Australia Council

Planning for the Future

Issues, Trends and Opportunities for the Arts in Australia

Discussion Paper – February 2001

We cannot work to create a future which we do not first imagine.
Peter Ellyard, Executive Director, Preferred Futures Pty Ltd

The argument for public arts funding is ultimately not about whether you get better symphonies or more of them. It's about a society having self-confidence, self-awareness and self-knowledge. In musical terms, it is about a society that listens to itself… it's also about how the present makes itself known to the future.
Andrew Ford, composer, *Sydney Morning Herald*, 9 September 2000

Foreword

This paper has been prepared expressly to stimulate thought and discussion about the arts in Australia and about the best means for the Australia Council and other funding bodies to facilitate artistic development in Australia over the next decade.

Since the establishment of the Australia Council some 30 years ago the artistic landscape in this country has changed dramatically. The level of activity has multiplied substantially. The number of practising artists has increased significantly. The number of arts courses and of arts students in our universities is growing exponentially. Australian artists are now respected internationally, none more so than our Aboriginal and Torres Strait Islander artists. And at home, the cultural diversity of our artistic expression is well accepted and celebrated.

The Australia Council used to be the only significant funding body for the arts in Australia. But not anymore. The Council's budget represents only about 22 per cent of the Commonwealth's direct support for the arts[1] and less than two per cent of total government funding for culture.[2] Some city councils have larger arts budgets than individual Funds within the Australia Council. And yet, despite the changes in the arts environment, the changes in arts practice, the changes in arts funding patterns, the Council has continued to conduct its business along much the same lines as it did in 1975, the date of the *Australia Council Act*.

But the world around us is changing even faster now, and we need to take a good hard look at the implications of those changes for the arts, and for the way in which we support the arts into the future.

The crucial task for the Australia Council is to establish mechanisms of support for the arts that will celebrate the achievements and insight of the past and, at the same time, support innovation and develop new opportunities. To do this the Council will need to work beyond the traditional dichotomies – 'high arts' versus community arts; commercial or subsidised versus amateur; established arts and artists versus the young and the new – that have often inhibited successful outcomes.

Increasingly, art making is hybrid, as reflected in the terminology used by many young artists who see themselves as 'slash artists': musician/dancer; writer/graphic artist; and so on. And increasingly, the syntheses will involve taking the strengths of the existing alternatives and combining them, while simultaneously jettisoning as many of the weaknesses as possible.

And, at a time when cyber-hype is at a high, there is an opportunity for artists to be involved in the development of digital media tools that can be put to use in association with, or in counterpoint to, traditional modes of creative work. This will often involve new relationships between creators, users, and audiences, relationships that will be critical for the arts in future years.

Both here and internationally we can see an increasing trend for the arts to intersect more strongly with other areas of public policy and to be seen in a broader context than that of an

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[1] *Cultural Funding in Australia: Three Tiers of Government 1998-99*, National Centre for Culture and Recreation Statistics, Australian Bureau of Statistics, October 2000. This figure excludes broadcasting and film.

[2] This includes Commonwealth, State/Territory and Local government funding, and includes broadcasting and film.

industry or that of an aesthetic manifestation. As the reports later in this paper make clear, advocating for the arts in the public policy arena is not inimical with the notion of an intrinsic value for the arts. On the contrary, it reflects the diversity of values within the arts sector and beyond.

One of the most difficult questions is, then, how to think about the arts in a way which takes these various perspectives into account when setting policy?

So we bring you this paper. It is the result of a diverse range of views from a lot of people. Some 150 people from the arts sector came together for a series of Vision Days convened by the Council's Funds, to deliberate on the major issues, trends and opportunities for their sector in the future. As one would expect, the reports of these Vision Days reflect the diversity of views and approaches within the sector. But they also reveal a number of common themes, which are reflected in the overview of the present (section 2) and the challenges for the future proposed in section 3.

While much of the information gathered in compiling this paper will be used for the Australia Council's own strategic planning processes, we are keenly aware of the interconnectedness of the Council and the arts sector, other levels of government, the private sector and the community. We recognise the importance of partnerships to achieve our charter as set out in the Act. We see three main areas for action:

- issues of arts practice or artforms that Council's Funds could focus on
- issues on which the Australia Council might act
- issues that should be pursued by other agencies or partners.

The Council wants to avoid homogeneity in either the reporting of issues or the setting of strategies. Very real differences exist between areas of art practice and between sectors of the community. There are, nevertheless, areas of mutual concern and we believe that concerted effort can only have a positive impact on the future of the arts.

This is, therefore, a work in progress, the final part of which will depend on the responses from the arts sector, whether they be specific to one or more artforms, or of a more general nature. The invitation to respond may be found in the centre of the paper and we welcome feedback in either electronic or paper form. From the responses we will produce a final report which will inform the Council's next triennial plan and our subsequent funding approaches to Government. This is the opportunity for the field to affect the policies of the Council for years to come.

I would like to take this opportunity to thank all of those who have made input to this discussion paper, and most particularly the members of the Steering Committee and Sarah Gardner, who has pulled all the threads together. And I look forward to the final outcomes of this collaborative effort to drive arts funding policy into the future.

Margaret Seares
Chair
Australia Council

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1 Introduction

1.1 Purpose

This discussion paper aims to provide a clear and simple picture of the key trends, issues and opportunities for the Australian arts sector in the next decade. It summarises the findings of 12 months of research and consultations with over 150 people. The Australia Council wants to know what you think about the findings. Once your feedback is incorporated, the Council will use this report to devise coherent long-term development strategies to fulfil its charter of promoting the practice and appreciation of the arts.[3]

The future is, of course, inherently uncertain. But it can be shaped by our leaders. As Australia's national arts funding and policy advice agency, the Australia Council is acutely aware of its leadership role. In setting its future direction, the Council wants to scan the horizon, to better inform itself about issues that have an impact on the arts as defined in the broadest sense.

Planning for the Future is an organic process, influenced by many factors. Your response to this Discussion Paper is invited in the central tear-out section of this report. We encourage your comments and advice as an invaluable aid to Council's planning sessions this year. These sessions will prioritise the issues, opportunities and strategies and will ultimately shape the future of support for the arts in Australia.

1.2 Scope

Planning for the Future is one of the most significant planning projects initiated by the Australia Council in the last decade. It has generated volumes of information both qualitative and quantitative. A report such as this could be ten pages long or a thousand. The aim has been to produce a report condensed enough to enable stakeholders to read and respond to it, yet substantial enough to highlight key concerns. A vast amount of detailed information, particularly that of a statistical nature, has inevitably had to be omitted, not because it lacked value but because of competing constraints. For those wanting to read more, detailed reports will be available at www.ozco.gov.au/issues/pff/.

This paper aims to influence the mechanisms to support arts practice and the public's engagement with that practice, not what type of art is created. We acknowledge readily that reports like this can appear bureaucratic and/or simplistic. The language and imagery is that of strategic planners primarily because it is written not just for artists but for policy makers and administrators who have the opportunity to create an environment of support for Australia's artists.

Planning for the Future is not just about building an arts 'industry' to improve the economic wealth of the arts community or the nation.[4] The statistics show the 'creative industries' do

[3] See Appendix 6.2, the Australia Council Act.
[4] Research on an industry-assistance model for the arts was initiated by Government almost a decade ago. For example, *A Framework for Improving Viability in Selected Sectors of the Cultural Industry, A Report to the Department of the Arts, Sport, the Environment and Territories*, September 1992 was

contribute significantly to the economy. Yet few artists benefit. Whether one's expectations of the arts are economic, social, cultural or personal, there is value in striving to ensure the sustainability of the arts by trying to understand the dynamics of the resources available to them.

Finally, while this paper provides a helicopter view of qualitative and quantitative issues, it is beyond its scope to map individual companies and infrastructure. (Refer to section #1.4.6).

1.3 Background

The Australia Council's strategic plan, *Directions 1999-2001,* highlighted, as one of four key priorities, Council's concern about the 'sustainability of the arts'.[5] In 1999, the Council's strategic responses to this were the reviews of the major performing arts companies and the impact of the changes in the tax system. Having achieved progress on both these fronts[6], the Council resolved in late 1999 to develop a broad industry plan to provide a long-term strategic focus to the Council's activities. Terms of reference[7] were agreed in January 2000.

1.4 Approach

The *Planning for the Future* process is designed to be consultative and to draw on a variety of information sources.

1.4.1 Management

The project has been steered by a committee chaired by Australia Council Chair, Dr Margaret Seares. The Committee comprised two other members of the Australia Council: John Rimmer (Chair, New Media Arts) and Patrick Morgan (Chair, Regional Arts Panel); and Professor David Throsby (arts economist), Joseph Skrzynski (former Acting Chair, Major Organisations Fund), and Rob Palfreyman (Department of Communications, Information Technology and the Arts (DCITA)). Lesley Alway (Director, Arts Victoria) was on the committee until 28 July 2000.

The project has been managed by the Executive Director, Strategic Initiatives, Sarah Gardner, in collaboration with senior managers in all divisions, in particular: the Executive Director of Arts Development, Ben Strout; and Managers, Bernice Gerrand (Community Cultural Development), Rosalind Richards (Dance), Gail Cork (Literature), Peta Williams (Music), Lisa Colley (New Media Arts), Campion Decent (Theatre), Anna Waldmann (Visual Arts/Craft) and Cathy Craigie (Aboriginal and Torres Strait Islander Arts); and the Manager

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commissioned from The Australian Commission for the Future Ltd. It covered the visual arts/craft, performing arts, museums and arts museums, and publishing industries. The report proposed a range of strategies, many of which were implemented. The report highlighted three main categories of objectives: strengthening the marketing and distribution links within the value chains; improving management efficiency; and building links into other industries and into their marketplaces.

[5] For a full discussion of the use of the term, 'sustainability', see Appendix 6.3.

[6] Initiatives had been put in place which, during 2000, resulted in outcomes such as the implementation of the recommendations of the Major Performing Arts Inquiry, the tax-education program for the arts sector, the Books Industry Assistance Package, changes in the Ralph legislation, etc.

[7] See Appendix 6.1.

Policy and Planning, Mark Stapleton, who, from 1 March 2001, will manage the final consultation phase.

The *Planning for the Future* process has required a flexible approach, due to the context of each Fund's operations. For example, the:

- nature of the arts practice and its recent history.
- relationship of the Fund with other parts of the sector.
- breadth of the sector and the Council's relative impact in that particular 'industry'.
- extent to which strategic planning discussions have already occurred in the Fund.
- amount of consultation that has occurred with the particular sector over the last five to ten years and therefore the state of readiness of the sector.
- availability of research data or industry analyses for an area of arts practice (either produced by the Council or by other bodies).
- activities (or not) of the service organisation(s) in strategic planning and research.
- relative impact on each area of arts practice of other funding bodies (e.g. DCITA, States/Territories, local government); or of corporate support.

1.4.2 Vision Days

To enable wide consultation, a coordinated series of planning sessions was organised by each of the Council's Funds – Dance, Theatre, Music, Visual Arts/Craft, Literature, Community Cultural Development, Aboriginal and Torres Strait Islander Arts and New Media Arts. These involved over 105 artists, administrators, academics, social commentators, journalists and others from around Australia, as well as about 20 staff and 25 Council peers.[8]

The intention of these sessions was twofold. Firstly, to give Council a broad perspective on each area of arts practice so that **a shared view of current issues and trends** might be reached. The second was to debate possible and preferred future scenarios given the changes in, for example, Australia's society and economy, globalisation, technology and innovation, public policy and education. All participants received a briefing kit which comprised background on the Council, Fund and participants, relevant policies, the structure of government funding, a statistical profile and the intended outcomes.[9]

The Vision Days provided an opportunity for Fund members to 'take a step back' from the intense focus required in administering highly competitive grants programs. The diversity of participants made it possible to view the 'big picture' of each area of arts practice. The Vision Day reports[10] in section 4 are presented using the following framework:

- **The present** – key issues, trends and opportunities impacting on the arts at present.
- **Key drivers of change** – grouped under headings such as 'technology', 'economics', 'society', 'policy regulation', 'education' and 'globalisation'.
- **The future** – visions for the future of the creation and presentation of the arts, the community's engagement with the arts, and the relationships these processes involve.

[8] Details of participants and the dates are provided in Appendix 6.5.
[9] Details of expected outcomes are provided in Appendix 6.4.
[10] We thank Wendy Wise for editing the summary reports of the Vision Days to bring them into a common format.

Following the Vision Days, the senior management team met to debate the points of commonality and difference. As section 2 highlights, there was a great degree of similarity in the issues which arose. Whilst manifesting themselves in particular ways and requiring specific responses, the process highlighted the value of a Council-wide, national approach to setting arts support strategies. As a stimulus to discussion, the Australia Council has proposed, in section 3, key challenges and a range of opportunities and options for the future.

1.4.3 Other consultations

Input and advice has been sought from DCITA, the State and Territory arts departments, Australian Local Government Association members, national arts service organisations, and other agencies and researchers involved in this area. Members of the Australia Council, its Funds and its staff have played a key role throughout the process.

1.4.4 Bibliography

One of the first steps was a literature search of key documents relating to strategic planning in the arts and economic/statistical reports over the last ten years or so. In July, the draft bibliography was posted on the Council website at www.ozco.gov.au/issues/pff/. Feedback has since been incorporated and further suggestions would be appreciated.

Two major research initiatives, in particular, have informed this project: *Australians and the Arts*[11] conducted as part of the Council's Promoting the Value of the Arts Strategy and Guldberg's *The Arts Economy 1968-98.*[12] Their findings, while underpinning many of the conclusions, are not reiterated here.

On going to press, we received a new report from CREATE Australia, entitled *Crafting a Position: Education, Training and the Cultural Industries.*[13] The report strongly complements the findings of *Planning for the Future*.

1.4.5 Statistical profiles and analysis

To complement and inform the Vision Days, the Council commissioned policy analyst and economist, Christopher Madden, to compile a statistical profile of each area of arts practice. Drawing on a wide range of existing sources, particularly the Australian Bureau of Statistics and the Council, this was the first time such compilations had been done. The aim was to develop statistical profiles for each area of arts practice,[14] with a particular focus on trend data. In addition to the profiles, a Total Arts chapter was produced which summarised and, in some cases, built on the major trends identified in Guldberg.[15] The profiles comprise data on, for example, employment, organisations, products, household expenditure, attendances,

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[11] *Australians and the Arts: What do the Arts mean to Australians – Overview,* Australia Council, 2000
[12] Hans Hoegh Guldberg, *The Arts Economy 1968-98: Three Decades of Growth in Australia,* Australia Council, 2000
[13] Marie Manidis, *Crafting a Position: Education, Training and the Cultural Industries*, CREATE Australia, 2000.
[14] Profiles were completed for Aboriginal and Torres Strait Islander Arts, Community Cultural Development, Dance, Literature, Music, New Media Arts, Theatre, Visual Arts/Craft and Performing Arts in General (as a companion to dance, theatre and music).
[15] Guldberg, op.cit.

participation, educational enrolments, corporate support and funding. Data on selected socio-economic trends[16] and extra-industry influences were also gathered.

Federal and State government arts agencies and national arts service organisations were given the opportunity to comment on the profiles in draft form. While the statistical profiles provided valuable background to the discussions in the Vision Days, steering committee, the Council and its Funds, they are not included in this paper. Full versions are available at www.ozco.gov.au/issues/pff/.

Arts industry expert and policy analyst, Lesley Alway, was commissioned to analyse the data presented in the profiles. Using a SWOT analysis, in conjunction with the Vision Day summaries and the Council's definition of 'sustainability and the arts', her report summarises the strategic implications according to the categories used in the statistical profiles (Supply, Demand, Sector and Funding). Key issues for each area of arts practice were also identified[17].

Her major conclusion was that whilst growth has been relatively strong across the cultural sector (with some exceptions, such as dance), throughout the last decade, this growth has been largely supply driven. She notes that this mirrors a relatively buoyant economic climate in Australia and internationally. However, indications are that both the Australian and global economies are currently in transition and likely to weaken in the short to medium term. Also, because cultural consumption is related to higher levels of education and lifestyle factors, there may be a short-term lag in overall demand prior to further expansion in the second half of the decade. Finally, she notes that whilst there is some evidence of unmet demand in particular sectors, investment in research and development and new technology will be required to capitalise on emerging opportunities.

Ms Alway's report proposes four key strategies for discussion and debate and identifies hotspots of areas requiring further research.

1.4.6 Evaluation of small- to medium-sized arts organisations

The report on the Major Performing Arts Inquiry, *Securing the Future*,[18] highlighted the value of in-depth analysis of the financial health of 31 companies. In August 2000, the Cultural Minister's Council (CMC) noted that the Major Performing Arts Inquiry had broader implications for other areas of the performing arts:

> *'Ministers affirmed the important contribution small-to-medium sized arts organisations make to the cultural vitality and diversity of Australia. These arts organisations play a central role in nurturing creative talent, developing new work for local and international audiences, and in encouraging participation in the arts at a grass roots level … The Ministers agreed to commission an examination of the factors influencing the artistic and*

[16] covering population, age, education, working hours, income, gender issues and the workforce, growth in service industries, and tourism. New technologies are covered in the New Media Arts chapter.

[17] *Cultural Statistics and Sustainability – so what?*, Lesley Alway, January 2001. The full report is presented in section 5.

[18] *Securing the Future*, Department of Communications, Information Technology and the Arts, December 1999.

financial position of Australian's small-to-medium sized performing arts organisations'.[19]

The terms of reference for the research initiative are currently being developed by the Standing Committee of CMC.

In early 2001, the Australia Council's submission to the *Inquiry into the Definition of Charities and Related Organisations* presented financial data compiled from the audited accounts of 109 arts organisations that receive triennial or project funding from the Australia Council. While details of the analytical methods are provided in that submission, the conclusion is that non-profit arts organisations have the following financial characteristics:

- Low liquidity.
- Large debt levels (in terms of balance-sheet liabilities).
- Low reserves and low operating margins (making it difficult for these organisations to withstand a financial shock, such as poor box office, loss of public subsidy or loss of charitable tax concession).
- High reliance on public subsidy – on average these organisations receive between 49 and 62 per cent of their income from grants.[20]

It is evident that a more detailed analysis of a range of such companies would yield valuable industry data.

1.4.7 International comparisons

As the bibliography reveals, many international reports describing the policies and strategies used to support the arts or the so-called 'creative or cultural industries' exist. While some interesting models were raised in the Vision Day discussions, it is beyond the scope of this draft to satisfactorily summarise, let alone analyse, their application in the Australian context.[21]

[19] Communiqué, 11 August 2000, Cultural Ministers Council.
[20] *Australia Council submission, Inquiry into the Definition of Charities and Related Organisations.* Refer www.cdi.gov.au.
[21] A number of international comparisons are drawn in *Crafting a Position: Education, Training and the Cultural Industries*, CREATE Australia, 2000 .

2 The Present – Overview of the Vision Days

As previously noted, those attending the Vision Days were asked to raise **issues and concerns** particularly related to their sector of the arts, to identify **key drivers of change** and to articulate their **vision for the future**. While many issues and visions were specific to a particular area of arts practice, the Vision Days revealed some common themes. These have been grouped under the five resource categories used in the model of sustainability which is described in Appendix 6.3. The reports of the Vision Days, in which many of these themes are more fully elaborated and various strategies proposed to achieve desired outcomes, are to be found in Section 4.

2.1 Artistic resources, capabilities and performance

Participants in the Vision Days, both artists and observers, voiced a remarkable confidence in, and appreciation of, **our artistic wealth** as a nation. Our contemporary art was perceived to be distinctive, innovative and energetic: our isolation, landscape, Indigenous heritage, recent history and national character, as contributing to this artistic strength. The world's response to the Opening Ceremony of the Olympic Games, to Aboriginal painting, and to productions, such as *Cloudstreet*, were seen to evidence this coming of age.

Many participants expressed concerns about sustaining this artistic wealth in the face of cultural **globalisation**. Concerns were raised about the increasing competition for the leisure dollar, about the apparently divergent goals of nurturing the individual voices of our community, whilst simultaneously accessing and benefiting from globalisation. The Literature report spoke of maintaining the 'biodiversity' of the publishing sector. Similar sentiments were expressed in nearly all reports. The New Media Arts report noted the importance of supporting the presentation of work at a national level, whilst at the same time encouraging exhibitions, and discourse, on a global level. The Community Cultural Development report voiced concerns that Australia's increasingly global focus was at the expense of our neighbours in South-East Asia and the Pacific.

What was overwhelmingly acknowledged and endorsed was the fundamental role of **Indigenous arts** in Australian arts, culture and identity.

It was widely acknowledged that the maintenance and growth of our artistic resources was dependent on **innovation** and renewal. And that innovation was dependent on diversity, creativity, and the interaction between the two, and the connection of new products with new markets.

The issue of **diversity** was a pronounced theme of the Vision Days, as was the concern with homogeneity, in both arts product and audiences. There was a strong desire for the recognition and celebration of difference, for an increasing respect for the work of the individual. New Media Arts, for example, noted that local impact and relevance was vital to the survival of work in a global context. Difference was viewed as paramount to our identity and culture. There was a strong desire for artistic voices to be heard from sectors of the arts and the wider community that had been marginalised by geography, fashion, background or perceived ability. And for these voices to not only be heard, but integrated into our cultural identity.

The need for renewal in management echelons of the arts was also raised. The Theatre report underlined the need for succession planning and for the regular turnover in leadership, thus ensuring a wider range of perspectives and depth of expertise.

Some participants believed, as described in section 2.4, that to ensure their continuing relevancy, some arts practices needed to have a **greater understanding of and connection to the community's concerns and aspirations**.

Many called for a greater **critical debate** and more open appraisal of work as a means of encouraging artistic excellence.

From the issues raised by the Vision Days, it would seem that many of the existing barriers (between artforms, between 'high' and 'low' art, and other formerly mutually exclusive arts practices) – are under challenge. Unexpected **connections and collaborations**, resulting in new arts experiences and new community interactions, are being made. The Internet is shaping not only the way artists are communicating with each other, but with the world. What constitutes, for example, literature or dance or visual art? Young artists, community cultural development workers, new media artists and Indigenous Australians, aren't taking the time out for debate. But what remains in question is how these new collaborations and convergences, whilst stimulating new artform development, will be able to attract financial partners.

2.2 Knowledge, learning and innovation

A number of the Vision Day reports noted the unevenness or lack of **skills** that artists need to sustain their practice. Some also expressed concern that training for those skills is difficult or costly to access or, in some cases, not available, at many institutions. The New Media Arts and Visual Arts/Craft reports spoke of the need for multiskilling of artists; the Literature report noted the need for editing and export development skills. The CCD report identified the need for training in promotion and advocacy of the arts, and the Aboriginal and Torres Strait Islander Arts report, the need for planning, financial and management skills. Shortages in skills in managing intellectual property and taxation issues were also noted.

Whilst virtually all reports highlighted the potential and opportunities of **new technologies** they also expressed some apprehensions and reservations. The Visual Arts/Craft report noted the widening gap between 'rich and poor' in terms of artists' access to and ability to utilise new technologies. The New Media Arts report voiced similar concerns regarding information, technology and income. The ATSIA report noted a desire to be able to 'use technology our way'. The Music report, in particular, noted the necessity to develop artists' skills in the face of the changing processes of production, competition and distribution.

Whilst the benefits of the Internet were widely acknowledged, other methods of communication between artists themselves and between artists and other sectors were deemed of equal, if not of more, importance. Face-to-face communication, particularly with international counterparts, was seen as vital to learning and innovation. As was the need for new models of working which enable artists to gain experience in industry and the community.

Some reports raised the existing structures and make up of art schools as a barrier to developing collaborations and multi-skilling. The desire to see greater engagement between the tertiary sector and the arts in general, particularly in terms of partnerships and collaborations for research and development programs, was expressed.

2.3 Financial resources, managerial capabilities and performance

All arts sectors raised significant concerns with regard to the **generation of income**. Some concerns related to the modest size and limited opportunities of Australia's domestic market. Others to the tenuous economic situation of artists due to the payment of low salaries, and the impact on all arts sectors of the resultant low morale. As described in section 2.5, a lack of infrastructure was seen to inhibit the ability to generate income. The Theatre report cited the ongoing problem of lack of support for research and development. The Music report expressed a concern that the pursuit of the sponsorship dollar might, in some areas, result in a 'dumbing down'.

Most perceived the strengthening of **community support** for the arts to be one of the key factors to increasing box office income, corporate and philanthropic support, and political will.

Concern about **government funding** for innovation and diversity was at the forefront of all reports. The Dance report, with its call for funding agencies to both sustain existing levels of subsidy and to support increasing diversity, reflected the prevailing sentiment. The need to support work which crossed artistic sectors and boundaries was also highlighted with Theatre suggesting this may require the development of new funding models. The Music report voiced concerns about a 'hierarchy of support and recognition' which was perceived to exist within funding bodies; whilst the Literature report expressed concerns about the growing divide between support for young and older writers.

Government policy was felt to exert a significant influence in such areas as education, taxation and employment. Concerns were expressed about the arts sector's ability to deal with the vexed **issue of intellectual property** and its increasing impact on the arts. The ATSIA report touched on both authenticity and appropriation; the New Media Arts on the importance of intellectual property and the perception, by many artists, of it being 'too hard'.

The shift to **new ways of working** was expressed in several reports. Visual Arts/Craft noted that, compared with ten years ago, artists are working increasingly across sectors and outside the traditional arts infrastructure; that they need an entrepreneurial approach, and the know-how to run small businesses. The New Media Arts report noted the blurring between the commercial and non-commercial aspects of artistic practice. The view was expressed frequently that the arts need more strategies to engage with business, science, education, sport and other sectors of government. Similarly, that the arts need to access more non-traditional venues, such as workplaces, sporting grounds and shopping centres.

The media was seen to exert an important influence on public attitudes and public access to the arts and therefore on financial resources. Several reports voiced a desire for a more thorough understanding of, and engagement with, the rapidly changing media environment as an aid to furthering the distribution and coverage of the arts. The ATSIA report noted the particular challenges faced by media networks operating in remote areas. Other issues raised were how to best capitalise on the increasing availability of channels for the distribution of artistic product, how to better understand media consolidation, and how to broaden arts reportage in non-arts sections of the media.

2.4 Society – 'Legitimacy', markets and partnership

Of primary concern, across all arts sectors, was the need for a greater level of **engagement with the community**. A recurrent theme expressed primarily, but not exclusively, by those engaged in the performing arts was the lack of community ownership, the failure to connect with local communities. The Dance report, citing the huge amateur sector involved in Dance, pointed out its failure to translate into a public engagement with Dance. The Literature report spoke of the gradual erosion of the status of literature in the Australian community and its commensurate undervaluing in school and university systems. The Theatre report spoke of its failure to connect with local communities; the Music report of the lack of community ownership of music, of the separation of Music into a 'separate box', rather than it being recognised as an integral part of life/culture/wellbeing. The Visual Arts/Craft report cited the gaps that exist in our understanding of the role and value of the arts in a civil society, in a diverse and vibrant community. The New Media Arts report spoke of the need to engage differently with young people; that young people desired to be more than passive spectators; and that the arts had to ensure that the pathways which would lead to community/audience engagement were embedded in their work.

Several reports evidenced the strong links that exist between the arts and **spirituality.** There was a 'desire for dance to be central to people's lives': such observations as 'literature speaks to the contemplative side of human nature'; that Indigenous art is considered to be 'spiritual expression'.

Many discussions of community engagement overlapped with those of **education**. Although figuring in other reports, the Dance report particularly emphasised the need to reconnect at all levels of education. The CCD report highlighted the need for stronger links between arts, education and the community.

Various issues, relating to the concept of **leadership**, were also raised in the reports. Many felt that the arts needed to enter more fully into the nation's political debates. Some reports noted an increasing tendency to self-censorship in the arts. The New Media Arts report encapsulated many of these concerns: 'Art … is being seen as increasingly redundant in a materialistic society. Artists are part of the culture but artists and scientists do not lead the culture.' The Theatre report spoke of a 'failure to create outstanding and resonant theatrical images', while the CCD report cited the failure of the arts to seize the agenda outside the arts policy area. In contrast, was artists underlying perception that they and their work were insufficiently valued and understood by the community.

Many viewed the Australia Council as the vehicle for providing leadership, particularly in terms of engaging the community more fully with the arts. The CCD report expressed concern about the Australia Council's ability to break down 'policy boxes' and to cater for young people.

The role of the community as audiences was a recurrent theme. The New Media Arts report noted the changes in audience habits, the 'grazing' approach that requires better access, variety of choice and better contextualisation. There was a general call for arts organisations to increase their expertise in marketing and delivering the arts through new modes of distribution. The Dance report emphasised the importance of the media and the ability of initiatives (such as dance-on-screen) to reach new audiences.

2.5 *Infrastructure – Resources, capabilities and performance*

All reports expressed concern for the decline of supporting infrastructures, such as venues for performers, arts service organisations, touring circuits and distribution outlets. While the growth of most sectors has led to increasing demands on the organisations which provide cultural infrastructure, funding for them has often remained virtually static. The Music report pointed out that the decline of live performance and live performing venues (pubs and clubs) had led to a corresponding decline in audiences and employment prospects for musicians. The New Media Arts report suggested that, to correspond to the creation of networks to encourage participation and engagement by audiences, new infrastructures may be needed to achieve distribution. The Literature report expressed concern about the merging of publishing houses and the resultant decline in distribution options for writers.

Indigenous artists voiced a particular concern that the lack of infrastructure prevented opportunities to present and sell their work. A desperate need was signalled for networks between Indigenous artists, arts organisations and other commercial and community agencies, as well as better access to existing infrastructure.

The performing arts Vision Days, particularly, reflected a keen interest in the interdependencies between the 31 major performing arts companies and the rest of the performing arts sectors.

Young and emerging artists across all sectors were concerned about how they gain access to the existing infrastructure. They were also concerned that there be a continuation of the Federal government funding that supports new opportunities for presenting work.

3 The Future – Key Challenges, Opportunities and Options

Planning for the future not only depends on identifying the key challenges faced by the arts in Australia over the next ten years, but also on identifying how best to meet those challenges.

Based on the Vision Day discussions (summarised in section 2) and the analysis of arts sector statistics (in section 5), the following opportunities and options have presented themselves. There will, naturally, be many others. It is keenly appreciated that different areas of arts practice will have different views about the emphasis that should be laid on these and by whom they should be carried out.

The Australia Council hopes that the process of public consultation will more effectively articulate these views. Please use the central tear-out pages of this discussion paper, to give us your feedback.

3.1 Artistic

Challenge: To further develop the uniqueness and diversity of Australian voices and to ensure that they are heard in an increasingly globalised world.

Opportunities:

- To stimulate an artistic environment which not only encourages originality, diversity and innovation, but engages widely with the Australian community.
- To exploit the new sales, distribution and communication facilities presented by the online economy.
- To capitalise on Australia’s cultural diversity to create unique artistic outcomes.
- To exploit globalisation in order to promote Australian work across national borders.
- To assist not only the international success of Australian artists but the presentation of their work in their own communities.

Options might include:

- The Australia Council taking a more proactive role in brokering partnerships and new forms of support for artists.
- Giving artistic innovation more focus and higher priority in funding programs over the next three years.
- Ensuring funding mechanisms deliver support to artists and arts organisations in a flexible and responsive manner.
- Raising awareness that providing support for the development of original and innovative work requires significant research and development (and inherent risk-taking).
- Considering creating funding initiatives to encourage first-time applicants.

3.2 Knowledge

Challenge: To encourage support for innovation, research and development so that artists have opportunities to develop skills that will enable them to work effectively in the changing global communications and cultural environment.

Opportunities:

- To promote the role of innovation as a keystone of excellence in the arts.
- To overcome barriers between the arts and other industry sectors in order to open up new opportunities for artists to practise their art.
- To develop partnerships between tertiary arts institutions and the broader arts sector that will encourage sector-focussed research proposals and curriculum development.
- To create collaborations that use existing expertise in the tertiary education sector, CREATE Australia and the business sector.
- To exploit skills development opportunities in the media, broadcasting and online environment.

Options might include:

- Finding new pathways to enable artists to participate in, and benefit from, the creative industries and the support provided by government to those industries.
- Assisting arts sector participants wishing to apply for research funding from the Australian Research Council and other research funding agencies.
- Identifying resources which would lead to ongoing improvement in management expertise within the arts sector (marketing, development, financial, governance, risk management).

3.3 Financial

Challenge: To improve the financial viability of arts research and development activity in the creative industries.

Opportunities:

- To exploit new employment opportunities arising in the creative industries.
- To investigate new avenues of support and remuneration for artists.
- To establish partnerships with other public sector programs that have complementary objectives e.g. Local Government; Industry, Science and Research; Family and Community Services; Foreign Affairs and Trade.
- To promote greater awareness of the new tax benefits for philanthropic and cultural activities.
- To seek new mechanisms for establishing intellectual property rights (eg. droit de suite) and more effective collection and distribution of copyright fees.
- To develop shared-business models for small arts organisations, with regard to infrastructure, commissioning, promotion etc.
- To work with government to clarify the implications of current and future tax legislation on the arts sector.

- To open up the relationship between business and the arts, with due emphasis on the ‘triple bottom line’ or dividend to the community.
- To develop closer relationships with those cultural organisations within the Federal arts portfolio which might benefit artists.

Options might include:

- Developing a strategy that would assist artists to exploit new opportunities in the creative industries.
- Assisting artists to develop the skills required to work in an environment that is moving increasingly towards offering casual or part-time employment.
- Designing employment programs to include customised training/work experience programs.
- Ensuring that artists can readily access information about developments in intellectual property issues that might impact on their rights and remuneration.
- The Australia Council becoming a conduit between the arts sectors and the Federal Government on issues relating to world trade treaties and their impact on Australian culture.
- Involving artists in urban renewal projects and providing low cost spaces in redundant buildings to enable artists to create and present their work.

3.4 Society

Challenge: To promote the role of the artist in 21st Century Australian society.

Opportunities:

- To raise the profile of artists as being essential to communities that wish to be vibrant and successful in innovation.
- To make creative pursuits central to education, by changing the values and perceptions of education ministries and schools.
- To facilitate greater public visibility for artists in intellectual forums.
- To stimulate greater public presence for art within the physical spaces of our communities, particularly in non-art environments.
- To broaden the Australia Council’s thinking about ‘audience development’ to include ‘public engagement’.
- To evaluate and promote the beneficial role that creativity can play in rebuilding fractured communities.
- To facilitate greater dialogue and synergy between amateur, professional and commercial parts of the creative industries.

Options might include:

- Challenging the current status of arts education in policies and practices at the school and tertiary levels.

- Promoting the findings of the Council's research on Promoting the Value of the Arts[22] in debates on public policy in areas other than the arts.
- Re-focussing funding programs so that stronger community cultural development outcomes are achieved.
- Creating a coherent policy proposal regarding the balance of Australian content in radio/TV that engenders greater support for contemporary work.
- Examining the role of public broadcasting in developing Australian culture.
- Learning from the centrality of both artists and culture to Aboriginal and Torres Strait Islander societies.
- Developing practical models for promoting meaningful and increased interaction between artists and communities.

3.5 Infrastructure

Challenge: To ensure that current arts infrastructures develop sufficiently over the next ten years to enable the arts sector to fulfil its potential.

NB: Council acknowledges that the artform needs and definitions for infrastructure vary widely. There is, however, an underlying assumption that each sector will be able to benefit in future from a network of presentation, distribution, service and producing organisations. As we have covered the main opportunities and options for such organisations in previous sections, we have kept the following section brief.

Opportunities:

- To build on the potential for national and international collaborations and networks provided by technology.
- To engage with governments' interest in reviewing the 'second and third' tier performing arts sector and analyse infrastructure needs.
- To involve government and non-government bodies in a scoping study of the current visual arts and craft industry environment or 'eco-system'.

Options might include:

- Analysing existing infrastructures and clearly indentifying anticipated needs.
- Engaging all levels of government in discussions about future infrastructure needs in all areas of arts practice.

NOTE: The discussion of general arts sector issues ends here. If you would like to comment on this first part of the discussion paper only, you will find the instructions about how to provide feedback located in the centre pages. For detailed reports on the Vision Days and the statistical analysis please read on.

[22] *Australians and the Arts* op. cit.

4 Reports on the Vision Days for Each Area of Arts Practice

4.1 *Aboriginal and Torres Strait Islander Arts*

4.1.1 Introduction

Art has always been integral to Aboriginal and Torres Strait Islander people's lives – as an expression of our spiritual connection with the land and sea and as a ceremonial and educational tool of lore and Dreaming. Diversity abounds throughout our arts and cultures with every community realising their own distinctive interpretations. Arts often powerfully reflect our political, legal, historical and cultural concerns with many artists bringing issues of dispossession to non-Indigenous audiences – from land rights to Aboriginal Deaths in Custody to the Stolen Generations. Art has, therefore, played a vital role in our survival since colonisation allowing us to affirm and assert our individual and collective identities.

Richard Walley, Chair, Aboriginal and Torres Strait Islander Arts Fund

The ATSIA Vision Day involved over 20 Indigenous artists and practitioners from across Australia. The artists came from different backgrounds and artforms. Bringing together some of the most dynamic people working in arts ensured that the scope and diversity of Indigenous arts would be the focus. The ATSIA Vision Day was probably the first time in over 20 years that the Indigenous art community was able to come together to discuss such a broad range of arts issues. Gatherings of Indigenous artists have tended to focus on particular artforms or issues.

4.1.2 The present

Aboriginal and Torres Strait Islander Arts:

- Act as a vehicle
    - to preserve and express our culture
    - to understand and make sense of the world
    - to tell our stories
    - to set future directions
    - for personal development
    - for regeneration and healing
- Unite
    - by being accessible
    - by embracing diversity
    - by reaffirming identity
    - by addressing social issues
    - by stating Indigenous survival
- Play a practical role
    - in rewriting history
    - in sustaining communities
    - in promoting political ideas
    - in maintaining traditions
    - in dispelling myths

In summary, Aboriginal and Torres Strait Islander art:

- is spiritual expression.
- provides a sense of belonging and being.
- strikes a balance between cultural and commercial interests.
- is a political voice and a tool for change.
- rehumanises what has been dehumanised.

4.1.3 Key drivers of change

Gains in Indigenous art over the last 10 years could be grouped under the following headings.

Arts practice – We have:

- increased productivity/output.
- the ability to maintain a distinctive cultural presence.
- adjusted in expectations of ourselves and our role, leading to other genres and artforms being developed. It is no longer tied to romantic notions of 'tradition'. We are creating our own stories. We can challenge our own community and critique ourselves.
- reclaimed Aboriginal identity through art, telling more of our stories as seen through our eyes.
- used new technology in a culturally appropriate ways.
- increased choice and opportunities.
- increased cultural exchanges, nationally and internationally.

Power – We have:

- greater momentum for self-empowerment.
- protection of artists' rights.
- more sophisticated, social and political debate.
- broken down some of the barriers and created more access points through affirmative policies and affirming attitudes.
- increased self-management of cultural resources.
- seen Indigenous protocols be adopted (e.g. welcoming ceremonies). Aboriginal art is being embraced and enjoyed by the non-Aboriginal community (versus previous anthropological study).
- more open discussion and awareness about appropriation.
- more equitable collaboration between black and white.
- increased identity of ATSI Nations and strengthened our regions.
- reclaimed our individual/cultural identity.

Infrastructure – We have:

- more developed networks of artists.
- more companies and organisations.
- increased opportunities and infrastructure, marketing, promotion (national and international) resulting in more access to resources.

- recognition that our organisations are a springboard into the 'mainstream'.
- increased processes of accountability.
- more festivals, gatherings, and Indigenous arts at festivals.

Image – We have:

- less stereotyping of Indigenous art.
- increased recognition resulting in increased representation.
- recognition and representation of diversity.
- less reliance on non-Indigenous people for credibility.
- broader community knowledge and understanding of Aboriginal issues and cultural interpretation of ownership.
- recognition of our culture as potentially financially viable and profitable.
- increased recognition as contributors to the community.

Skills – We have:

- more Indigenous managers and consultants.
- more people attending universities and other tertiary institutions, performing and teaching in schools, inspiring others – all of which provide more role models.
- more opportunities to gain arts management skills and artform development skills.

4.1.4 The future

The plan is:

- to protect intellectual and cultural copyright.
- to manage and determine our own art practices.
- to develop a coordinated approach to supporting for Indigenous arts through both State/Territory and Federal art agencies.
- to increase recognition and an understanding of the nature of ATSI arts.
- to increase visibility both in Australia and internationally.
- to increase economic sustainability.
- to embrace new technologies for cultural expression.
- increase our participation in non-Indigenous festivals.
- to embrace and promote the diversities of Indigenous expression and styles.
- to increase opportunities for skills development and training.

The Dream (Vision) of Vision Day participants was:

In 2010 there will be only Australian art that reflects the overall Australian landscape and future of society, that is, our Indigenous art and practices will be accepted on their merit rather than their identity.'

As artists are the true historians, we must use the arts to recognise the past for what it truly is, and continue to plant seeds here in the present for future generations.'

Strategies

Control – Indigenous artists should have control of:

- appointment of people on decision-making bodies.
- decision-making structures and processes.
- branding of Aboriginal products; a process for a 'label of authenticity'.
- a strengthened legal system to protect artists' rights/strengthen cultural heritage protection legislation.
- preservation of community values by creating our own standards of success and creating our own procedures and values system/performance criteria which relate to Indigenous values.
- a cultural database and register controlled by Aboriginal people.
- a national cultural watchdog.
- autonomy of the ATSI Arts Fund.

Influence – Aboriginal and Torres Strait Islander people, with the assistance of State/Territory and Federal art agencies, should:

- provide a coordinated approach.
- develop a bi-partisan policy/protocol framework at national and State levels.
- advocate on such things as tax reform.
- inform local government on arts issues.

Structures – Indigenous art requires:

- the capacity to maximise the use of technology.
- the establishment of a Business/Arts Foundation to attract and distribute resources.
- specific cultural events/festivals for our own people.
- State/Territory governments to recognise art as part of Aboriginal community development.

Processes – Indigenous art requires:

- a more flexible system for submissions and grants.
- more opportunities for discussion around Australia.
- accountability to our communities.
- development and implementation of a national and international strategy for marketing and distribution for all artforms.

Training/education/information – Indigenous artists need:

- education/training/apprenticeship structures and facilities across Australia.
- more assistance in preparing submissions.
- culturally aware and sensitive staff at the Australia Council etc (offer cross-cultural workshops, etc.).
- mentor programs with paid trainee positions.
- a national information centre.

- train-the-trainer programs for artists running workshops.
- preparation for going overseas.

Research – The development of Indigenous art requires:

- a survey to map what is out there and the gaps.
- research into audience development, especially Aboriginal audience development.
- research into marketing strategies suitable for Indigenous arts.

4.2 Community Cultural Development

4.2.1 Introduction

Community Cultural Development (CCD) is a process which fosters creativity, inclusiveness, empowerment and trust in communities – all elements of social capital. The practice of CCD promotes the arts not only as a creative activity in its own right, but also as a vehicle for uniting and enabling communities. When communities are encouraged to create and manage arts projects and to take an active role in artistic collaborations with professional artists, the resulting contemporary art works provide that community with a focus for finding solutions to wider issues. CCD can provide a basis for communicating change as well as for delivering change.

Case studies of CCD practice cover a wide range of topics related to the concerns, achievements and aspirations of particular community sectors. Projects may focus on issues such as: the isolation of youth in rural Australia; the role of women in building social capital; the benefits of community users contributing to the development of public spaces; equity and diversity within communities and across cultures; natural and built environments and health.

CCD (or community arts) has developed and changed since the early 1970s when it first became recognised in Australia as an arts practice. The initial focus was on wider participation in the arts – taking the arts to the people. As the practice became established, emphasis moved to communities taking control of their cultural direction and development, creating an environment within which the arts can flourish.

4.2.2 The present

Over the past two years the CCD sector has identified key issues that are now being addressed in the CCD Fund's strategic plan (to 2002). The strategic plan encompasses the policies and priorities of the Australia Council's *Directions 1999-2001* and provides strategies for the Fund to develop and deliver programs that support those policies.

The Fund and the field shared concerns that the existing models of infrastructure for CCD services, resources and programming were not able to meet the needs of the sector which has seen significant growth and change over the past two decades.

A national survey, the CCD Infrastructure Review, was undertaken in 1999 by an external consultant. This survey, together with additional reviews and assessments, identified that some service/resource organisations and triennially funded clients of the Fund (providers of much of the national infrastructure) were not always able to demonstrate a satisfactory level of skill in strategic planning, performance management and evaluation, and the Fund expressed concerns regarding accountability and governance issues.

A training program for invited clients (organisations) of the CCD Fund has been delivered in all States over the past three months. This program, providing high quality and relevant training, was well received by the client groups with a number of them organising further training sessions at their own expense. The Fund expects that participant organisations will develop and implement a more consistent approach to planning and evaluation strategies over the next 12 to 18 months.

From a number of meetings, seminars and conferences around the country, CCD practitioners expressed a need for a framework and program that would stimulate critical analysis and debate on CCD practice. The Critical Debate Initiative established discussion groups to identify key issues; selected writers and commissioned papers for distribution, presentation and debate. Four of the nine papers have been presented and debated at different fora and conferences in 2000, with a range of presentations being planned for the remaining five papers throughout 2001. The papers will be published online and in journals to ensure ongoing discussion and to generate new subjects for future commissioned writing.

Strengths

Community Cultural Development has much to offer. It:

- is committed to core values such as equity, social justice, access and respect for diversity which communities are crying out for.
- offers diversity of expression and builds linkages between communities.
- is not artform specific, uses collaborative processes and is user friendly.
- is relatively cost effective; promotes the value of the arts and is inclusive.

Weaknesses

Community Cultural Development suffers from:

- fragmentation of experiences, skills and resources.
- unrealised potential due to existing structures.
- poor recognition that CCD facilitates quality of life within the current dominant economic focus.
- poor promotion of CCD and its values to public leaders.

Opportunities

Community Cultural Development**:**

- offers a policy framework in which more than the arts sector can operate – which helps integrate the arts into the big political issues and stop the add-on mentality.
- could use new technologies to create internationalism of CCD.
- could influence government policy formulation by targeting swinging electorates.
- could identify niche markets and sell CCD skills to government/corporations.

Threats

Threats to Community Cultural Development include**:**

- government economic policy and reduced funding for community activity.
- limited employment opportunities within the wider arts industry resulting in de-professionalism of CCD artsworkers.
- homogenisation of culture linked to technology, globalisation and their eventual manifestation in the community.
- further factionalisation of the arts industry and lack of cooperation.

4.2.3 Key drivers of change

Technology

- Face-to-face human contact remains a vital part of communication, to encourage individual identity and develop relationships. There is a need for belonging.
- Technology should be used as an effective tool for CCD complementing human contact and interaction.
- The potential of virtual communities (as opposed to communities of place and identity) to be involved in CCD will need to be addressed.
- Technology can be a threat, but also an opportunity.

Economic

- The skills and values of CCD need to be recognised and implemented through strategic partnerships across all sectors of society, government and non-government policy areas.
- Economic development versus cultural development is a dilemma, especially for Indigenous communities. Cultural integrity is threatened and compromised.
- Growth in the field does not equal growth in funding or infrastructure.

Society

- There is a drive towards homogenous communities, services and products resulting in a fear/suspicion of difference.
- The arts and sciences hold society together; CCD is about quality of life, opportunities and ownership.
- Through CCD practices, communities can celebrate the differences; recognise the strengths in the individual; and appreciate the complexities.
- There is a lack of political leadership or vision about the sort of society we want.
- A broad dismantling of social structures and the resulting political/economic climate is causing social problems. This is creating new cultures and an emphasis on self-support by communities including their cultural development.
- There has been a shift in young people's attitudes (and parents') towards their future, their need to get an income and a good job in contrast to the climate in the 1970s when CCD was introduced as a practice.
- The tyranny of speed (expectations of a quick fix, 'instant societies' and that faster turnover equals a greater chance of funding) works against CCD implementation. A hyperactive society is unrealistic for genuine CCD practice which requires time to listen, establish 'protocols', define boundaries and develop trust, respect and understanding.
- The media follows political climate, not the diversity of community attitudes.

Policy and regulation

- Arts practitioners are becoming more confident and willing to engage with social and political issues: they believe they have the ability to influence governments and corporations to make a genuine commitment to core values (social justice, equity, acknowledgement and respect for diversity).
- Conservatism, Hansonism, competition between and within sectors for funds and recognition, and the imposition of directions/policies that are politically motivated and not based on need present challenges to CCD practice.

- There are negative perceptions or concerns about the Australia Council's ability to:
  - take a leadership role in policy and advocate CCD to other sectors
  - broker meaningful relationships
  - create a sense of community across sectors
  - break down its own policy boxes in order to respond to change and increase its ability to fund innovation
  - cater for young people who are resource savvy and often operating outside the Council's definitions

Education

- Arts and cultural understanding must be integrated into our learning and skills base.
- CCD practice is broader than the formal education system.

Globalisation

- There is significant tension between the policy focus at the global versus the local level; increasing gap between 'haves' and 'have nots' (e.g. the differences between Australia and its Asia-Pacific neighbours).
- We should celebrate diversity and a sense of local identity before going global. There is a need for cooperation not competitiveness.
- The international focus has shifted. There is a lack of awareness of, and an unwillingness to engage with South-East Asia/Pacific as a region.
- Globalisation is seen as both an opportunity and a threat. Free-market policies are dismantling social structures.

CCD practice

- Tension exists between artistic self-censorship in a conservative political climate and an increased willingness (of the sector) to engage in social and political issues.
- There are artificial boundaries between CCD and community development. There is a need to look outside of the usual boundaries of arts/cultural project support (infrastructure).

4.2.4 The future

The following vision statement aims to represent and incorporate the views, aspirations and concerns of the people who have had input to the CCD component of Planning for the Future to date. It is provided as a starting point from which others may contribute to a vision for community cultural development and for the arts industry in Australia.

The Vision: Community cultural development unites Australians through arts practices that diminish social isolation; strengthen relationships between and within communities; and recognise that our differences are fundamental to our identity.

Opportunities and challenges

Homogenisation of the global community and impact of new technology.

- CCD practice is a cost-effective way of building links between communities by actively seeking to be inclusive.

- CCD actively promotes diversity of expression as part of a whole. It is not elitist.
- CCD needs to recognise artificial boundaries between community development and cultural development for many communities – especially Indigenous communities.
- We should see technology as a tool and ensure that human contact is not downgraded.

Changing political framework and artificial policy barriers limit the realisation of CCD's potential.

- CCDF needs to target policy advisors in key portfolios.
- R&D on key issues, impacts and analysis is required.
- Need to do its own research-based advocacy and not rely on government.
- Australia Council should broker relationships with stakeholders.

Capacity to impact on the agendas of other sectors, such as education.

- Develop lobbying skills and strategies.
- Need face-to-face briefings and inspiration about benefits of CCD.
- Market key models through Promoting the Value of the Arts strategy.
- Foster links between schools and community activities (e.g. support a strategy for teachers to utilise CCD practice in schools).
- Develop greater links between education and arts funding.

Economic policy and declining allocation of funds to the arts/culture and community.

- Introduce research-based advocacy of the benefits of CCD.
- Think laterally about other funding that already exists in other sectors.
- Promote the 'cost-effective' nature of CCD to alternative parts of government that are seeking similar outcomes.

CCD seen as arts specific, lack of understanding of CCD process leading to diffused community benefits.

- Promote CCD collaborative processes that build solutions.
- Encourage government agencies to develop cultural policies and encourage inter-agency collaboration.
- CCDF needs to take a leadership role to do this work.
- Provide information and illustration of benefits of CCD.
- Promote successful CCD models to non-arts sector.

Fragmentation, factionalisation and shortage of the CCD sector's resources and skills.

- Encourage greater interconnectedness through cross-discipline networking.
- Make appropriate use of technology.
- Support learning, vocational educational and training.
- Review and revise the terminology that creates the boxes.
- Support rural communities in decline.

Limited earning capacity for artsworkers leading to de-professionalism.

- Develop career paths for artists in arts and non-arts sectors.

- Ensure arts are seen by the wider community as a real job.
- Ensure government recognises artists as assets to Australian culture.
- Ensure taxation laws are monitored for any negative impact on artists working with communities.

4.3 *Dance*

4.3.1 Introduction

Professional dance and movement arts in Australia have gone through many changes in recent years to arrive at their current position in the Australian arts sector. The sector is well served by a strong national and State network of Ausdance service organisations. There is currently a national touring circuit (Made to Move) for contemporary dance, and the hope that this circuit will be enhanced or supplemented.

There is a range of training available for dancers, a valuing of contemporary performance and respect of the needs of independent dance and movement artists. The boundaries between artforms are continually being shattered and crossed over these days and there is a greater awareness of different work processes. Dancers are more adept at contributing to the processes of the creation of work and are not just the movement tools. There is a perception, too, that contemporary dancers are as articulate and well trained as classical dancers.

Dance on screen in Australia is a growing area of practice with great potential, though we are not always able to sustain or maximise that potential.

However, dance is a relatively small arts sector with extremely limited employment opportunities provided by a small number of companies. Compared to many other arts practices, the commercial industry is also small and artistically limited.

There is a huge level of dance participation in ballet schools, eisteddfods, in jazz and tap classes, etc., but the continuum between that participation and the professional dance and movement arts is broken – it does not translate into public engagement with the art form. There is a concern about evidence of declining audiences for contemporary dance, while other cultural attendances have increased.[23]

Broadly speaking, dance artists undertake the highest number of years of training of all artists and earn the lowest mean arts and total income.[24] Artists face the lack of a living wage, leading to low self-esteem.

The following notes combine related comments from the two planning/Vision Days held in 1999 and in 2000. Among the ‘wildest dreams’ put forward by the participants of the two planning days it is possible to detect some key concerns:

- a desire for dance to be seen as central to people’s lives.
- valuing the diversity of dance and movement practices.
- community access to dance works.
- notions of linking dance to a political context.

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[23] Australian Bureau of Statistics, A*ttendance at selected cultural venues*, 1999
[24] David Throsby and Beverley Thompson, *But What Do YouDo for a Living*, Australia Council 1994

4.3.2 The present

These are some of the key environmental strengths and challenges facing the Australian dance and movement arts today.

- Film and multimedia are strong in Australia and can affect dance. They provide new arts media and audiences. Dance translates well to multi-platforms of technology and presentation; the non-verbal, non-linear nature of dance means there is great distribution potential in the digital environment, in public space installations, use of other non-traditional spaces, etc. These all have the potential to increase the marketability of dance.
- Australian Dance has a high international standing. There is continuing international interest in a range of Australian dance companies and artists to tour. Recent international promotions such as the Heads Up Centenary of Federation program in London, the New Moves program and Tanz Essen have shown the strength of Australian dance in the international arena. Dance generally travels well across international language borders. Many Australian artists are gaining employment in overseas dance companies.
- There is a high level of training of Australian dancers. The average length of training is eight years, with about 40 per cent of dance artists reporting 10 years of training.[25] The heads of key training institutions are people with extensive professional experience. Tertiary institutions have resources that might be available for use. Dance as a field for research has been recognised with the recent Australian Research Council funding for the Unspoken Knowledges project.
- Community dance is a growing area of practice. There is a growing recognition of conditions for effective community dance work, including the benefits of long-term commitment (money and time). The practice includes but is much more rich and complex than the notion of audience development. It is recognised that as a sector dance is more community based than other artforms; youth or community dance participation may be a pathway into the industry.
- With such a small network of ongoing organisations, most not terribly well resourced, the sector has limited employment opportunities – and most work is on short-term contracts. There is a danger of the various companies being in competition rather than working together: any schism between the 'haves' and 'have nots' is counter-productive. With the dominance of Western dance forms, dance is in danger of being artistically narrow. The pressure on funding agencies both to sustain levels of subsidy on the one hand and support increasing diversity on the other leads to many initiatives being under-resourced.

4.3.3 Key drivers of change

Technology

New technologies are seen as offering a range of opportunities rather than threatening the sustainability of the Dance sector. The potential for 'over stimulation' with a decrease in levels of concentration and the impact of technology which provides instant gratification for young people in particular presents a range of dangers. However, technology can offer great opportunities for wider distribution of dance through the Internet, film and multimedia platforms. Technology can allow creative exploration, wider distribution of dance on screen and filmed dance and can be a useful communication or presentation tool.

[25] ibid

Economic

The current economic pressure for financial rationalism is creating dangers for the Dance sector, which is labour intensive and requires ongoing artists' wages. Poor work conditions can cause injury and burn-out in the industry. There is still, of course, the need to increase audience numbers.

Society

Dance, as a vehicle for cultural development of a community, is a growing practice with dance involvement encouraged in regional and urban areas, targeting specific communities or locations. Community attitudes as to the essential nature of dance to culture and identity are changing, so it is important that the skills base in community dance be utilised.

Education

Moves to reconnect all levels of education with the professional arts sector are seen as providing opportunities for dance. Clearly an increasing number of tertiary dance graduates will create unsustainable expectations of employment for dance artists, but ways to change the understanding of, and broadening the influences on, dance students are possible means to rebuild dance and movement arts as an integral part of Australian life.

Globalisation

A more global cultural awareness is seen to be a good thing for dance and movement arts. The growth of international interest in Australian dance shows this to be potentially an area of larger growth in the future; internationally there is a respect for the quality and energy of Australian dance and an appreciation of the way it communicates 'being Australian'. Many of the downsides of globalisation in market terms were not seen as a significant threat. However, the range of current artistic practice is dominated by Western dance culture.

4.3.4 The future

Develop the relationship between dance and technology, especially with film/media and multimedia centres.

- Dance artists need to have access to the available technology in order to learn to use them as distribution and creation tools.
- Develop partnerships through science and technology.
- Look at models of industry-funded artistic research and development and attachment programs (e.g. Xerox Park and Massachusetts Institute of Technology).

Develop an international dance profile, such as through a dance festival, to help increase an international appreciation of Australian dance.

- Explore the resources required and possible partners for an Australian international dance festival, maybe biennial and maybe hosted in different cities each time.
- Continue to court international presenters, to learn more about and see more Australian dance and movement work.
- Develop funding for international visits for artists and producers to make contacts for touring.

Develop a wide range of strategies to get dance recognised as an integral part of Australian life where dance is seen as a daily activity, essential to the health of the nation.

- Encouraging engagement with communities ensures dance artists are connected in some way to particular communities.
- Artists might facilitate community involvement, promote dialogue and forums and discussions and engage the necessary people to be able to do so. It is important to accept that there are other responsibilities beyond just creating dance works, and acknowledge what's going on in your communities.
- Australia has or is close to cultures where dance is central – Aboriginal elders and artists from other cultures might be resident in tertiary dance institutions, strengthening the idea of community ownership of work.
- This is a generational development, beginning with education: introduce the element of dance into primary schools and sustain this development with high-quality youth dance activity.
- Ensure dance-literate people are in programming positions, festival direction. etc, so that events programming automatically includes dance.
- Skill up dance artists in communicating with government, build a group of public champions/advocates.

Engage broadly with other artforms, diverse partners from the arts and non-arts sectors, and with the social and political forces that influence – and are influenced by – the arts.

- It is important to lose the divide between definitions of community dance and professional dance – there are many different doors/entry points for dance. Re-think the terminology that traditionally has set community and professional dance as opposites.
- Tertiary dance departments could be encouraged to broaden professional input and become centres of excellence in specific areas.
- Maximise connections with all other artforms, as well as collaborating within, across and outside the arts. For example, live music, partnership networks with people outside arts community (e.g. technology centres, Australian Research Council, tertiary institutions, schools, community groups).
- Encourage more presentation of dance in other environments/sites/media to help rebuild audiences.

The future might also see specific developments in:

Creation

- Create a repertoire of Australian dance works, to which young dancers can be exposed.
- Less is more. Reduce expected level of activity. Value research and development. Choreographic development is valued 'in stages' and it is possible to delay the 'product end'.
- Choreographers work with research assistants and/or dramaturgs to encourage a culture of creative exchange and critical debate.
- Collaborations are encouraged so that the choreographer is not the sole author (i.e. endorse collaborations as valuable process). This may result in greater depth and diversity of work, relieves the sense of making work in isolation and is vital to the development of the form.

- Some choreographer-led companies might produce curated seasons to broaden the artistic input.

Positioning dance/cultural context

- Every theatre company and film, etc. might have a resident choreographer.
- Importance of educating decision-makers – including political and social leaders in the context in which dance is trying to be made.
- Find Ministers and politicians who can be persuaded to be supportive champions of dance. The ideal is that a party thinks that winning the next election may be influenced by the quality of its dance policy.
- Install wall-sized screen monitors in public spaces showing dance.
- Build skill and knowledge base in the media, leading to better reviewing.
- Improve the ability of artists/groups to communicate with media and audience/community, to build contacts, reach the right people and open doors.
- Shift direction from audience development to public engagement.

Resources/relationships

- There could be a widespread network of smaller (rather than larger) organisations, giving more choreographers the opportunity to engage with a support structure.
- New structures could be available to support mature and emerging artists.
- More flexible management structures are encouraged.
- An ideal is to have many choreographic centres and managed rehearsal spaces.

4.4 Literature

4.4.1 Introduction

What is literature? Given the changing nature of what we call 'literature', it is not surprising that Vision Day participants paused at the outset to consider this fundamental question.

Literature no longer refers to the book alone. While books are still by far the most important medium of publication, literature these days can also be found on websites, CD-ROMs, in radio broadcasts, stage and street performances, even in the form of public murals and bus-shelter posters. The idea of literature as an inviolable body of text on a page is too narrow a definition for today's dynamic literary community. We recognise that the parameters of literary activity are changing and that we need to embrace the changes. At the same time, we do not want to lose sight of striving for excellence in literature, regardless of the form it takes.

These guiding principles emerged:

- Literature reflects the cultural life of the nation and, for that reason, cannot be regarded simply as an industry.
- Literature speaks to the contemplative side of human nature and its true value does not lend itself to statistical measurement.
- Respect for language should be regarded as an important cultural artefact.
- Above all, the role of literature, in whatever form it takes, is to celebrate language as the keystone of human communication.

4.4.2 The present

Current trends and issues of concern:

Eroding status of literature

There are indications that respect for reading and language is slipping. Too often, the role of the creative writer as a critic and commentator is undervalued or misunderstood. In publishing, the role of the editor has diminished, leading to a disappointing drop in the editorial standard of some books. While the number of children reading books is encouraging, there are indications that literacy and writing skills are undervalued by the education system. At the tertiary level, the cultural status of literature is suffering as a result of reductions in funding for Humanities and reduced emphasis on literature.

Tenuous economic position of writers

While the number of 'hobby writers' continues to grow (latest ABS figures indicate that around 850,000 Australians write as a leisure activity), professional writers are finding it increasingly difficult to live on the proceeds of their writing. It is not unusual for our 'literary elders' to be living in poverty.

Fragile literary culture

Australia's evolving literary culture is dynamic, but still fragile and at risk of being swamped by:

- globalisation.
- one world – one homogeneous literature? Individual writers with regional loyalties are finding it more difficult to make themselves heard above the dominant voice of mass-market culture. It is recognised that globalisation represents both a threat and an opportunity for Australian literature to reach a world market. The continued development of Australian literature as a distinctive body of work with its own identifiable cultural stamp is vital if Australian literature is to find a foothold in the global marketplace.
- marginal commercial viability of quality Australian literature.
- the domestic market for Australian literature, particularly for poetry, is too small to sustain a dynamic and diverse literary culture without government subsidy. Publishing Australian literary works is often seen as high risk and commercially marginal. Independent, boutique publishers are taking over the role of innovators and nurturers of excellence in Australian literature.
- more competing demands on consumers' leisure time and disposable income.
- literature seems to have an image problem in relation to other leisure pursuits which offer more instant gratification. Reading books tends to be seen as 'difficult' and too time consuming to fit into a busy life, except at holiday time. This is a re-branding issue which the Book Industry Assistance Plan (BIAP) is addressing in its media advertising campaign based on the motif 'Books Alive'.

Government policies

In recent times, Government policies have tended to further marginalise the already tenuous commercial viability of publishing quality Australian literature. The erosion of territorial copyright has unfairly disadvantaged locally published titles in competition with titles from the USA and UK. Book sales have dropped since the introduction of the GST (no reliable statistics are available on this yet but anecdotal reports from the Australian Booksellers' Association put the figure as high as 20%).

Need to develop export skills

The export potential of Australian literature remains largely untapped due to a lack of skills, resources and government assistance. Development of overseas markets is crucial to the sustainability of a dynamic Australian literature sector. The sector as a whole needs to learn practical export skills.

Divide between young and established writers

There is a perception that the Australian literary establishment is a 'closed club' which excludes young writers, particularly those working in new areas and forms such as zines and collaborative multi-artform projects.

4.4.3 Key drivers of change

Technology

- The proliferation of online publishing outlets for writers offers new opportunities to reach a global market, but most are unpaid.
- Protection of copyright and moral rights in the Internet community seems to be a losing battle. Piracy of intellectual property is running out of control.
- Print-on-demand is coming; booksellers and publishers face major changes in the way they do business.
- Self-publishing is becoming easier and cheaper.
- Writing is becoming an increasingly collaborative activity.

Policy and regulation

The Australia Council has an important leadership role to play in:

- Supporting the continued pursuit of excellence in Australian literature – concern was expressed that some Australian writers at the peak of accomplishment in their artform yet still suffering economic hardship may be left behind in the Council's pursuit of other priorities.
- Building the readership/audience for Australian literature – while the vast number of Australian hobby writers is cause for celebration, much more could be done to encourage reading, awareness and consumption of Australian literature.
- Supporting innovation and diversity in Australian writing – a view was expressed that the Literature Fund in the past has seemed more concerned with perpetuating the literary establishment than encouraging newcomers. It is important that the Fund be seen to be responsive to new literary forms and that it continue to seek the optimum balance in its support for emerging and established writers.

The Federal Government's level of willingness to consider the needs of writers and publishers when dealing with the complex issues of copyright and moral rights plays an important part in the vitality and morale of the Literature sector. There is a sense that the sector has been let down in this respect by the present Government. GST on books has delivered a harsh blow to the sector. It remains to be seen whether or not the Book Industry Assistance Plan will successfully halt the decline in book sales.

Globalisation

Cross-media ownership and expansion of multinational corporate empires has meant that global market control is becoming concentrated in fewer hands. Publishing is increasingly driven by the purely commercial concerns of multinational corporations. As a result, the survival of an independent 'fringe' publishing sector is more important than ever to protect the 'biodiversity' of Australian literature.

4.4.4 The future

Guiding principle

We must continue to recognise the value of language and writing skills as cultural artefacts. A credo of this kind should be constantly kept in mind in devising educational, cultural and commercial policies.

The Vision

In 2010, we have a thriving Australian literature sector which celebrates both innovative newcomers and its most skilled practitioners. Online outlets for Australian writing are flourishing and new ways have been found to make them commercially viable for the writer and to safeguard intellectual property.

Australian literature has secured a firm niche in the global marketplace with high quality Australian titles regularly translated and published overseas. Australian literary works are read and performed in many non-traditional venues. Literature has stretched its boundaries into new forms of collaboration not only with other artforms but also in collaborative projects with science, industry and even with sport! At the same time, more people of all ages are reading and buying books. There is a high level of critical debate and public engagement with literary works and the issues they raise. Literature in all its forms, old and new, continues to celebrate language in all its richness and subtlety.

Strategies for achieving the vision

The following strategies will move us towards the vision:

- **Develop international markets as a high priority** by sending Australian writers to international festivals, bringing overseas publishers to Australia, funding the translation of Australian works into other languages. Look at overseas models of how to position writers on the international stage and develop similar strategies for Australian writers.
- **Continue to foster diversity and innovation in Australian literature** by increasing support for publication of a wide range of Australian literary works.
- **Continue to foster excellence in Australian literature** by providing direct financial support to highly accomplished mid- and late-career writers.
- **Continue to support new writers** by providing direct financial support and continuing to fund outlets for their work, e.g. small magazines and writers' festivals.
- **Advocate to protect the revenue base of writers** by addressing intellectual property issues and supporting professional payment to writers for their work.
- **Broaden Australian literature's readership/audience reach** by forging more strategic partnerships with non-literary sectors, for example, with the business sector, science, adult education, etc. Explore more non-traditional venues for literature such as the workplace, public transport, sporting events and so on.
- **Exploit the digital era more effectively** by supporting and encouraging the development of online skills and online literary ventures.
- **Target non-readers and lapsed readers in campaigns to expand the market**. Find out how they are spending their leisure and how they could be motivated to take up or return to reading.

- **Target early education** by researching strategies which are most likely to succeed in nurturing a love of reading in young children. Establish links with schools and libraries to create programs promoting literacy and children's literature.
- **Work with the literary community** to develop a dialogue between players. Build on dialogue with government with the aim of securing a strong investment in infrastructure and policy over the next 10 years.

4.5 Music

Music is the answer to the mystery of life; it is the most profound of all the arts; it expresses the deepest thoughts of life and being in simple language which nonetheless cannot be translated.

— Arthur Schopenhauer

4.5.1 Introduction

The musical landscape in Australia today is broad and diverse, consisting of different cultural traditions, genres and practices. Increasingly, previously defined boundaries between musical genres are being crossed and exciting new genres are being created. Australia, with its multicultural make-up, is uniquely placed to lead the world in this development.

The many interrelated layers that contribute to this musical landscape include grassroots music-making, music education, youth music practice, amateur music practice, moving through opportunities offered for professional development, to emerging artists, through community music practice and peak youth bodies, to professional artists and organisations creating and presenting music of the highest quality.

The different sectors do not exist in isolation from each other. They are inextricably linked as quality cannot be manufactured from a tiny base; there needs to be a broad and diverse field in order to attain quality. The multilayered nature of music means that the health of each sector is dependent on the health and sustainability of the other.

The key characteristics of music in Australia today are **range** and **diversity**:

- diversity of **musical styles,** including classical, jazz, blues, contemporary rock/popular, contemporary classical, folk, country, early music, Indigenous, world, non-Western classical, non-Western traditional, fusion, multicultural, cross-cultural.
- diversity of **format,** including orchestral, chamber, choral, vocal, concert/brass bands, opera / music theatre, electronic/computer, improvisation, sound art, amplified bands, DJs.
- diversity of **practice,** including professional, emerging, amateur, youth music, community music, music education and training.

4.5.2 The present

The following matters are an analysis of the music field’s strengths, weaknesses, opportunities and threats which impact on the vision for the future.

Strengths

- Many voices with a range and diversity of style, form and practice.
- Creativity and energy of musical practitioners.
- Distinctiveness of Australian music as a result of physical/cultural/social/musical environment – leads to innovative practice.
- Innovation and excellence in instrument-making.

- Across the diverse range of music practices Australian artists continue to demonstrate levels of invention and expertise among the world's best.
- Performing artists willing to cross artistic and artform boundaries.

Weaknesses

- Lack of valuing – not all musicians receive professional recognition and financial reward.
- Undervaluing of education generally by Government, and a related devaluing/worsening of music education at all levels – primary, high school and tertiary.
- 'High' art 'low' art concepts/perceptions.
- Music is put into a separate box rather than seen as integral to life/culture/wellbeing.
- Lack of community ownership of music, and antagonism to the music of others.
- Hierarchy of support and recognition – only certain voices nurtured. There should be a continuum between grassroots, community, national and international.
- Lack of valuing of/adequate guiding principles for Australian music content by broadcast media.
- Inequity in the division of the funding and resourcing pie.

Opportunities

- The recognition and celebration of all musical voices.
- Exploration and experimentation.
- Community/artist links – 'elite' practice to grassroots practice.
- Ownership of creation/presentation – links with participation.
- Increased Australian content in the new environment.
- Assisting Australian musicians to be supported/equipped to succeed in a world of new technologies.

Threats

- An ongoing decline in activity and attendance in some forms of live music performance.
- Lack of or declining venues.
- 'Dumbing down' in some areas of programming to focus on the sponsorship dollar and audience development rather than programs of artistic excellence and challenge.
- Moral rights and royalties threatened by the impact of new technologies and the appropriation of Indigenous culture. An increasing difficulty to give copyright to materials – broken down by technologies where co-creation and distribution proliferate.
- An inequity of earning capacity across musical genres.

4.5.3 Key drivers of change

Technology

New technologies and related impacts on industry structure, competition and the role of musicians. The technology is driving new styles, forms and delivery of music – it is changing dramatically the process of production, competition and distribution.

Artists will be faced with the need for a greater number of skills in the new media where they will need to market themselves, establish a brand, understand where the Internet is going and how to position and reposition themselves to remain a point of value in representing and distributing their music online.

Society

- There is an increase in the numbers of 'haves' and 'have-nots' in terms of access to music and music production through the Internet. There are barriers to regions with poor or expensive telecommunications, and the gap is widening.
- Processes of retailing and distributing music are changing and will continue to change.

Globalisation

- Globalisation causing homogeneity of music culture on the one hand, but in turn creating the need for individuals and communities to create their own voice.
- Traditional modes of music presentation face increased competition from the greater number of leisure activities available to young people today.
- Cultural diversity and immigration patterns constantly change the range and presentation of music in Australia. This will lead to more cross-cultural music and breaking down of barriers between musical genres.
- Competitiveness is relevant in a context where it challenges ideas, stimulates new approaches which lead to higher standards and inspiration, but it needs to be seen alongside *collaboration* and *cooperation*.
- Inclusion of artforms traditionally independent from subsidised funding, such as rock music – this trend is diversifying a diminishing arts-funding dollar and necessitates a widening diversity of infrastructure resourcing.

4.5.4 The future

- The many distinctive voices that make up Australian music are heard and enjoyed in Australia and throughout the world.
- Music is regarded as essential to the fabric of Australian life; it is integral, not separate, to the lives of all Australians and provides inspiration and stimulation to individuals and to the society as a whole.
- Musicians are highly valued by society.
- Musicians have a wide range of employment opportunities and receive appropriate financial recompense/reward.
- Our diverse musical heritage has been built upon and developed.
- Enshrined in cultural and educational policy and practice is a commitment to music-making and appreciation.
- Children and young people are actively involved in music in many ways (as performers, creators, instrument makers, audience); there are musicians and composers resident in schools and communities.
- Music performance, training and participation flourishes in regional Australia.
- All forms of music have equal opportunity to flourish, including new or changing practices and cross-fertilisation of musical ideas.
- New models for live music presentation have been developed.

- There is no gap, perceived or actual, between the so-called ‘major’ and other sectors of music; there is recognition of the interrelatedness of all sectors of music.
- More Australian music is heard through the broadcast media in Australia and the whole world.
- Australian instrument makers are recognised as leaders and pioneers; new instruments are being created.
- The mental, physical and social benefits of music-making are recognised and nurtured.

4.6 New Media Arts

4.6.1 Introduction

The New Media Arts Fund (NMAF) was established in 1996 with a brief to support experimentation with new forms of expression and the exploration of hybrid arts practices involving cross-fertilisation of disciplines, technologies or established artforms. The Fund supports interdisciplinary practice that crosses artistic and cultural boundaries in ways that challenge and engage artists and audiences.

The establishment of the NMAF occurred after a long period of debate and discussion within the Australia Council and the field about how interdisciplinary, hybrid practice could be supported. The establishment of the Fund communicated a strong commitment by the Australia Council to supporting, innovative, experimental and emerging artistic practice. The members of the NMAF have taken this charter very seriously in the development of programs, policies and initiatives while the Fund continues its role in evaluation and encourages critical debate around how it continues to support innovative practice.

There has been a perception that the NMAF is a multimedia or new technology fund. This stemmed from the choice of name for the Fund, which in common usage mean ‘digital media’. The Fund has continued to advocate strongly that there is no requirement for projects to incorporate new technologies or formats. However, many funded projects do include new technology because artists use it as a medium through which different disciplines are brought together.

The Fund has continued to emphasise and support work that is interdisciplinary, work that challenges conventional notions of what art is by drawing upon and combining different artforms, disciplines and media to create new work. This work can result through collaborations between artists and practitioners from other disciplines, including science, ecology, philosophy or engineering.

There is very strong support for the continued role of the NMAF in supporting innovation, research and collaboration, as well as a commitment to be flexible and proactive in programs and initiatives.

4.6.2 The present

The present environment in which artists are operating features the following strengths, weaknesses, opportunities and threats.

Strengths

- Artists are tapping into distribution and information economies. There will be new models that will supersede and augment current networks. The sector will need new and different networks of distribution and artists will be working with business.
- There are increasing opportunities for artists to get jobs in industry using skills from artistic practice within the job, in a way that artists have not had an opportunity to do before.

Weaknesses

- Undergraduate experience is highly valued by those entering the sector but universities are unable to respond effectively to the interaction that people seek.
- It is a concern that artists see the protection and or/ promotion of their intellectual property as 'too hard'. There is a need to look at the issues and opportunities that exist for artists to move ahead and not ignore the issues related to intellectual property.
- Art is becoming increasingly irrelevant within the university context. It is being seen as increasingly redundant in a materialistic society. Artists are part of the culture, but artists and scientists do not lead the culture.

Opportunities

- The roles of educational institutions and academies are changing and how people engage with these institutions is also changing.
- Educational experience has changed dramatically to be a totally different experience. Institutions are understaffed and lecturers are overworked. Education is about economics and getting students through rather than the experience of inspirational lecturers. How do you inspire creativity in that context?
- There is an ability to involve the audience within the work through the Internet; live streaming, etc.
- Space exploration and biotechnology will be things we need to focus on in the next 10 years. They are two areas that will have an impact on development and artists.

Threats

- There is an increasing gap between rich and poor in terms of information, access to technology and income.
- It is harder and harder to sustain intellectual capital within current legislative frameworks. Artists need to be smarter about intellectual property.

4.6.3 Key drivers of change

The key drivers of change over the next 10 years, as elaborated below, will be:

1. a breaking down of artform disciplines and the changing nature of artistic practice.
2. society – changing audience expectations.
3. economic – changing means of distribution, production and creation?
4. globalisation – what is the unique role of the arts in Australia in an increasingly global culture?

The changing nature of artistic practice

We are seeing an increasing hybridity in artistic practice. What does this mean for the future of artform disciplines and the training of artists? Artists are making choices about how they create work based on content and how they want to communicate their ideas rather than making choices based on their training.

- What does this mean for the skills base? Working in a cross-disciplinary practice requires the artist to be multiskilled. How does this have an impact on the depth of skills needed across a craft?

- This approach has an impact on the future of training for artists. What does this mean for how people learn their skills? If training covers many areas, what does this mean for the depth of skills and craft?
- Do we need to look at increasing the number of areas of specialisation; offering a range of different experiences rather than a bit of everything?
- The sector needs to look more at the skills of collaboration – both with other artists and other disciplines. Collaboration is not just about creating relationships with other artists but can also cross disciplines.
- The way institutions are established influences how artists are defined. Do we need to move to a more hybrid model of artistic practice?
- There is blurring between the commercial and non-commercial aspects of artistic practice and is this having an impact on the choices of disciplines and training for artists. Does this really matter? Will artists still call themselves 'artists' or will they describe themselves as something different?

Society – changing audience expectations

- There is an increasing demand from audiences to get involved – particularly with younger audiences who expect to be a participant in the experience, not a passive spectator in the audience. There is a broad cultural change. In café culture it is known as 'grazing' (e.g. Net surfing, channel changing).
- There is an increasing choice of available product through entertainment on demand. Audiences will choose when they want to interact with art. Artists need to embed pathways into their work to enable people to be able to do this.
- In relation to media installation work, there is a debate about how people have experiences that are of a different or higher quality. Audiences want it to be easy, but enjoyable.
- Artists are having, or can have, a role in looking after the context in which their work is viewed and need to think more strategically about niche audiences rather than the mass audience.
- The constant pressure from the audience to change is a real challenge. Audiences will not go back to view the artwork on the Web if it isn't constantly changing.

Economic

What will this mean for the arts in terms of distribution, production and creation?

- Work is becoming increasingly site- or community-specific. The artist is becoming a facilitator as much as a creator. There is a concern that artists making work for public spaces self-censor.
- What will this mean for contextualising the work, so that the audience can experience it? Creators need to be making work with the audience in mind. It is important to ensure the continuation of an audience.
- Creating networks to encourage participation and engagement might call for new infrastructure to achieve multiple contexts. There is a real change in the way work is being made and distributed, which will impact on the infrastructure that we currently have.
- The cultural institution has a role in promoting across all levels: from local community to a broader base up to international context.

- There are a range of levels and we need to think about how people will access work: it is about layers of audience, and is not just a marketing problem.

Globalisation

Globalisation can be turned into an opportunity but there needs to be attention paid to how work is developed locally in order for it to survive effectively globally. Many Australian artists, particularly those working in the electronic media, do so in a global context. They are exhibiting work and participating at workshops and in international discourses about practice. Much of the work supported by the NMAF, has been found to have a better showing overseas. Therefore, the focus needs to be on how we can make the presentation of work sustainable on a national level.

It is critical that work has more than one viewing in order to develop work of a higher quality. This is particularly relevant with work that experiments with form and content and where a longer investment needs to be made in the development period.

Australian artists need to be able to share in the output of their fellow artists. It is important to develop opportunities to see the work of artists from overseas so that there can be more dialogue. Currently this only occurs in the context of overseas festivals and conferences. There is a desire to focus more on an exchange model rather than a one of exhibition or performance.

4.6.4 The future

The challenges for the future are:

- Economic – How will the arts be paid for and how will artists make a living?
- Training and learning – How do we achieve a balance between skills and education to create a learning environment that is appropriate, flexible and responsive to the rate of change? Both are relevant in terms of rate of change and technology.
- The Arts industry itself – How do you sustain relevant infrastructure and let other infrastructure die? It is important to foster the new and innovative rather than focus on infrastructure which needs to be phased out.
- Change in the arts industry – The arts industry is breaking down barriers between disciplines.
- Australia is a small culture with a small market – How can we make this an advantage?
- Mass culture may be global, but there is the need to recognise that it is difficult to get a genuine interchange between cities in Australia, let alone regional areas. Geographic distance/isolation/specificity are big issues to be overcome.
- Connectedness is increasingly desired by artists as is plurality of arts practice. Globalisation can be a positive as it is easier to make connections between communities of interest (e.g. Indigenous groups work in a global context, political groups are issue-based on a global scale). The electronic arts community also has a global community, there are many projects that operate across country boundaries.
- How do we create an environment that addresses the increasing desire for work presented internationally to reflect Australian content and issues?
- Convergence will impact on Australia’s cultural institutions, the challenge is to develop flexible, inclusive, networked infrastructure.

- The challenge with technology is to ensure it is accessible to artists, communities and cultural organisations.

The vision

The key elements of a vision are:

- continuing support for innovation, research and collaboration.
- having a flexible perspective of approaches to art-making which are not static.
- creating an artist-centred approach to funding support, working out ways to break down the boundaries of disciplines.
- developing a new approach to intellectual property for artists.
- developing flexible models of distribution, thereby developing new income streams for artists.
- Increasing access to resources for artists.
- Increasing opportunities for artists' work to be viewed nationally and internationally.
- developing ways in which large projects can be supported.
- engaging audiences in a dialogue.

4.7 Theatre

4.7.1 Introduction

Theatre is an activity that deals with core life issues. It is about **ceremony**, **community**, **change**, **imagination** and **our stories**. It is arguably society's workplace or rehearsal space for an examination of humanity's darker side. Certainly, it is a safe space to resolve conflict. It dwells in the space of the *nexus*, teasing out the complexities between the heart and the mind; the known and the unknown; and the public and the private by mediating and locating private voices in public spaces.

Yet, how relevant is Australian theatre in 2001? There is a sense that the gulf is widening between artists and audiences. Urgent questions include, how is current theatre content connecting to its audience? Why are potential audiences uncomfortable with theatre? How do we break down the prohibitions to audience access? Why do so many people perceive theatre as elitist, both in relation to the artists and the audiences that do choose to engage?

In answering these questions there is a need to acknowledge failure on two fronts. There has been a failure in Australia to create outstanding and resonant **theatrical images** – those moments that live in the psyche long after the detail has faded; and there has been a failure to connect with **local communities**. It is here that an audience exists and has the potential to turn theatre from its status as the 'exotic unrelated other' into a lifetime partner. However, the current preoccupation with and domination of the large over the small, and the nature and **content** of currently produced theatre work exacerbates the issue of audience isolation and impedes potential for integration of theatre into our everyday lives.

4.7.2 The present

A number of significant issues face Australian theatre today. These are identified in various and intersecting ways, but broadly address **questions of relevance**, **societal challenges and changes, funding structures** and **leadership abilities**.

There is a need to make theatre relevant.

- Provide support for works that engage with and are about the community.
- Understand different languages and priorities, and encourage cross artform and site specific works.
- Fund regional theatre companies to engage with and draw on the expertise of urban theatre companies.
- Develop connections and exchanges within and outside theatre and the arts.
- Encourage collaborations between small and medium-sized companies within Australia.

There is a need to define the value of theatre and embed it into our educational and political institutions.

- Identify points of leverage to affect attitudinal change in promoting the value of theatre.
- Establish cross-artform forums to brainstorm with organisers of successful cultural events.

- Influence policy and funding decisions.
- Support artist residencies in the education sector.
- Rethink the 'feeder stream' (training institutions).
- Establish a three-year 'journeyman' apprentice status for performers, with those achieving a body of work during this period moving on to full union membership.

There is a need for new funding models in Australian theatre.

- Support an inquiry into small and medium-sized companies and act on the findings at Federal and State Government level.
- Encourage greater collaboration between federal and local governments.
- Provide funding for longer collaborative processes and build in collaboration as a criterion in funding categories at all levels of government.
- Pursue advantageous tax treatment for investment in live theatre along film-financing lines.
- Provide incentives for production of contemporary Australian work.
- Encourage bequests to theatre companies of all sizes.
- Provide international residencies, exchanges and artistic collaborations.
- Establish a discrete agency to deliver Australian culture, including theatre, abroad (especially in the Asian region).

There is a need for public leadership in Australian theatre.

- Promote new leaders.
- Innovatively improve leadership skills.
- Create opportunities for artists as social commentators.
- Introduce succession planning for companies.

The barriers to Australian theatre becoming an integral part of life, and achieving a broader reach, new funding approaches and stronger leadership are many and various. Some issues relate to the **nature and quality of the work** itself; others broadly relate to **inherited institutional structures** and **isolation**. It is recognised that:

- Theatre work needs to be better; and what constitutes 'good' Australian theatre needs to be challenged and redefined.
- It is time to challenge inherited institutional structures and reorganise for a new century.
- Geographic isolation, isolation between artforms and a lack of worldliness hinders our ability to draw strength from the number of arts workers available to work towards goals of mutual benefit across the arts.

4.7.3 Key drivers of change

Technology

Theatre artists could better use the tools on offer to increase administrative advantage and explore possible new linkages with audiences. However, technology is a tool and is no more fundamental to the creation of theatre in a modern world (and this discussion) than the many tools at the disposal of the theatre artist.

Economic

The lack of support for research and development contributes to a 'brain drain' in the arts, not unlike the field of science where there is a high degree of 'brain haemorrhage' with talented practitioners fleeing the country. In the arts, many innovative practitioners are becoming weary, and turning to film, TV or teaching to earn a living.

Society

Although a slippery paradigm, a question mark arises in relation to the politics of *language*: are artists allowed to use *their* language any more to represent *their* values? Have we lost the language? Or merely the artistic voice in the current environment? The rise of corporate terminology and the language of economic rationalism implicitly devalue the worth of theatre. Theatre is not a business or an industry, nor is it a sector. Yet it is within this economic rationalist paradigm that theatre artists operate; and, accordingly, they adopt a 'hopelessly inadequate language' to survive.

Policy and regulation

'Top-down' policy practices need to give way to more lateral and inclusive policy approaches. Too much corporate thinking currently drives the agenda. We do need funding for maintenance of significant organisations, but we also need funding for creativity and new initiatives.

Education

There needs to be a concerted effort to affect how children and young people are exposed and encouraged to engage with cultural events and activities. Youth theatres play an important role, but the relationship with education, public education especially, is very limited. It is essential for children to encounter artists in schools and in their communities in meaningful ways and for this to be funded adequately.

Globalisation

Competition from other forms of entertainment, which is affecting people's leisure preferences, is identified as a key challenge for theatre. If time is of the essence in an increasingly busy world, theatre must be made as attractive a choice as other options.

The pervading sense of Euro-centrism and Americanism that dominates a substantial part of mainstream theatre programming in Australia must be challenged. At the same time there is a need to acknowledge the nation's racism and overcome neo-colonial thinking if Australian theatre is to fully find a truly distinctive voice. It needs to be acknowledged that Australia is no longer a monolingual country and the nation's theatre needs to reflect this.

4.7.4 The future

By 2010 Australian theatre will be **integral** to daily life, have a far **broader reach**, be subject to **new funding approaches** and demonstrate **stronger leadership**.

Theatre will be joyous and essential for many people.

- Theatre practitioners have left behind their inherited structures, artform boundaries and company bunkers.
- Theatre processes are reinvented around things that need to be done as identified through community engagement.
- There is improved integration of theatre in education (and education in theatre) and links, where useful, to cinema and sport.

Resources will be shared between companies, and partnerships will replace competitiveness.

- Regional focus and support is in place.
- A redesigned theatre 'church' is in place with a commitment to including a diversity of artists, works and audiences.
- Community networks are valued with communities having greater ability to commission new works and tell their stories through the 'jamming' of traditional and contemporary artforms.
- Coalition building through shared subject matter is embedded in theatre practice.

Arts funding agencies will be proactive and provide artists with a meaningful platform for development.

- Funding cycles and criteria have been rethought and there is an increased emphasis on the diversity of practice and value within the small to medium-sized organisations.
- The 'roots' of the industry have been watered with another $72 million.
- Many new funding models have been explored and adopted with particular reference to Ireland (introducing tax incentives); subsidising venues for 'non-mainstream' work; attaining local government support for small organisations; and offering long-term funding for layered project development.

Leadership in the public domain will be matched by a commitment to leadership in governance, marketing and policy development.

- Arts leaders are called on for public comment in matters relating to art and matters of broad community interest.
- Opportunities are presented to a broader range of theatre workers to better enable them to assume a leadership role.
- Optimal marketing, reoriented towards the community it is attempting to reach, is encouraged.
- Qualitative consultation with artists occurs before and during policy development.

4.8 *Visual Arts/Craft*

4.8.1 Introduction – Facing a blank canvas

Australians like to see themselves in terms of the images painted of them by artists. Whether it be a Sidney Nolan Ned Kelly or a Vanessa Beecroft installation at a Biennale, it is through the eyes that many Australians like to live. Likewise, craft has a special place in the hearts and minds of many, connecting as it does the hand with the mind through a curious combination of problem solving and aesthetics.

What then of the role of those artists and artsworkers in creating visual arts and craft and presenting it to Australian audiences? Or the wider role of art in Australian society, the significance of living artists and how they are supported? These were some of the questions posed to the 20 or so people attending the Visual Arts/Craft Vision Day. Throughout much of Australia's development the approach has been to ensure each State and Territory had a flagship art museum, whilst encouraging visitors to 'take home' some art in the form of shared memories or exhibition catalogues.

Australia's Visual Arts and Craft sectors comprise a complex and subtle infrastructure that includes eight major State/Territory art museums, a similar number of exhibiting contemporary art organisations, 120 regional galleries, numerous tertiary training courses (both practical and theoretical). This infrastructure is mirrored by a corresponding pattern of organisations for craft, and Indigenous and new media art. Driving the sector are several sets of government policies that operate on a local, State or national basis. Most importantly there are some 20,000 living artists who, in turn, connect to commercial galleries and industries ranging from e-commerce to traditional tapestry.

The essential challenge facing the sector is how to strategically stimulate the development of contemporary art and craft within the available infrastructure to provoke yet ultimately reassure the public of their value. The following broadly sketches the features essential to Australia's development as a uniquely visual culture as identified by the Vision Day participants. Unsaid, but implied, is that without innovative artists, society itself risks becoming a blank canvas.

4.8.2 The present

For artists this comes down to a comparison with the situation of ten years ago.

- Artists face a competitive economic environment.
- Artists are entrepreneurial and see themselves in a professional role.
- Artists run small businesses and need to be multi-skilled in order to do so.
- Artists are more aware and concerned about economic, intellectual and moral rights.
- Artists work in smaller 'niche' groups.
- Artists work more with and in new technologies.
- Artists work across sectors and often not in the traditional arts sectors to develop their work.

- Artists work outside the arts infrastructure and can do so because of cheap production technologies they can readily access.
- It is common for individual artists to show work and be promoted as individuals, rather than themed/philosophical shows more popular 10 years ago.
- There are many distinct artist voices seeking resolution about the diversity of practice, opportunities, and political, economic and social issues.

Arts organisations

- Infrastructure is falling behind – arts organisations need to be empowered to deliver services they already provide and to build on potential projects/services that they themselves have identified: public access, marketing, adequate salaries and artists' fees, new technologies, publications, touring, and networking.
- Spectacular events and festivals provide competition for government and corporate funds, in pursuit of tourism and economic benefits.
- They are stretched to the maximum and need extra support. A crisis is looming.

Education

- Funding for tertiary education in the arts is decreasing.
- Session payments and poor conditions fail to reward sufficiently and attract the best practitioners to teach.
- New technologies are not sufficiently embraced in tertiary studies.
- Contemporary art needs to be part of the curriculum from primary, through secondary to tertiary-level education.
- Diversity and a future employment-focused system creates competition for 'space' for the arts in curricula at schools and universities.

Audiences

- Australians are responsive to the arts and value artists, although not as much as some other cultures. There is the sense that more people would engage as an arts audience if they were made more welcome.
- We need to identify the points/stages in life when people enter and leave our audience and to nurture them and attract them back.
- Australians have become more aware of Indigenous culture.
- There are, however, gaps in our understanding of the role and value of arts in a civil society and a diverse and vibrant community.
- Audiences want to be entertained.
- Audiences relate to the star concept of 'super artists' on the world stage.
- Niche audiences are developing for niche arts.
- Galleries have been forced to be more professional and show contemporary work well and cater for diverse needs.
- Australia has a conservative, critical media which lacks good art critics prepared to celebrate cutting-edge work. Critics tend to be afraid to promote work that is difficult/breaks new ground

Globalisation and technology

- The fascination with technology allows both very individual and anti-social behaviour, but there is also a greater need for spiritual and community engagement.
- Audiences are looking for the transformative experience in viewing and experiencing artists' work.
- While there is distinct evidence of mass global culture, there is also evidence of individuals' need for cultural differentiation and personalisation.

4.8.3 Key drivers of change

Technology

- There is greater use of technology in production and dissemination of work. This will challenge infrastructure, equipment and skills.
- Even for traditional arts practice there will be a big impact on artists in the way they run their business. The professionalism of artists is increasing.
- In niche arts, techno-ghettoes will form where artists avoid institutions altogether, creating greater fragmentation of what is termed 'visual arts'.
- Artists will create audiences and co-create work with audiences.
- There will be greater use of online dissemination of opinion and critical discussion, but in a global environment there will be a lot of noise. Who will know what and how to access it? Who will care? Can there be an explanation to broaden audiences?
- In the online environment, there could be new forms of artistic output and new commercial opportunities for artists.
- Technology will become less costly and more available over time.
- Commercial galleries could be bypassed by artists in direct dissemination of their work and direct relationships with audiences online.

Artists

- Rather than vocational careers, artists have careers valued for adding economic and creative benefits to other sectors.
- Multi-skilling is becoming a feature of the sector.
- There will be a convergence of artforms.
- Artists are required to justify themselves in non-creative terms (such as economic benefits to a region, or cultural tourism).
- There is an emphasis on value for audiences, rather than value to artists and their practice, with the potential danger of overlooking the producers of culture in favour of consumers of culture.

Art Organisations

- These are suffering low morale resulting from fewer rewards and declining audiences.
- Financial pressures may result in possible closures and mergers.

Arts education

- There is a decline in the number of tertiary courses and increased specialisation, creating pressures on arts schools to increasingly provide niche education.
- There are gaps in arts education which is not fulfilling professional needs and requirements.

Opportunities

Arts organisations

- Arts organisations have considerable depth of knowledge, experience and goodwill.
- Arts organisations are very lean.
- Arts organisations are close to artists, curators and writers.
- Arts organisations all the elements are there to help them flourish and use their full potential.
- Keen to build meaningful relationships with the wider community.

Artists

- There is increased recognition of individual artist's needs.
- Relevant legislation is on the agenda for artists' rights.
- Rising incomes, changing demographics, and better education lead to an affluent society and disposable incomes. This has the potential to increase artists' incomes and make their art a desirable commodity.

Technology

- Technology profoundly affects audiences who are looking for interactive experiences as co-creators.
- Technology influences artistic producers.
- Technology needs new 'content'.
- Technology has changed the concept of community and audience into digital and non-digital.
- Technology is the new, natural domain of the visual arts. It is shared with new 'partners'.

Education

- There is a solid base in visual arts/craft in the primary and secondary education system.
- We have an educated society with some awareness of cultural issues.

Australia Council's leadership role

The Australia Council is well placed to take a leadership role in:

- re-defining the social contract of art with society.
- re-branding art as relevant to society.
- ensuring that the community recognises that arts are an integral part of life.

International

- Internationalised art museums, conferences and biennales produce increased cultural opportunities for considerable exposure.
- Visits to Australia by international artists and curators and visits by Australians to exhibitions and forums, exchanges and internships create networking opportunities and provide knowledge, awareness, positioning.

4.8.4 The future

Those communities that are richest in their artistic tradition are also those that are most progressive in their economic performance and most resilient and secure in their economic structure.

— J.K. Galbraith

Infrastructure

- New resources deliver convincing access and public programs are aimed at different audiences, an enhanced use of technology, skills in promoting, writing, publishing, national and international networking.
- Key advocacy groups and national service organisations are better resourced to deliver effective communication networks, information and leadership skills.
- Contemporary art spaces, showing visual arts as well as craft and design are open in 50 regional locations, supported by all levels of government and local arts patrons.

Artists

- Artists are able to access government support at different stages in their career.
- Artists are able to access support through non-traditional means, including partnerships, sponsorships and patronage.
- Artists' rights are ensured and enforced, providing income and integrity.
- Artists' work is bought to form local collections to be lent free of charge to local residents.

Technology

- Technology is used intelligently by artists and organisations to create, promote, distribute and encourage cooperation through new modes of expression which defy traditional spaces, publication, information and exhibition strategies.
- There are virtual tours of exhibitions and collections which bring art into every classroom and onto wall-mounted screens in our living rooms.

International

- There are new cultural opportunities including exchanges, exhibitions, residencies, art/craft/design fairs, international advocacy networks.
- Touring international biennales come to our cities.
- Artists are invited (and paid) to attend major arts events.
- Arts writers and curators are on international juries, art museum boards and publication committees.

Audiences

- Targeted services are offered by arts organisations to raise awareness of the value of the arts (collecting, looking at, practicing, and reading about).
- There are contemporary art spaces and artists run initiatives that develop meaningful engagement between artists and audiences by demystifying art without losing what is unique.
- Arts and education have developed into a natural partnership that delivers tomorrow's viewers and collectors.
- Magazines like *Art Monthly* and *Object* are delivered with the weekend papers.

The Australia Council

- Has a leadership role in promoting the importance of art and culture.

Australians recognise that art:

- presents a sense of identity.
- counteracts fragmentation and becomes a unifying force for society.
- has a political voice.
- is a catalyst for the republic and for reconciliation.
- creates bridges between cultures.
- is a visual translator and keeper of our history.
- has become our major tool for export – where culture leads, trade follows.
- value-adds to other products and concepts.
- nurtures the creativity of young audiences.
- is identified by all government partners as the century's growth industry.

5 Analysis and Strategic Interpretation of the Statistical Profiles

This is a report commissioned, as part of the Planning for the Future project, from arts industry expert and policy analyst, Lesley Alway, entitled *Cultural Statistics and Sustainability – So What?* The statistical profiles on which this report is based are available at www.ozco.gov.au/issues/pff/.

5.1 Summary

As part of its Planning for the Future (PFF) project, the Australia Council commissioned a set of statistical profiles for all relevant areas of arts practice in order to assess the current status of the cultural sector and discern relevant trends. This report analyses the strategic implications of the data presented in the profiles.

The statistical data has been reviewed as a SWOT analysis, in conjunction with both the sector summaries arising from the Vision Day consultations and the Australia Council's definition of 'Sustainability and the Arts'. Conclusions and strategic implications have been summarised according to the key categories used in the statistical profiles (Supply, Demand, Sector and Funding), as well as key issues according to artform.

The major conclusion is that whilst growth has been relatively strong across the cultural sector (with some exceptions, such as dance), throughout the last decade, this growth has been largely supply driven. It also mirrors a relatively buoyant economic climate in Australia and internationally. However, indications are that both the Australian and global economies are currently in transition and likely to weaken in the short to medium term. Also, because cultural consumption is related to higher levels of education and lifestyle factors, there may be a short-term lag in overall demand prior to further expansion in the second half of the decade. Whilst there is some evidence of unmet demand in particular sectors, investment in research and development and new technology will be required to capitalise on emerging opportunities.

Four key strategies are proposed for further discussion and debate:

1. Macro-planning strategy

- 2001-03 (Conservation and R&D) Plan for lower growth/demand
- 2004-10 (Expansion and Innovation) Prepare for higher growth/demand
- 3Ds (Dialogue, Discussion and Debate)

2. Supply strategies

- R&D and Innovation
- Collaboration and Cooperation

3. Demand strategies

- Community/Local Access
- International Markets

4. Infrastructure strategies

- New Media Technologies
- SME[26] and niche organisation support

The analysis revealed six 'hotspots' or areas requiring further research:

- Economic/political climate assessment
- Update of statistics and performance indicators
- New Media Arts statistics
- Comparison of facts and perceptions for the Literature sector
- Review of the Dance sector
- International market data.

5.2 Introduction

Sustainability, or the long-term continuity of the arts sector, depends on maximising and balancing resources and capabilities to support both innovation and the conservation of arts activity.[27]

The Australia Council's Planning for the Future project is utilising a range of resources and research tools to assist in the data collection and identification of strategic choices for both the Council's three-year plan and the development of longer-term initiatives for each area of arts practice and for consultation with other stakeholders.

Inputs to the planning exercise comprise both qualitative material derived from sector Vision Days and quantitative material compiled from the latest statistical data available for all cultural sectors. The statistical profiles give a comprehensive overview and some analysis of available data for relevant sectors categorised according to:

SUPPLY

- Employment
- Organisations
- Product

DEMAND

- Household expenditure
- Attendances
- Participation

SECTOR

- Educational enrolments

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[26] Small to medium enterprises
[27] Drawn from Appendix 6.3

FUNDING

- Corporate support
- Government funding

The author of this material, Christopher Madden, recommends caution in the use of this material to draw strategic implications. Following this review, the issues below should be noted:

- Some of the material is very out-of-date. This is usual where ABS and particularly census data is used. However, it can be misleading in an increasingly dynamic technological and economic climate. For instance, data on the growth rate of organisations relates to the period 1980-91 and must be interpreted with a great deal of care as the structural dynamics of various sectors have changed markedly over the last 10 years.
- For some sectors, the Vision Day material provided a more up-to-date analysis – albeit more anecdotal – on the current status of various sectors, particularly in the case of CCD, which had already done some of its own research and planning. In a couple of sectors, most notably in Literature, there was a large disparity between the statistical data and the Vision Day assessment.
- The 'macro' nature of some of the statistics makes them difficult to analyse and draw strategic assumptions for specific sectors. Additionally, many of the statistics are subject to external factors outside the control of the cultural sector itself, or the Australia Council – i.e. employment, income levels and training may be the result of other economic, political and structural influences.
- Whilst relatively comprehensive, the statistics display major gaps if one is aiming to develop strategic options for the future. The data on New Media Arts is of limited value and focuses on technological take-up by consumers rather than of arts organisations or of product, audience or business development trends in the sector. Similarly, whilst there are some export statistics, the material on international market trends for each sector is limited.

5.3 The strategy roadmap

The Australia Council is undertaking a strategic planning process for both its own (internal), as well as industry (external), planning purposes. As such, PFF is attempting to answer the following questions:

Where are we? (current situation)

Where do we want to be? (preferred outcomes)

How do we get there? (options and strategies)

The statistical profile material provides some quantitative trend data towards answering the first of these questions. However, unless this material is interpreted in the context of the other two questions – the usual response is: So what?

Each sector's statistics were reviewed and subjected to a SWOT (Strength, Weakness, Opportunity, Threat) analysis. The key constraint is that, depending on what assumptions are made about outcomes, a threat can also be an opportunity or a strength may be interpreted as a weakness. For instance, evidence of funding growth can be interpreted as evidence of strong advocacy or weak, inherent viability.

It is assumed that the answer to 'Where do we want to go?' is contained very broadly in the Australia Council's concept of 'Sustainability and the Arts'[28], as well as in the future aspirations outlined in the sector Vision Day summaries. Any organisation attempting a strategic prioritisation has to make choices based on the best available data. A summary of the key SWOTs was read in conjunction with the Vision Day summaries to highlight the strongest matches and mismatches with each sector in order to develop strategic options and proposals.

The statistical profiles highlight the dynamic relationship between different industry elements of the (i.e. the link between growth in employment opportunities and demand and the relationship between product and distribution). The implication of this for the Australia Council's planning is the need for strategic investment in all three industry components: supply (product and artists); demand (market and audience); and infrastructure (management and governance). The key difficulty for the Australia Council is in trying to be all things to all sectors and artists – and indeed this expectation is revealed in the Vision Day summaries.

The strategic proposals outlined in section 5.5 are an attempt to answer the question 'How do we get where we want to be?' and move the planning process to the next stage. Whilst the strategic options are, to some extent, necessarily subjective, they have been informed by the above parameters and are offered – not as a solution – but to stimulate further dialogue, discussion and debate.

5.4 SWOT analysis

- The detailed statistical SWOT analyses for Total Arts and for each area of arts practice are presented at section 5.6.
- Drawing from these analyses, summary conclusions and corresponding strategic implications have been proposed under each of the statistical categories used in the statistical profiles (Table 1), as well as for each area of arts practice (Table 2).
- The conclusions and proposals outlined in the following sections have strong linkages to the Resources, Capabilities and Performance components of the 'Cycle of Sustainable Success' discussed in the model of sustainability (Appendix 6.3).

[28] See Appendix 6.3.

TABLE 1 – Summary Conclusions and Strategic Implications by Statistical Category		
Category	**Conclusion**	**Strategic Issues and Implications**
SUPPLY *Employment* *Organisations* *Product*	In most sectors growth has been strong both in employment opportunities and output, but this is primarily supply driven seen in both funding growth and numbers of organisations although data is somewhat out of date. Some reduction in 'core' funding in some sectors may be evidence of a shift to support demand and infrastructure areas of value chain, although changes in funding categories (i.e. international, AATSI and audience development) make this difficult to interpret. Different patterns of support for sectors are apparent and probably appropriate (i.e. high level of support for individuals in visual arts). Strong level of support for production in performing arts. Organisational support may be lagging given high growth and requirement for infrastructure support acknowledged at most Vision Days. Public support for funding facilities – but not for organisations.	Review **numbers and types of organisations** supporting each sector and review trends over last 10 years. Review levels **of individual / organisationa**l funding for each sector. A need to review concept of **'core funding**' in terms of funding rationales. Given high output – has product quality been maintained? What is the **R&D strategy** for investment in new product? Is growth likely to continue as economy is expected to slow? Can strategies be developed to prepare for **lower growth?** Will lower growth increase sustainability?
DEMAND *Household Expenditure* *Attendances* *Participation*	Some evidence that cultural demand is expandable with growth trends in household expenditure on culture and some unmet demand. Small overall growth in audiences, but decline in a couple of sectors (dance / theatre). Venue attendance stable but not growing with population or matching libraries/cinemas and gardens (although these are also cultural experiences). Some evidence that support for arts is related to lifestyle and higher education, therefore possible lag before attendances	Review information and distribution systems for the arts and invest/research/train in **new technology/media** options for cultural sector (i.e. e-commerce, audience development and product development). **Cross-market** with other sectors (such as cinemas, libraries and botanic gardens) through co-operation. Prepare **for increased demand in 2004** through investment in **R&D**

	increase in 2004-10. Audience demographic is ageing but young may be accessing arts through electronic distribution means. Barriers of price, information, local availability and perception of intimidation identified.	after slower economic growth in 2001-03**.** Improve **community identification and local access** to the arts.
SECTOR *Educational Enrolments*	Enrolments overall keeping pace with expansion in tertiary enrolments overall, although declines in some areas (such as dance and craft). Shift in preference to design/fashion/graphics courses from craft. Expansion of new technology and Internet access, particularly amongst younger people. Graduate careers increasingly involve the ability to work in a mix of contexts and sectors, including community, subsidised and commercial.	Review status **of relationship between arts agencies and tertiary education arts** sector. Enhancement of information and networking required at all levels of government cultural funding agencies. **Review new technology/media training** for all artists and arts managers. Improvement in **dialogue and debate** among students, artists and cultural managers regarding status and opportunities in the cultural sector. New, more flexible **funding and organisational models** will be required to facilitate cross-sector career structures.
FUNDING *Corporate Support* *Government Funding*	Real growth in funding from both government and corporate sources but not as much as welfare, social services area, therefore losing 'funding market share'. Public attitudinal shift more supportive of venue funding and less supportive of artist/organisation funding.	Effectiveness/professionalism of corporate/private support strategies for the arts. **Improve service and relationship with existing supporters** and research strategies utilised by other sectors. Review relationship with the Business and the Arts Foundation.

TABLE 2 -Summary Conclusions And Strategic Implications By Area of Arts Practice

Area	Conclusion	Strategic Implication
A&TSI Arts	Demand is very dependent on tourist industry. Secondary sales exceed primary sales Sector dominated by visual arts/craft /dance.	Diversify market/audiences. Review structure of sales/distribution if secondary sales are new work rather than genuine 'resales' if this disadvantages artists. More investment in A&TSI involvement with other sectors (theatre/literature).
CCD	Strong correlation between statistical indicators and CCD sector's own assessment and vision. Strong growth opportunities and willingness to undertake collaboration and partnerships. Social capital outcomes well understood but political/economic outcomes not so. Funding shift to local government.	Continue and finalise current planning project and promote process / outcomes internally and externally. Enhance partnership role with State / local government. Incentives for **collaborative programs** with other sectors. Promote economic/political outcomes in addition to social.
Dance	Statistics indicate some problems in sector, although figures may not reflect current situation. Audiences declining and growth of organisation below average and enrolments declining. Vision Day identified some opportunities with New Media Arts.	**Review infrastructure/organisation support** for dance. Build relationship **with training/ tertiary providers.** Build **local community access/**awareness with CCD. Explore **new media** opportunities for dance/choreographers.
Literature	Statistics indicate relatively strong sector but Vision Day assessment much more pessimistic. Strong participation/interest in creative writing. Importance of small publishers to new Australian titles	Review statistics trends through discussion with **Literature Fund and sector.** Possible growth in writer's festivals/ centres at **local/community level.** Support **for small publishers** required. Continue to pursue **international**

	Concern about rationalisation of publishing houses and decline in editorial support. Australian market too small. UK/USA has greater potential than some others.	**market** opportunities in USA/UK.
Music	Parts of sector relatively well funded and 'healthy', although ageing audience. Increased government funding and declining sponsorship may affect 'sustainability' in the long term. Young people may be accessing music electronically rather than via live concerts.	Review strategies for support to both **live performance and recorded music** which may be more critical than 'genre funding' (i.e. jazz/ classical / rock etc.). Improve **corporate support** for music.
New Media Arts	National statistical information in relation to cultural sector/new media use is poor. Usage/access higher among young people. B2B[29] use increasingly important.	Research new media usage trends and opportunities in cultural sector in three areas: • Business management • Market development • Product development. Review relationship with DCITA and planned training programs.
Theatre	Experimental theatregoers are more frequent attendees. Attendance rates stable, but vulnerable. Audience profile ageing and non-English speaking background people are under-represented in audiences.	Review infrastructure support to **independent artists and small organisations**. **R&D** into new product to maintain market share. Work with **multicultural arts** agencies to identify theatre opportunities.
Visual Arts/Craft	Strong educational enrolments maintained. Emphasis on individual versus organisations grants Expected increase in demand for art museums. Opportunities for international/export is developing.	Review infrastructure support to visual artists (i.e**. artist spaces**). Management skills for museum/gallery managers needed. Build relationships with existing **international markets.**

[29] B2B means Business to Business

5.5 *Strategic proposals*

5.5.1 Macro-planning strategy

- **2001-03 (Conservation and R&D)**

Plan for stable or lower growth and demand in the short term. Consolidate infrastructure and invest in new product development. Focus on maintaining audiences and improving relationships with most likely targets. Invest in training for future growth. Strong investment in technology.

- **2004-10 (Expansion and innovation)**

Prepare for higher growth/demand in the long term. Create opportunities to take greater risks in testing new product, expanding markets and infrastructure. Reap the benefits of prior three-year investment in product, technology and management development.

- **3D (Dialogue, discussion and debate)**

Articulate strategy and options to all stakeholders, including other government agencies and sector representatives. Secure commitment from Australia Council staff and undertake internal marketing of the strategy. Communicate often and consistently. Use the next three years to debate issues arising from both the statistical profiles and Vision Days in detail.

5.5.2 Supply Strategies

- **R&D and innovation**

Invest in new product and development and distribution mechanisms with a view to the long term (three-year time frame).

- **Collaboration and cooperation**

Develop funding priorities for collaborative projects for both product and management. Also, build relationships and programs with tertiary arts sector to improve communication, influence training strategies and assist career development options for new graduates.

5.5.3 Demand strategies

- **Community/local access**

Build on successful Regional Arts Fund initiatives and translate to all local government, including metropolitan to improve access and identification with the arts at a local level. Utilise leadership and partnership strengths of CCD with local government.

- **International markets**

Continue and enhance investment in overseas markets with a focus on consolidating existing markets and relationships prior to exploring new markets.

5.5.4 Infrastructure Strategies

- **New Media technologies**

Further research and strong investment in product, market and business applications.

- **SME and niche organisation support**

Review support for organisations that promote experimental and niche work.

5.5.5 Hotspots

The following six areas have been identified from the above study as requiring further research or discussion.[30]

5.5.5.1 Economic/political climate assessment

- The statistical profiles and Vision Days document the key issues and vision for the cultural sector and artform areas, as well as noting implications of social and technological change. Apart from the influence of globalisation, there is little assessment of the current and future economic climate in terms of growth and issues, such as the effect of the GST. A study of the latter is currently under way and outcomes should be factored into the strategic plan.
- Given the softening economic trend that is currently emerging and likely to influence issues such as demand for the next 1-3 years, a more thorough analysis of the economic outlook and its likely impact on the arts is warranted. Whilst some initial observations have been made in this study, it is unlikely that the cultural sector would be quarantined from any recessionary trends.
- As a number of States and the Commonwealth will be facing elections over the next 12 months, it will be necessary to monitor any key policy and/or resource implications for the arts arising from the election outcomes.

5.5.5.2 Currency of statistics and performance indicators

The report has previously cautioned the interpretation of the statistics as some are quite out of date and recent statistics are unavailable for key issues such as the numbers and growth of organisations. The statistical profiles document is valuable, as it has brought this information together according to artform for the first time. It would be useful to fill the gaps with more up-to-date information and monitor key indicators annually to assess progress in delivering selected strategies.

5.5.5.3 New Media Arts statistics

The data on new media arts is of limited use in assessing artform strategies and the report notes that relevant statistics are not available. More detailed research is required on current and potential usage of new media in the cultural sector for product, market and business development.[31]

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[30] In response to this general issue, a status report on current plans for selected industry research has been prepared and is provided at Appendix 6.6.
[31] Some statistics are available for Victoria through the *Digital Imagination* report undertaken by Reece Lamshed from In.site enterprise in 1999.

5.5.5.4 Comparison of facts and perceptions for the Literature sector

There appears to be a large disparity between the Vision Day assessment of the Literature sector and the more positive indicators in the statistical data. This may need some further discussion with the Literature Fund and key sector stakeholders.[32]

5.5.5.5 Review of the Dance sector

Whilst much of the statistical data was relatively positive for many of the sectors, the area of most concern appears to be the Dance sector. This could be due to the currency of the data which does not take account of some new initiatives in dance and some structural changes arising out of the Nugent Report. However, this sector would appear to warrant close attention – particularly in a softening economic climate.

5.5.5.6 International market data

Given the importance of international markets and cultural exchange to artistic, economic and social outcomes for the cultural sector and Australia, a more detailed review of the quite extensive available data should be made to integrate the international strategies already under development. The Australia Council and Arts Victoria have already produced a major research document which could be of use within the broader strategic planning framework.

[32] The data on which this analysis was conducted predate the introduction of the GST. Anecdotal evidence suggests that since this time, there has been a decline in book sales. Research is being conducted to determine the actual impact.

5.5.6 Statistical SWOTS for each area of arts practice

STATISTICAL SWOT – TOTAL ARTS				
STRENGTH	**WEAKNESS**	**OPPORTUNITY**	**THREAT**	**SUMMARY**
83% of adult Australians attend some form of cultural activity – that is twice the number that attend sport. Trends indicate the arts are a growth industry i.e. arts output increased by 7% -10% which is more than twice the rate of growth for other parts of the economy (3%). Employment increased average 4.4% p.a. compared to 2% for total and trends indicate supply of labour increased in 1990s. Spending on arts etc. grew by 29% between 1989 –94 (but price data not available). Public attitudes more supportive of arts facilities.	People from non-English speaking countries have below-average attendance at performing arts. Attendance rates for artistic venues vary between 9% - 25% . (Inter-national average 20% and relatively stable). Lower than cinema (67%) botanic gardens (34%) and libraries (38%). Arts consumption related to lifestyle and 'path dependent'. Artists' incomes declined relative to other incomes.	Women are more active consumers of arts than men. Higher levels of education are associated with higher participation and support for arts. Barriers to arts include price, information, local availability and sense of intimidation. Data indicates current demand for the arts is expandable. University art enrolments increased similar to total enrolments and Year 12 art courses grew more. Growth in media coverage over last 30 years. Artists are increasingly working across sectors including community, subsidised and commercial.	Corporate sponsorship grew in real terms, but proportion going to arts declined from 13%-5%. Government funding increased in 'real' terms and per person. But proportion going to 'core arts' declined. Growth from local and State government – not Commonwealth. Government expenditure on arts etc. increased by less than total and less than for education, health and welfare. Attendances stable in 1990s, but have not kept pace with population growth. (Could be definitional problem with some activities – particularly for young people). Public attitudes less supportive of professional artists. More Australians believe arts orgs should be self-funding.	Cultural sector exhibits strong growth, but mainly supply driven. Increased employment opportunities for artists, but incomes declining. Funding increased in real terms but proportionally less than health/welfare sector. Proportion of funding through local and State sources increasing compared to the Commonwealth. Public attitudes supportive of venues, but less so of artists and organisations. New models of creating and delivering cultural product and experiences are being developed through cross-sectoral and artform collaborations.

STATISTICAL SWOT – ABORIGINAL AND TORRES STRAIT ISLANDER ARTS				
STRENGTH	**WEAKNESS**	**OPPORTUNITY**	**THREAT**	**SUMMARY**
Number of A&TSI organisations grew faster than number of cultural organisations Demand strong partly due to tourist interest. Strong representation in commercial galleries (11%). Visual arts and design very strong (30% of A&TSI artists). Increasing prices. Growth in A&TSI funding through the Australia Council.	High level of secondary sales versus commission sales. (If this is related to new work, then economics of industry structure may disadvantage A&TSI artists).	Sales to tourism audiences greater than 50%. Price and information are not barriers to interest/purchase.	Highly dependant on tourism numbers Sales have increased with numbers of tourists, but proportion of expenditure on A&TSI art declined. Awareness/interest in A&TSI art from tourists in apparent decline.	Strong growth in organisations and infrastructure evident. Strong representation in visual arts and dance. Strong tourism sales but some evidence of visitor interest waning. Secondary sales higher than commission sales.

STATISTICAL SWOT – COMMUNITY CULTURAL DEVELOPMENT				
STRENGTH	**WEAKNESS**	**OPPORTUNITY**	**THREAT**	**SUMMARY**
External social and educational benefits perceived as significant as artistic benefits. Growth in community-based work for artists (1988-93).	Proportion of time devoted to principal artwork declined versus increase for all artists. CCD has increased appreciation for	Whilst there has been a federal funding decline from 16%-10%, there has been a corresponding shift and increase through local government of 6%-22%.	Poor public perception/understanding of political/economic benefits of CCD art.	Growth in funding, but shift from federal to local government Social capital outcomes well understood, but important political/economic

Number of community artists increased greater than all artists. Incomes have increased and are more stable. Number of CCD organisations grew faster than other arts organisations (1991) Funding increased in real terms.	the arts, but not affected demand.	Identification of social capital investment as a significant outcome of CCD work.		benefits less understood by public. Strong employment opportunities and growth in incomes but less opportunity for 'principal' artform. (Contradiction in CCD as artform in own right?) Involvement/understanding by public does not translate into demand.

STATISTICAL SWOT – DANCE				
STRENGTH	**WEAKNESS**	**OPPORTUNITY**	**THREAT**	**SUMMARY**
Employment growing faster than total employment. Audience size larger than industry average.	Number of dance organisations grew less than all performing arts organisations (1991). Numbers enrolled in dance courses decreased more than other arts enrolments. Income lower than all cultural and other occupations.	Little indication of opportunities from statistics, but Vision Days identified New Media technologies, collaborative projects with other artforms and CCD as possibilities.	Decline in dance attendances (-1%) compared to 2% increase 1995-99 in all cultural occupations. Higher dependency on proportion of government funding. (35% versus 30% industry average).	Expansion of job opportunities, but declining income. Audiences larger than average, but declining. Greater dependence on government funding.

STATISTICAL SWOT – LITERATURE[33]				
STRENGTH	**WEAKNESS**	**OPPORTUNITY**	**THREAT**	**SUMMARY**
Higher median incomes than average. Value of publishing grew faster than the total economy, but slower than cultural sector (1975-94). 50% sales are new titles and 60% are Australian titles. Growth in demand stronger than total expenditure (1984-94) Retail value strong. Participation in reading increasing.	Employment grew more slowly than total employment. Industry dominated by a small number of large businesses and a big number of small businesses. Small businesses have a higher proportion of sales from Australian titles.	New media industries expanding the role and concept of publishing. Trade deficit declined in books 1992-96 and Export value to USA/UK is more significant. Growth in the number of Australian fiction titles published 1989-92. (7 %-13%) Increase in proportion of Australian books borrowed. High incidence of creative writing (18% population) and is most popular form of active participation.	Publishers reduced stocks (1994-98), were less profitable and focused more on sales than publishing. Apparent decline in funding from non-federal sources? Revenue from educational/fiction titles declined and non-fiction/children's titles increased.	Relatively strong industry profile in supply/demand and export. High active participation in writing

[33] The data on which this analysis was conducted predate the introduction of the GST. Anecdotal evidence suggests that since this time, there has been a decline in book sales. Research is being conducted to determine the actual impact.

STATISTICAL SWOT – MUSIC				
STRENGTH	**WEAKNESS**	**OPPORTUNITY**	**THREAT**	**SUMMARY**
Growing employment in music occupations and proportion of people involved in music as part of their main job increased between 1997 and 1999. Funding increased relative to all cultural funding.	Music incomes are declining as employment expands. Live music organisations are larger than average and recorded music organisations are smaller.	Expenditure on music items growing at a faster rate than average expenditure. Digital and new media technologies increasingly being used for distribution Increase in the value of music exports 1992-93 Public involvement in music increasing but not as fast as other cultural/leisure options. 4 out of 5 music involvements are as a performer.	Business sponsorship of music declined by $6m in 1993-96. Attendances declined for popular music & opera/musical and increased for classical music. Expenditure on recorded music was volatile 1975-94 but could be related to pricing rather than demand changes.	General statistical trends are positive except for music artist incomes – but could be explained by artists choosing to work full- time on music as opportunities expand. Increase in classical music could be due to ageing demographic and access to popular music through electronic means rather than live performance. High particip-ation/practitioner rate. Funding increase but sponsorship decrease.

STATISTICAL SWOT – NEW MEDIA ARTS				
STRENGTH	**WEAKNESS**	**OPPORTUNITY**	**THREAT**	**SUMMARY**
Internet access of population strong and growing. Purchase of books strong through Internet. High usage of computers by SMEs.	Statistics related to computer usage generally and not specifically MM[34] as artform or use of new technology by cultural organisations (Refer 'Hotspots' section 5.5.5).	Access to Internet higher with young people, but high overall. E-commerce more utilised B2B than consumer purchasing. Growth in interactive MM titles (primarily CD - ROMs).	Lack of training resources to keep pace with developments and opportunities. Resistance from 'traditional' artforms and management practices.	Strong growth in Internet access and usage. B2B applications important. Growth of interactive titles. Lack of national statistics on cultural/new media usage.

STATISTICAL SWOT – THEATRE				
STRENGTH	**WEAKNESS**	**OPPORTUNITY**	**THREAT**	**SUMMARY**
Theatre organisations grew at a faster rate than other organisations (1991). Employment in drama occupations grew faster than total employment 1999-96. Enrolments in drama courses grew 1991-96, whilst other arts enrolments declined.	Ticket prices increased more than average ticket prices. Median incomes for actors were lower than other occupations in 1996.	Attendance rates stable (1995-99) after decline in 1991-95. However, less than all culture which increased 2% (cinema 5%). Demand highest for humorous theatre and general drama. Experimental theatregoers are more frequent attendees.	Sponsorship to theatre declined as a proportion of total arts sponsorship. Age profile of audience getting older. Theatre funding appears to decline (32-18%) as a proportion of total Council funding, but must be read with caution due to classification shifts.	Theatre orgs grew faster but figure out of date. Attendance rates stabilised following a decline but not matching growth in other sectors or competition from cinema. Ageing audience profile but experimental theatregoers (likely to be younger) are more frequent attendees.

[34] Multimedia

STATISTICAL SWOT – VISUAL ARTS / CRAFT				
STRENGTH	**WEAKNESS**	**OPPORTUNITY**	**THREAT**	**SUMMARY**
Strong growth in visual arts organisations – higher than other cultural organisations Attendance at art museums increased. Strong household expenditure on art/craft. Employment in visual art, craft/design occupations grew faster than total employment (1986-96). Strong growth in grants to individuals from 19% to 32%	Attendances at non-art museums decreased. Balance of trade deficit in the visual arts ($79m in 1994-95). Declining income levels. Graduates have a lower-than-average employment in arts occupations than other arts graduates.	Visual arts increased as a proportion of all arts sponsorship (1993-96). 25% artwork sales were through commercial galleries. Possible expansion of art museum attendance 2004-10 as a result of lag in higher education influence. Shift from craft to graphic art /fashion design in enrolments and increase in art conservation, film and photography.	Australia Council funding declined, but government funding to galleries increased. Craft enrolments decreasing in demand. Art gallery attendance rates fell 1991-99.	Strong growth in visual arts organisations, but increase in grants to individuals. Growing employment opportunities but lower income levels. Lag in audience demand for art museums. Shift in preference for arts training within sector from craft to graphic/design areas.

STATISTICAL SWOT – PERFORMING ARTS				
STRENGTH	**WEAKNESS**	**OPPORTUNITY**	**THREAT**	**SUMMARY**
Performing arts employment grew faster than total employment and same as cultural employment. Industry output grew faster than rest of economy. Represents 47% of cultural organisations and growth the same as for all cultural organisations Surpluses recorded 1991-97. The Australia Council funding increased 9% in real terms, which is greater than other core arts.	Dance and drama graduates have a higher rate of unemployment than other occupations. Full-time median incomes lower, but part-time higher. Lower employment representation of people from non-English speaking background. Music and venue funding increased faster than other performing arts and total cultural funding.	Some evidence of shift in preference to live performances based on household expenditure. Government funding targeted to production rather than venues and services.	Sponsorship more likely to be from medium-large firms. Prices of live performances decreased in real terms. Attendance rates declined except for classical music. Enrolments in music grew less than other performing arts. Government subsidy per attendance increased 1991-97.	Performing arts is a growth sector in terms of employment and output, but strongly supply driven. Prices and attendance rates have declined. Government subsidy per attendance increased.

6 Appendices

6.1 Terms of reference

As foreshadowed in its strategic plan, *Directions 1999-2001*, the Australia Council has decided to develop a broad strategy to nurture the vitality and sustainability of the arts in Australia. The terms of reference, agreed by Council on 31 January 2000, are as follows:

1. The plan, which is to cover a five-to-ten year timeframe, will provide an organising framework to analyse the characteristics of subsidised arts activity and its place in the Australian community.

2. Based on this analysis, the plan will identify trends, issues and opportunities and make recommendations to assist the preservation and strengthening of the arts in Australia.

3. There are three key reasons why Council is undertaking this work:

   - To address concern raised by the Council about the sustainability of the arts sector and the need for coherent long-term artform development strategies.

   - To fulfil the role of the Council as the Federal government's arts advisory body.

   - To complement the Major Performing Arts Inquiry, the final report of which was released on 16 December 1999.

4. The plan is to be developed for the information of the Australia Council and its Funds/Board, Federal, State and local governments and the arts sector.

5. In developing the plan, the Council will consult with staff and members of the Australia Council and its Funds/Board, the Department of Communications, Information Technology and the Arts, State and local governments, the arts sector and other significant external stakeholders.

6. While the plan will relate predominantly to arts practice supported by the Australia Council, it will inevitably need to take stock of other aspects of the creative industries.[35]

7. The analysis will take account of recent cultural policies and industry plans, current information and data sources both Australian and, where appropriate, international. Apparent gaps or research needs are to be identified.

8. The plan, which is expected to be completed by December 2000, will be conducted according to a timetable agreed by Council.

[35] The Australian Bureau of Statistics is currently reassessing the classification of the Framework for Culture/Leisure Statistics under which 'The Arts' will probably include literature, broadcast media and film, visual arts, design, music, performing arts, and arts education.

6.2 The Australia Council Act

The Australia Council is a Commonwealth statutory authority created under the Australia Council Act 1975. Under the Act the Council has substantial independence from government in its policy-making and funding roles. It provides advice on cultural matters to the Commonwealth Government through the Minister for the Arts.

Section 5 of the Act defines the functions of the Council as:

(a) to formulate and carry out policies designed:

> (i) to promote excellence in the arts;
>
> (ii) to provide, and encourage the provision of, opportunities for persons to practise the arts;
>
> (iii) to promote the appreciation, understanding and enjoyment of the arts;
>
> (iv) to promote the general application of the arts in the community;
>
> (v) to foster the expression of a national identity by means of the arts;
>
> (vi) to uphold and promote the right of persons to freedom in the practice of the arts;
>
> (vii) to promote knowledge and appreciation of Australian arts by persons in other countries;
>
> (viii) to promote incentives for, and recognition of, achievement in the practice of the arts; and
>
> (ix) to encourage the support of the arts by the States, local governing bodies and other persons and organisations;

(b) to furnish advice to the Government of the Commonwealth, either of its own motion or upon request made to it by the Minister, on matters connected with the promotion of the arts or otherwise relating to the performance of its functions; and

(c) to do anything incidental or conducive to the performance of any of the foregoing functions.

6.3 *What do we mean by 'sustainability' of the arts?*

The Australia Council defines the term 'sustainability' as the combination of resources employed in the arts to sustain and renew the creative potential of the community at large. These resources comprise:

(a) **Artistic –** the inspiration, creativity and innovation of artists, the lynchpin to sustainability.

(b) **Knowledge** – skills, expertise and know-how in creative practices, management or policy. Continual learning and the accumulation of a body of knowledge and 'corporate memory' are essential to growth.

(c) **Financial** – from commercial activity (sales or box office), corporate and philanthropic support or volunteers, or from government funding (Federal, State/Territory, local).

(d) **Social/market support –** from the general public or the arts sector or government. Reflected in audiences or networks between people with similar interests or aims.

(e) **Physical and institutional infrastructures** – including galleries, performing arts venues and libraries, and formal networks between individuals and organisations.

These resources combine and develop into **capabilities**. The application of these capabilities results in **performance**.[36] The development of both capabilities and performance feed back into the resources.

Resources tend to decline over time if not maintained, renewed or developed. The baseline for sustainability is resisting this decline and securing the future by means of a dynamic growth in resources. Ensuring the sustainability of the arts requires an understanding of the resource dynamics and the formulation of strategies to maintain or grow all types of resources, capabilities and performance . The success of these strategies can be gauged by the change in the resources over time.

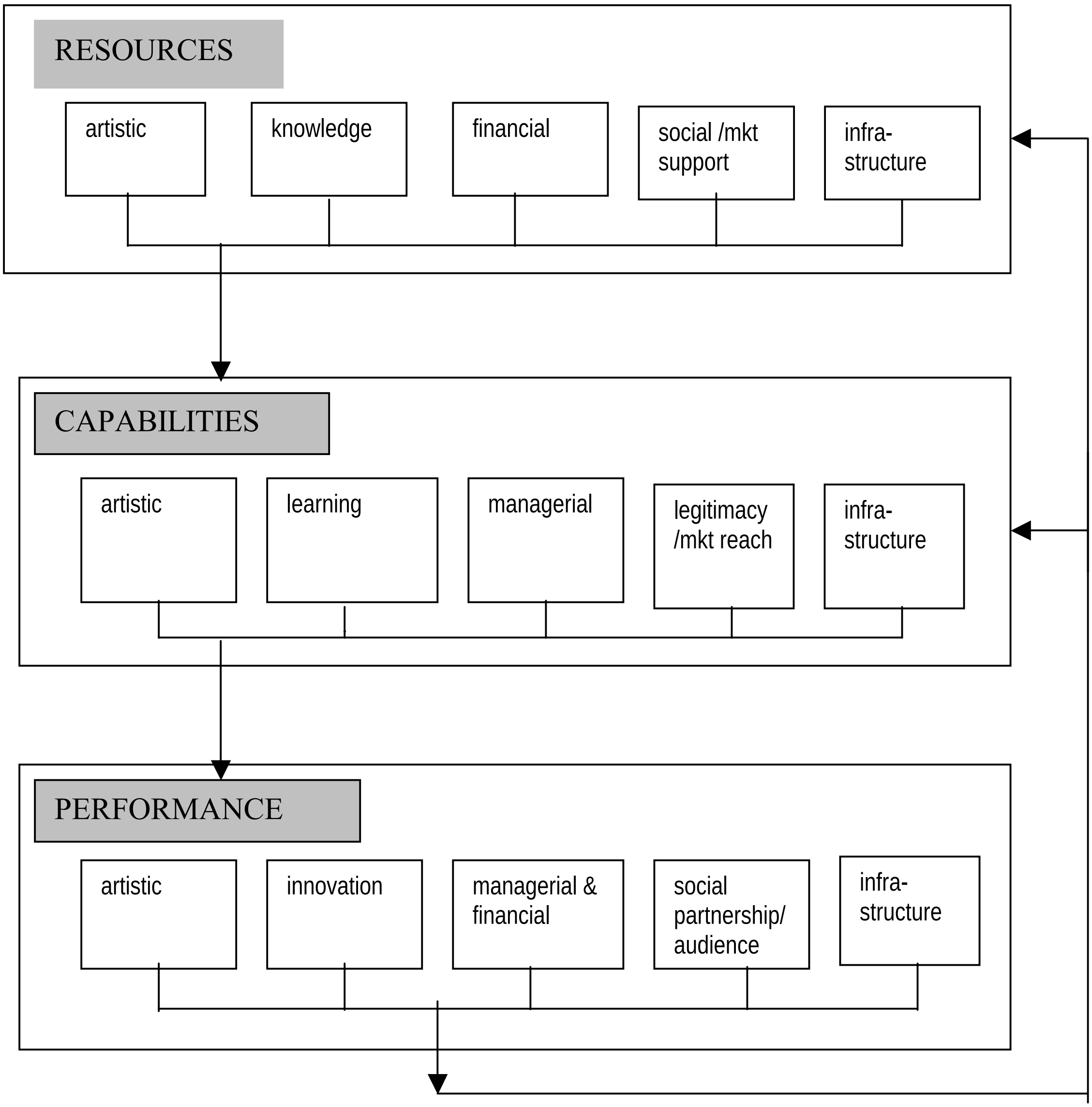
Resource bases are intertwined and interdependent. The 'cycle of success' is generated by the interaction of all five types of resources, building capabilities and enabling performance. These, in turn, help build resources and capabilities and so on.

A part of the financial resources available to the arts, the Australia Council's budget, can be used to leverage growth in other resources. A balance needs to be sought between using this resource to maintain current artistic 'stock' (human and physical) and supporting growth and innovation.[37] Both are essential to a sustainable arts sector.

[36] 'Performance' is used in the broadest sense and applies to all areas of arts practice.
[37] 'Innovation' is used to denote new developments in the arts, not an artistic genre.

Sustainability, or the long-term continuity of the arts sector, depends on maximising and balancing resources and capabilities to support both innovation and the conservation of arts activity.[38]

CYCLE OF SUSTAINABLE SUCCESS



As the model suggests, the key to sustainability is not just the building of financial resources. It is a complex relationship between the renewal of financial and other resources (such as artistic skill, knowledge, social support and infrastructure); capabilities and performance.

This is evident in the diversity of issues raised in this paper.

[38] It is important to note that the concept of sustainability relates to the *whole* of the art sector, *not* individual artists or organisations. The Council does not suggest that it can ensure the long-term existence (i.e. *viability)* of any single organisation or artist. Also, Council's commitment to sustainability of the arts is *not* about expecting individual arts organisations to be *self*-sustaining.

6.4 *Intended outcomes of Vision Days*

The briefing for Vision Day participants outlined the following intended outcomes:

The first outcome will be a shared view of the key issues and trends which are having an impact on your areas of arts practice in 2000 and the current strengths and weaknesses, opportunities and threats.

The second outcome will be a shared view of possible or preferred futures for your area of arts practice over the next 10 years to 2010. This would cover:

- Arts practice (How might theatre be created and presented?) – could cover more collaborative or converging practices, changing roles of artists, or the form of work produced. Discussion to cover the full spectrum – commercial/professional to amateur/community.
- Arts audiences (How might the community experience and reward the work of artists?) – this might cover different media, venues, formats, copyright.
- Sector/industry: given the above, what infrastructures need to be established or resourced to encourage both creation and public involvement in the arts? And what partnerships with other sectors or agencies might be most valuable for arts practice in coming years?
- Balancing efforts to maintain existing arts activities with the need to encourage innovation in form and content (the key to 'sustainability').
- Looking back – how do changes in the arts sector (including its infrastructure) over the last 10 years inform the next 10?

To achieve these outcomes, the following key drivers of change will probably be considered during the course of the day:

- Technology – What impact does it have on creating, distributing, marketing, receiving and paying for arts as well as communicating/debating ideas about the arts.
- Economics – How do the changes in Australia's economy (and the growth of the 'knowledge industries') impact on the arts sector? how can the commercial potential of the cultural industries be leveraged to assist artistic R&D? What is the impact of increasing costs on arts organisations?
- Society – Changing employment patterns, leisure preferences, e-consumerism, attitudes about the value of the arts, role of arts in developing civil society and contributing to communities in need.
- Policy and regulation – What are the key trends or apparent contradictions (e.g. taxation, philanthropy, social security, intellectual property, artists' rights, broadcasting, funding)?
- Education – What impact will current (arts) education programs have on the Australian arts in 10 years? What might or could the future of education in this sector be?
- Innovation – What can be done to assist collaboration and knowledge sharing in order to stimulate innovation?
- Globalisation/internationalisation – What are the impacts on artists and audiences of increased ease of access to, and the influence of, other countries, cultures, communities?

6.5 Participants in the Vision Days

Aboriginal and Torres Strait Islander Arts (13 December 2000, Sydney) – Kylie Belling, Samantha Chalmers, Cathie Craigie, Wesley Enoch, Richard Franklin, Robyn Forester, Lola Greeno, Anita Heiss, Bessie Liddle, Clare Inkamela, Carol Innes, Kerri McIlvenny, Tess McLennan, Hetti Perkins, Rhoda Roberts, Rick Shapter, Gerard Scifo, Heather Shearer, Richard Walley.

***Community Cultural Development (15 July 2000, Canberra)* –** Dulcie Bronsh, Andrew Donovan, Bernice Gerrand, Anna Grega, Mary Hutchison, Onko Kingma, Julie McCrossin, Dominic Mico, Frank Panucci, Trevor Pierce, Scott Rankin, Julie Shiels, Meg Simpson, Robyn Williams, David Whitney, Gareth Wreford.

Dance (18 July 2000, Sydney)* –** Naomi Black, Sally Chance, Jo Croft, Sue Healey, Stefan Karlsson, Ron Layne, Felicity MacDonald, Pino Migliorino, Lydia Miller, Tim Newth, John O'Connell, Rosalind Richards, Maggi Sietsma, Helen Simondson, Garry Stewart, Ben Strout, Tarcisio Teatini-Climaco, Angharad Wynne-Jones. ***(August 1999, Adelaide) Susan Street, Angharad Wynne-Jones, Ben Strout, Rosalind Richards, Julie Dyson, Lee Christophis, Stephen Armstrong, Stephen Burstow, Garry Stewart, Teresa Crea.

***Music (23 July 2000, Sydney)* –** Sean Bridgeman, Kylie Burtland, Vanessa Chalker, Clare Clifton-Bligh, Eva Cox, Marshall Cullen, John Davis, Gavin Findlay, Michael Fortescue, Cameron Goold, Michael Hannan, Robyn Johnston, Richard Letts, Trish Ludgate, Marcella McAdam, Kurt Olofsson, Helen Rusak, Nigel Sabin, Shane Simpson, Sue Spence, Tim Stevens, Jillianne Stoll, Guy Strazzullo, Nathan Waks, Andrew Walker, David Watts, Peta Williams, Peter Winkler.

Literature (19 August 2000, Melbourne) – Simon Clews, Gail Cork, Alison Croggon, Mary Dalmau, Peter Davis, Michele Field, Craig Garrett, Libby Gleeson, Sandy Grant, Connie Gregory, Nicholas Hasluck, Jack Hibberd, Christine McKenzie, Bruce Pascoe, Andrea Stretton.

Theatre (29 August 2000, Sydney) – Janis Balodis, Cathy Craigie, Campion Decent, Carrillo Gantner, Lana Gishkariany, Kim Hanna, Rachel Healy, Sue Hunt, Nigel Jamieson, Lachlan McDonald, Caitlin Newton-Broad, David Pledger, John Romeril, Kris Scudds, Peter Sellars, Jeremy Sims, Ben Strout, Cheryle Yin-Lo.

New Media Arts (30 August 2000, Sydney) – Lisa Colley, Kay Daniels, Campion Decent, Victoria Doidge, Reed Everingham, Jenny Fraser, Peter Hennessey, Laura Jordan, Lyndal Jones, Beth Jackson, Peter Lavery, Amanda Mcdonald Crowley, Julianne Pierce, Jesse Reynolds, John Rimmer, Julie Regan, Philip Rolfe, Jenny Spinks, Mari Velonaki, Angharad Wynne-Jones, Fiona Winning.

Visual Arts/Craft (1 September 2000, Adelaide) – Geoffrey Edwards, Susan Fereday, Noel Frankham, Greg Healey, Peter Hennessey, Helen Hyatt-Johnston, Bruce James, Michael Keighery, Sean Kelly, Lindy Lee, Pam Lofts, Kate McMillan, Christine Moloney, Kevin Murray, Joe Pascoe, Daniel Palmer, Ron Radford, Scott Redford, Darren Siwes, David Throsby, Anna Waldmann, Bill Wright.

6.6 Status of selected forthcoming arts industry research initiatives

Employment	**Source**	**Most recent data**	**Next report due**	**Notes**
'Main job' artists	ABS Census	1996	July 2002	
Paid/unpaid workers in the arts	ABS survey	1999	Dec 2001	
Practising professional artists	AC survey	1983	2002	4th ed in progress
Indigenous artists (writers)	AC survey	na	2001	In preparation
Industry structure				
Number of organisations	Count of ***Ozarts*** listing	1996		Relates to 2nd and 3rd tier companies
Number of larger organisations	ABS SIS[39]	1996-97	Apr-Jul 2001	
Turnover	As above	1996-97	Apr-Jul 2001	
Production data	As above	1996-97	Apr-Jul 2001	
Income	As above	1996-97	Apr-Jul 2001	
Expenditure	As above	1996-97	Apr-Jul 2001	
Industry economic value				
Overall value	ABS Nat'l accounts	1997-98	2002 est	
Value of individual sectors	ABS SIS	1996-97	Apr-Jul 2001	
Export of arts services	ABS SIS	1996-97	Apr-Jul 2001	
Export of arts goods/ products	ABS Intern-national trade stats	1996-97	2001	Limited by ABS collection methods and classifications
Attendance & consumption and related statistics				
Arts attendances	ABS survey	1999	2002	
Spending by Australians	ABS HES[40]	1998-99	2004 est	
Australians' attitudes to the arts	AC	1999		
Public attitudes to the arts	AC /ABS	1997		
Time spent on the arts	ABS Time Use	1997	2003 est	
Sectoral data				
Books and reading	AC report	1996		Impact of GST being monitored
Visual arts industry	NAVA study	na	2001	In progress
Music industry	AC report	1987		
Performing arts audiences	AC report	1997		
Contemporary arts audiences	AC study	na	2001	In progress
Indigenous cultural product	SWG project	na	2002 est	In progress
Cultural funding data				
Government funding	SWG[41]	1998-99	July 2001	Updated annually
Business sponsorship	ABS SIS	1996-97	2002	SIS in progress

[39] Service Industries Surveys
[40] Household Expenditure Survey
[41] CMC's Statistical Working Group