events was approximately 13 million.¹⁷⁶

7.2 Australians are active in their own creative pursuits

We also invest in our own artistic endeavours. Almost one-third of Australians aged 15 years and over reported actively participating (rather than just attending/observing) in artistic/cultural creation or performance in 2017, with activities including playing music, singing, dancing, writing, painting or photography.¹⁷⁷ Active participation increased from 27% in 2013–14 to 31.4% in 2017–18.¹⁷⁸ This is very similar to active participation rates by adults (16 years and over) in the European Union.¹⁷⁹ Active participation rose to 95.6% for Australians aged 5–14, who participated in at least one cultural activity outside of school hours.

We're also avid readers: reading is among our most popular cultural engagement activities. In 2016, 79% of Australians read fiction or non-fiction for pleasure.¹⁸⁰ And this looks likely to continue into the future, with Australians aged 5–14 embracing this form of cultural engagement—the Australian Bureau of Statistics estimates that 78.5% of this age group read for pleasure during 2017–18.¹⁸¹

7.3 Our cultural appetite is increasing

A study of the impact of national cultural institutions by the Department of Communication and the Arts demonstrated that the number of on-site educational visits to these institutions is on the rise. A record number of approximately 1 million on-site school visits occurred in 2017–18.¹⁸² The number of visits to the websites of national collecting institutions (such as our national museums and galleries) also continues to increase, with an estimated 47.6 million website visits in 2017–18. This study also indicates a rise in attendances at activities supported by the Australia Council for the Arts, from 15.9 million in 2013–14 to 22.7 million in 2017–18. A similar trend has been observed in attendances at productions supported by Screen Australia, which reached 3.4 million in 2017–18.

7.4 Our First Nations artists and cultural leaders are making unique global contributions

The contribution made by Indigenous artists is acknowledged both at home and overseas. Nine in 10 Australians agree that Indigenous arts are an important part of Australian culture, and Indigenous visual art is regularly featured in high-profile international events.¹⁸³ This has included formal efforts by the Australian Government to highlight this contribution, such as the Department of Foreign Affairs and Trade's Aboriginal and Torres Strait Islander Program, which promotes a wide range of Australia's Indigenous cultural exchange activities.¹⁸⁴

Australian Indigenous artists are proportionally more likely to be nominated for a major art award and participate in international arts events. For example, of Australian artists participating in international events in 2013, around 5% were Aboriginal or Torres Strait Islander people. This is notably higher than the proportion of Aboriginal and Torres Strait Islander people within the broader Australian population, which is 3%.¹⁸⁵

These achievements sit at the forefront of efforts to augment the visibility and recognition of these communities across all domains of national life.

***Nine in 10 Australians agree
Indigenous arts are an important
part of Australian culture,
and Indigenous visual art is
regularly featured in high-profile
international events.***

7.5 Barriers and access to arts and culture varies across geography and demography

The monetary costs of cultural access

The affordability of cultural consumption across Australia is an important area of current research. A detailed “cultural price index” produced in 2011 revealed that when compared to capital cities, the cost of mainstream cultural consumption was generally 200–500% higher in regional communities, and up to 1,300% higher in remote locations.¹⁸⁶

This index uses a standardised basket of six cultural consumption items (based on Australian Bureau of Statistics estimates of mainstream cultural consumption) to measure the affordability of cultural experiences across different geographic areas. The basket is comprised of mass culture (for example, a blockbuster movie), family culture (for example, a library visit), interactive culture (for example, a festival), home culture (for example, streaming an album), high culture (for example, a trip to the theatre) and cultural learning (for example, a piano lesson).

This indicator reveals the existence of a stark “cultural divide” between metropolitan areas, regional centres and country and remote towns, with the real cost of cultural consumption dramatically higher in regional and remote Australia. Importantly, this work found a substantial factor

in the higher costs of cultural consumption in regional and remote Australia relates to the indirect costs of cultural access, noting that “much of the true cost in regional and remote Australia is paid not at the box office but at the petrol station along the way”.¹⁸⁷

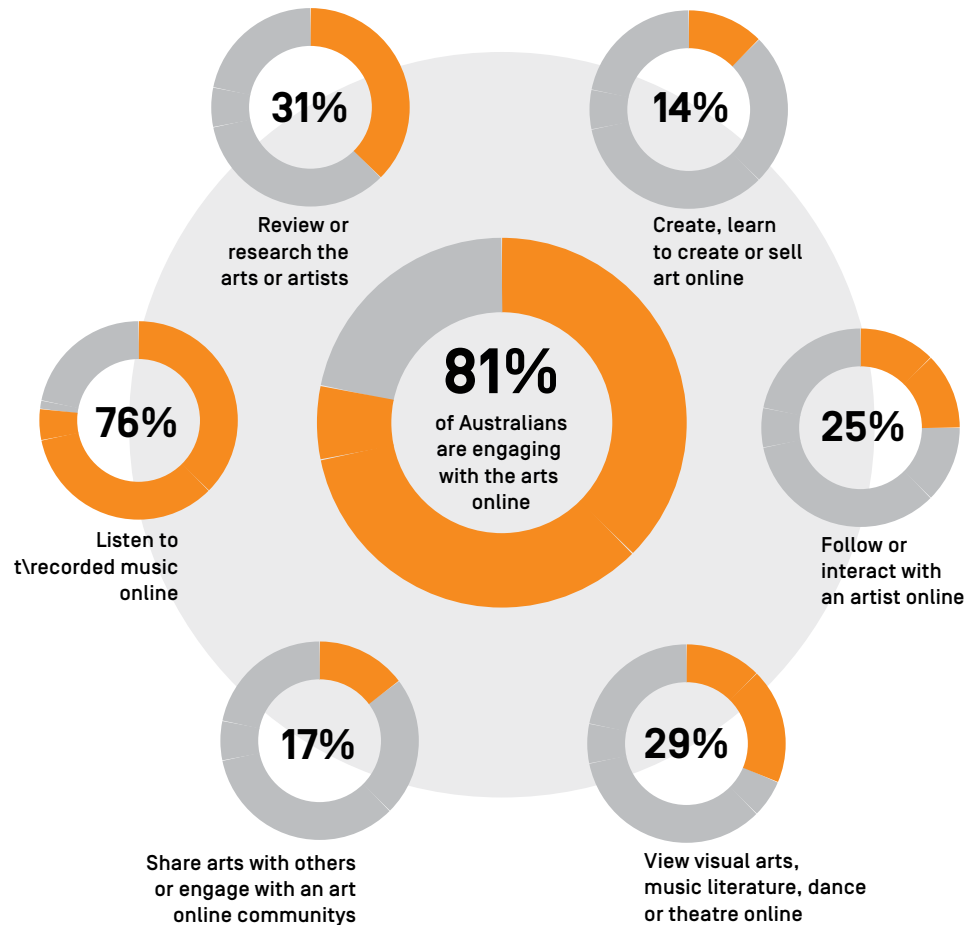
Accessibility: who participates and who doesn't?

Arts indicators show that attendance is increasingly accessible to people from a wide range of demographics. Rates of live attendance, and levels of creative participation for people with disability, steadily increased from 60% in 2013 to 73% in 2016.¹⁸⁸ Living in a regional area does not appear to substantially affect the rate of arts attendance, despite the aforementioned costs of doing so: the regional attendance rate of 69% is not far behind the metropolitan attendance rate of 73%.¹⁸⁹ These indicators also demonstrate that younger Australians are more likely than older Australians to attend arts events, as are respondents from culturally and linguistically diverse backgrounds.¹⁹⁰

However, we know there is still more work to be done to enhance accessibility, with socioeconomic background, education, age and gender playing a major role in determining the extent and nature of Australians' cultural consumption. The Australian Cultural Fields project indicates that cultural privilege is often passed from generation to generation, and that economic, social and cultural capital are each vital determinants of an individual's level

The real cost of cultural access
“Much of the true cost [of cultural access] in regional and remote Australia is paid not at the box office but at the petrol station along the way.”

Figure 7: Australia's online engagement with the arts.
Reproduced from the Australia Council for the Arts, 2017b, p. 80.



of cultural consumption and participation.¹⁹¹ This form of privilege presents a real challenge to the development of an equitable and prosperous society, as those with fewer opportunities to experience or engage with creative and cultural activities are, in turn, less likely to enjoy the educational, health or career benefits that these activities can generate. Ensuring equitable access to culture remains a major challenge.

For those who cannot, or prefer not to, attend cultural activities in person, digital access is becoming an increasingly critical component of cultural participation. The latest survey from the Australia Council for the Arts estimates that 81% of Australians engage with the arts online.¹⁹² Further, a growing number of Australians choose to engage in creative activities via electronic platforms. In its 2019 report, the Interactive Games and Entertainment Association noted that more than two-thirds of Australians play video games, and 91% of households own a video game device.¹⁹³ The report highlights that people engage with video games not only to entertain, but also to transform, create, connect, communicate, live well and educate.

Our first Insight Report, *The Big Picture: Public expenditure on artistic, cultural and creative activity in Australia* highlighted the shifting relationship between the different levels of government and their expenditure on arts and culture. Over the last decade local governments have increased their per capita expenditure on arts and culture by 11%.

While the largest expenditure on cultural services and products is through private consumption, we noted that public expenditure plays an important role in enabling both access and experimentation, as well as caring for our shared cultural assets.

You can access Insight Report One at: <https://www.humanities.org.au/new-approach/report1/>

7.6 Our cultural workforce is growing and changing, but challenges remain

While there are upwards trends in employment in creative industries more broadly, significant challenges remain for professional practising artists.¹⁹⁴ The most recent release of economist David Throsby's 30-year survey of the trends in the lives and working conditions of Australian artists highlighted that Australia's 48,000 professional practising artists face "increasing insecurity in contractual arrangements, and the replacement of steady employment with the emerging concept of the portfolio career".¹⁹⁵ An earlier report from the study found that artists have predominantly portfolio careers (in which they split their time between two or more part-time positions), with only 17% working full-time in their creative practice.¹⁹⁶

As in other sectors with high levels of precarious employment, this presents a major challenge to the development of sector capacity, quality products and demographic diversity, as well as being detrimental to individuals and their families.

7.7 Models of investment and support are changing

Our definition of culture is broad and includes activities that are purely commercial as well as those subsidised by governments, community-sourced, privately funded, supported via patronage, and those that are a combination of these (See *What we mean by culture*, p.115 for more detail). How artistic and cultural production is incentivised, supported and leveraged is a significant area of interest, change and opportunity.

Future models for sustainability are being explored internationally. In 2018, the Arts and Humanities Research Council in the United Kingdom launched the Creative Industries Clusters Program, which aimed to serve as a catalyst for collaboration between the country's creative industries and arts and humanities-led research from its leading universities.¹⁹⁷ By seeking to stimulate this collaboration, the program was designed to generate new jobs for highly-skilled creative professionals through the development of new products and services.

For some forms of creative and cultural practice, newer models of investment may represent a suitable financing vehicle. The Arts Impact Fund in the United Kingdom, for example, is the world's first investment fund specifically

dedicated to cultural sector endeavours, and requires beneficiaries to take up the challenge of generating social impact and making great art in order to fully repay the investment.¹⁹⁸

This format addresses the need in the sector for longer-term funding, and also supports a large number of organisations that require relatively small amounts of finance but, because they do not fit under the traditional “arts” umbrella, cannot obtain funding through traditional avenues. Support for these ventures is critical not only as they help to fund the creation of art, but also often result in significant wider social benefits for individuals and communities.

Similar approaches have also been trialled in Australia. A notable example is a project at the Queensland University of Technology (QUT), supported by the Australian Research Council, which provided participating artists with an opportunity to develop skills for collaborating with interactive entertainment industries in Australia, and thus extend the range of their career pathways.¹⁹⁹ Since 2013 QUT Creative Enterprise Australia has also operated Australia’s first dedicated creative tech investment fund.²⁰⁰

Alongside these questions about financial sustainability, key stakeholders including both government and peak cultural bodies have emphasised the importance of ensuring that the make-up of, and support for, our cultural workforce is both representative of, and relevant to, contemporary Australian demographics.²⁰¹ Indeed, the overwhelming consensus of a 2019 Parliamentary Inquiry into Canberra’s national institutions was that, because the collections of national institutions play a critical role in supporting Australia’s democracy, these collections need to include—and be representative of—all Australians.²⁰²

This highlights a critical need to ensure that our investment in this area is effectively generating a relevant and engaging cultural life for contemporary Australia. A recent survey found that 22% of Australians believe that arts and culture are “not for people like me”, with an additional 20% feeling unsure.²⁰³ With the positive impacts of creative and cultural activities apparent across many areas of our lives, it is imperative that these be accessible and relevant to all Australians.

How could Australia be transformed if we...

- * **Prioritised cultural infrastructure projects in regional, remote and peri-urban communities on the outskirts of larger cities?**
- * **Took a systematic approach to ensuring that our arts and cultural sector represented contemporary Australia?**
- * **Explored effective and innovative ways of funding arts and culture in Australia and reducing the precarious employment of the creative workforce?**

For Consideration

FC 1	Establish a cross-portfolio policy inquiry, modelled on the APS200 projects, to map current investment in and impacts of cultural and creative spend and identify the policy areas that would most benefit from strategic investment. This should include a strategy and mechanism for better coordination between the three levels of government. At a federal level, grow the impact of—and effective collaboration between—the Commonwealth National Cultural Institutions, by establishing a clear and cooperative framework within which government expectations can be communicated, enabling collaborations to be incentivised and reported upon.	<i>Federal, state, territory and local governments, with a cross-department approach at each level; Cultural sector.</i>
FC 7	Prioritise initiatives for regional and remote Australia to benefit from the particular impacts and value of cultural infrastructure (both built and human) for economic diversification, community wellbeing and population attraction and retention.	<i>Federal, state, territory and local governments; Businesses based in or focused on regional Australia (including through corporate social responsibility activities).</i>



FOR CONSIDERATION

For Consideration

FC 1

Establish a cross-portfolio policy inquiry, modelled on the APS200 projects, to map current investment in and impacts of cultural and creative spend and identify the policy areas that would most benefit from strategic investment. This should include a strategy and mechanism for better coordination between the three levels of government. At a federal level, grow the impact of—and effective collaboration between—the Commonwealth National Cultural Institutions, by establishing a clear and cooperative framework within which government expectations can be communicated, enabling collaborations to be incentivised and reported upon.

Federal, state, territory and local governments, with a cross-department approach at each level; Cultural sector including cultural institutions

FC 2

Identify areas of potential comparative advantage and incorporate the creative, cultural and digital sectors in industry development programs such as the Industry Growth Centres, Industrial Transformation Scheme and Cooperative Research Program. This will assist in diversifying Australia's economic base and addressing our trade deficit in creative goods and services.

Department of Industry, Innovation and Science; Australian Research Council; Universities; Chambers of Commerce; Industry leaders

FC 3	Recognise the positive impacts of arts and cultural interventions in treating loneliness and mitigating the risk of dementia, and prioritise research and investment in randomised-controlled trials for Australia-specific interventions.	<i>Department of Health; Universities; Health care providers; Australian Research Council; Health insurers</i>
FC 4	Prioritise new investment in cultural participation programs and arts-based initiatives that bring together communities and give individuals both skills and a greater sense of agency to encourage greater social inclusion and cohesion.	<i>Philanthropists and other private supporters; Government agencies; Local, state and territory governments; Religious institutions; Not-for-profits</i>
FC 5	Support research that explores the specific, causal effects of arts and culture on students' academic performance and long-term outcomes, to assist in identifying cost-effective strategies.	<i>Government agencies; Departments of Education; Australian Research Council; Unions; Parent groups</i>

FC 6	Ensure arts and culture are a central pillar of Australia's soft power diplomatic activity. Include opportunities for collaboration and exchange in research and practice between Australia and our regional neighbours.	<i>Department of Foreign Affairs and Trade; AusTrade; Australian businesses with international ties; Chambers of Commerce; Industry bodies; Diaspora communities</i>
FC 7	Prioritise initiatives for regional and remote Australia to benefit from the particular impacts and value of cultural infrastructure (both built and human) for economic diversification, community wellbeing and population attraction and retention.	<i>Federal, state, territory and local governments; Businesses based in or focused on regional Australia (including through corporate social responsibility activities).</i>

Glossary of terms

Arts and health definition

According to Australia's National Arts and Health Framework: "In its broadest sense, arts and health refers to the practice of applying arts initiatives to health problems and health promoting settings. It involves all art forms and may be focused at any point in the health care continuum. It also has an impact on the determinants of ill-health by changing individuals' attitudes to health risks and supporting community resilience".

Creative industries

The creative industries are those that generate value from artistic and cultural outputs requiring individual creativity, skill and talent. Often the value of these outputs is derived from the intellectual property associated with their creation. This definition covers a wide array of endeavours including: music and performing arts; film, television and radio; advertising and marketing; software development; writing, publishing and print media; and architecture, design and visual arts.

Creative workforce

"The ARC Centre of Excellence for Creative Industries and Innovation (CCI) has identified six creative workforce segments by grouping together several industry categories...[advertising and marketing; architecture, design and visual arts; film, television and radio; software and interactive content; music and performing arts; writing,

publishing and print media]. Also considered by CCI as part of the creative workforce are those people employed in specialist creative occupations either working in the industries listed below or employed in other sectors of the economy". Screen Australia Employment Trends, 2006.

Cultural capital

This "refers to the symbols, ideas, tastes, and preferences that can be strategically used as resources in social action... By analogy with economic capital, such resources can be invested and accumulated and can be converted into other forms. [For example], middle-class parents are able to endow their children with the linguistic and cultural competences that will give them a greater likelihood of success at school and at university. Working-class children, without access to such cultural resources, are less likely to be successful in the educational system...Educational success—reflecting initial cultural capital—is the means through which superior, higher-paying occupations can be attained, and the income earned through these jobs may allow the successful to purchase a private education for their children and so enhance their chances of educational success. This 'conversion' of one form of capital into another is central to the intragenerational or intergenerational reproduction of class differences". Oxford Reference for Cultural Capital <https://www.oxfordreference.com/view/10.1093/oi/authority.20110803095652799>

Cultural diplomacy

This “involves governmental programs that allow populations to interact with each other through cultural artefacts. Those artefacts can reflect any aspect of the state’s culture, and can involve food, visual art, literature, cultural exchange programs, academic exchange and overseas student programs, and language classes to name a few”. Carey, 2018, “Cultural Diplomacy: Australia’s Chance in the Pacific”, *Quarterly Access*, Vol 11, No. 2, p. 3.

Cultural participation

“Participation in any activity that, for individuals, represents a way of increasing their own cultural and informational capacity and capital, which helps define their identity, and/or allows for personal expression”. (UNESCO 2012: 51). We have used this synonymously with “participation in arts and culture/cultural activities/creative activities”.

[The] Fourth Industrial Revolution

Industrial revolution is characterised by the introduction of a new technology that fundamentally changes how people work, live and interact. The first industrial revolution in the late 18th and early 19th centuries used water and steam power to mechanise production, transforming agrarian societies to industrial. The second industrial revolution occurred in the late 19th and early 20th centuries, and used electric power to facilitate mass production, which dramatically expanded industrial capacity. The third indus-

trial revolution in the mid-20th century relied on electronics and information technology to automate production. The current, fourth, industrial revolution is in many respects an extension of the third, but its scope and speed of development sets it apart as a new revolutionary stage. Today’s industrial revolution is powered by digital technologies, and defined by breakthroughs in fields such as artificial intelligence, robotics, the Internet of Things, 3-D printing, nanotechnology, biotechnology and quantum computing.

Outputs, Outcomes and Impacts

The policy literature on measuring the beneficial impacts of investments for social good generally distinguishes between outputs, outcomes, and impacts. Outputs refers to products or activities resulting from investment. Outcomes refers to the immediate effects of these products or activities on target communities. Impacts generally refers to the longer term benefits or changes that occur as a result of the investment. For example, a First Nations television and drama program for school-age children in regional South Australia might result in eight annual sessions at different sites (outputs) reaching 600 students among whom a measurably higher proportion choose to complete their schooling (outcomes), of whom a number go on to higher education as a result of the program and to provide appropriate professional services to their communities (impacts).²⁰⁴

In this report we use the terms outcomes and impacts interchangeably. We do not measure outputs, outcomes or impacts in close detail. Instead, we present a summary of published research findings relating to the beneficial effects of arts and culture which can properly be described both as outcomes and as impacts.

The evidence base: methods

Insight Report Two constitutes a conceptual analysis about the benefits ensuing from engagement with arts and culture. Our unit of analysis was written texts, including grey literature such as reports by governments and other agencies, as well as academic texts such as journal articles and theses. Our purposive sampling approach to choosing these texts first involved snowball sampling, starting with one of the world's leading reports on the benefits of creative engagement, *Understanding the value of arts & culture, The AHRC Cultural Value Project* (Arts and Humanities Research Council). Using the bibliography from this report, we then began expanding our sample, with each new text providing additional leads on literature with which to engage.

Our report draws on a wide range of Australian and international sources. These include reports and data from Australian Government agencies and departments, including the:

- * Department of Communications and the Arts
- * Department of Industry, Innovation and Science
- * Australian Trade and Investment Commission
- * Department of Foreign Affairs and Trade
- * Australian Bureau of Statistics.

In addition to academic research produced by leading universities and research institutes in Australia and worldwide, our report considers the work of the Australian Council of Learned Academies and the Australian Academy

of the Humanities. We also consulted research by the Australia Council for the Arts, the Australian Council for Educational Research, the Foundation for Young Australians, the Regional Australia Institute, and the Cooperative Research Centre for Remote Economic Participation.

Studies conducted by leading government and non-governmental agencies in the United Kingdom and the United States provide important and broad context for this report. We drew on United Kingdom publications by the Arts and Humanities Research Council, the Cultural Learning Alliance, Arts Council England and the Nesta Innovation Foundation, as well as the work of the National Endowment of the Arts in the United States.

Publications by the OECD and United Nations Conference on Trade and Development (UNCTAD) provide an important global perspective, as has polling and survey data by leading international consultancies including Deloitte and Portland Communications.

A note on research terminology

Several forms of research discussed throughout the report are considered gold standard methods for understanding the direction of causes and effects, rather than just relationships.

- * *Longitudinal intervention studies* involve doing a baseline analysis at Time 1 to understand the state of a sample prior to an intervention, then applying the intervention, then doing a second analysis at Time 2 to explore (and potentially measure) any change.
- * *Experimental studies* involve having two or more groups, preferably closely matched in terms of demographics and psychographics, and applying an intervention to one group but not the other, to see if changes that occur can be attributed to the intervention, and not something else that coincidentally applies to both groups. These are more common in social science settings.

* *Randomised control trials* involve taking a sample of eligible individuals and randomly assigning them to either a group that will receive an intervention (the experiment group), or a group that will not (the control group), sometimes without members of either group knowing which group they are in. This is common in drug trials, where the control group can receive a placebo that looks and tastes exactly like the drug being tested. It is much more difficult to undertake randomised control trials in social science research where it may be impossible to randomly allocate individuals to an experiment or control group (such as in a classroom, where one class receives an intervention and the other does not, but the students have not been randomly allocated).

Notes

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broader scope than traditional artistic domains with the inclusion, for example, of all ICT industries or research and development. The framework addresses this issue by allowing the inclusion of some specific creative industries (design and advertising) as a separate domain” (p. 19). With specific reference to Australia, in developing the Cultural and Creativity Activity Satellite Accounts, on which several BCAR studies referred to in this report are based, the ABS drew on the following definition: “Cultural and creative activity satellite accounts for Australia would encompass productive activities broadly defined as: ‘cultural’ in that they communicate symbolic meaning (e.g. beliefs, values, traditions), require human creativity as an input, and potentially contain intellectual property; or are ‘creative’ in that human creativity is a significant and identifiable input”. ABS, “Discussion Paper: Cultural and Creative Activity Satellite Accounts.” 2013, p. 8.

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ANA acknowledges the cultures of Indigenous peoples in Australia and their continuing cultural and creative practices in this land. We recognise that Australia's culture has been uniquely shaped by Indigenous peoples, by centuries of migration from many other places, and by generations of people born in this place.

What we mean by culture

We take a broad view of culture, which draws together two main meanings.

The first meaning refers to the beliefs, values, ways of living and everyday forms of creativity that we either share as Australians or share with other members of our particular social groups or communities.

The second meaning refers to the arts and culture as the set of institutions, industries and actions by individuals, which combine to produce and distribute a wide range of texts, performances, exhibitions, experiences and events. Some of these activities are purely commercial while some are subsidised by governments, some are community-sourced while others are privately funded, some are supported via patronage and many are a combination of these.

The activities include but are not limited to galleries, libraries, archives and museums, music, screen, radio, video gaming and digital arts, performance, literature, visual art, community-engaged practice, hybrid and experimental forms, language, festivals, craft, heritage, design, and live art.

The interactions between these two notions of culture are crucial to understanding the issues in assessing the public value of expenditure on culture. How do these notions of culture relate to and interact with our ways of living and everyday forms of creativity? How far do they promote our common interests and values as Australians? How do they also serve the interests and values of different demographic groups? And do they do so fairly?

We note also that arts and culture sit within the broader category of cultural and creative activity. No global, agreed-upon definition exists for this category of activity, and it is a topic of contest and change over time.²⁰⁵

This report refers to a variety of sources that use differing definitions and therefore include or exclude different things from their underlying datasets. Through referencing and clarifications where important, we have endeavoured to make these distinctions as transparent as possible.

