

CREATING OUR FUTURE: RESULTS OF THE NATIONAL ARTS PARTICIPATION SURVEY. Australia Council. August 2020

Creating Our Future: Results of the National Arts Participation Survey is the fourth study in the landmark research series that explores Australians' engagement with and attitudes towards the arts. The survey was conducted in late 2019, not long before the COVID-19 pandemic disrupted our world, lives and the cultural and creative industries. The survey results provide a benchmark of Australians' arts engagement before the impacts of the pandemic, providing much needed information as doors reopen, audiences are rebuilt and the cultural and creative industries are re-ignited.

The 206 page report is jam packed with data and information invaluable for those who need to argue the value of the arts with the latest data. Even the Executive Summary is 36 pages long.

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What Arts Mid North Coast has done in this summary paper is provided a glimpse into the range of data and materials available. You should always refer back to the full report for sources and further information.

The Report also has a number of featured sections in the report called Spotlights. We have summarised two of these in Appendices as being particularly relevant to Arts Mid North Coast, being:

- Economic Value of the Arts
- Arts and Wellbeing (Health)

Key Statements

The 2019 National Arts Participation Survey results show that Australians increasingly recognise the positive impacts of the arts. Nearly every Australian – 98% of us – engage with the arts in some way, whether it be through listening to music, reading, engaging online, creatively participating, attending arts in person or engaging with the arts of our cultural background or community (figure 1). The arts are not a luxury; they are embedded in the very fabric of our lives. More Australians now agree First Nations arts are an important part of Australia's culture and interest in First Nations arts is growing.

Prior to COVID-19, Australians' appetite for both online and live engagement with the arts was increasing too – rather than replacing the live experience, digital platforms provide complementary experiences and ways of engaging that can translate to growth in live audiences and greater access to the arts for all Australians. Live attendance at arts events was thriving prior to COVID-19. The power of arts and creativity to connect us, and Australians' strong and growing engagement with arts events, experiences and festivals, highlight the critical role for the arts in reinvigorating tourism, our economy and our wellbeing, and in creating our future for generations to come.

Chapter 1. Impacts of the Arts and Creativity

Significantly more Australians now recognise the range of positive impacts of arts and creativity in our lives and communities. In 2019, 84% of Australians acknowledged positive impacts, up from 75%

in 2016. Since 2016, agreement has increased across all the 'impact' areas explored by the National Arts Participation Survey.

This includes increasing recognition of the impacts of arts and creativity on:

- child development (63%, up 13 percentage points)
- our sense of wellbeing and happiness (56%, up 11 percentage points)
- dealing with stress, anxiety or depression (56%, up 11 percentage points)
- understanding other people and cultures (60%, up eight percentage points)
- bringing customers to local businesses (41%, up nine percentage points).

Additionally, one in two Australians believe the arts build creative skills that will be necessary for the future workforce (47%, new in 2019)...

Since 2016, the most significant attitude shifts among Australians have been greater agreement that artists should have freedom of expression (76%, up 15 percentage points), the arts allow us to connect with others (53%, up 15 percentage points), the arts should receive public funding (63%, up 12 percentage points) and the arts should be an important part of education (73%, up 12 percentage points)...

Investment in the arts and creativity

As well as strong and growing support for public funding for the arts in Australia, Australians have clear priorities for investment. The top two priorities are ensuring young people have access to art and creative experiences to support their learning and development (74% ranked this in their top three priorities for public or private investment), and ensuring free or low-cost events are available (68%).

More than half of Australians think funding should ensure art and creative experiences are available to support our health and wellbeing (55% ranked this in their top three priorities for public or private investment). One in four prioritise investment in art that pushes boundaries and drives innovation (26%).

The high value that Australians place on the arts is reflected in the time and money they give to support artists, arts organisations and arts projects. Australians are increasingly giving to the arts (26%, up from 18% in 2016), including donating money (10%, up from 6%), volunteering (9%, up from 6%) and supporting crowdfunding (8%, up from 5%)...

Chapter 2. Cultural Identity

First Nations arts are an important part of Australia's culture (75%, up from 70% in 2016).⁹ However, only half of Australians believe First Nations arts are well represented (51%, up from 48% in 2016), showing there is still work to be done to build the representation and profile of First Nations arts in Australia.

Both attendance and interest in First Nations arts were strong and growing prior to COVID-19. One in three Australians were attending First Nations arts (32%, up from 26% in 2016) and four in ten were interested in First Nations arts (40%). Among those interested, nearly half reported a growing interest (45%).

Cultural diversity and arts engagement

Whether in First Nations, Anglo-Celtic and/or diasporic communities,¹⁰ the arts are a key way that Australians connect with, and share, our cultural backgrounds, identities and heritages. All Australians are enriched and benefit from the tapestry of our people and cultural landscape. More than one in three Australians connect with, and share, their cultural background through arts and creativity (36%), including by attending arts events (31%).

More than half of CALD respondents attend arts events focused on their cultural background or community (55%) and more than eight in ten attend arts events overall (82%), including significant cross-cultural arts engagement and strong engagement with First Nations arts. This is a positive indicator for social cohesion and intercultural empathy.

Australians attend a range of live events to engage with their cultural background or community, including live music (17%) and festivals or celebrations (11%). They attend at a variety of places including concert halls or theatres (36%), community centres (28%) and local parks (28%) – local community infrastructure is vital to cultural participation, particularly among CALD communities. Australians who attend particularly benefit from spending time with family or friends (51%) and getting to know people in the community (39%). Many Australians also participate in creating art themselves to connect with their cultural background or community (22%, including 46% of CALD respondents), particularly by making music (9% of Australians, including 20% of CALD respondents).

Chapter 3. Arts Attendance

Prior to COVID-19, live attendance at arts events was thriving. More than two in three Australians attended the arts in person in 2019 (68%), up nearly ten percentage points since 2016. Attendance increased across all types of arts events including live music, theatre, visual arts and craft, dance, literature events, festivals and First Nations arts.

Younger Australians and parents with young children have particularly strong attendance, highlighting the importance of the arts to both the wellbeing of our younger generations and the future of Australia's culture.

Spotlight on live attendance by art form

Half of Australians attend live music and attendance was increasing prior to COVID-19 (48%, up from 43% in 2016). On average, those who attend went to 10.9 music events in 2019, or 4.2 live music events for every Australian.¹² More than one in four Australians attend contemporary music (28%) and 8% attend classical music. Australians attend live music at a range of places including concert halls or theatres (19%), pubs, clubs or bars (16%), outdoor spaces (16%), stadiums or arenas (15%) and places of worship (4%).

Live theatre was connecting an increasing number of Australians prior to COVID-19 (37%, up from 30% in 2016). On average, those who attend went to 8.8 theatre performances in 2019. One in five Australians attend musical theatre or cabaret (19%), 16% attend traditional or contemporary theatre, 7% attend circus and 6% attend children's theatre.

More than one in three Australians attend visual arts and craft events (37%, up from 33% in 2016). The equivalent of three visual arts and craft events were attended for every Australian in 2019. One in five Australians attend painting, drawing, printmaking or street art (19%), 13% attend photography, 12% attend sculpture, installation or light projections and 12% attend craft.

Three in ten Australians attend dance (29%, up from 24% in 2016). Those who attend dance are the most frequent attendees, attending on average 16.3 dance events in 2019. Australians attend various types of dance including contemporary (7%), ballet (6%), street dance or hip hop (6%), social or competitive dance (5%) and classical/traditional/folk (5%).

Australians are increasingly connecting through book or literary events (22%, up from 15% in 2016). On average, those who attend book or literary events went to 15.6 events in 2019. Australians connect with literature and with each other through writer talks or book launches (8%), book clubs (6%), readings (6%) and writers festivals (6%).

The festival audience

Festivals bring people and communities together and play a pivotal role in tourism in Australia. Festivals are a part of life for many Australians (42%) and were growing in popularity prior to COVID-19 (up by 9 percentage points since 2016). Parents with children aged under 16 years are the most likely to attend (54%). Festivals connect families as well as communities.

Australians attend a range of festivals including music festivals (23%), multi-art form festivals (18%), visual arts festivals or fairs (14%) and performing arts festivals (12%). One quarter of Australians attend festivals related to particular cultural groups or communities (24%), including First Nations festivals (19%).

Motivations and barriers for live attendance

Entertainment, social connection and wellbeing are the main drivers of arts attendance. Australians are motivated to attend the arts to have fun and to be entertained (63%), to socialise and connect with others (41%), to understand other perspectives and cultures (33%) and to improve their wellbeing (25%). One in eight Australians attend the arts to develop skills for education, training or work (13%).

Four in ten Australians would like to attend more arts events (42%). Prior to COVID-19, cost and location were the main barriers to increased attendance: cost of tickets or entry prevented one in three Australians from attending as many events as they would like (34%) and one in four said there were no arts events near where they live (25%).

Chapter 4. Creative Participation

The proportion of Australians who creatively participate in the arts (45%) has increased by 13 percentage points since 2016. This includes increased participation in visual arts and craft, music, creative writing, dance and theatre.

Creative participation is particularly strong among young people, parents of children under 16 years, First Nations respondents, CALD respondents and respondents with disability.

In addition, one in three Australians were creative using a digital platform in 2019 (32%) – from creating TikTok videos or memes to creating music, digital visual art or poetry

Spotlight on creative participation by art form

An increasing proportion of Australians create visual arts and craft (23%, up from 20% in 2016), including painting, drawing, printmaking or street art (11%), photography (10%), craft (10%), digital or video art (5%) and sculpture, installations or light projections (3%).

More than three million Australians create music (15%, up from 12%), including playing a musical instrument (10%), singing (6%) and writing songs, mixing or composing music (6%).

An increasing proportion of Australians are creative writers (14%, up from 9%), including writing novels or short stories (6%), poetry (5%), creative non-fiction such as biography or history (4%), instructional non-fiction (3%) and plays or graphic novels (2% each).

Almost one in ten Australians participate in dance (8%, up from 6%), including contemporary dance (3%), street dance or hip hop (3%), social or competitive dance (3%), ballet (2%) and classical, traditional or folk dance (2%).

Australians increasingly creatively participate in theatre (6%, up from 5%), including musical theatre or cabaret (3%), traditional or contemporary theatre (3%), children's theatre (2%) and circus (2%). In addition, one in six Australians participate in community arts (16%). This includes community choirs and community theatre, which have demonstrated benefits for wellbeing and community cohesion. It may also include community arts and cultural development (CACD), which is a specific type of arts practice where as a group, community members and professional artists collaborate to create art that is reflective of that place and community.

Chapter 5. Listening to Music, Reading & Digital Engagement

Listening to recorded music

Recorded music is infused throughout the lives of almost every Australian, providing a soundtrack to our lives and helping us through the day. In 2019, 19 million Australians chose to listen to recorded music (92%). Fewer Australians are listening to music they own or on radio or TV than they were in 2016.

The proportion using online streaming (either paid or free) (67%) is now on par with the proportion listening on radio or TV (68%). Half of Australians aged under 45 years stream music through paid subscriptions (52%), providing vital income for the music industry.

On a daily basis, one in three Australians listen to music on the radio or TV (34%), and around one in five Australians use a paid service to stream music (18%).

Reading

Despite busy lives and digital distractions, reading remains a fundamental activity for Australians and provides a lifetime of enjoyment. The proportion of Australians who read for pleasure (72%) has increased by 17 percentage points since 2016.¹⁶ The most popular types of reading material are novels or short stories (47%), instructional non-fiction such as guidebooks or cookbooks (32%) and creative non-fiction such as biography or history (31%).

Print books remain the most popular format, read by seven in ten Australians (69%), including one in four Australians aged over 55 who read print books daily (23%). Two in five Australians read e-books (41%) and almost one in three listen to audiobooks (31%).

Digital engagement with the arts

Most Australians engage with the arts online (82%, up from 76% in 2016). In the digital age, the arts are more accessible than ever. Listening to streamed music remains the most popular way to engage (67%).

Two in three Australians use digital platforms to engage with the arts (64%), including Facebook (38%), YouTube (38%) and Instagram (25%). One in three Australians express themselves creatively on digital platforms (32%), including through image galleries (9%), memes (8%) and music or songs (7%). But from video games to creative blogs, Australians have differing views of which digital creations can be considered art.

Chapter 6 Arts Engagement. Targeted Groups

Connecting with Generation Z

Young people are vital to the future of Australia's culture and our nation's future success. Almost all young Australians aged 15–24 years recognise the positive impacts of arts and creativity in our lives and communities (91%). Four in ten young Australians give time or money to the arts (40%), including one in two 18–19 year olds (49%).

Support for public funding for the arts is strong among young Australians and their top priority for investment is ensuring young people have access to art and creative experiences to support their learning and development. Young Australians aged 15–24 years are highly engaged – four in five attend arts events (83%), including live music (66%) and festivals (61%). More than a third attend the arts to understand other perspectives and cultures (35%) and more than a quarter to improve their wellbeing (27%). One in two young Australians connect with their culture and community through arts and creativity (53%) and two in three creatively participate in the arts (66%).

The majority of young Australians agree First Nations arts are an important part of Australia's culture (76%) and 47% attend First Nations arts or festivals. The vast majority of young Australians read for pleasure (73%); stream music, either paid (60%) or for free (70%); and use digital platforms to explore (84%) or express creativity (62%).

Regional and remote First Nations communities

The 2019 National Arts Participation Survey was expanded to ensure greater representation of First Nations people in regional and remote communities, with 150 face-to-face interviews conducted by First Nations interviewers in Lismore (NSW), Woorabinda (Qld), Humpty Doo (NT) and Darwin (NT).

Almost all First Nations respondents interviewed believe the arts provide social, cultural and economic value, including by bringing customers to local businesses (85%) and building creative skills necessary for the future workforce (90%).

Targeted regional and remote First Nations respondents have stronger engagement with the arts than Australians overall, except theatre and literature events, and would like to attend the arts more than they do. They are less likely to agree First Nations arts are well represented than Australians overall (35% compared to 51%).

Targeted regional and remote First Nations respondents are more likely to engage with the arts online than Australians overall, with three quarters using digital platforms to engage (74%). But despite strong digital engagement, targeted regional and remote First Nations respondents are less likely to view digital creations as art.

Appendix 1. Australia Council Value of the Arts

The Australia Council Report, *Creating Our Future: Results of the National Arts Participation Survey* is the fourth study in the landmark research series that explores Australians' engagement with and attitudes towards the arts. The survey was conducted in late 2019, not long before the COVID-19 pandemic disrupted our world, lives and the cultural and creative industries. The survey results provide a benchmark of Australians' arts engagement before the impacts of the pandemic, providing much needed information as doors reopen, audiences are rebuilt and the cultural and creative industries are re-ignited.

The 206 page report is jam packed with data and information invaluable for those who need to argue the value of the arts with the latest data. Even the Executive Summary is 36 pages long.

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The following is a summary of material relating to the key question of the **Economic Value of the Arts**.

Australia's arts and creativity are among our nation's most powerful assets and will play a critical role in Australia's future success. Results from the National Arts Participation Survey highlight the importance of arts and creativity to child development, education, local businesses and skills for the future. Previous research has shown the arts to be powerful drivers for regional, domestic and international tourism. Australians' strong and growing engagement with arts festivals and events prior to COVID-19 highlights the critical role for arts in reinvigorating tourism and our economy.

Arts and creativity in child development, education and young people's lives.

Young Australians value the arts and are highly engaged – four in five of those aged 15–24 attend, two in three creatively participate and four in ten give time or money to the arts. There is a reciprocal relationship between young people and the arts: a connection with the arts sets them up for success and in turn, they play a critical role in the future of the nation. There is a substantial body of evidence about the value of arts and creativity in education, including the power of arts activities to help students develop personal, social and cognitive skills that transfer to and improve performance in a wide range of academic and social situations

The National Arts Participation Survey results show that Australians increasingly recognise the value of arts and creativity in the lives and education of children and young people. While Australians increasingly recognise positive impacts of arts and creativity in a range of areas, the most substantial increase since 2016 is the proportion of Australians who agree the arts and creativity impact child development (63%) – up 13 percentage points from 2016.³³ Additionally, the proportion of Australians who agree the arts should be an important part of education (73%) is up by 12 percentage points. When it comes to public and private investment in the arts, the priority with the highest level of support among Australians is access to arts and creativity in the lives of children and young people to support their learning and development – 74% ranked this in their top three investment priorities.

Creative skills for the future workforce

Australians also increasingly agree that the arts stimulate our minds (64%, up nine percentage points from 55% in 2016) and impact our ability to think creatively and develop new ideas (62%, up from 54% in 2016). One in two Australians agree that the arts have a big or very big impact on building creative skills that will be necessary for the future workforce (47%, new in 2019). Further, one in eight Australians are motivated to attend the arts to develop skills for education, training or work (13%), including more than one in five young Australians aged 15–24 (22%).

This is in line with the growing body of evidence that identifies creative skills as essential to workforces of the future. In recent years, multiple predictions about workforces of the future – both Australian and international studies – have identified increasing need for creative thinking and skills. Creativity enables adaptability, experimentation and innovation. Creative skills have been integral to

the fast-growing industries in Australia over the past decade³⁵ and prior to COVID-19, the creative economy was growing at a rate nearly twice that of the Australian workforce.

As well as fuelling our talent pipeline and job growth, investment in arts and creativity can cultivate new ideas, technologies and cutting edge innovation. One in four Australians rank investment in art that pushes boundaries and drives innovation in their top three priorities for public or private investment in the arts (26%).

The value of arts to local businesses and their vital role in reinvigorating the economy

Arts events boost tourism and hospitality. Australians increasingly recognise the impacts of the arts on bringing customers to local businesses (41%, up nine percentage points from 32% in 2016).

Live attendance at arts events and festivals was booming prior to COVID-19, up nearly ten percentage points since 2016 (to 68%). This included 8.7 million Australians who attended an arts festival in 2019 (42%, also up by ten percentage points). Attending arts festivals and events is a way of life for many Australians.

Arts festivals and events are powerful drivers for regional, domestic and international tourism.³⁷ For example, the 2019 Adelaide Festival generated an estimated \$76.8 million in associated spending for the state with 19,046 visitors coming from interstate or overseas for 141,258 bed nights. Both domestic and international arts tourism were growing prior to COVID-19 and arts tourists are high value tourists who tend to stay longer and spend more. From large scale festivals and events, to visits to artist workshops and studios, the arts draw domestic tourists to both metropolitan and regional locations and to unique offerings in different parts of Australia.

Arts and creativity will be critical as we seek to bring life back into our cities, regions, culture and economy. Creativity connects us and will be vital to our recovery from this pandemic and our nation's future success.

Appendix 2. Australia Council Art and Wellbeing

The Australia Council Report, *Creating Our Future: Results of the National Arts Participation Survey* is the fourth study in the landmark research series that explores Australians' engagement with and attitudes towards the arts. The survey was conducted in late 2019, not long before the COVID-19 pandemic disrupted our world, lives and the cultural and creative industries. The survey results provide a benchmark of Australians' arts engagement before the impacts of the pandemic, providing much needed information as doors reopen, audiences are rebuilt and the cultural and creative industries are re-ignited.

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The following is a summary of material relating to the key question of **Art and Wellbeing**.

Wellbeing is a policy consideration growing in currency internationally, and Australians increasingly recognise the positive impact of arts and creativity on our wellbeing. The arts can save expenditure and provide returns on investment across health services and social care, helping meet major challenges such as ageing, loneliness, chronic conditions and mental health.

Arts and creativity can meet pressing challenges to our nation’s health and wellbeing.

The arts make our individual lives better and build stronger and more cohesive communities. The arts have been shown to improve quality of life in myriad ways, including: increasing mental wellbeing; addressing loneliness, mental health and ageing; decreasing anxiety and depression; increasing wellbeing and social inclusion; positive wellbeing impacts for young people; and treating PTSD and helping communities recover from trauma.

The creative arts and health sectors have significant and growing connections, covering primary care, acute and chronic hospital care, rehabilitation, respite care and general wellbeing. Techniques are used across art forms, including visual arts, music, dance and drama.

The arts can save future expenditure across health services and social care. In the UK doctors are literally prescribing arts experiences, providing up to £11 return on investment for every £1 invested, as well as employment and income for artists.

Australians increasingly recognise the impact of arts and creativity on our wellbeing Results of the National Arts Participation Survey show that the proportion of Australians who agree that arts and creativity have a ‘big’ or ‘very big’ impact on our sense of wellbeing and happiness has increased 11 percentage points since 2016 (up to 56%), as has the proportion of Australians who agree the arts help us deal with stress, anxiety or depression (up to 56%).

More than four in ten Australians attend to socialise and connect with others (41%); and one in four attend to improve their wellbeing (25%). Compared to Australians overall, respondents with disability and respondents in remote areas are more likely to attend the arts specifically to improve their wellbeing.

Connection and wellbeing are also key benefits reported by Australians who attend arts events focused on their cultural background or community. More than half benefit from spending time with family and/or friends (51%, including 47% of CALD respondents) and four in ten benefit from getting to know people in the community (39%, including 41% of CALD respondents). One in three Australians who attend arts events to engage with their cultural background or community report improved health and wellbeing as a benefit (33%), particularly younger generations in CALD communities.

When it comes to public and private investment in the arts, more than half of Australians think funding should ensure that arts and creative experiences are available to support people’s health and wellbeing (55% ranked this in their top three investment priorities).

