
A NEW APPROACH

Insight research series
Report Three

A VIEW FROM MIDDLE AUSTRALIA: PERCEPTIONS OF ARTS, CULTURE AND CREATIVITY

Acknowledgements

This report has been prepared by A New Approach (ANA). The primary research and analysis which underpins it was completed by the qualitative market research firm Visibility Consulting and was led by Tony Mitchelmore.

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ANA Reference Group members led by Chair Rupert Myer AO, ANA Steering Committee members led by Chair Professor Joy Damousi FASSA FAHA and members of the Council of the Australian Academy of the Humanities also provided helpful comments and input.

Previous reports in the Insight Research Series:

1. *The Big Picture: Public expenditure on artistic, cultural and creative activity in Australia*
2. *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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Contents



Feature image: Founders of Australian initiative 'Pub Choir', Astrid Jorgensen and Waveney Yasso, virtually 'conducting' a choir of 1000+ socially-distanced strangers as they sing The Carpenters' 'Close to You' from their living rooms (March 2020).

The premise of Pub Choir is that everyone can sing, regardless of age, gender or anything else. When people sing together, in an informal setting, it doesn't matter whether they're good at it or not—what matters is the joy that a sense of belonging can bring.

The feature image of this report shows the COVID-19 version of Pub Choir, aptly named 'Couch Choir': participants learn the harmonies via video, record themselves singing their part, and the Pub Choir team edit everyone together into a cohesive choral community.

To see the video from which the feature image is drawn, see Pub Choir's facebook page here: <https://www.facebook.com/PubChoir/videos/514737662575602/>

For more information about this initiative, see www.pubchoir.com.au.

Image source: Pub Choir.

Executive summary	4
Summary of findings	7
Summary of opportunities	9
Introduction.	11
A brief overview of the research	15
How to use this report	17
Part 1: Context.	18
For Context: Australian Cultural Fields (2015-present)	21
For Context: Australians and the Arts (2000)	22
Part 2: Findings.	23
What do middle Australians mean by 'arts and culture'?	25
What do middle Australians think life would be like <i>without</i> arts and culture?	27
Four reasons why arts and culture <i>matter</i> to middle Australians.	29
What made the cut?	35
Summary of Findings.	41
Part 3: Implications	44
Summary of opportunities	52
Research design and methods.	56
Notes	59
Bibliography	63
What we mean by arts and culture	65



EXECUTIVE SUMMARY

Executive Summary

This report, *A view from middle Australia: Perceptions of arts, culture and creativity*, comes at a strange time in Australia's history, when COVID-19 has meant that coming together to experience public culture has become a physical impossibility.

There is an irony to this timing. Just weeks before COVID-19 was declared a pandemic, A New Approach (ANA) commissioned qualitative research to talk about arts and culture with 'middle Australians'—that is, middle-aged, middle income swing voters from suburban and regional Australia. We wanted to know whether they valued arts and culture, made space for it in their lives, thought it was important to their kids and to society, and what they would and would not be willing to lose from the Australian cultural terrain.

They were asked: what would Australia be like *without* arts and cultural activities?

Arts and culture really brings people and whole communities together. Without it, we'd be much more isolated as individuals. That's never a good outcome.
[Male, Townsville]

Without imagination or creativity, life would be horrible, no freedom of expression—it would be a black world, or a white world. No colors or grey.
[Male, Melbourne]

I don't know if this is relevant, but without [arts and culture], it affects our health department and all the things. I think if you don't have cultural—all those sorts of things—people get mental health issues. All of these things make us happier, which is better for our mental health. Without those things, there is a lot more strain on services like that.

[Female, Brisbane]

There would definitely be an increase in drugs here. People would be bored, so that's what they'd turn to...It's a way to immerse yourself in something. I don't know what I'd replace that with.

[Male, Townsville]

You may as well live on Mars.
[Female, Sydney]

Within a few weeks these people, and the rest of us, were living in a version of that Australia; an Australia where the public space for sharing and experiencing arts and cultural activities has shrunk, usually to the size of the screens on our phones, computers or televisions.

The purpose of this report is to explore current attitudes to arts and culture amongst middle Australians, with a particular focus on swinging voters and marginal electorates in suburban and regional areas. The data already shows that Australians are keen consumers of arts and culture; Australian Bureau of Statistics figures show 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. In researching the attitudes of middle Australians, our aim is to better inform contemporary discussions about ensuring that Australia's policy settings and public investment are relevant, targeted and effective in the 21st century.

The findings highlight that middle Australians are passionate about the role of arts and culture in their lives. They're selective about what forms of arts and culture they engage with, or even what forms they count in the category of arts and culture, but perhaps not in the ways you might imagine. And they're loath to lose the opportunities that arts and culture create for them, for their families, and for society more broadly.

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.

These are part of our work to champion effective investment and return in arts and culture by governments, individuals, philanthropists and businesses. This, ANA's third Insight Report, is structured as follows:

Part 1 provides the context in which the findings of this report should be read.

Part 2 presents the findings, using the words of middle Australians to describe what arts and culture means in their lives.

Part 3 highlights the implications of these findings and identifies opportunities for change to help build a more inclusive and relevant arts and cultural landscape.

This report provides a window into the living rooms, workplaces and hearts of a group of Australians whose interests feature strongly in much of our political discussion and debate. We hope it provides nuanced insights that can help guide strategic decisions about effective and relevant investment in arts and culture in 21st century Australia.

Summary of findings

Finding 1 Middle Australians consider arts and culture to be essential to the Australian way of life; without them, Australia would be like authoritarian or war-torn nations. The value of arts and culture was expressed through two key themes: 1) creativity, imagination and inspiration; and 2) participation, belonging and community.

Finding 2 Using 'arts and culture' together, rather than 'arts' or 'culture' separately, broadens middle Australians' emotional response and evokes a wider range of imagery. The word 'arts' alone prompts imagery of the high arts, which are seen as elitist and as being more for others [wealthier] people, not them.

Finding 3 Middle Australians directly connect participating in arts and cultural activities with experiencing better mental health, as well as with improved creativity and lateral thinking in the workplace.

Finding 4 Middle Australians believe arts and culture help bring communities together, break down barriers between different groups within society and encourage greater communication. Participating often means opportunities to socialise with friends and family. Consequently, the most valued activities involved attending and participating in local activities, such as festivals, live performances and local libraries.

Finding 5 Middle Australians believe that children develop better when broadly exposed to arts and culture both in and out of school time. Arts and culture help children to: enhance their self-esteem; find new ways to express themselves; build social and intellectual skills; and prepare for the future—both socially and in terms of their career opportunities.

<p>Finding 6</p>	<p>Middle Australians are not consistent in what boundaries they place around activities that can be categorised as arts and culture. They recognise that different people have different definitions and values in this area, and are generally comfortable with this. This extends across generations, with parents acknowledging that their definitions of arts and culture are narrower than their children's definitions, and that what they value does not always align with what their children value.</p>	<p>Finding 8</p>	<p>Middle Australians are largely unaware of the contributions that arts, cultural and creative activities make to the economy, including to employment.</p>
<p>Finding 7</p>	<p>Middle Australians believe that Australian content and cultural heritage icons should reflect Australians' [all Australians, in all their diversity] stories back to them, while also being an important tool for representing Australia on the world stage.</p>	<p>Finding 9</p>	<p>When activities are seen as purely profit-driven, they are considered superficial, and this erases them from most middle Australians' definition of arts and culture. This, along with the belief that access to arts and culture is essential to the Australian way of life, indicates that middle Australians believe arts and culture are what economists call 'a public good'.</p>

Summary of opportunities

To communicate more effectively with middle Australians about arts and culture:

Opportunity 1 Use both words—'arts and culture'—together to demonstrate relevance, make middle Australians feel welcome and evoke a positive emotional response.

Opportunity 2 Discuss the value of arts and culture in terms of the themes of a) imagination, inspiration and creativity; and b) community, connection, diversity and acceptance of all Australians.

Opportunity 3 Note that discussions about the value of arts and culture to a) children's development, and b) maintenance of the Australian identity, can evoke emotional and passionate positive responses.

To ensure relevant and effective investment and policy settings:

Opportunity 4 Continually review investment in, and diversity of, arts and cultural activities so as to increase opportunities that will bring individuals together and build community. Eg. festivals, community arts and cultural development initiatives, and local and regional events and experiences.

Opportunity 5 Increase opportunities for Australian children to experience arts and culture at school so as to encourage children's development and overall well-being, through actions such as: reviewing the time allocation to The Arts learning area (and reframing it as Arts and Culture) at the primary level; improving preservice teacher training in how to teach arts and cultural activities; and investing in artist-in-school programs.

Opportunity 6

Prioritise incentives, requirements and schemes that support production and distribution of diverse Australian content and iconography that will help to build a unified national identity and represent Australia to the world.

Opportunity 7

Review pathways and mechanisms that connect and embed arts and cultural activities in mental health and social inclusion strategies, particularly those related to recovery from natural disasters and significant social and economic disruptions.

Opportunity 8

Establish a strategic mechanism to make policy and investment recommendations about Australia's employment and other opportunities emerging from the Creative Economy in the 21st century, leveraging the dependencies between the media, creative and tourism industries.

Opportunity 9

Address the drop in per capita public expenditure on arts and culture, with respect to the other opportunities presented here.

Opportunity 10

Create a National Arts and Culture Plan, in the same vein as the existing National Sport Plan *Sport 2030*, that identifies the enduring and non-partisan principles and responsibilities that could inform more coherent arts and cultural policy settings and investment at all three levels of government.

Opportunity 11

Celebrate the role of arts and culture more explicitly and consistently to reflect the value that middle Australians place on arts and culture.



INTRODUCTION

Introduction

As you're reading this, Australia is, hopefully, on the road to recovery from the worst pandemic the world has seen in a century. As we are *writing* it, however, most of the globe is in a state of lockdown. In Australia, national and many state borders are closed, and public gatherings of more than two people are outlawed.¹

It is self-evident that this third Insight Report from ANA comes at a unique moment in Australia's history. It was several weeks *before* COVID-19 was declared a pandemic that we commissioned this qualitative research, asking middle Australians whether they valued arts and culture, if they made space for it in their lives, if they thought it was important to their kids and to society, and what they would and would not be willing to lose from the Australian cultural terrain.

In retrospect, it is ironic that we asked them: what would Australia be like *without* arts and cultural activities?

With the pandemic in full swing, we are now seeing a version of that Australia; an Australia where the public space for sharing and experiencing arts and cultural activities has shrunk to the size of a phone, a computer screen, a window or—if we're lucky—a balcony.

One participant's answer was particularly prescient of current circumstances. A woman from Townsville told us:

—
We'd definitely be more isolated if we didn't have [arts and culture in Australia]. I can't imagine something else that we'd do to achieve this. We'd be having to find something to do at home! We'd still bring it into our lives, even if it was just with sticks and paper!
(Female, Townsville)

And this is, indeed, what the world is seeing.

Across the globe, people are seeking ways to stay connected with their loved ones, their friends, their neighbours and are building new communities with people they've never even met. But with social distancing rules enforced, how are they doing it?

They're singing and playing music to each other from their balconies or apartment windows.²

They're drawing chalk art on the footpaths outside their homes, leaving messages of hope and compassion for people walking past during their permitted daily exercise routine.³

They're creating YouTube and TikTok videos about life in lockdown and sharing them across their own social networks and beyond, so that others can enjoy, relate, and respond.⁴

A disease that has forced Australians apart has also made clear the value they place on opportunities to be together. And in a world that cannot sanction physical closeness, they are relying on arts and cultural activities to help them connect, encourage each other, and try to make sense of this experience.

In response, many cultural organisations, creators and producers have accelerated the process of connecting with audiences through different digital platforms. From music festivals curating live-streamed performances;⁵ to national institutions providing free virtual tours and workshop programs;⁶ to local libraries offering takeaway and delivery of freshly sanitised books,⁷ there is a significant transformation happening here in Australia and overseas. Yet despite this flurry of activity, it's clear that a world where digital arts and culture is the only option is simply not the same.⁸

From an economic perspective, Australia's cultural and creative businesses and individuals are disproportionately affected by the pandemic, despite audience uptake of these many online opportunities. Data released in early April by the Australian Bureau of Statistics highlighted that Arts and Recreation businesses are the worst hit, with only 47% able to operate—the lowest proportion of all industries. To place this in perspective, the same data showed that the two other industry segments most affected—Accommodation and Food Services, and Information Media and Telecommunications—had 65% and 69% of businesses able to operate.⁹

What do kids get out of arts and culture?

Participating in arts and culture makes them [children] more accepting of other people's behaviours or their cultures. So, once we have seen something, we are more accepting of it, rather than if it just turns up out of the blue. You take it differently, if you are exposed to something more. (Female, Melbourne)

In our first and second Insight Reports, we highlighted that the vast majority of Australians engage in artistic, creative and cultural activities in their 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 being enrolled 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 the production of arts, cultural and creative products and services—although the profound changes brought about by digital connectedness have blurred the lines between producers and consumers in this space. Our reports also highlight the many benefits that participation in arts and cultural activities provides to individuals, communities, and the nation.

And so, everything has changed. Although we originally commissioned this research to provide insights into perceptions of arts and culture during a period of 'business-as-usual' for the Australian population, the planned timing for conducting the eight focus groups—February 2020—unexpectedly occurred at the tail end of Australia's 2019/20 bushfire crisis, and just as Australia confirmed its first cases of COVID-19. This year has not yet seen 'business-as-usual', yet the findings seem to be more relevant than ever.

The findings highlight that middle Australians are passionate about the role of arts and culture in their lives. They're selective about what forms of arts and culture they engage with, or even what forms they count in the category of arts and culture, but perhaps not in the ways you might imagine. And they're loath to lose the opportunities that arts and culture create for them, for their families, and for society more broadly.

A view from middle Australia: Perceptions of arts, culture and creativity has three parts:

- * Part 1 provides the context in which the findings of this report should be read.
- * Part 2 presents the findings, using the words of middle Australians to describe what arts and culture means in their lives.
- * Part 3 highlights the implications of these findings and identifies the opportunities for change to help build a more inclusive and relevant arts and cultural landscape.

This report provides a window into the living rooms, workplaces and hearts of a group of Australians whose interests feature strongly in much of our political discussion and debate. We hope it provides nuanced insights that can help guide strategic decisions about effective and relevant investment in arts and culture in 21st century Australia.

A brief overview of the research

In this report, we reveal the findings from focus group research with a specific sub-section of Australian society that are referred to as 'middle Australians'. Here, we give a brief overview of the groups of people we spoke with, and the research process.

The people we spoke to: 'middle Australians'

Our participants—56 of them, divided equally across four male groups and four female groups living in Brisbane, Melbourne, Sydney and Townsville—had the following features in common:

- * All were swing voters who had swung their vote between the major parties more than once, and at both state and federal elections.
- * All had a combined household income between \$70K and \$150K. [According to 2016 Census data, this equates to just over a quarter of the Australian population.]¹⁰
- * More than 70% were from outer- and middle-suburban or regional locations.
- * More than 50% were from marginal electorates.
- * All were aged between 35 and 60 years of age.
- * More than 60% had dependent children.
- * 100% of men and 75% of women were employed full-time in a single position. 25% of the female participants were combining part-time work with home duties.
- * None of the participants were on pensions, welfare, or receiving government benefits.

Our participants worked in a variety of occupations, from administrative roles to caring roles to a range of different trades. Most—80% of participants—identified as Australians,¹¹ and many of that 80% were culturally and linguistically diverse (CALD), describing themselves as first or second generation Australians. The remaining 20% identified as Indian, Bangladeshi, Polish, Samoan, American, Spanish, Pakistani and British.

Want more?

For more detailed information about this research, please see our Research Design and Methodology section on p.56.

Collecting the data

Data was collected during 90-minute focus groups, conducted by qualitative research consultancy Visibility. A male group and a female group were conducted in each of the four locations. Participants were not advised in advance that they would be participating in a focus group about arts and culture.

Analysing the findings

The focus groups were analysed for recurring themes across the groups. It's important to note, therefore, that the quotes presented throughout this report are not the only instances of each theme being mentioned; they merely exemplify the kinds of things participants were saying about that topic.



Focus groups are usually held in friendly, comfortable rooms around large tables and with snacks. Participants are first asked for unprompted ideas, then shown images or lists to prompt further thinking.

How to use this report

This report provides insights into the way a specific segment of the Australian population—middle income swing voters from the suburbs and regional cities—thinks about and talks about arts and culture.

For elected members and policy advisors

Use this report to better understand both the priorities of middle Australians when it comes to arts and culture, and the language they use to discuss those priorities. This may assist you in strategic discussions about effective investment in arts and culture, and in exploring new policy opportunities with your stakeholders.

For cultural and creative organisations and individuals

Use this report to gain new insights into the attitudes and priorities of a group of consumers you may not have come across before. It may assist you in considering new markets, new types of engagement and new ways to understand the relevance of what you do. It may also assist in preparing advocacy documents and grant applications.

For philanthropists and sponsors of arts and culture

Use this report to gain up-to-the-minute understandings of the arts and cultural activities most valued by middle Australia. This may assist in strategic discussions about what investments may be relevant or a priority to your desired outcomes.

For the interested public

Use ANA's Insight Reports as an introduction to some of the considerations stakeholders take into account when determining what effective, relevant investment in a rich cultural life looks like. Consider this report an accessible, qualitative overview of attitudes and priorities towards arts and culture in 21st century middle Australia.

For the media and content creators

Use this report to better understand the interests of middle Australians regarding arts and culture. Get in touch with ANA about media opportunities using the contact details on p.2.

What does arts and culture do for a place?

*It really enriches a place, when there's lots of arts and culture and things to do. You can meet lots of different people—it creates a real sense of community for an area. It's a real reflection of the place you live in.
[Male, Townsville]*



PART 1: CONTEXT

Part 1: Context

Australians love their sport. Everyone knows it. It's a cornerstone of the Australian way of life.

What's lesser known is how they feel about arts and culture. It's just not something Australians talk about that much; arts and culture are often associated with other countries, other types of people. When politicians talk to the media about what they'll be doing on the weekend, they often talk about going to the footy or the cricket. And when they do this, it conjures up images of what Australians *allegedly* think 'average' Australians look like—the Aussie battler, the larrikin, the salt of the earth type.

But the statistics conjure up an alternative image.

In ANA's 2019 Insight Report, *Transformative: Impacts of culture and creativity*, we collected research about arts and cultural participation and attendance from a range of sources. For example, we found that 82.4% of Australians attended at least one live arts and cultural activity in 2017/18.¹² A similar 2017 study out of the European Union, on the other hand, found that only 63.7% of adults (on average across the E.U.) had attended live arts and cultural events in the previous year.¹³ These studies were not conducted using the same questions and methods, making the findings difficult to compare; however, a 2010 report comparing arts and cultural participation between Australia and the U.K. supported this comparison, also finding higher participation rates in Australia [72% compared to England at 67% and Scotland at 68%].¹⁴ There is a view in some quarters of this country that arts and culture are 'a European thing, not an Aussie thing'. The statistics indicate otherwise.

How does the rest of the world see Australia's arts and culture?

Compared to Europe, their funding for arts and culture is really up there. Australia hasn't really valued it, compared to Europe. I think overseas people, particularly my relatives, think Australia is backward. There is a lot of mis-education out there. And we could definitely improve on how our multiculturalism is presented to the world. The perception is probably quite general and boganish, like Paul Hogan [from Crocodile Dundee]. I think they are trying to change that now, but there needs to be a big shift, a balance. [Male, Melbourne]

We found that Australians invest significantly in cultural goods and services—3.5% of their total annual household expenditure in fact,¹⁵ which equates to nearly \$40 a week for a household on an average income.¹⁶ In comparison, only 1.5% of Australians' annual total household expenditure is spent on sporting and physical recreation goods and services, according to the most recent ABS statistics.¹⁷ Surprised? Here's another one. Two independent reports, both conducted in 2017, found that Australians attended more professional arts and cultural live performances than they did professional live sporting events.¹⁸

There's no debate here about how important sport and physical recreation are to Australians and to the Australian way of life. But the statistics do suggest a need to better understand how Australians feel about arts and cultural activities, also.

That's why we decided to ask them.

To the best of our knowledge, this is the first study to explore perceptions about arts and culture with this specific segment of the Australian population. Research has, however, been conducted with other segments of the Australian population, and at other times. In this section, we introduce two other key studies that have explored perceptions and attitudes of Australians towards the arts and culture that have informed how we approached this work.

If something was important to Australians, wouldn't we already know about it?

Facilitator: We've been talking about arts and culture for a while now. Has anything changed or solidified in your minds now when you think about it, compared to when you walked in this evening?

***Participant: It has a really important part to play in our daily lives. I've never realised how important it is—for creativity. For our work. Our everyday lives. For—everything. More so than I thought. It's actually so broad.
(Female, Townsville)***

For Context: Australian Cultural Fields (2015–present)

In this report, we refer in several places to the findings of the Australian Research Council-funded *Australian Cultural Fields* project: an inquiry into the cultural tastes and practices of a national sample of 1461 Australians from a wide range of ethnicities and demographic markers.¹⁹

Conducted in 2015, the study's quantitative survey asked respondents whether they had heard of and liked a range of Australian artists, novelists, musicians, heritage sites, sports personalities, television programs and television personalities. As was the case with our own research, the *Australian Cultural Fields* study found that most Australians share a strong interest in Australian culture. However, the ways and degrees to which they do so varies significantly across different demographic groups.

The highest rates of liking across the board were shown by Italian and Indigenous Australians, both of whom registered slightly stronger levels of preference compared to the main sample as a whole. The members of more recent migrant communities—from China and India, for example—showed lower levels of familiarity with Australian arts and culture. Australian-born respondents generally knew and liked a wider range of Australian arts and culture than those born overseas.

Levels of involvement with Australia's diversity of cultures also varied. Although 62% said that they had taken part in or attended arts and cultural activities from cultural backgrounds other than their own, only 5% were involved once a month or more, close on 29% were involved a few times a year, 28% said about once a year, and 38% said never.

Among those who did report participation in such activities, the highest rates of involvement were registered for heritage and musical activities at 60% and 53% respectively, followed by the visual arts (39%) and sport (25%), with the lowest rates being for media (18%) and literary activities (13%).

For Context: Australians and the Arts (2000)

Twenty years ago, consultants Saatchi & Saatchi were commissioned by the Australia Council for the Arts to undertake a comprehensive exploration of Australians' attitudes towards the arts.²⁰ This included: a nationwide, representative, quantitative phone survey; 16 discussion groups with various cohorts representing a wide range of demographic segments of the Australian population; and more than 200 qualitative interviews with industry representatives from the arts sector.

Interestingly, this study's findings focused predominantly on everyone other than the group ANA has categorised as middle Australians: Saatchi & Saatchi focused particularly on 15-25 year olds and anyone over 55, for example, while ANA looked at 35-60 year olds; and they focused on low income and high income households, rather than those with middle incomes. Similarly to our own study, however, it was clear from the findings that the arts and creative pursuits were firmly entrenched in Australian society and in Australians' everyday lives, albeit in different ways for different societal groups.

Furthermore, it was clear in 2000 that many Australians did not feel welcome within a wide range of arts spaces, particularly those associated with 'high arts', due to financial, geographical, and class-based factors. The arts sector, for its part, was found to be 'not well-organised when it comes to dealing with the general public outside specific markets', leading Saatchi & Saatchi to recommend 'making it easier for the general public to understand the arts, and to know how to enter into the experience of the arts'.

Saatchi & Saatchi made the point that 'the arts' can be considered a brand which carries brand imagery, just like any other product or service. They found that the brand imagery

associated with 'the arts' was limited to high art activities, but also that the majority hoped that more activities would be accepted in a definition of the arts in the future, including areas such as popular television dramas, live music, and design.

One key difference between Saatchi & Saatchi's findings and ANA's is around the distinction between commercial vs subsidised arts. Saatchi & Saatchi found that only those who identified themselves as members of the arts community were aware of or had thought about the differences between these sectors, while 'the general public [was] largely unaware of this distinction'. In our study, however, this was a theme that was raised regularly by participants across all groups, none of whom identified as members of the arts community.

What does commercialism in arts and culture mean to middle Australians?

***Movies or commercial television...
it's more for money-making—that's
not arts and culture...it's just for
entertainment, just a thing to pass
the time, I think. It's not that
deep—that it shakes your soul.
(Female, Brisbane)***



PART 2: FINDINGS

Part 2: Findings

For middle Australians, arts and culture provide more than just a pastime, more than just shallow entertainment. In this section, you can read about this in the words of the focus group participants themselves.²¹

We asked our focus group participants about the role arts and culture play in their daily lives, their social lives, their work lives, and their children's lives. The answer across all eight focus groups was emphatic: these activities are *fundamental* to the Australian way of life; indeed, to being human. They told us that arts and culture are the key to 'opening our minds'.

Our participants identified two key roles that arts and culture play in our society. On the one hand, they said that the arts and culture are essential for creativity and imagination; are a source of joy and inspiration; and that they *enrich* our lives in many ways. On the other, they said that the arts and culture help us to understand each other. They bring communities together, encourage unity in diversity, and increase acceptance of differences across society.

One of the most surprising things about the findings from this research was just how consistent they were. There was genuine, enthusiastic and complete consensus across all eight focus groups that arts and culture played a vital role in participants' lives. We know that's a bit difficult to swallow. We know it could look like we cherry-picked the data. And to be clear, it's not that there were no voices of dissent on *any* topic—one man in Townsville said that he thought schools should prioritise reading, writing and arithmetic over arts and culture, but the other participants didn't agree with him. A man in Brisbane felt that Australian literature was a low priority,

following up with the point that he never had time to read, so he just didn't see books in general as having an important role in his life. And there was vigorous debate about which activities should be included in a definition of arts and culture, and which arts and cultural activities were most and least important. These debates are laid out in this section.

But the fundamental question as to whether arts and culture, in general, are important? These middle Australians were adamant that they are not just important, but *critical* to the Australian way of life.

In the Findings, we:

- * Unpack what the term 'arts and culture' means to middle Australians.
- * Explore what middle Australians think life would be like without arts and culture.
- * Show the extent of their profound belief in its importance.
- * Lay out their top four reasons for this belief.
- * Give an overview of what they value most and least in the arts and culture landscape.

What do middle Australians mean by 'arts and culture'?

The majority of participants saw arts and culture as core elements of society. The term 'arts and culture' spontaneously evoked responses about inspiration, participation and the value that comes from creating something or being able to engage with something creative.

It's a sense of wonder, I think, it's something I—I'm no musician or painter but I love seeing people's imaginations and what they can come up with.
[Male, Sydney]

People try to use their imagination, and they create something and build something that is more visible, like [a] festival, or event, or any structure. Arts actually comes from culture, that's what I think.
[Male, Melbourne]

The opportunity for interaction and engagement with other people was, for some, a key part of whether an activity was defined as arts and culture.

When I'm listening to the radio, I don't feel like I am consuming art, but whereas, I go and see something live and you can see the artist performing and you can feel the emotion—that, for me, is consuming arts and culture. Otherwise, it's just noise for me.
[Male, Brisbane]

[Discussing if films are arts and culture] I think, like, if you go to the Italian [Film] Festival or the French [Film] Festival, it's what you make out of it. You can go as a group and have

champagne and celebrate their culture, so it can be an event and can be a social event as well where you can pick up ideas.
[Female, Melbourne]

For some, the terms provoked specific examples. The idea of festivals came up consistently, along with artforms traditionally considered 'high art', such as the theatre, ballet and opera. For some, it was about activities rather than outputs—the action of painting, rather than the portrait created by it, for example, or even the action of attending a live music event as opposed to a piece of music. Others pushed the boundaries of what could be considered arts and culture a little further, and although not everyone agreed on these edge-cases, the groups were generally interested and receptive to the ideas suggested.

It's galleries or exhibitions; sometimes you can see art on the sides of buildings or parks or—I like to see the sand sculptures they used to have every year at Bondi Beach. Or graffiti, yeah, that's definitely art, it's pretty cool, it's very attractive. And Vivid, just like Vivid.
[Female, Sydney]

I think my job [as a construction worker] in itself is an artform. Some of the things we have to do—we built GOMA, that's probably one of the best jobs I have worked on: the ceilings, the walls, everything is different, nothing is normal, the roofs are curved. We did a job where the ceilings are curved in the Emirates lounge, a lot of stuff is—yeah, to build a curve out of steel and plaster board is, yeah, not everyone can do it. I reckon it's art, yeah.
[Male, Brisbane]

Participants identified a tension, however, between the term 'art' and the term 'culture' when the terms were separated out. The arts were seen as less accessible, less 'for people like me', more 'hoity toity'. Culture without arts, on the other hand, was often thought about more in terms of national or ethnic culture, or specific subcultures. All groups discussed the idea of the arts being something tangible, and culture being more intangible.

I see culture more as people, whereas I see art more as a thing—a work, it's a work. A piece of work, whereas culture resonates as people. Arts is more...activities, and culture is more...living and breathing. It's more accessible. More simple. It's free events. You can just walk in the park and participate in it.
[Female, Brisbane]

The arts are specific things aren't they? More tangible. Things like painting or a specific kind of art, where culture is not a specific—it's like, it's your people, it's your background, it's your beliefs, what you identify with. But certainly, certain arts can be cultural as well. Yeah there is a crossover.
[Male, Sydney]

Some participants felt that arts and culture are like two sides of the same coin; that they are inherently connected even if they aren't quite the same thing.

For me, culture can tend to be broader. For me, culture is bringing together all the different arts and performances within a community.
[Male, Brisbane]

For me, art is the outcome of [a] certain thing, whereas the culture is the origin, or the reason.
[Male, Brisbane]

Throughout the discussions, however, the groups embraced the term provided by the moderator from the outset, using the two words together, especially whenever discussing positive ideas. While it's likely that this was because they had been prompted to, it does speak to a sense of ease in using the words to speak about a broader concept.

All these different types of arts and culture [discussed during this focus group] have opened my mind to what I'm missing out on. I need to broaden my perspective.
[Male, Townsville]

I think it broadens their understanding of life more when kids do arts and culture at a young age, when they are exposed to more of what is going on in the world.
[Female, Sydney]

And a small number of participants explicitly pointed out that putting the two words together evokes a different response because it speaks to a different experience. As a concept, the term 'arts and culture' was considered much broader than either the arts, or culture, alone.

I said [arts and culture] is about imagination, because the way to create culture—every generation creates something [artistic] and it is passed on from generation to generation and changed and modified and this is imagination. So the words [arts and culture] together have a different meaning to using the two words separately.
[Male, Melbourne]

What do middle Australians think life would be like *without* arts and culture?

Turns out, middle Australians reckon life without arts and culture would be *terrible*. We asked participants to speculate about what a world, a country or a life without arts and culture would look like. Their reactions were visceral: the outright rejection of the notion was spontaneous and highly emotional. They felt deeply that life without arts and culture would be bleak, dull and colourless.

It would be like certain countries that have been devastated by war...Like Syria, destroying all their culture, yeah. It would just be ruined, basically.
[Male, Melbourne]

Arts and culture provide something out of the ordinary. It would be pretty boring without it. It provides something to look forward to and relax. It's an opportunity to socialise—we'd definitely be more isolated if we didn't have it. I can't imagine something else that we'd do to achieve this. We'd be having to find something to do at home! We'd still bring it into our lives, even if it was just with sticks and paper!
[Female, Townsville]

There would definitely be an increase in drugs here. People would be bored, so that's what they'd turn to...It's a way to immerse yourself in something. I don't know what I'd replace that with.
[Male, Townsville].

Without imagination or creativity, life would be horrible, no freedom of expression—it would be a black world, or a white world. No colors or grey.
[Male, Melbourne]

You may as well live on Mars.
[Female, Sydney]

Many felt there would be consequences for people's mental health and wellbeing.

I don't know if this is relevant, but without [arts and culture], it affects our health department and all the things. I think if you don't have cultural—all those sorts of things—people get mental health issues. All of these things make us happier, which is better for our mental health. Without those things, there is a lot more strain on services like that.
[Female, Brisbane]

Let's think of North Korea. Arguably, you could say that in a dictatorship there is not a lot of art and culture unless they tell you it's art and culture. And there are some very unhappy people over there.
[Male, Brisbane]

[A country without arts and culture would be...] sterile. Boring. Controlled. It'd be a more tense society, not as many opportunities to express yourself or enjoy yourself.
[Male, Sydney]

A world with no arts or culture would produce clones, or drones. It wouldn't produce normal human beings, they'd be...psycho-paths! Arts and culture gives people something to give back.
[Male, Melbourne]

They felt that people would be less tolerant of each others' differences, and they would have fewer opportunities to learn from others who were less like them—something participants seemed to genuinely value.

There'd be less conversations, more silos. Art and culture transports you to a different place—if someone tells you where they're from and what they've done, it tells you where they are coming from.
[Female, Sydney]

Arts and culture really brings people and whole communities together. Without it, we'd be much more isolated as individuals. That's never a good outcome.
[Male, Townsville]

I suppose it builds tolerance, and it's about being open to diversity or the acceptance of other people that they may not be exposed to in their own family. So, being exposed to a Middle Eastern sort of culture or music, hopefully that will stop the bigotry or the, you know, hate wars, or whatever you want to call it these days. They can be more tolerant of people's cultures and beliefs.
[Female, Brisbane]

Without festivals, particularly the cultural ones from other countries, where you get an awareness or better understanding of those communities—certainly, I learnt a lot from the Eid Festival, that was a religion I hadn't had any exposure to, growing up in Brisbane.
[Male, Brisbane]

We would head down a pathway where we had a very divided community, where you have African Americans here, Hispanics here, Latinos over there—it gives you a lot of that intercultural understanding that's so important for helping people live together. Otherwise we will end up with Chinatown being completely segregated from some other—people will have no understanding of each other and all of a sudden you have turf wars going on.
[Male, Brisbane]

And they worried that people would be less effective at work, because arts and culture have a spillover effect into creativity and innovation.

Innovation would disappear. There would be no thinking outside the box!
[Female, Townsville]

People would have less reason to work as hard [in a world without arts and culture] because there is less fun to be had, less incentive to do anything.
[Male, Sydney]

I feel like the arts and culture is what people do to spend time outside of their work, to make them happy, and they need that balance, so that you have good people in a good head space when they come back to the work environment. I think, as well, in a workplace, that's a way people can come together in a different way, other than just have drinks of a Friday. Because not everyone wants to do that. I think it evokes conversation and transcends different barriers and brings people together and helps with cultural awareness as well.
[Female, Sydney]

Certainly, if you are in a job where you need to create things, like a policy or something, it's going to stifle your creative thinking [if you came from a world without arts and culture].
[Male, Sydney]

There's often concerts in Martin Place at lunch time. You see workers come out and enjoy their lunch and whatever is on stage. Gives them some stress relief. Changes their perspective from whatever is going on in their office, gives them a broader perspective on life.
[Female, Sydney]

All those art skills can now be a trade. People constructing buildings have to be creative now. We're not just building blocks [i.e. simple buildings] anymore. Everyone wants things to be creative.
[Male, Townsville]

Four reasons why arts and culture *matter* to middle Australians

Having established that arts and culture do indeed matter to Australians—for these participants, the consensus was wholehearted, with no dissenters—we then wanted to know: *why* do middle Australians value so many of these activities?

In this section we explore the answer to this question. The four most common reasons identified are:

1. Because arts and cultural activities give us opportunities to be together and build community.
2. Because our children need exposure to arts and culture to develop.
3. Because arts and culture stimulate creativity and broaden your mind.
4. Because Australian arts and culture are essential for giving us a sense of identity and helping us represent Australia to the world.

In the pages that follow, we explore what our participants said about why arts and culture are so important to them, to their families, and to society more broadly. We've provided a few indicative examples of participants' actual words for each reason.

Reason 1: Because arts and cultural activities give us opportunities to be together and build community

Without us explicitly asking about it, participants across all eight groups talked freely about the importance of arts and culture for social cohesion, community development, and reducing isolation across different groups in society. Most believed that, at their core, arts and culture are inherently *about* bringing us all together.

Community, that's what art is for, bringing the community together.

[Male, Townsville]

Culture, in my mind, is anything that brings a community together to express themselves.

[Male, Melbourne]

It's bonding, uniting, exactly. Especially music. Like with the community events and all, you get hold of your community more often. I think certain cultures within the community would feel like they belong, so that's important.

[Female, Brisbane]

It's different things, where people from all walks of life come together to participate.

[Female, Sydney]

Arts and culture enriches a community. We need it. It may not have tangible benefits but we've just shown [throughout this focus group discussion] how much it can add.

[Male, Townsville]

They discussed how participating in arts and cultural activities brings people together around common interests.

[Arts and culture] can be a point of discussion. In the family, you might talk about it, it might go deeper. Maybe, you know, your son or daughter, you might find something out that they haven't expressed before. It's a good way of learning more about your family or friends.

[Male, Sydney]

I think cultural festivals bring everyone together, help you to know neighbours and communities.

[Female, Sydney]

Art, or culture, it's acceptable to all...You can find a person that says, 'I don't like this art, or that art', but in general people really love to see or enjoy those things, doesn't matter which personality, which religion you belong to, but art and culture is always something that people from every aspect, they love to do, it's acceptable to all. It brings people together.

[Male, Melbourne]

A key recurring theme was about bringing groups who might feel they are on the fringes of society together, and helping them feel that they belong.

It can help certain fringe groups feel more accepted in society as well, you know? You get small, niche interests—some people like Cosplay for example, and they have Comic-Con, and Supernova, and everyone dresses up in costumes and it's an opportunity for them to go and meet other people that are interested in it too. Sometimes that's the only time that group will get coverage in mainstream media.

[Male, Brisbane]

Culture is belonging, too, even though someone might come from a different culture, it's like we belong to a culture: 'which culture do you fit in?' You go to the workplace and it's a different culture. It's more than background and traditions, it's more where we feel we fit in.

[Female, Sydney]

And many participants talked about the social opportunities—coming together with friends and family to participate in arts and cultural activities.

Yeah, I usually go with people and you go first for dinner or something.

[Female, Sydney]

I like the fact that some local council organises some local events and that gets the community together and you meet all your neighbors and people you don't know.

[Female, Sydney]

It's something you can have fun with friends and enjoy.

[Female, Brisbane]

Reason 2: Because our children need exposure to arts and culture to develop

When asked whether arts and culture should be taught in schools, the vast majority of participants' responses were *vehement*—they felt it was essential to their children's development and overall well-being. Many thought it was, in fact, a silly question, a no-brainer—it was obvious to them that arts and culture are key components of a well-balanced curriculum.

They felt that participating in arts and culture at school helps children build confidence and self-esteem, by helping them find new ways to express themselves.

The arts is all about that creative expression—like, 'I want to tell a story about my religion and I am going to express it this way,' or whichever way they need to express themselves. I think it's absolutely important that kids have the skills they need to be able to express that in a way that's healthy for them.
(Male, Brisbane)

My daughter was very shy, she had trouble at school. Now that I have opened her up and introduced her to, say, many activities, she's a different person. She had a lot of anxiety, it took her a long time. But I introduced her to art and culture, she has thrived, her whole personality, well—she is quite outspoken—if anything, too outspoken now!
(Female, Sydney)

When children get to be creative, they might find where their passion is or what they are capable of. They learn how to think outside the square and problem-solve. It gives them a sense of pride. They learn to work with other people. And it improves their self-esteem, it releases anger or nervous energy.
(Male, Sydney)

They discussed how arts and cultural activities could build important social and intellectual skills in children.

Because it develops a part of the brain that can't be developed doing other things. It makes a connection, you know? Science makes us understand why things happen, but arts look at a bigger picture of, you know, why this is like it is. It broadens their perspective.
(Female, Sydney)

It's also, for me, it's helping kids build resilience. There are some kids that are so focused on maths and science, getting the best scores, the high achievers, then they go onto Uni and do well, but then they enter the workforce and they fall apart because they don't know how to relax.
(Male, Brisbane)

And they felt that exposure to arts and culture helped prepare children for a successful future.

I think it broadens their understanding of life more when they do arts and culture at a young age, when they are exposed to more of what is going on in the world and are exposed—my children, I think they are better people for that reason.
(Female, Sydney)

Even someone that's aspiration is to move to the corporate world and problem-solve needs to have studied arts and culture at school. Be able to look at things from different angles—we are supposed to be moving into the Information Age so it's not about the manual processing anymore and it's going to be that people need to be able to think better.
[Male, Brisbane]

It's [a] very good learning activity for the kids; it will help them to develop—personality development for the kids. Yes. It's very good for the kids. It's preparing them for the real world.
[Female, Brisbane]

Interestingly, many participants were aware that their own definitions of what constituted arts and culture differed from their children's, or from the 'younger generation's' definitions. They acknowledged that, although they didn't personally get value from those activities, their children did.

No, I don't think [making a YouTube or TikTok video counts as arts and culture]. I think times are changing, but our generation, we see it as a waste of time. We don't see the worth in it, but the young people are taking it on and...it's expression for them. It's a new medium I guess.
[Female, Brisbane]

My kids have sent me one video they created on TikTok and they are dancing and they have fun doing it, but I didn't think it was part of the arts. But they would say it is.
[Female, Melbourne]

Yeah, I had crossed out YouTube [from the prompt list of potential arts and cultural activities], but then I was like, 'hold on, that's like this whole TikTok thing now.' So, anything that is community-based like that is really forming a culture or a subculture, really. It's a new type of community, an online community. They are building worlds.
[Male, Melbourne]

I think, with the young people, they are doing [arts and culture] in areas we don't even know about, whether it be gaming or YouTube videos, having workshops—I know the libraries have a lot of workshops on that kind of stuff. Because I'm not interested, I don't pay attention to it, but young people are and that's—I believe they are the next generation that are going to come up, be [the] people the world will take notice of when they are doing these things.
[Female, Brisbane]

Reason 3: Because arts and culture stimulate creativity and broaden your mind

Throughout the focus groups, participants discussed the potential for stimulating creativity and imagination as one of the core purposes of arts and culture in Australian society. Exposure to, and participation in, arts and culture opens up your mind to think about things in new ways.

Arts and culture adds to innovation and creativity. You might be able to say 'Oh wow, I didn't think of something like that' or 'that possibility'—it opens up viewers' minds to different possibilities that weren't there before.
[Male, Sydney]

If you're not exposed to all the arts and culture, you'd be lacking imagination, you wouldn't be so open to trying new things.
[Female, Melbourne]

It opens you up to different perspectives and understanding of—not necessarily cultures, but just of people's way of looking at the world and way of doing things. You expand what you know and your awareness of others.
[Male, Sydney]

They felt that participation in arts and cultural activities, as opposed to passive consumption, was helpful for stimulating creativity, imagination and emotion.

I feel like, actually, it's people expressing themselves. Creativity, it's their creative outlet, whichever way they do it, it means something to do them.
[Female, Sydney]

It's about emotion. [Arts and culture] can make you happy, interested or excited, or sad or depressed—just to experience more from your life, and get more from yourself, and not be in a rut. Just, change. Some of the ones in New York, they set up a whole room of something random, like Styrofoam or something and you are just, like, you go from room to room, it's like avant garde, and you think 'I wouldn't enjoy this', but when you get in there, you aren't on your phone or talking, you are like 'whoa'. You're thinking in a whole different way.
[Male, Sydney]

And they felt that these new ways of thinking that were inspired by engagement with arts and culture were beneficial in many areas of their lives—not just during that moment of engagement.

Arts and culture are so important for creativity. For our work. Our everyday lives. For everything. Even something simple like cooking requires creativity and we're doing that everyday.
[Female, Townsville]

For me, it [exposure to arts and culture from a young age] isn't about a specific job. More, they can know that art can connect present and future, they can know about their past and at the same time they can imagine about what the future can be. It's better to give art, then kids can have the creativity to do whatever job they want.
[Male, Melbourne]

It creates more innovation in people, definitely. Art and culture always give flexibility, people love to think more or think outside the box when they have been exposed to art, it gives them creativity.
[Male, Melbourne]

Reason 4: Because Australian arts and culture are essential for giving us a sense of identity, and helping us represent Australia to the world.

Participants felt strongly that having and supporting Australian arts and culture was important for Australia's identity, not only for telling our own stories to ourselves and each other, but also so that we were adequately represented 'on the world stage'.

Although they were often discussed in concert, these are also two distinct ideas. On one hand, participants wanted Australian arts and culture to be relevant and reflective of themselves and the people they saw around them every day. They viewed arts and culture as a critical medium through which to connect with their Australian identity.

It's about Australia's identity. Our experiences are quite different to someone who may have lived in England or America, even though culturally we may have some connections with language, there are some distinct differences and I think it's important to celebrate those and express them.
[Female, Sydney]

Without Australian arts, we would lose our sense of identity. You would lose your heritage as well, lose the connection to your country. You want to have something to be proud of, to pass it on [to] the future generations. It's a very important thing, I have never really thought about this before.
[Female, Brisbane]

On the other hand, participants wanted Australian arts and culture to be recognised as distinctive and perceived as successful by an international audience. They took pride in Australia's creative achievements, and saw arts and culture as a natural avenue for building up our international reputation.

It's important to have Australian artists and movies and—so we feel like we can be representing on the world stage. Gives us feelings of pride and identity, of belonging. It's also promoting what Australia is all about and giving that unique flavor that other countries would not be able to experience or understand. It's promoting Australia. Our culture. Yeah. It's a good introduction to the world about us; it's definitely a good thing.
[Female, Brisbane]

Promoting our content [abroad] is a good example. Like, the 'G'day Australia' campaigns in LA, trying to get more exposure for Australian actors and actresses, and you just think: now it's all [Australian actor Chris] Hemsworth, all—who else're the chicks watching now? So that's actually given Aussies a chance to be world famous and crazy rich.
[Male, Melbourne]

With the Government, what they are trying to do is also to promote our [Australia's] internal creativity outside as well. A couple of years ago they had, in the States, they had a campaign called 'True Blue' that focused on getting, on building up tourism. You had a lot of Australian artists that went out there to 'bring back the tourists' type thing. It was two-fold: encouraging Australian arts and culture [abroad] therefore can attract tourism, and tourists [coming to Australia] support arts and culture.
[Female, Brisbane]

In discussions of Australian arts and culture, many participants wanted to emphasise the diversity in Australian society—that the Australian identity is nuanced and complex, but still uniquely 'ours'. And they wanted Australian content to reflect that nuance.

I suppose we are building our own culture. We are a multicultural society and draw from a lot of different backgrounds, we are saying 'here you go, here is something that is uniquely Australian, you can see elements of different cultures in there but it's something we can say is uniquely Australian'.
[Male, Sydney]

I reckon Australian movies are really important. I think they cover such a broad spectrum of people and that's a reflection of Australia.
[Female, Townsville]

It gives us something to celebrate that we think is uniquely ours. We may have borrowed bits and pieces but it's something we can stand behind and say 'look what we have done, collectively'.
[Male, Sydney]

There are subcultures within that, but we are part of the Australian culture. We embrace multiculturalism here. To me—I am Spanish—I feel I am part of Australia. We embrace other ethnic backgrounds.
[Female, Sydney]

Some participants talked about how our 'way of life' was the key to a unified Australian identity. Whether it was about the things Australians do every day, or the way we grow up, the ways that we interact with our physical spaces came through as a unifying feature of Australian culture, and there was a strong sense that the stories we tell ourselves and the world should reflect that.

We have an Australian culture, even though there are many nationalities in it, we live the Australian way of life. So really, we all belong to the Australian culture, regardless of where we come from.
[Female, Sydney]

I think it's really important for kids, when they are growing up, to see someone they can relate to in the media. And whether that—sometimes that will be people that aren't 'mainstream' Australians, but they are telling a story about—I'm thinking of [Asian-Australian writer and comedian] Benjamin Law for example, where he talks about growing up as a first generation Australian. It's very much an Australian story, even if it's not everyone's story, and that's what's really important for kids.
[Male, Brisbane]

Interestingly, the impact that arts, cultural and creative industries and activities have on the economy was only very infrequently mentioned spontaneously by participants as a reason that arts and culture are important. Even when prompted to think of examples of how arts and culture might contribute to the economy, participants struggled, commonly identifying contributions to tourism in terms of the ripple effect around events, and Australia's movie and music industries.

As discussed in our second Insight Report, cultural and creative activities in Australia contribute 6.4% of GDP and 5.6% to Australia's Gross Value Added—a similar GVA contribution to those of Transport, Postal and Warehousing (5.4%) and Health Care and Social Assistance (5.8%), and more than Agriculture, Forestry and Fishing (2.5%), Retail Trade (4.9%) or Education and Training (4.6%). Furthermore, the cultural and creative industries employ 5.5% of the national workforce, with these industries having double the annual job growth rate compared to the Australian average.²² However, it was clear from the focus group findings that middle Australians are largely unaware of these contributions and opportunities.

What made the cut?

Of course, people have different preferences in arts and cultural activities. Which activities, objects and events are prioritised by middle Australians? And which are seen as less relevant? In this section we share the responses to these questions and highlight themes within them.²³

Arts and cultural activities considered most relevant

Great value was placed on *participating* in many different types of arts and cultural activities, often at a local, community level. Interactive, immersive experiences were valued over passive consumption. This meant a strong focus on enjoying festivals, attending live performances, and engaging with street-level, community-driven creative activities such as those put on by local and state libraries and museums.

I think libraries are important for culture. I like books, and it's somewhere that people can walk in, and it's free. You see young and old people there, it's very accessible to people—you don't have to be arty. And they have everything, CDs and—everything. And it's all free, I think.
(Male, Sydney)

[Pointing to paintings on the wall] It's an outlet for creativity, you know? You look at those paintings up there—that's a form of art work that someone created for some reason, and everyone can have a different interpretation to what it is—you get your own enjoyment from it.
(Female, Brisbane)

Australia being very multicultural, we get that exposure to other cultures...I can't think of anywhere else where you would have Chinese New Year, Diwali, the Greek and Italian festival all in one place, and you can go festival to festival and experience that acceptance and understanding.
(Male, Brisbane)

It's something that's active, it's not stagnant, it's something you participate in.
(Female, Sydney)

I think it's anything that any particular individual uses to express how they are feeling. Like tattoos...that's another angle, it's any medium people use to express themselves.
(Male, Melbourne)

There was also an emphasis placed on creative and cultural places and icons, particularly those that evoked emotions about Australian identity and cultural heritage.

They're our unique edge, you know? France has the Eiffel Tower, London has London Bridge, we need to have these iconic things that are ours.
(Female, Melbourne)

It's hard to imagine those places without [their heritage sites]. Like, Sydney without the Harbour Bridge? Impossible.
(Male, Townsville)

[Regarding valued cultural icons] I said places like—perfect example, Festival Hall [an iconic music venue in Brisbane]. They knocked it down to put a block of units in, and I never got to go and see a fight there or a band there.
(Male, Brisbane)

For Context: Australian Cultural Fields Study

Middle Australia and Beyond

How do the cultural interests of the 'middle Australians' in ANA's study compare with those of other Australians around the same age? According to the investigators of the *Australian Cultural Fields* project, three of the analytical 'clusters' of participants that emerged from that data were of a similar age to ANA's middle Australians, but the ways that they differed in other social characteristics—particularly in terms of occupation and level of education—strongly influenced their cultural interests.

The intermediate classes

The cluster that was most similar to the 'middle Australians' of the ANA study, accounting for 20% of the sample, consisted mainly of 35 to 55-year-olds, with a slight bias in favour of women. There was a spread of educational levels across those with secondary, vocational and tertiary qualifications, but very few with postgraduate degrees, and a spread of occupations with the exception of lower-level routine or semi-routine occupations.

Like 'middle Australians', the members of this cluster showed real but infrequent levels of involvement in activities with high art or cultural associations. Art galleries were visited, but only once a year, and the same was true of bookstores and participation in book clubs. Tastes were mainly for conventional genres: literary classics, light-classical music, and landscapes, for example, but with some engagement with more contemporary and avant-garde forms.

Older, wealthier and highly educated

A second cluster, accounting for 12% of the sample, was older—its largest concentration was around and over the age of 55—and strongly tilted towards higher level management

and professional occupations. It was also marked by high levels of the tertiary-qualified and postgraduate degree holders. This cluster exhibited the most intensive levels of involvement in the high arts: in opera, in orchestral concerts, as friends of museums, as members of book clubs, and in the visual arts.

Middle-aged, blue-collar men

The third cluster was predominantly male, mostly in the 45 to 54-year-old age range, and recruited mainly from routine occupations, lower level supervisory and technical positions, and from small business owners and the self-employed. Secondary levels of education predominated.

Accounting for 26% of the sample, the members of this cluster showed little interest in the 'high arts'. Art galleries were not visited, nor were museums or heritage sites; there was no involvement with book clubs or bookstores; and there was little involvement in musical events outside the home, whether 'high' (like opera) or popular (like rock gigs).

The active cultural interests of this cluster were tilted more toward traditional forms of popular culture, with high levels of television viewing, especially of commercial channels, as well as interest in sports, especially sport on television, and particularly rugby league.

Activities that provided inspiration, learning, and provoked these middle Australians to think differently about the world were also considered highly valuable, both to individuals and more broadly to society.

These things [arts and culture] stimulate your mind. You never stop learning; you could think you know everything and there is always something else that could pop up that you didn't know—I see it like that, that it stimulates your mind.
[Male, Melbourne]

I like to do something a bit more hands-on...like, if you go to the theatre, it would be good to see a bit more of behind-the-scenes, or the prep, finding out what their roles are like. I went to the cinema today at the Orpheum; I like it when they have special events on, and they have people there to do a talk first.
[Female, Sydney]

Attending arts events inspires me to try things. Like attempting to learn a musical instrument or doing my own artwork.
[Female, Townsville]

I think you can learn new things and be exposed to culture through movies. And the cinematography is definitely an art form.
[Male, Townsville]

I think about the theatre and museums...you have a lot of cultural things that you can explore and learn more about different things.
[Female, Brisbane]

I said cultural festivals [as the top item in a list of valued arts and cultural activities]. It's something that I really enjoy going to, I like eating food from around the world, I like going and seeing and trying new things.
[Male, Brisbane]

Discussions of heritage icons during the focus groups also evoked some discussion of the role that Australia's Indigenous arts and culture play in communicating about Australia to the world.

Well, look at Ayers Rock and the whole Aboriginal culture and their entire art—that has to be one of the biggest tourism things in Australia, I would imagine.
[Male, Melbourne]

I had number one [in a list of cultural heritage icons] as Indigenous art centres. You learn about Australia's culture and where it started, and how creative some of the Aboriginal artwork is.
[Male, Sydney]

We are seen as a little bit culturally bereft in this country, we really need stuff like [public arts and cultural activities], especially—Europeans, you know what they think about us? They think about us as a drinking culture. They would like to see more, say, Aboriginal culture.
[Male, Sydney]

I feel we don't show enough of our Aboriginal culture, we don't give it enough exposure. I would like to see more of that.
[Female, Sydney]

For Context: Australian Cultural Fields Study

Australian and Indigenous Heritage

Heritage activities were important to those respondents to the *Australian Cultural Fields* survey who were similar to 'middle Australians', according to that project's investigators. These participants liked many different kinds of heritage: local area heritage; Australian heritage; military heritage; industrial and working-life heritage. And they had visited many iconic Australian heritage sites: Port Arthur, Sovereign Hill, Fremantle Prison, and Cockatoo Island as well as Uluru.

They were also interested in Australia's Aboriginal and Torres Strait Islander heritage as part of a broader interest in Indigenous culture. Indeed, there was a strong sense of an ethical obligation to engage with Indigenous culture even though this might not always be followed up in practice. Stronger levels of engagement with Indigenous culture were evident among survey respondents with higher levels of income and education, and from professional and management occupations.

The interest in all items of Indigenous culture was, unsurprisingly, strongest among the Indigenous Australians who took part in the survey. This was strongest of all in relation to Aboriginal and Torres Strait Islander heritage. This was a favourite heritage category of 69% of the Indigenous Australians in the survey compared to 18% of the main sample.

Australian heritage more broadly was of much less interest to Indigenous Australians (at 21%) relative to the main sample (at 42%). Evidence from interviews with Indigenous respondents testified to the respects in which they felt troubled by the colonial and military aspects of Australian heritage.

Arts and cultural activities considered least relevant

Less value was placed on 'high art', which was seen as 'for other people', although many participants were happy for it to exist and for those other people to enjoy it.

They do, like, modern masters and art works at museums and things and—yeah, I wouldn't pay to see it. Yeah, I do appreciate it, but there are just so many things on, the Impressionists or whatever is touring, but I don't seem to also know about it. It's not targeted at me either. There are certain people that would love it.
[Male, Sydney]

I am not a big fan of the ballet; I have seen it advertised a lot recently—yeah, not really my thing. Also some opera. Or, they might do The Happy Prince, which I wouldn't mind seeing, but opera itself, no. Stuff they are charging \$200 a ticket for? No.
[Male, Brisbane]

I wouldn't go to opera, or anything like, classical music, that would put me to sleep.
[Female, Brisbane]

If it is too expensive, if it's \$30 per person, I can't justify for a family of four. If they have admission for \$10 per person, that's reasonable.
[Female, Sydney]

Opera, because of how expensive it is, I don't think it is easily accessible for everyone. And if you haven't been exposed to that sort of music you might not enjoy it. You might find it difficult to listen to in other languages. It's not the usual form of singing, not part of everyday life. I feel like it is an elite art.
[Female, Sydney]

I have been to Vivid in Sydney as well, they are quite accessible, you see a lot more of the general public there enjoying it with kids in prams that you wouldn't see at the National Ballet Company, where it is more an exclusive crowd, it is more of a specific demographic.
[Male, Melbourne]

For Context: Australian Cultural Fields Study

The 'high arts' are 'not for people like me'

This preference for culture in a broad sense, accompanied by some degree of hesitancy regarding the 'high arts', the sense that they are 'not for us', is typical of intermediate groups in a society. The *Australian Cultural Fields* project found a strong degree of connection between place of residence and levels of participation in different kinds of cultural activity.

Suburbanites were typically placed halfway between those living in regional or remote communities, (whose levels of visitation of art galleries, museums, opera, orchestral concerts, book clubs, literary and arts festivals were mostly low) and inner city residents. Suburban residents registered higher levels of involvement in these activities than regional or remote communities, but fell a good way short of the more intensive levels of involvement in the 'high arts' exhibited by inner city residents.

Of course, not *all* inner-city dwellers are arts devotees any more than *all* suburbanites are hesitant about participation. The effects of place of residence intersect in complex ways with the roles played by level of education and occupational class in differentiating the types of art and culture that Australians engage with.

Familiarity with, and participation in, the 'high end' of the visual arts, literature and music was most strongly associated with the tertiary-qualified, those from a private school background, and those in professional and managerial occupations.

Perhaps one of the most surprisingly consistent findings was how profit-driven enterprises were referred to with something akin to scorn. Commercial arts and culture, particularly activities such as commercial art galleries, art that was seen to have been tokenistically incorporated into commercial building design, commercial television (such as reality TV show *Married at First Sight*), Hollywood movies, and commercial radio stations were not valued highly by participants as arts and culture. This was in spite of their acknowledged popularity. Although participants found these things entertaining, or consumed them regularly as a way to 'zone out' or be 'mindless', these qualities were seen to be in opposition to the characteristics that would allow them to be categorised as arts and culture.

Commercial radio, I don't value. It's too much noise. Kyle and Jackie O? [laughs] The only things they promote are the things they are paid to promote.
[Male, Sydney]

Some movies are art but not mainstream blockbusters. More your indie type of films. Blockbusters are designed to just make money. Well—it depends on what movie you're watching, if it is a commercial movie then it is not [arts and culture].
[Male, Brisbane]

The way you listen to music is important [in deciding whether it's valued as arts and culture]. You want to get something out of it. In the car, it's just background music. You're pretty zoned out. It's too passive and most stations just play the same songs. They're influenced by advertising, so it's all just about commercial gain.
[Female, Townsville]

In my mind, a lot of stuff you listen to on radio is monetised and that's the reason why they play it on the radio...There are some radio stations that are like 'listen to this new artist' just to get their work out there, so you can experience it. It's not about money for the radio station, it's about the artist, like Triple J Unearthed. But most are too mainstream.
[Male, Brisbane]

Movies or commercial television, it's more commercial, it's more for money-making—that's not arts and culture. It's aimed at profit rather than expression. And, like, playing games on your phone, or listening to the radio; it's just for entertainment, just a thing to pass the time I think. It's not that deep—that it shakes your soul.
[Female, Brisbane]

It is worth noting the various ways in which one might interpret the word 'commercial' in assessing this finding. While commercial can simply mean 'for-profit', for many people, the term comes with additional baggage around how trustworthy the motivations of a commercial entity might be. This can be seen by the prevalent use of totalising words like 'just', 'only' and 'all' in the related quotes; when activities are seen as being *only* for making money, their intentions no longer align with the values that middle Australians associate with arts and cultural activities.

This does not necessarily imply, however, that middle Australians object to arts and cultural activities costing money to produce, or to those costs being passed on to some degree to consumers. Considering how often notions of commercialism were also tied to notions of superficiality ('just background music', 'it's not that deep') it is more likely that this was another way in which participants were demonstrating the value they placed on activities that 'make you think differently' and provide inspiration, as has been demonstrated in the other themes throughout this report.



SUMMARY OF FINDINGS

Summary of findings

Finding 1	Middle Australians consider arts and culture to be essential to the Australian way of life; without them, Australia would be like authoritarian or war-torn nations. The value of arts and culture was expressed through two key themes: 1) creativity, imagination and inspiration; and 2) participation, belonging and community.	Finding 4	Middle Australians believe arts and culture help bring communities together, break down barriers between different groups within society and encourage greater communication. Participating often means opportunities to socialise with friends and family. Consequently, the most valued activities involved attending and participating in local activities, such as festivals, live performances and local libraries.
Finding 2	Using 'arts and culture' together, rather than 'arts' or 'culture' separately, broadens middle Australians' emotional response and evokes a wider range of imagery. The word 'arts' alone prompts imagery of the high arts, which are seen as elitist and as being more for others [wealthier] people, not them.	Finding 5	Middle Australians believe that children develop better when broadly exposed to arts and culture both in and out of school time. Arts and culture help children to: enhance their self-esteem; find new ways to express themselves; build social and intellectual skills; and prepare for the future—both socially and in terms of their career opportunities.
Finding 3	Middle Australians directly connect participating in arts and cultural activities with experiencing better mental health, as well as with improved creativity and lateral thinking in the workplace.		

/ Summary of findings

<p>Finding 6</p>	<p>Middle Australians are not consistent in what boundaries they place around activities that can be categorised as arts and culture. They recognise that different people have different definitions and values in this area, and are generally comfortable with this. This extends across generations, with parents acknowledging that their definitions of arts and culture are narrower than their children's definitions, and that what they value does not always align with what their children value.</p>	<p>Finding 8</p>	<p>Middle Australians are largely unaware of the contributions that arts, cultural and creative activities make to the economy, including to employment.</p>
<p>Finding 7</p>	<p>Middle Australians believe that Australian content and cultural heritage icons should reflect Australians' [all Australians, in all their diversity] stories back to them, while also being an important tool for representing Australia on the world stage.</p>	<p>Finding 9</p>	<p>When activities are seen as purely profit-driven, they are considered superficial, and this erases them from most middle Australians' definition of arts and culture. This, along with the belief that access to arts and culture is essential to the Australian way of life, indicates that middle Australians believe arts and culture are what economists call 'a public good'.</p>



PART 3: IMPLICATIONS

Part 3: Implications

What do the findings of this research mean, and what might be done to capitalise on these new insights? In this section, as in Parts 1 and 2, we continue to draw from the *Australian Cultural Fields Study* to provide additional context for our findings. We also outline the key opportunities arising from these insights.

The concept of ‘arts and culture’ has broader relevance than ‘arts’ or ‘culture’ alone.

The focus group data showed that ‘arts and culture’ as a concept, is bigger than the sum of ‘arts’ plus ‘culture’. Together, the words take on a broader meaning that is more accessible and legible to middle Australians. This is a useful insight, because it implies that when engaging with this cohort, the words should be used together. In particular, it’s best not to use ‘the arts’ alone; the term is off-putting to this group, as ‘the arts’ are considered to be elitist. This is despite the fact that many of the artforms and activities that the term ‘arts’ describes are in fact thoroughly accepted and valued by middle Australians.

This finding is consistent with the findings from the most recent Australia Council National Arts Participation Survey, which found that many Australians maintain ‘an ingrained, narrow definition of “the arts”’. Those who are less engaged with the arts are more likely to have entrenched perceptions of them as “opera and ballet”, rather than, for example, free and accessible festivals’.²⁴

Given the evidence that the language used to discuss arts and culture signals whether it is relevant to—and welcoming of—middle Australians, anyone seeking to engage with this cohort could consider the following:

Opportunity 1: use both words—‘arts and culture’—together to demonstrate relevance, make middle Australians feel welcome and evoke a positive emotional response.

Opportunity 2: discuss the value of arts and culture in terms of the following themes: a) imagination, inspiration and creativity; and b) community, connection, diversity and acceptance of all Australians.

Opportunity 3: note that discussions about the value of arts and culture to a) children’s development, and b) maintenance of the Australian identity, can both evoke emotional and passionate positive responses.

Middle Australians would like more opportunities to participate in immersive, interactive arts and cultural experiences, especially those which bring communities together.

For arts and cultural activities to be considered most valuable by middle Australians, they should provide an active, not passive, experience. The focus group findings suggest that, if an activity, event or piece of creative work is 'merely' for entertainment, then it is seen to be more like 'background noise', 'predictable', etc. And once seen this way, it is no longer valued as arts and culture.

The degree of interaction or immersion can vary, from just 'making you think about things differently' through to active participation or creation. But because arts and culture do require that extra effort and cognitive engagement compared to background entertainment, they're not necessarily something middle Australians want to be immersed in every day. Arts and cultural activities are considered a bit special. They're to be savoured, preferably with other people.

In light of the findings from this research that highlight the value placed on festivals, participation and shared experiences, as well as the participation data from the ABS and findings from the Australia Council's National Arts Participation Survey,²⁵ investors and creators who want to engage with middle Australia could:

Opportunity 4: continually review investment in, and diversity of, arts and cultural activities so as to increase opportunities that will bring individuals together and build community. Eg. festivals, community arts and cultural development initiatives, and local and regional events and experiences.

Arts and culture should be taught consistently at school.

The focus groups made it clear that middle Australians value opportunities for their children to regularly and deeply engage in arts and cultural activities. At the same time, however, most participants do not describe themselves as having specific artistic skills, although many identify ways in which they are creative at work. Parents are relying on teachers to provide the next generation with the knowledge of arts and cultural practices, and the skills to approach these practices with increasing independence. They see this as critical for their children's intellectual and social development.

Although arts and culture are included in the Australian curriculum, their application is not consistent. According to Art Education Australia, approximately 5% of a child's weekly curriculum is dedicated to arts and cultural activities. This varies between states and territories, and includes the option for schools with capacity to provide additional arts and cultural education as they see fit.²⁶ In many states, this percentage is lower than the amount of time allocated to Health and Physical Education at the primary school level.²⁷

Despite being one of the eight mandated learning areas of the Australian Curriculum, many teachers do not feel competent teaching arts and cultural activities. Furthermore, the time that preservice teachers spend on learning how to teach arts and culture has been consistently reduced.²⁸

In light of middle Australians' vehemence about the value of arts and culture to children's development:

Opportunity 5: increase opportunities for Australian children to experience arts and culture at school so as to encourage children's development and overall well-being, through actions such as: reviewing the time allocation to The Arts learning area (and reframing it as Arts and Culture) at the primary level; improving preservice teacher training in how to teach arts and cultural activities; and investing in artist-in-school programs.

Australian content and icons can help middle Australians feel more connected with each other around a unified identity.

This research has made clear that middle Australians value Australian content for its capacity to reflect their lives back to them, help them process their own experiences, and also to build Australia's reputation on the world stage, particularly when it comes to Indigenous arts and culture.

These are not new revelations—for example, a 2016 Screen Australia survey drawing on a large representative sample of the Australian population found that audiences had a preference for Australian screen productions when they could see themselves reflected in it, and they valued local content for its capacity to build Australian identity both at home and abroad.²⁹

What was unexpected in our focus group findings was the particular way participants talked about wanting to see the diversity of their nation baked into their homegrown content. They didn't feel that Australian narratives needed to be *about* diversity, as such, just that the nuance inherent in Australia's multicultural society should naturally be reflected in the stories we tell about and to ourselves and each other. They suggested that the thing that makes us all Australian is, in fact, our 'way of life': the things we do and the ways we interact with space and place.

It is evident that Australians want priority given to Australian content, and are hungry for leadership—including from the Australian government in this global content environment—to ensure that Australian voices and stories are heard.³⁰

In light of the significant value that Australians place on Australian content as a way of representing Australian identity to each other and to the world:

Opportunity 6: prioritise incentives, requirements and schemes that support production and distribution of diverse Australian content and iconography that will help to build a unified national identity and represent Australia to the world.

Mental health and social inclusion initiatives utilising arts and culture will be welcomed.

The focus group data indicated that middle Australians are familiar with the positive effects that arts and cultural participation can have on mental health, wellbeing and social inclusion. They pointed to benefits such as increased happiness, stress relief, and reduced likelihood of substance abuse, as well as increased connection with community and decreased isolation. They also raised the positive impact that these benefits have on the public health system.

These benefits are borne out in research around links between arts and health. In our second Insight Report, we explored a range of research outcomes from around the world that showed that: arts engagement reduces depression and stress and can improve self-worth; incorporating arts and creative programs into health settings improves a wide range of patient outcomes, particularly in in-patient hospital contexts; and that two hours a week participating in cultural and creative activities has a significant and measurable positive impact on mental health.³¹

Given that middle Australians recognise the significant effect that arts and cultural activities have on mental health, social wellbeing and social cohesion:

Opportunity 7: review pathways and mechanisms that connect and embed arts and cultural activities in mental health and social inclusion strategies, particularly those related to recovery from natural disasters and significant social and economic disruptions.

There is low awareness of the impact of creative industries on the economy

While there is a strong recognition of the importance of creativity to both children and adults in developing skills for their working life, there is much less familiarity with the economic contribution made by, and the faster-than-average jobs growth in, Australia's cultural and creative industries.

This is a crucial opportunity, particularly in the context of recovery from the dual impacts of the 2019-20 bushfires and COVID-19. Just when our world is being rapidly remade, this research has debunked the notion that arts and culture is seen merely as 'nice to have' in Australia. It has shown that this idea is not only outdated, but that to keep thinking this way would risk Australians missing out on the economic and employment opportunities in this global industry.

Mechanisms such as a Creativity Commission, a Productivity Commission Inquiry or a Parliamentary Committee Inquiry would provide useful insights into the best use of arts and culture in Australia's recovery efforts as well assist in identifying the economic and employment opportunities.

In light of opportunities for Australians to benefit from the cultural and creative industries, both economically and through employment opportunities, now and into the future:

Opportunity 8: establish a strategic mechanism to make policy and investment recommendations about Australia's employment and other opportunities emerging from the Creative Economy in the 21st century, leveraging the dependencies between the media, creative and tourism industries.

For Context: Sport 2030

A case study of change

In 2018, Australia saw the introduction of *Sport 2030*, a long-term strategy for sport that included a commitment from the Minister for Sport to implement the plan: across the Australian Government; with states and territory governments; with Sport Australia; and with the wider sports industry. The plan sets out national expectations about the fundamental nature of sport in Australia, and was developed around four key pillars: participation, performance, prevention through physical activity, and integrity.

The consultations for this policy were extensive, including focus groups and workshops with Australians from many walks of life, from within the sporting sector, and with members of the general public. The process also included the option for any Australian to upload a written submission to influence the strategy.

The National Sport Plan, *Sport 2030*, indicates a shift in the way that Australians and Australian policy makers think about sport. How was this shift brought about?

Through their extensive consultation process, the Australian Sports Commission (now Sport Australia) identified four core benefits to participating in physical activity that appear to unify Australians: benefits to physical health; benefits to mental health; direct social inclusion; and the building of community connectedness and cohesion. Importantly, these are areas in which governments have important roles to play, and that hold benefits that are valued by most people.

Sport Australia also identified areas that Australians felt should be emphasised more in public discussions about sport—for example, while most Australians are aware of the physical health benefits of sport, they were less aware of the social and mental health benefits. However, once informed, they showed great enthusiasm for these ideas, and expressed a desire for other Australians to be made aware of them also.

Could a national plan for arts and culture in Australia be developed in a similar way?

Middle Australians see arts and culture as a public good.

'Public good' is a technical economic term and, unsurprisingly, the focus group participants didn't use this term, nor did facilitators prompt participants to discuss arts and culture as a public good. There were, however, several ways that arts and culture were discussed throughout the groups that indicate that they may see them that way.

Public goods are defined as items or effects that a) have social benefits beyond their market price; b) are (or should be) available to all members of a society without exclusion; and c) do not become less available to one individual because they are also being used by others.³²

These three characteristics of arts and culture emerged from the focus group data in the following key ways.

The motivation behind arts and culture should be social benefit (not just profit)

Firstly, this was demonstrated when participants did not include 'commercial' or profit-driven activities in their definitions of arts and culture. Although participants acknowledged that arts and culture cost money to create, they had less value if participants felt that they only existed to make someone money. The idea of profit-motive as sole motivation seemed to reduce participants' trust in the intentions behind the activities—and if the activities weren't intended to do society good, then they couldn't be arts and culture.

They believed arts and culture should be accessible to all, regardless of disposable income

Despite not wanting arts and cultural activities to be profit-focused, participants still wanted more and higher quality arts and cultural activities to be made more widely available and accessible, especially in their preferred genres, because of the capacity they felt these activities have for improving societal outcomes.

These are two key components of a public good: that it be an object or effect a) that society wants and needs and b) that is accessible to everyone, irrespective of disposable income levels. But in most circumstances, for a good to be available to all, it must be financed by someone whose top priority is societal improvement, not simply increasing profits.

They wanted arts and cultural activities to exist, even when they didn't want to participate personally

Belief in arts and culture as a public good was also evident when participants identified that the value of arts and cultural activities to society is reduced when the cost is increased, irrespective of whether they wished to go to those events themselves. Belief in arts and culture as a public good was also evident when participants identified that the value of arts and cultural activities to society is reduced when the cost is increased, irrespective of whether they wished to go to those events themselves (as was the case with opera and ballet).

In economic terms, when individuals see value in something that they have no interest in or intention of using personally, this is called 'existence value' (i.e. there is value to individuals in simply knowing that the thing exists). Existence value is intricately tied to categorisations of public goods.³³ The fact that participants wanted to see the more expensive arts and cultural events made more accessible to all, even though they didn't necessarily want to attend these themselves, is further evidence that they see arts and culture as a public good.³⁴

Noting the high value that middle Australians place on opportunities being made available and accessible to a wide range of people in and about the places where they live, the drop in per capita cultural funding by governments over the last 11 years is a concern.

Opportunity 9: address the drop in per capita public expenditure on arts and culture, with respect to the other opportunities presented here.

Furthermore, it is clear that middle Australians would welcome public leadership and celebration of the role that arts and culture play in their lives and the life of the nation.

Opportunity 10: create a National Arts and Culture Plan, in the same vein as the existing National Sport Plan, *Sport 2030*, that identifies the enduring and non-partisan principles and responsibilities that could inform more coherent arts and cultural policy settings and investment at all three levels of government.³⁵

Opportunity 11: celebrate the role of arts and culture more explicitly and consistently to reflect the value that middle Australians place on arts and culture.

Concluding thoughts

This research has made it clear that arts and culture are pivotal to the Australian way of life, and that the COVID-19 lockdown has, as a consequence, changed our way of life. Australians are, as our Townsville participant predicted, bringing arts and culture into their homes 'with sticks and paper, if they have to', and ANA is heartened to see the many opportunities that are being made available, and being taken advantage of, in arts and cultural spaces online.

Yet, despite all of this activity, Australians are missing the ways that arts and cultural activities allowed them to come together with friends, neighbours and strangers. Journalist Brigid Delaney decided to curate her own three-day, online arts and culture festival during the lockdown, travelling the world from her living room to get her fix of her favourite activities. Her conclusions at the end of this experience, and our research findings, are aligned:

My brain is mush from seeing so much art, music, theatre and dance. I loved sharing everything from a dance, to a reading, to pub trivia with strangers. But...but...it's not the same.

You make memories at festivals. You meet people who become friends or lovers. There is serendipity and surprise—all this, plus the art. I experienced some of the best art and culture the world has to offer—but without the festival crowds and a posse of friends it's like the proverbial tree falling in the forest.

*Did the festival really happen if there was no one else to share it with?*³⁶



SUMMARY OF OPPORTUNITIES

Summary of Opportunities

The research in this third Insight Report builds on ANA's previous two reports: 1) *The Big Picture: Public Expenditure on Artistic, Cultural and Creative Activity in Australia*;³⁷ and 2) *Transformative: Impacts of Culture and Creativity*.³⁸

All three reports emphasise that without strategic and coordinated effort, Australia risks deterioration in our cultural fabric and loss of the benefits that arts and culture provide.

Accordingly, we suggest the following eleven opportunities for consideration.

To communicate more effectively with middle Australians about arts and culture:

Opportunity 1

Use both words—'arts and culture'—together to demonstrate relevance, make middle Australians feel welcome and evoke a positive emotional response.

Opportunity 2

Discuss the value of arts and culture in terms of the themes of a) imagination, inspiration and creativity; and b) community, connection, diversity and acceptance of all Australians.

Opportunity 3

Note that discussions about the value of arts and culture to a) children's development, and b) maintenance of the Australian identity, can evoke emotional and passionate positive responses.

To ensure relevant and effective investment and policy settings:

Opportunity 4

Continually review investment in, and diversity of, arts and cultural activities so as to increase opportunities that will bring individuals together and build community. Eg. festivals, community arts and cultural development initiatives, and local and regional events and experiences.

Opportunity 5

Increase opportunities for Australian children to experience arts and culture at school so as to encourage children's development and overall well-being, through actions such as: reviewing the time allocation to The Arts learning area (and reframing it as Arts and Culture) at the primary level; improving preservice teacher training in how to teach arts and cultural activities; and investing in artist-in-school programs.

Opportunity 6

Prioritise incentives, requirements and schemes that support production and distribution of diverse Australian content and iconography that will help to build a unified national identity and represent Australia to the world.

Opportunity 7

Review pathways and mechanisms that connect and embed arts and cultural activities in mental health and social inclusion strategies, particularly those related to recovery from natural disasters and significant social and economic disruptions.

Opportunity 8

Establish a strategic mechanism to make policy and investment recommendations about Australia's employment and other opportunities emerging from the Creative Economy in the 21st century, leveraging the dependencies between the media, creative and tourism industries.

Opportunity 9 Address the drop in per capita public expenditure on arts and culture, with respect to the other opportunities presented here.

Opportunity 10 Create a National Arts and Culture Plan, in the same vein as the existing National Sport Plan *Sport 2030*, that identifies the enduring and non-partisan principles and responsibilities that could inform more coherent arts and cultural policy settings and investment at all three levels of government.

Opportunity 11 Celebrate the role of arts and culture more explicitly and consistently to reflect the value that middle Australians place on arts and culture.



RESEARCH DESIGN AND METHODS

Research Design and Methods

This research, including recruitment of participants as well as the primary analysis that underpins this report, was completed by Visibility, a specialist qualitative market research firm. Additional analysis was undertaken by ANA.

The project aimed to explore the social norms and discourses around arts and culture in 'middle Australia'. Middle Australia is a descriptive rather than analytical term. As discussed in the Introduction, this cohort of 'middle Australians' had to meet the following criteria:

- * All were swing voters who had swung their vote between the major parties more than once, and at both state and federal elections.
- * All had a combined household income between \$70K and \$150K. [According to 2016 Census data, this equates to just over a quarter of the Australian population.]³⁹
- * More than 70% were from outer- and middle-suburban or regional locations.
- * More than 50% were from marginal electorates.
- * All were aged between 35 and 60 years of age.
- * More than 60% had dependent children.
- * 100% of men and 75% of women were employed full-time in a single position. 25% of the female participants were combining part-time work with home duties.
- * None of the participants were on pensions, welfare, or receiving other government benefits.

In addition to the full-time stay-at-home mothers [5%], participants worked in: Administrative and support services [21%]; Project or middle management [21%]; Professional services (such as accountancy or IT) [17%]; Trades [14%]; Sales [8%]; Allied health and health support services [5%]; Childcare and education services [5%]; and Self-employment [3%].

Approximately 20% of respondents identified as being from somewhere other than Australia, with countries of origin including India, Bangladesh, Poland, Samoa, America, Spain, Pakistan and the United Kingdom, although all participants were also Australian citizens based on their ability to vote in Australian elections. Through the discussions, many additional respondents identified themselves as being culturally and linguistically diverse, and first- or second-generation Australians, noting their non-Australian cultural heritage to be significant in their daily lives. Participants were not informed about what topic they would be discussing when they signed up to participate, in order to avoid creating a bias in the sample towards people with strong views about arts and culture.

The data collection occurred with groups of seven, and at each location there were separate groups for male and female participants. Splitting focus groups according to gender is best practice in this kind of qualitative research. It significantly improves rapport in the focus groups, allowing respondents to relax and speak freely, therefore uncovering richer, deeper and more honest insights.

The research was conducted in custom-designed rooms that looked much like comfortable dining areas, complete with snacks and non-alcoholic beverages. Each of the rooms was fitted with audio-visual equipment to provide for recording and playback during the analysis phase of the research, as well as one-way mirrors to allow for real-time observation of the groups by note-takers. Participants were aware of, and consented to, all of these measures.

Data was then collected over a 90-minute period with each group. The consultants opened by showing participants a piece of paper that said, 'Arts and Culture' and asking them to write down the first two words that came to mind, then allowing each participant to discuss why they had chosen those two words.

They were then shown a 'prompt'; in this first instance, a broad list of activities that could be considered related to arts and culture. Examples from this list included both 'traditional' artistic activities such as going to an art gallery or playing a musical instrument, as well as many broader activities such as digital gaming, watching a drama on TV, creating a YouTube video, listening to commercial radio, engaging with virtual reality technology, visiting the Australian War Memorial, reading popular fiction and going to a live music festival. This list aligns with ANA's broad view of arts and culture, as described in 'What we mean by arts and culture' on p.65.

Participants were asked to discuss whether the activities on this list met their personal definitions of arts and culture (and why or why not). This catalysed significant debate in the groups over what should and should not be included in a definition of arts and culture. Groups were then prompted to think about whether the definition would change if they were defining only arts, or only culture, and how they felt about the two words when used together.

Throughout the discussion, participants were asked about their own personal engagement with arts and cultural activities as they defined them, whether they saw value in arts and cultural activities, and if so, which kinds, to whom they might be valuable (with specific prompts including 'to children', 'to employees' and 'to society'), and under what circumstances. They were specifically asked about how important Australian arts and culture and cultural heritage was to them personally, as well as more broadly.

The focus groups concluded with the facilitator asking participants whether they felt their perceptions of arts and culture had shifted in any direction, or become strengthened or weakened, over the course of the 90-minute discussion.

Following data collection, the focus groups were transcribed and analysed to uncover and explore recurring themes. The quotes presented throughout this report are not the only instances of each theme being mentioned; they merely exemplify the kinds of things participants were saying about that topic, as is typical in qualitative studies.

It should also be noted that this was not a comparative analysis between the variables along which the focus groups were split—i.e. gender and location. Themes that emerged through the analysis had to apply to all eight of the focus groups to be considered worthy of note. As previously mentioned, the decision to split the groups based on gender was about rapport building. The decision to divide the groups over four locations was an attempt to be as broadly representative of the nation as possible by choosing the three most populous locations in the country, as well as one regional centre that was both a marginal electorate and had a high ratio of swing voters available to recruit for the research. Decisions about both gender and location divides were made on the advice of the qualitative research consultants conducting the research on ANA's behalf.

Notes

1. Jonathan Barrett and Renju Jose, 'Australia Closes Internal Borders to Capitalise on Fall in New Coronavirus Cases.' Reuters, April 3, 2020, sec. World News. <https://www.reuters.com/article/us-health-coronavirus-australia-idUSKBN21K3JK>.
2. Vanessa Thorpe, 'Balcony Singing in Solidarity Spreads across Italy during Lockdown.' The Guardian, March 14, 2020, sec. World News. <https://www.theguardian.com/world/2020/mar/14/solidarity-balcony-singing-spreads-across-italy-during-lockdown>.
3. Yara Murray-Atfield 'Why These Chalk Messages Could Be 'Really Important' for Getting through the Coronavirus Pandemic.' ABC News. April 2, 2020. <https://www.abc.net.au/news/2020-04-02/coronavirus-covid-19-chalk-messages-on-streets-around-australia/12102778>.
4. Yuan Ren, 'Amid the Coronavirus Lockdown, Chinese Social Media Is Full of Laughter and Anger.' The Guardian, February 25, 2020, sec. Opinion. <https://www.theguardian.com/commentisfree/2020/feb/25/coronavirus-lockdown-chinese-social-media-laughter-anger>.
5. For a good example, see the live streaming events being hosted by the Woodford Folk Festival organisers in support of local artists: Woodfordia Inc.'Woodfordian Artists: Live Online.' Chuffed, April 6, 2020. <https://chuffed.org/project/woodfordia-live-online-week2>.
6. For examples, see the National Museum of Australia's 'What's new' page <https://www.nma.gov.au/whats-on>; see the National Library of Australia's Digital Classroom page <https://www.nla.gov.au/digital-classroom>; see the National Archives of Australia's #ArchivesAtHome page <https://www.naa.gov.au/explore-collection/archivesathome>.
7. See the Alice Springs Public Library "Book-a-Book" Service, which is allowing members to order sanitised books for pick up or home delivery: <https://alicesprings.nt.gov.au/recreation/library/services>.
8. Brigid Delaney, 'Arts in Lockdown: I Curated My Own Three-Day Online Festival. Now It's over, and I Am Wrecked.' The Guardian. April 21, 2020, sec. Culture. <https://www.theguardian.com/tv-and-radio/2020/apr/21/arts-in-lockdown-i-curated-my-own-three-day-online-festival-now-its-over-and-i-am-wrecked>.
9. Australian Bureau of Statistics [ABS], 'ABS5676.0.55.003 - Business Indicators, Business Impacts of COVID-19'. Week Commencing 30 March 2020. Released April 7, 2020. Section: Trading Status of Australian Businesses.
10. .id community, 'Community Profile: Australia's Household Income.' .id community demographic resources. Accessed April 15, 2020. <https://profile.id.com.au/australia/household-income?BMID=50>.
11. Participants were not asked their citizenship status because the key recruitment criterion was swinging voting preferences over multiple state or federal elections. Only citizens can vote in Australia; however, we wished to ensure that Australia's culturally and linguistically diverse profile was captured in our recruitment. There is a significant body of research that indicates that the amount of time a migrant has spent in their new country of citizenship determines how likely they are to identify themselves as being 'from' that country. (For example see Roger Waldinger, 'Between Here and There: How Attached Are Latino Immigrants To Their Native Country?' Los Angeles: Pew Research Centre, 2007.) Therefore, it can be assumed that the 20% of participants who identified as being of a different nationality were probably newer Australian citizens.

12. High rates of attendance at cultural venues (82.4%), including art galleries, museums, libraries and archives, live music concerts and performances, theatre, dance, musicals, opera, acrobatics, cabaret, comedy, festivals, magic acts, cinemas and drive-ins are found by the ABS in its series, '4114.0 Attendance at Selected Cultural Venues and Events, Australia, 2017-18,' 2019.
13. From Eurostat (Statistical Office of the European Union) online publication, 'Cultural Statistics—Cultural Participation,' 2017. In this research, live performance is described as attending 'the cinema...theatre, concert, organised cultural event outdoors and so on' while cultural sites are described as 'museum, historical monument, art gallery or archaeological site'. These two studies (the ABS 4114.0 study mentioned in the previous footnote and the Eurostat study) were not designed to be comparable, and because Eurostat has defined live performance to include 'and so on', we don't know if the activities they have described are entirely commensurate with the ABS figures. Furthermore, the Eurostat data is an average across 28 countries, so although there is significant variability amongst cultural participation by region and location in Australia, this is undoubtedly more pronounced across the various countries in the EU. However, given that these two studies represent the most recent data available, and are supported through other, older sources, they are still worthy of note.
14. Australia Council for the Arts, 'Arts Participation: How Does Australia Compare to Other Countries?' 2010. https://www.australiacouncil.gov.au/workspace/uploads/files/how_does_australia_compare_to_591bc93a3a10b.pdf.
15. Based on the ABS household expenditure survey results for 2015/16, which are the most recent statistics available. ABS, '6530.0 - Household Expenditure Survey, Australia: Summary of Results, 2015-16.' ABS: Household Expenditure, October 27, 2017. <https://www.abs.gov.au/household-expenditure>.
16. Based on ABS household income figures for 2017/18. ABS, '6523.0 - Household Income and Wealth, Australia, 2017-18.' 2019. <https://www.abs.gov.au/household-income>.
17. Based on the ABS household expenditure survey results for 2009/10, the most recent statistics available. ABS, '4156.0 - Sports and Physical Recreation: A Statistical Overview, Australia, 2011.' ABS: Household Expenditure Survey 2009/10. 2011. <https://www.abs.gov.au/ausstats/abs@.nsf/4156.0~2011~Chapter~Household+Expenditure+Survey?OpenDocument>.
18. According to a Live Performance Australia Report conducted by EY, 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. All up, Australians bought 23 million live performance tickets, generating total ticket sales revenue of \$1.88 billion. In comparison, total combined attendance at the above-mentioned sporting events was approximately 13 million tickets. (EY, 'Ticket Attendance and Revenue Report 2017.' Australia: Live Performance Australia, 2017.) <https://reports.liveperformance.com.au/ticket-survey-2017>.) Total attendance at AFL, NRL, A-League Soccer, Super Rugby, Test Cricket and NBL games in 2017 is based on information collected by Stadiums Australia. (Austadiums, 'Australian Sport Attendance Records.' Australian Stadiums & Sport, 2019. https://www.austadiums.com/sport/crowd_records.php.) To be clear, none of this indicates that ALL Australians prefer arts and cultural activities to sporting activities. We know, for example, that class and location have a significant impact on these preferences, and attendance numbers do not give any indication of who is attending what. However, what these statistics

do tell us is that we are not ONLY a sporting nation, and that arts and cultural activities are also worthy of further exploration and consideration in the national narrative.

19. The Australian Cultural Fields: National and Transnational Dynamics project, funded by the Australian Research Council [DP140101970], was awarded to Tony Bennett [Project Director], David Carter, Modesto Gayo, Michelle Kelly [Senior Research Officer and Project Manager], Fred Myers, Greg Noble, David Rowe, Tim Rowse, Deborah Stevenson, Graeme Turner and Emma Waterton. As a member of ANA's Research Working Group [see Acknowledgements on p. 2], Tony Bennett assisted with the creation of the relevant Australian Cultural Fields boxes for this report.
20. Costantoura, Paul, *Australians and the Arts*. Annandale, NSW: Federation Press, 2000.
21. The quotes throughout this report are taken from transcripts prepared by the investigators, Visibility Consulting. On occasion, we have removed parts of quotes when doing so does not impair the meaning of the quote. Where grammatical errors were made by participants, we have left them in. For more on the analysis of data, please see our Research Design and Methodology section on p. 56.
22. Fielding, Kate, Iva Glisic, and Jodie-Lee Trembath, 'Transformative: Impacts of Culture and Creativity.' Insight Series. Canberra: A New Approach and The Australian Academy of Humanities, 2019. <https://www.humanities.org.au/new-approach/report2/>
23. It is worth noting that for 'middle Australians', like people from the middle ranges of society elsewhere, certain types of arts and culture may be considered valuable on a broader societal level, rather than to them personally. Thus, their enthusiasm for particular activities may not align with their own participation in those activities. French sociologist Pierre Bourdieu reflected on this in his remarks on what he called the 'cultural goodwill' exhibited by France's middling social strata. This goodwill, he argued, was manifest in the preference for 'the minor forms of...legitimate cultural goods and practices' that he characterises as 'middlebrow' culture. [See Bourdieu, Pierre. *Distinction: A Social Critique of the Judgement of Taste*. Cambridge MA: Harvard University Press, 1984]. The currency of similar cultural values in Australia has been examined in the tradition of Australian middlebrow studies.
24. Australia Council for the Arts, 'Connecting Australians: Results of the National Arts Participation Survey.' 2017, pp. 11-12.
25. See: ABS, '4921.0 - Participation in Selected Cultural Activities, Australia, 2017-18.' 2019. <https://www.abs.gov.au/ausstats/abs@.nsf/mf/4921.0>. See also: Australia Council for the Arts, 'Connecting Australians.' 2017, pp. 11-12.
26. Baguley, Margaret, 'Issues, Challenges and Needs for Government Arts, Culture and Education Policy: An Art Education Australia [AEA] Perspective.' Non Traditional Research Outcomes, March 1, 2019. <https://nitro.edu.au/articles/2019/3/1/issues-challenges-and-needs-for-government-arts-culture-and-education-policy-an-art-education-australia-aea-perspective>.
27. See Queensland's breakdown as a good example of this. Queensland Studies Authority [QSA], 'Time Allocations and Entitlement: Advice on Implementing the Australian Curriculum F[P]-10,' 2011. https://www.qcaa.qld.edu.au/downloads/p_10/ac_time_alloc_entitlement_advice.pdf.
28. Baguley, 'Issues, Challenges and Needs for Government Arts, Culture and Education Policy.' 2019.
29. Olsberg SPI. 'Measuring the Cultural Value of Australia's Screen Sector.' Australia: Screen Australia, 2016. <https://www.screenaustralia.gov.au/getmedia/1dce395e-a482-42d1-b5a9-47bb6307f868/Screen-Currency-Olsberg-SPI-Nov2016.pdf>.

30. These focus groups were conducted prior to the temporary changes to Australian content quotas announced on April 15, 2020. See Samios, Fergus, and Zoe Hunter, 'Fletcher Hopes Rescue Package Will See Regional Media through 'Immediate Crisis.'" Brisbane Times, April 15, 2020, sec. Coronavirus Pandemic. <https://www.brisbanetimes.com.au/politics/federal/fletcher-hopes-rescue-package-will-see-regional-media-through-immediate-crisis-20200415-p54k2y.html>.
31. Fielding, Glisic and Trembath, 'Transformative: Impacts of Culture and Creativity.' 2019.
32. This definition is condensed and paraphrased from two key sources: first, Drahos, who claims that 'Public goods range from those that are constituted by norms [peace, order, and good government] to those physical goods that provide a collective benefit independently of any norms [forests and algae that consume carbon are two examples]. Such goods are typically defined in terms of two qualities: non-rivalry in consumption and non-excludability.' [Drahos, Peter. 'The Regulation of Public Goods.' *Journal of International Economic Law* 7, no. 2 (2004): 321-39. p. 321]; and secondly from the Statistics Working Group of the Meeting of Cultural Ministers, who indicate that in the case of public goods, '...the market price does not take into account the full social benefits or costs of the good or service, known as externalities.' [Statistics Working Group of the Meeting of Cultural Ministers, 'Measuring the Economic Value of Cultural and Creative Industries.' 2018. p. 33].
33. Statistics Working Group, 'Measuring the Economic Value of Cultural and Creative Industries.' 2018.
34. Again, this is not to say that money-making detracts from arts and culture being a public good per se. For example, SBS runs ads in order to be able to offer public-good television, radio and digital offerings. It doesn't do this to make a profit. So it is the commercial intent that is being dismissed by participants, not the commercial activity itself. The mixed economy model is adopted for arts and cultural activities worldwide without detracting from the core function of the arts and culture when it is employed.
35. The next ANA Insight Report, which looks at cultural policy settings and is due for release in the second half of 2020, will expand on this idea significantly.
36. Delaney, 'Arts in Lockdown: I Curated My Own Three-Day Online Festival.' 2020.
37. A New Approach. 'The Big Picture: Public Expenditure on Artistic, Cultural and Creative Activity in Australia.' Insight Series. Canberra: A New Approach and The Australian Academy of Humanities, 2019. <https://www.humanities.org.au/wp-content/uploads/2019/09/ANA-InsightReportOne-FullReport.pdf>.
38. Fielding, Glisic, and Trembath, 'Transformative: Impacts of Culture and Creativity.' 2019.
39. .id community. 'Community Profile: Australia's Household Income.', 2020.

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What we mean by arts and culture

We take a broad view of arts and 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 arts and culture as the set of institutions, industries and individual actions that combine to produce and distribute a wide range of texts, performances, exhibitions, experiences and events. Some of these activities are commercial while some are subsidised by governments, some are community-sourced, others are privately funded, others 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.

In recognising these two notions of arts and culture, our purpose is to acknowledge that the interactions between them are crucial to understanding the issues at stake in assessing the public value of expenditure on arts and culture. How do these 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. ANA's reports refer to a variety of sources that use differing definitions and therefore include or exclude different things from their underlying datasets. Using endnotes and clarifications throughout the report, we have endeavoured to make these distinctions as transparent as possible.



