



Australian Government



Australia Council
for the Arts

More than bums on seats:
**Australian
participation
in the arts.**

Research report

Prepared for the Australia
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Australian participation in the arts.

Introduction

The Australia Council aims to generate research that creates value for the arts sector, which adds new knowledge to the field, and provides insight and direction for policy, practice and innovation. In 2009 the Australia Council re-invigorated its research program and identified five strategic priorities:

- artists careers
- audience access and participation
- business and philanthropic involvement in the arts
- arts content for the digital era
- increased support for the arts.

This report addresses the priority – ‘audience access and participation in the arts’. It has been ten years since the Australia Council undertook such a major study of public engagement and participation in the arts, so this research was both timely and necessary.

In undertaking this project we wanted to:

- get a more detailed picture of how Australians engage with the arts
- understand how different types of people engage
- identify the factors most important in determining arts attendance and participation, as well as non attendance and non participation
- gather useful data to improve understanding of the relationship between attendance and participation in the arts and between non attendance and non participation
- better understand the role that digital technologies were playing in the way Australians engage with the arts.

For policy makers, the research identifies the key factors that impact on Australian participation in the arts, including education, and the barriers and incentives for participation that can be addressed in future policies and funding strategies. For the arts sector, the research provides a comprehensive picture of the way Australians are involved in the arts and helps us to understand audience attitudes and values and the ways these impact on participation and attendance.

We want to encourage arts organisations to embrace this research, to see it as an essential resource, and rely on the Australia Council as a leader in research into Australia’s art and culture.

I look forward to the debate and dialogue that this research will undoubtedly stir as all of us look for creative and innovative ways of engaging with new and existing audiences.

Kathy Keele
Chief executive
Australia Council for the Arts
February 2010

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Research summary

1. The arts are strongly supported by the community
2. Attitudes towards the arts are increasingly positive
3. The internet is a key tool for the arts
4. Interest in Indigenous arts is growing
5. Levels of participation
6. There are significant opportunities to build arts audiences
7. Attitudinal segments and arts marketing

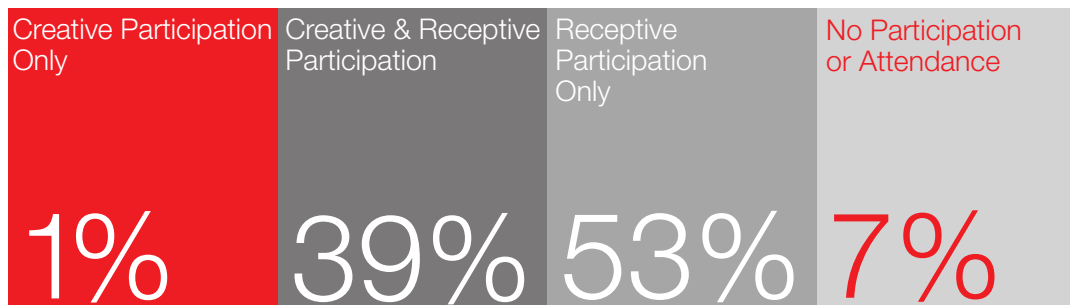
Australian participation in the arts.

1. The arts are strongly supported by the community

We found levels of engagement with the arts were high. In the year leading up to the research nine in ten Australians aged 15 and older had creatively participated in the arts (by making something themselves), or receptively participated (by attending a live event, an exhibition or reading literature).

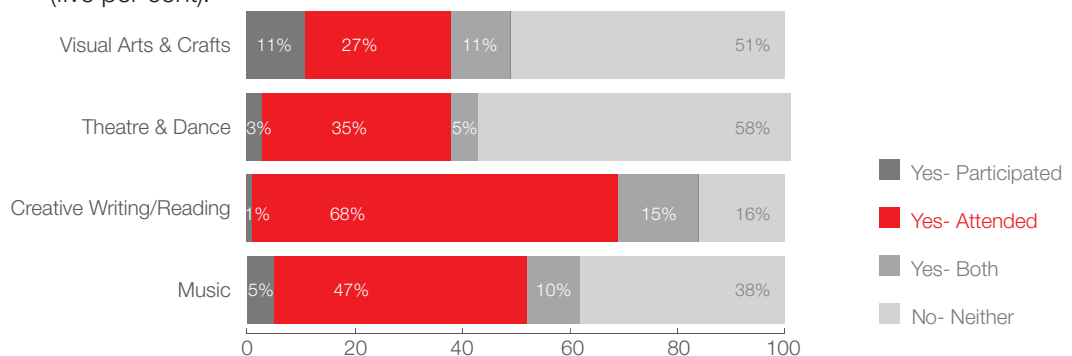
Australians are more likely to take in someone else’s art than to create it themselves:

- nine in ten claimed to have receptively participated in at least one art form
- four in ten had creatively participated in the arts
- only a small group (7 per cent) were not engaged with the arts in the past 12 months.



The key findings for each of the main art forms are:

- Literature is the most popular art form, with 84 per cent reading – mostly novels though one in five read poetry. Creative writing was also popular with 16 per cent engaged, 7 per cent writing a novel or short story and 5 per cent writing poetry.
- Nearly all Australians intentionally listened to recorded music and over half attended live performances. Most went to watch live music such as pop, rock, country and dance. Musical theatre/cabaret was the second most popular form of music attendance at 22 per cent, followed by classical music (13 per cent), and opera (eight per cent). Making music was also popular (15 per cent) with one in ten playing an instrument and five per cent singing.
- More people created visual arts and crafts (22 per cent) than any other form of art. Nearly one in ten engaged in crafts (like ceramics, jewellery making, sewing, woodcraft) (nine per cent), photography (nine per cent), or painting (eight per cent).
- Theatre was attended by one in four (26 per cent) with most going to traditional or contemporary theatre (19 per cent), followed by circus or physical theatre (10 per cent).
- Dance was attended by 16 per cent, with most going to ballet or classical dance (10 per cent), followed by social dance like ballroom or street (five per cent) and contemporary (five per cent).

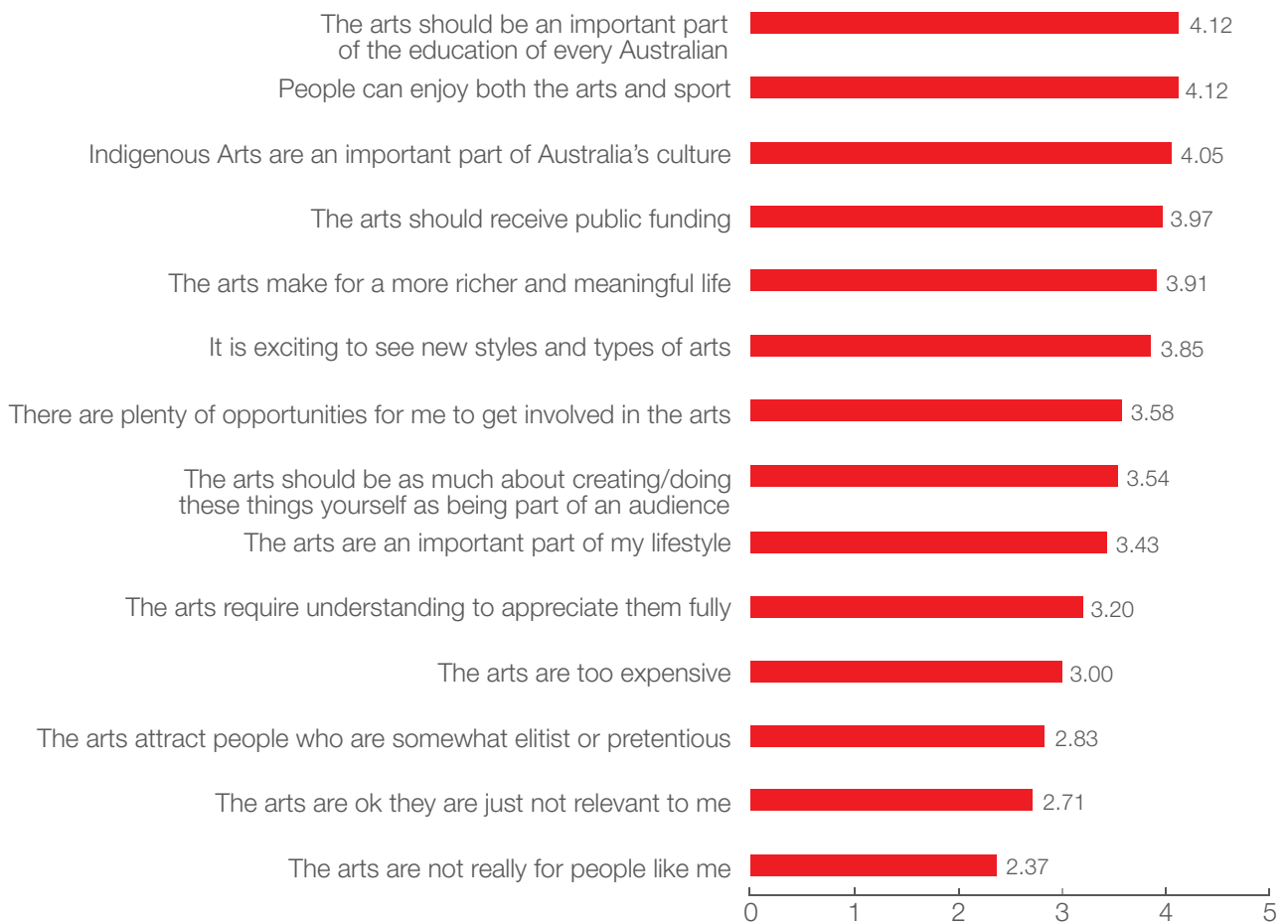


(Rounding has been applied to the numbers in this table.)

Australian participation in the arts.

2. Attitudes towards the arts are increasingly positive

Australians’ attitudes towards the arts are positive (the table below shows the average scores using a five point scale). They widely believe that the arts should be an important part of every Australians’ education, make for a richer and more meaningful life, and that there are plenty of opportunities to get involved. The strength of these views increased in the last 10 years, while the belief that the arts are too expensive and attract people who are elitist decreased.



Australian participation in the arts.

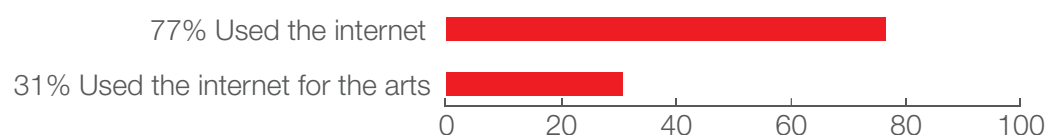
Australians more readily associated the arts with individual benefits (such as a form of expression, inspiration and personal growth) than community benefits (such as understanding others and feeling a part of the community). Many people attend the arts primarily as a social occasion and in response to requests to attend by their family and friends, rather than for the art form itself.



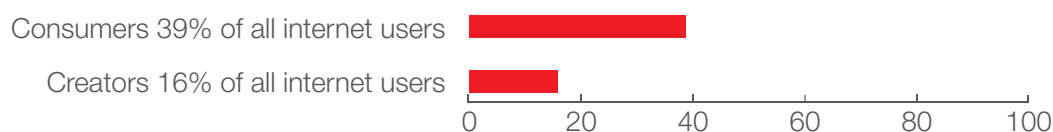
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3. The internet is a key tool for the arts

One in three Australians are already using the internet for the arts- mostly for attendance-related activities (such as researching artists/events or downloading music), but some are using it for creative participation (such as posting works of art, writing blogs or working with others to create art).



More than half of all 15-24 year olds had used the internet to engage in some form of art during the last year and were more creative online than others. The most widespread online art creations are writing and visual art/film/video, while the most frequent mode of creative participation is being involved in an online community or social network concerned with art in some way.



Creators are more likely to be:

- 15-24 years
- Highly engaged: both participating & attending
- Attending Indigenous arts
- High school or tertiary students
- Really like the arts

Consumers are more likely to be:

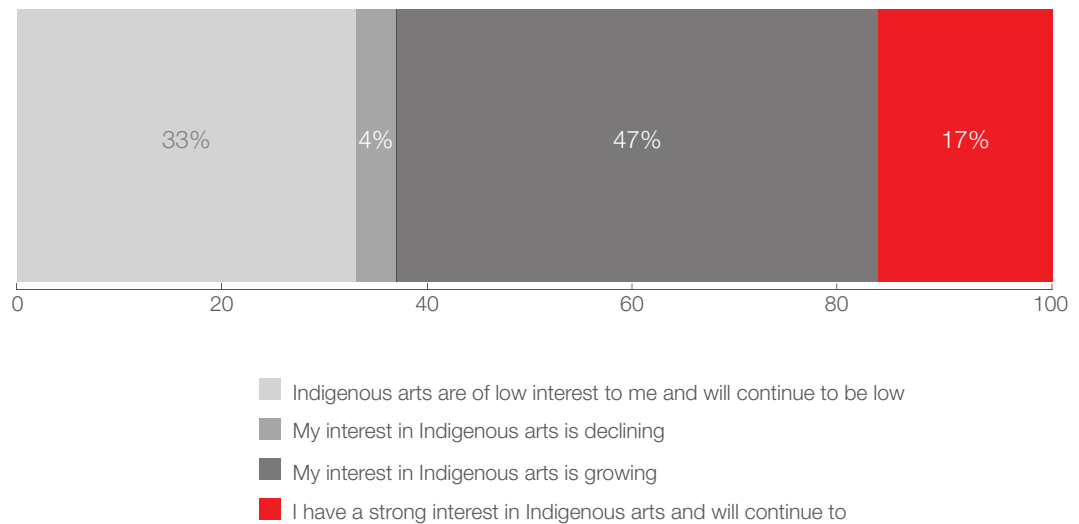
- 35-64 years
- Attending only
- Not attending Indigenous arts
- In full time paid employment, carrying out home duties or retired
- Like or neither like or dislike the arts

Australians' Engagement with the Arts.

4. Interest in Indigenous arts is growing

Of the three quarters of people who had attended visual arts and crafts, theatre, dance or music in the past 12 months, nearly a quarter (23%) had been to arts created or performed by Aboriginal or Torres Strait Islander artists. Attitudes to Indigenous arts are increasingly positive, indicating a great opportunity to grow the Indigenous art audience across Australia.

As is expected, there is a relationship between attitudes to Indigenous arts and attendance, with those who had attended an Indigenous arts activity having significantly stronger and more positive interest.



(Rounding has been applied to the numbers in this table.)

5. Levels of participation

YOUNG PEOPLE ARE HIGHLY ENGAGED WITH THE ARTS.

- Young people displayed higher levels of creative participation than the rest of the population. They were more likely to be creatively engaged in visual arts and crafts, theatre and dance, creative writing and music. This was to some degree a reflection of education; with young students more active in creative participation than young workers. Arts participation levels amongst younger people also appeared to be on the rise, with this group more likely to have increased their involvement in the arts in the last year. With a higher concentration of internet users, young people were engaging with the arts in new and evolving ways.

COMMUNITY ARTS TOUCHED AROUND A QUARTER OF THE POPULATION

- Community arts touched around a quarter of the population. Of the people who had creatively or receptively participated in visual arts and crafts, theatre, dance, creative writing or music in the past 12 months, a third (32%) engaged in some form of community art. Those living in rural areas were more likely to attend community arts than others.

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THESE GROUPS WERE LESS ENGAGED WITH THE ARTS:

- Those born overseas in a non-English speaking country have significantly lower levels of both creative and receptive participation compared to the total Australian population.
- Those for whom the main language spoken at home is not English are less likely to attend arts events.
- People with a serious illness or disability experience significant difficulties accessing the various services offered by the arts and consequently had much lower levels of arts participation.
- Regional areas have significantly lower levels of attendance at music events than inner metropolitan areas.
- Rural residents are more likely than inner and outer metropolitan residents to have had a below average year of receptive participation in the arts compared to the year before.

Australian participation in the arts.

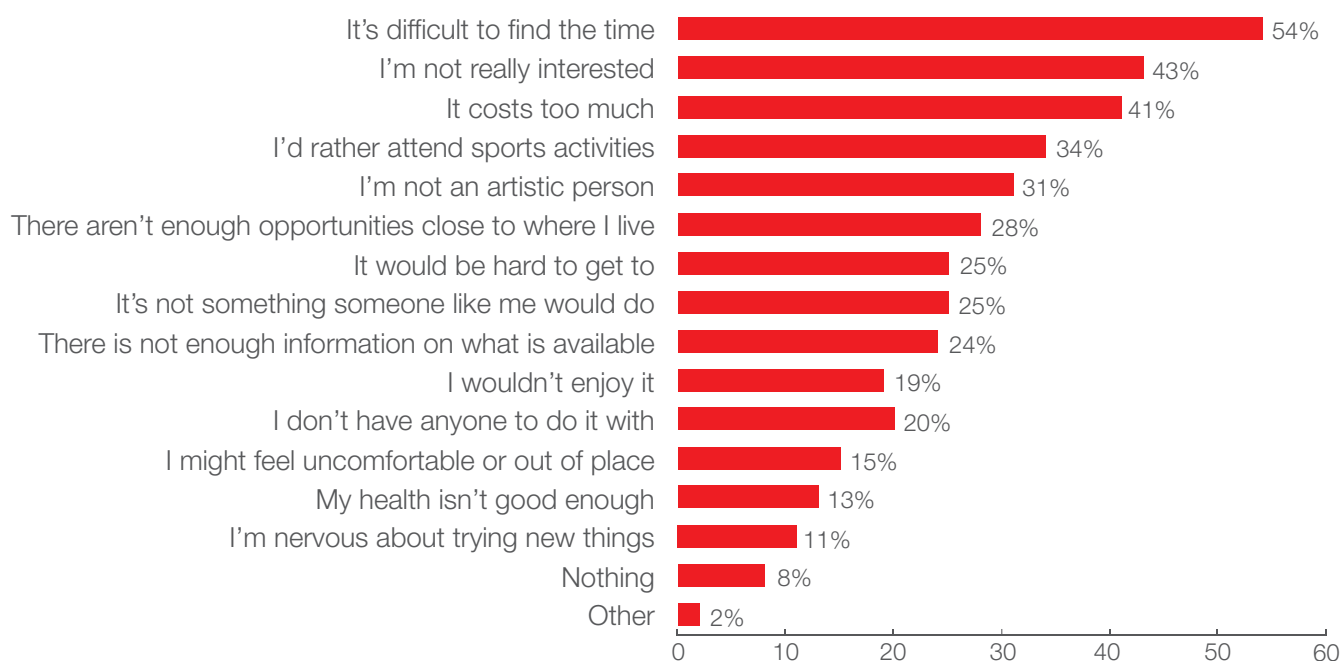
6. There are significant opportunities to build arts audiences

If we focus on attendance at an arts event we find 28% have not attended any arts event in the last 12 months. These people are:

- more likely to be older, male, affected by a disability or serious illness, have a lower level of education, speak a foreign language (other than English) at home and be on a lower wage.

The reasons for their lack of participation are:

- practical (such as time constraints, prohibitive cost and a perceived lack of information about the arts events available, and poor access) and
- attitudinal (such as lack of interest, feelings of inadequacy or a preference for sports over the arts).



Despite this, almost two thirds (63%) of those who had not attended an arts event in the last 12 months had attended at some time in the past. Moreover 39% of those who had not attended in the last 12 months are interested in attending arts events in the future. Time poor but highly interested people can, and should be, encouraged to find ways to engage with the arts.

7. Attitudinal segments and arts marketing

This study identified four attitudinal segments which have important implications for marketing the arts:

- **The lovers** (38%) are highly engaged with the arts and see the arts as an integral part of their lifestyle. They also hold the view that the arts provide them with a more meaningful and richer life as well as help them feel part of their local community.

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- **The flirters** (26%) are more likely to be influenced to attend arts events by their friends than the 'The lovers'. They like the arts, but are not necessarily convinced that they help them feel part of their local community. However they strongly believe that the arts provide a way of saying important things that need to be said in our society.
- **The un-attached** (19%) are those who have a neutral attitude towards the arts- many have not actually participated in, or attended any, of the main art forms in the past year, and some have never experienced these art forms at all. While they do not dislike the arts per se they just cannot see the personal relevance of the arts to them.
- **The outsiders** (17%) believe the arts tend to attract people who are pretentious and elitist. They believe the arts require a reasonable level of understanding to appreciate them fully and therefore the arts are "not for them".

Each of these segments can increase their level of engagement with the arts, although the strategies to stimulate demand vary.

For example even 'The lovers' have a significant sub-segment with no to low attendance. The strategy needed here is to encourage habit forming attendance. This segment want to attend and participate, they really like the arts but a claimed lack of time and awareness of upcoming events prevents attendance.

Half 'The flirters' attend frequently and this positive behaviour needs to be reinforced to ensure the frequent arts attendance continues. The majority of 'The un-attached' are more difficult to reach. They need to be tempted by arts offers and information that relates to them and stimulates their interest.

Lastly, 'The outsiders' need to be convinced why the arts should be on their agenda. These four distinct 'mindsets' were then crossed with the levels of attendance to produce nine segments based on attitudes and behaviours. Each of these community segments will demand different marketing and policy responses from arts organisations looking to build audiences. The full report details strategic insights and potential responses to each of these segments.

	The lovers 38%	The flirters 26%	The un-attached 19%	The outsiders 17%
Behaviour (attendance) per annum	high attendance 16+ times 14% Reinforce and maintain	med-high attendance 6+ times 13% Reinforce and maintain	med-high attendance 6+ times 4% Encourage attitudinal change	med-high attendance 6+ times 2% Encourage attitudinal change
	med attendance 6-15 times 14% Encourage behavioural change	no-low attendance 0-5 times 13% Encourage behavioural change	no-low attendance 0-5 times 15% Encourage attitudinal and behavioural change	no-low attendance 0-5 times 15% Encourage attitudinal and behavioural change
	no-low attendance 0-5 times 10% Encourage behavioural change			
	+ Attitude towards the arts -			

Australian participation in the arts.

Methodology

The study consisted of a phased approach beginning with a literature review, followed by 12 focus group discussions and 15 stakeholder interviews with arts marketers and entrepreneurs. A specifically designed survey was then administered to 3,000 Australians aged 15 years and older using Computer Aided Telephone Interviewing.

In order to improve the accuracy of the survey respondents were selected using a stratified random sample. Quotas were set so that a sufficient number of people were interviewed from the following groups:

- state – the study included all states and territories
- metropolitan and regional areas
- age (15 years and older)
- gender (50/50)

The survey results have been weighted to ABS Census data so that they are nationally representative. The weighting specification included state, age and gender.

Please note that throughout this report, all results have been rounded to the nearest whole percentage figure, including net results after summing the separate proportions rather than simply summing two rounded figures (e.g. '% total satisfied'). For this reason, anomalies of one per cent sometimes occur between net results and rounded results shown in charts. For example, a proportion of 33.3% 'satisfied' rounds to 33%, and a proportion of 4.4% 'very satisfied' rounds to 4%. However, when combined to derive the 'total satisfied + very satisfied', 33.3% plus 4.4% equals 37.8%, which would be rounded to 38%. In this case, the results would be shown in a chart as 33% satisfied and 4% very satisfied, but the proportion reported as 'total satisfied' would be 38%.

The fieldwork was conducted between 17 October and 6 November 2009. The average interview length was 16 minutes and the response rate was 33.8 per cent with a success ratio of approximately 1:3. That is, for every three households contacted, one survey was completed.

The maximum margin of error, at the 95 per cent confidence level, for a stratified random sample is + or - 1.79 per cent.

Full details can be found in the technical appendices.

Australian participation in the arts.

The literature

We conducted a literature review and included key insights into the survey design so that our approach could be based upon current ideas about arts participation.

Our goal was to move beyond a description of the socio-economic and demographic factors affecting arts participation to provide actionable consumer insights for arts marketers and policy makers. The literature criticised many participation surveys for failing to address the complexity of the decision making process in arts participation or to provide a meaningful segmentation that allowed arts marketers and policy makers to develop strategies to drive greater participation in the arts.

The literature showed that arts participation was affected by the level of engagement with the art form which meant that both creative and receptive participation needed to be factored into to any understanding of the decision making process for arts participation.

We decided that this study should include:

- a clear **definition** of the arts (not leaving it to the respondent to decide)
- a **new approach** to participation that included attitudes to the arts and perceived benefits of the arts (recognising these are important to the consumer decision making process)
- **segmentation** based on peoples' attitudes and level of engagement by:
 - Measuring the form of participation (both receptive and creative)
 - Measuring the levels of participation (to explore the intensity of involvement).

Our goal was to understand attitudes towards the arts as well as to benchmark both receptive and creative participation.

Definitions of arts participation

Past research also identified that the definition of the arts and of what participation actually means have significant impacts on the research outcomes. The previous study for the Australia Council (Saatchi and Saatchi 2001) which allowed respondents to “devise, and reflect on, their own definitions of the arts” found that “most people have a very limited spontaneous perception of the arts, with the majority being able to spontaneously suggest only three or fewer specific items.” An inability to recall easily what the arts were reinforced the importance of clearly defining what was considered to be the arts to obtain accurate results. We also found in the qualitative research allowing people to devise their own definition of the arts meant almost anything can be seen as the arts.

“well...I think...really even sport is actually parts of the arts... I mean it has all the hallmarks of the arts ...discipline, excellence and entertainment”.... -focus group, Rockhampton.

Since this is a benchmark study it was essential to provide a clear and concise definition to enable a solid read on current levels of participation of Australians, and in future surveys.

Australian participation in the arts.

The focus of the study is upon the art forms that are supported by the Australia Council (visual arts and crafts, music, dance, theatre, literature). The definitions were agreed after a thorough consultation within the Australia Council and with key stakeholders. Full details can be found in the technical appendices.

A new approach

Decisions about whether to participate in the arts are not simple; McCarthy conceived that people go through a series of stages when making a decision:

“They are likely, for example, to first consider whether the arts have anything to offer them. They then consider what those benefits are and where they are likely to find them. They might consider different, specific opportunities to participate, such as attending a play or visiting an art museum. Finally, if they do end up participating, they are likely to evaluate their experience and subsequently revise (for better or worse) their initial expectations about the benefits of the arts.” (McCarthy & Jinnett 2001, pp. 31)

In line with McCarthy’s views our qualitative research led us to agree that a person’s engagement with the arts could be better predicted by:

- their attitudes towards the arts
- the perceived benefits the arts provides them
- how they think their peers will view them if they participate in the arts.

Attitude segmentation

The literature also widely criticised earlier participation studies for their lack of market segmentation.

Other studies did include market segmentation, but their models often relied on demographic variables to predict and describe participation in the arts. This type of approach is more limited as it replicates the well established relationships between household income/education levels and arts engagement.

We considered it essential to stretch beyond demographics and looked for the relationships between:

- attitudes to the arts
- benefits of the arts and
- participation in the arts.

The need for this new focus upon attitudes/benefits was reinforced by the results of the qualitative research which found some significant changes in attitudes towards the arts (and engagement) that needed to be captured in order to understand how, and in what ways, behaviours were changing with regard to the arts.

Australian participation in the arts.

Australian engagement with the arts

The study measured creative and receptive participation in the visual arts and crafts, theatre, dance, literature, and music in the past 12 months.

We found that:

- the arts sector was very well supported by the Australian public
- ninety three per cent were involved in the arts as either attendees and/or participants in the year leading up to the survey
- most of this involvement was receptive participation, with 92 per cent of people having receptively participated and 41 per cent having creatively participated
- a small group (seven per cent) had neither creatively nor receptively participated in the arts in the 12 months leading up to the survey.

Understanding the arts

This research showed Australians no longer feel the need to position themselves as either an arts person or a sports person. Many people claimed to “love both these pursuits of excellence”.

Anecdotal evidence from our qualitative research suggested a growing confidence in the ability of Australian’s to appreciate the arts. As one art gallery owner told us;

“...once upon a time almost anyone who wandered into an art gallery would apologise for being there...now it’s much better...people do come and look and don’t feel they have to apologise for being there.” ...stakeholder interview, Sydney.

“I used to feel intimidated at these types of events [the arts] but that feeling has diminished over time as I’ve gone to more and more of them”...focus group, Rockhampton.

The most common view we found in the focus group discussions was the sense the arts had become more inclusive, more accessible, and less elitist in recent years. Some in the group discussions believed this was due to an increasingly culture savvy population. Others suggested it was due to a more confident population who, despite lacking depth of knowledge of the arts, were increasingly prepared to try them.

The qualitative research also points towards an expansion of what Australians typically defined as fitting under the arts umbrella. Consumers found ‘the arts’ to be an extremely difficult concept to define. The overwhelming response was to err on the side of inclusion where almost anything (“a five year old playing the drums”...“even sport itself”) became an art form. In fact, many believed that arts participation could be occurring without us even being aware of it. As a group participant remarked;

“I think a lot of people participate in the arts without realising that it is the arts”...focus group, Sydney.

Australian participation in the arts.

Responses to what constitutes the arts were wide-ranging and encompassed both emotive and multidimensional concepts (for example ‘innovation’, ‘possibility’, ‘food for the soul’) and simple descriptions such as ‘theatre’, ‘dance’, ‘music’.

To promote consistency in the question of ‘what is the arts?’ respondents were provided with a broad definition at the beginning of the survey;

‘The arts include things like being part of a production of theatre or dance, Aboriginal and Torres Strait Islander (Indigenous) music/dance, opera, live classical, jazz, pop or rock music, visiting art galleries, circus, street arts, painting, crafts, as well as reading books and creative writing. Your involvement may even have been through the internet.’

Then respondents were asked about their engagement with each of the art forms (visual arts and crafts, theatre, dance, literature, and music) which were clearly defined. Refer to the technical appendices for full details.

The prevailing view among consumers and arts professionals in the qualitative research was that attendance levels were increasing. According to key stakeholders, not only were there new audiences for the arts, but consumers were forming new habits of entertainment consumption that included a wider repertoire. The internet was widely believed to be the major contributor to this trend.

Creative and receptive participation

In terms of the overlap between creative and receptive participation in the arts, just over half (53 per cent) of all people surveyed were involved in receptive participation only. In other words, receptive participation alone was the most likely form of engagement in the arts. The second largest group of people was those who have both creatively and receptively participated at 39 per cent of the population. Only one per cent of people said they had only creatively participated.

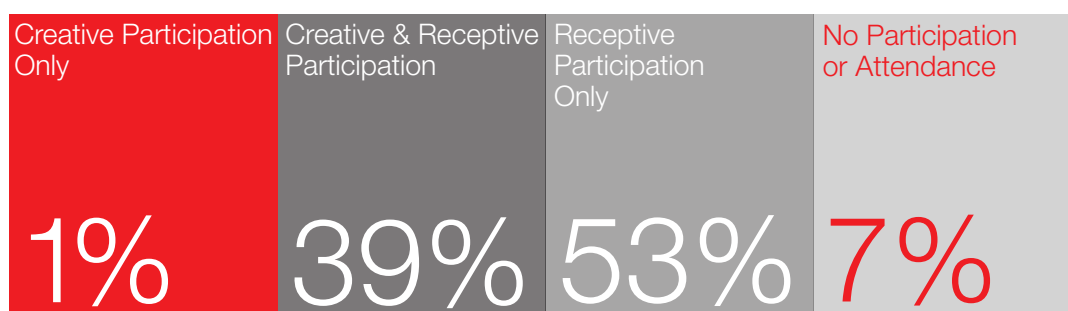


Figure 1: Relationship between creative and receptive participation in the arts

While this suggested that those who were directly involved in the making of art were also highly likely to attend art works made by others, correlation analysis found no strong relationship between participation in and attendance at the arts overall. However, there was a moderate relationship between creative and receptive participation within visual arts and crafts and within theatre and dance.

Australian participation in the arts.

Our definition of receptive participation in the arts included reading literature. We confirmed that reading was a widespread activity in Australia with 84 per cent of the sample reporting to have read literature in the last 12 months. Literature was the most popular main art form, and just over one eighth (13 per cent) of all Australians aged 15 years and older participate in the arts exclusively through reading. Therefore, literature is a critical element of arts participation and a potential channel to encourage other arts engagement.

In order to present a national picture of arts attendance we removed reading literature from the receptive participation figures shown in Figure 1.

Arts participation and attendance:

- thirty nine per cent of Australians only attended the arts
- eight per cent only creatively participated
- one in three people did both
- one in five people were not engaged at all.

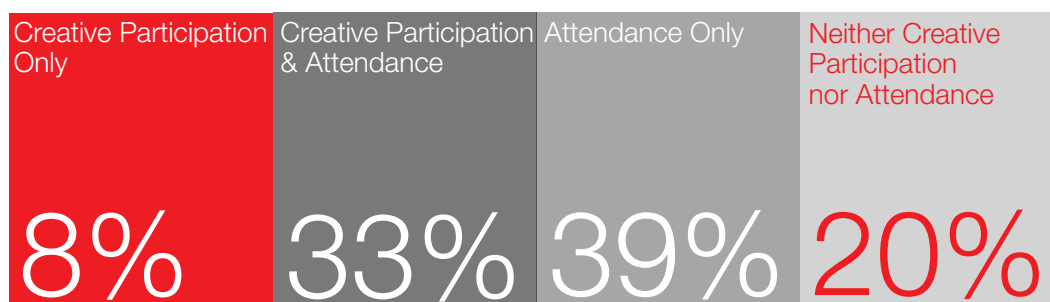


Figure 2: Relationship between creative and receptive participation in the arts (excluding reading)

Engagement by art form

As Table 1 shows, 84 per cent of the total sample had been engaged in literature in the past year (reading: 84 per cent; creative writing: 16 per cent). Almost everyone who had engaged in creative writing had also read literature in the past year. Novels were the most popular form of literature with 70 per cent of people having read one in the last year. Biographies, memoirs and histories were read by half (52 per cent) of the sample and short stories by 45 per cent. See page 25 for further details.

Engagement with music was also widespread, with 62 per cent either creatively or receptively participating. Listening to recorded music (as a separate measure) was universal, with 99 per cent of the sample having intentionally listened to music in the past year. Most of this music was heard via the radio, television or CDs/downloaded music files. See page 26 for further details.

Australian participation in the arts.

Table 1: Levels of creative and receptive participation in the arts

Art form	Creative participation %	Receptive participation %	Total participation %
Visual Arts & Crafts	22	38	49
Theatre & Dance	7	40	42
Creative Writing/Reading	16	84	84
Music	15	57	62

Half of all people surveyed engaged in visual arts and crafts, and this art form had the highest levels of creative participation (22 per cent). Furthermore, one in ten people engaged with visual arts and crafts purely through creative activity (i.e: they did not attend any visual arts and crafts exhibitions/fairs). See Appendix 1.1 for full details.

As one focus group participant in Darwin said;

“arts and crafts are a passion for me ... I just started doing it one day and I've been hooked for the rest of my life ... I get so much out of it ... appreciate what others can do and am always learning... it adds greatly to my life”... focus group, Darwin.

Frequency of engagement

We asked people who had participated in each art form how many times they had done so in the past 12 months. Not surprisingly, recorded music was receptively engaged in most often with an average of 222 occasions per year. This suggests that, on average, Australians intentionally listen to recorded music every 1-2 days. As expected, the art forms which required attendance in order to receptively engage (visual arts and crafts, theatre and dance, and live music) were engaged in less often (less than 15 occasions per year on average).

Table 2: Frequency of creative and receptive participation in the arts (average occasions per year)

Art form	Creative participation. Average per year	Receptive participation. Average per year
Visual Arts & Crafts	67	14
Theatre & Dance	48	6
Literature	39	71
Music	90	6
Recorded Music	-	222

A statistical analysis of creative participation showed three dominant patterns for creative participators;

- (1) those who created less art forms infrequently (the majority)
- (2) those who created more art forms infrequently
- (3) those who created less art forms but did this frequently.

(See Appendix 1.3 for full details)

Australian participation in the arts.

Receptive participation in the arts on the other hand followed a predictable pattern of low frequency visits to a varied number of different art forms.

The nature of creative participation

We found that creative participation was undertaken as a hobby by the vast majority, especially in the case of crafts like jewellery making, sewing or woodcraft, social dance like ballroom or street, playing a musical instrument, writing songs, mixing or composing music, and writing poetry. Social dance (like ballroom or street dance) was a highly affiliative activity, appealing to those who saw the arts as a chance to bond with others.

Art forms most likely to be undertaken as serious study included writing a biography, memoir, essay or history, sculpture or installation art, and writing a play. Art forms most likely to be undertaken for paid work included writing a play, traditional or contemporary theatre, and circus or physical theatre.

Engagement by age

Young people (15-24 year olds) were more likely to have creatively participated in all major art forms than those over 25 years. See page 42 for further details.

Table 3: Levels of creative participation in the arts by age

Art form	15-24	25-34	35-44	45-54	55-64	65+	Total
Visual Arts & Crafts	28 %	25 %	18 %	23 %	19 %	19 %	22 %
Theatre & Dance	17 %	8 %	5 %	7 %	5 %	2 %	7 %
Creative Writing	30 %	17 %	14 %	10 %	11 %	12 %	16 %
Music	30 %	18 %	13 %	9 %	9 %	9 %	15 %
At least one art form	60 %	44 %	36 %	36 %	36 %	33 %	41 %

However, in terms of receptive participation the results were mixed. The 55-64 year group had higher levels of receptive participation in visual arts and crafts and theatre and dance while the youngest group (15-24 year olds) had higher levels of receptive participation in music and overall.

Table 4: Levels of receptive participation in the arts by age

Art form	15-24	25-34	35-44	45-54	55-64	65+	Total
Visual Arts & Crafts	38 %	36 %	38 %	40 %	47 %	33 %	38 %
Theatre & Dance	40 %	41 %	38 %	44 %	46 %	30 %	40 %
Reading Literature	83 %	82 %	78 %	85 %	86 %	86 %	84 %
Music	68 %	61 %	56 %	58 %	55 %	43 %	57 %
At least one art form	95 %	91 %	89 %	93 %	92 %	91 %	92 %

Australian participation in the arts.

Receptive participation dropped slightly during the 35-44 years age range which was associated with the typical rise of family and career pressures. As one participant in the focus group discussions explained:

"...unless it's sort of a kiddy friendly event, we don't tend to go to it. For them to sit quietly for a long period of time, it doesn't happen. So we have to limit it to like half an hour stints, walking round the museum and that sort of thing..." focus group, Darwin.

Engagement by location

Both creative and receptive participation in the arts was high in all states, territories and regions. Despite this, there were some areas where participation levels were higher. For instance, Tasmanians showed a higher level of creative participation when it came to visual arts and crafts, higher levels of involvement in reading and higher creative participation levels overall for the arts. The ACT led receptive participation figures for visual arts and crafts, theatre and dance, and music. See Appendix 1.2 for full details.

In terms of the differences in arts involvement by region (inner and outer metropolitan, provincial and rural), both creative and receptive participation levels remained similar across the nation. Inner metropolitan residents showed higher levels of creative writing and reading and more receptive participation in music in the past 12 months, and those in rural areas showed lower participation rates in some areas. See page 41 for more details.

Education and income

It is widely accepted that socio-economic status is an important factor in understanding engagement with the arts, and our analysis by education and income levels confirms this.

Those who had not completed any formal education above primary school were much less likely to have creatively or receptively participated in an art form over the past year. Those with a university or postgraduate qualification were more likely than those whose highest level of education was secondary school to have both creatively and receptively participated in at least one art form.

Income levels are also a factor, particularly for understanding attendance. When reading was removed from the receptive participation analysis, the results showed that people with a household income of less than \$30,000 had significantly lower levels of receptive participation in each of the main art forms that required attendance at a venue outside the home (visual arts and crafts, theatre and dance, and live music).

Non-participants

Interestingly, attendance figures for the arts were found to be high despite strong competition in the entertainment field and the effects of the recent global financial crisis (which were considered to have limited arts attendance over the last twelve months). Thirty nine per cent claimed to have attended less and 40 per cent claimed to have participated less in the year leading up to the survey.

Australian participation in the arts.

Of the 28 per cent of people who had not attended an arts event in the past year (this definition excludes reading and recorded music consumption); two thirds had attended at some stage. This reinforced the view that receptive participation rates had declined over the last year.

In total, 59 per cent of the population had not creatively participated in the arts in the past 12 months. Of those, two thirds (67 per cent) had never creatively participated in the arts.

We asked those who had not engaged over the past year, whether they were interested in participating or attending 'nowadays'. Just under a third (29 per cent) of non-participants were interested in creative participation and four in ten (39 per cent) non-attendees were interested in attending arts events.

Table 5: Non-participants' and non-attendees' levels of interest in the arts

	Not at all interested %	Not interested %	Neither %	Somewhat interested %	Very interested %
No participation in past 12 months (n=1781)	26	34	11	23	6
No attendance in past 12 months (n=833)	20	29	12	29	10

The 29 per cent of people who had not creatively participated in arts in the last 12 months, but were interested in doing so, tended to have higher levels of receptive participation in all the main art forms, had less time and money available for the arts and really liked the arts.

The 39 per cent of people who had not attended an arts event in the last 12 months, but were interested in doing so, differed from those who were both disengaged and uninterested in that they were creatively participating more often, but were seemingly prevented from attending arts events because of time constraints and cost barriers.

However, 60 per cent of non-participants and 49 per cent of non-attendees were not interested in engaging. The qualitative research found the lack of exposure to the arts was a major barrier to arts participation. For people to have an interest in the arts they must have participated, usually from an early age. Clearly the role of education and/or parents is critical to experiencing the arts as a child, but increasingly the internet offers a convenient way to explore the arts at any age.

Australian participation in the arts.

Reasons for non-attendance

The main reasons for not attending the arts were both practical (lack of time, cost, opportunities, accessibility) and attitudinal (lack of interest, the perception that 'I'm not an artistic person', or it is not something 'someone like me' would do).

The table below shows the main reasons for not having attended arts events in the last year.

Table 6: Non-attendees' top 10 reasons for not attending arts events

Reason	Non-attendees (n=833) %
It's difficult to find the time	54
I'm not really interested	43
It costs too much	41
I'm not an artistic person	34
There aren't enough opportunities close to where I live	28
It would be hard to get to	25
It's not something someone like me would do	25
There is not enough information on what is available	24
I wouldn't enjoy it	21
I don't have anyone to go with	20

In a society where many are increasingly time-poor, it is no surprise that Australians blamed a lack of time for not being involved in the arts. Over half (54 per cent) of those who did not attend an arts event in the last year said it was because it's difficult to find the time.

One participant in the focus groups remarked;

"I'd like to do more but with work and family it's just not possible... isn't it the same for everyone?" focus group, Darwin.

Those who were less engaged in the arts were more likely to be:

- male
- older (65+ years)
- retired or conducting home duties
- affected by a disability/serious illness
- educated to the level of primary school or secondary school only
- speaking a language other than English at home and
- earning less than \$20K household income.

They were also less likely to be using the internet.

Australian participation in the arts.

Data suggested that those aged over 65 years were generally less likely to be engaging in the arts because they;

- are less mobile
- have difficulties with access
- have ill-health which restricts them
- have less money to spend
- associate the arts with snobbery.

However there were some art forms that over 65 year olds were more likely to engage in such as classical ballet or dance, opera, classical music and reading.

Engagement by art form

• VISUAL ARTS AND CRAFTS

Visual arts and crafts showed the highest levels of creative participation of any art form, with more than one in five (22 per cent) of the sample creating visual arts or crafts themselves over the past 12 months. Creative participation occurred mostly in the form of crafts like ceramics, jewellery making, sewing or woodcraft (nine per cent), photography (nine per cent), and painting (eight per cent). Creative participation in painting, drawing or street art was more widespread among 15-24 year olds. Around one in twenty people were creatively involved in digital or video art (four per cent), and one in forty in sculpture or installation art (two per cent).

Over one third of Australians had receptively participated in visual arts and crafts in the past year (that is they had attended a visual art/craft exhibition or fair). The most common form of receptive participation in visual arts and crafts was painting, drawing or street art (21 per cent). One in 10 (11 per cent) attended ceramics, jewellery, sewing or woodcraft displays and photography exhibitions.

Table 7: Levels of creative and receptive participation within visual arts and crafts

Art sub-form	Creative participation %	Receptive participation %
Crafts like ceramics, jewellery making, sewing or woodcraft	9	11
Photography as an artistic endeavour	9	11
Painting, drawing or street art	8	21
Digital or Video art	4	7
Sculpture or installation art	2	9
None of these (other)	3	8

In some cases, people's ideas about what counted as participation in visual arts and crafts did not align with the definitions provided in the survey. For instance, 12 per cent of those who said they creatively participated in visual arts and crafts did something other than the options provided. The same is true for 22 per cent of receptive participants within the category. This highlights the difficulties in defining and quantifying what constitutes the arts.

Australian participation in the arts.

Visual arts and crafts had the second highest frequency of creative participation, with those involved in this art form engaging an average of 67 times a year. Within this art form, painting, drawing or street art was the most frequently undertaken (on average of 86 times a year), with digital/video art close behind at 83 times a year. Other forms of visual arts and craft were also frequently participated in, with sculpture and ceramics/jewellery making involving people 68 times a year. Photography as an artistic endeavour was participated in 62 times a year on average for those participating in it.

The frequency of attendance at visual arts and crafts exhibitions was 14 times a year on average. This was the highest receptive participation rate of all the art forms which required attendance (visual arts and crafts, theatre and dance, and live music). Craft making (ceramics/jewellery/sewing/woodwork) had an average of 16 attendances a year; digital or video art (15 times a year); photography (14 times a year) and painting drawing or street art also 14 times a year on average. Sculpture or installation art had an average attendance of 10 times a year.

Creative participation in visual arts and crafts is predominantly a hobby, with sculpture or installation most likely to be undertaken for serious study, and digital and video art most likely to be undertaken for paid work.

• THE DRAMATIC ARTS

Australians were much more likely to participate in the dramatic arts receptively than creatively, with four out of ten people attending in the past year, while less than one in ten creatively participated.

Theatre

One quarter (26 per cent) of people receptively participated in theatre in the last year and four per cent creatively participated. In terms of its sub-forms, two per cent of people were creatively involved in traditional or contemporary theatre; predominantly as a hobby, but this was the most common art sub-form to be undertaken for paid work. Very few people creatively participated in circus or physical theatre (one per cent) or experimental theatre (zero per cent).

Of the three types of theatre we asked about, traditional or contemporary theatre had the highest attendance (19 per cent of all surveyed). A further one in ten attended circus or physical theatre, and a smaller group attended experimental theatre (three per cent). In terms of frequency of attendance at theatrical events, traditional or contemporary theatre was the most frequented at an average of seven occasions per year, followed by experimental theatre at four occasions, and circus or physical theatre at two occasions per year.

Dance

Receptive participation in dance was relatively low, with 16 per cent of Australians attending in the past year. While creative participation levels for dance (five per cent) were also lower than most other art forms, they were comparable with theatre (four per cent).

Australian participation in the arts.

Creative participation in dance was evenly shared across social, contemporary and classical dance (one per cent each). Receptive participation levels were highest for ballet/classical dance (10 per cent), followed by social and contemporary dance (five per cent each). Attendance at ballet and classical dance was more popular with those over 65 years.

Attendance frequency was highest for social dance at an average of 11 occasions per year, followed by contemporary dance at 10 occasions, and ballet or classical dance at four occasions per year.

Art sub-form	Creative participation %	Receptive participation %
Theatre	4	26
Traditional or contemporary theatre	2	19
Circus or physical theatre	1	10
Experimental theatre	0	3
Dance	5	16
Social dance like ballroom or street	1	5
Contemporary dance	1	5
Ballet or classical dance	1	10
Multicultural dance/theatre	0	7
None of these (other)	2	10

Table 8: Levels of creative and receptive participation within theatre and dance

Multicultural theatre and dance

Theatre and dance of a multicultural nature was creatively participated in by very few people we spoke to (15 out of 3000 surveyed). Further research would be required to understand the reasons for this result. Australians were more likely to engage with this sub art form as part of an audience; seven per cent over the past year. This group attended on average five occasions last year.

• LITERATURE

Literature was the most widespread of the four main art forms studied, and is comprised mostly of people reading novels (70 per cent of people surveyed). Levels of reading biographies/memoirs/ histories, short stories and poetry are also high with more than one in five people (21 per cent or more) reading at least one of them in the year leading up to the survey.

Australian participation in the arts.

Table 9: Levels of creative and receptive participation within writing/reading

	Creative participation %
Write a novel or short story	7
Write a biography, memoir, essay or history	6
Write poetry	5
Write a play	2
None of these (other)	4

Art sub-form	Receptive participation %
Read a novel	70
Read a biography, memoir or history	52
Read a short story	45
Read poetry	21

In terms of the different forms of creative writing, novels and short stories had the highest engagement seven per cent, followed by biographies/memoirs/essays/histories at six per cent, poetry at five per cent and plays at two per cent. Around four per cent of people wrote something other than these four forms of literature.

People involved in creative writing actively participate 39 times a year on average. Writing a novel or short story had a participation frequency of 44 times a year; a biography, memoir, essay or history 39 times a year and poetry 34 times a year.

Reading was also done frequently; those who read literature did so 71 times a year on average. In particular reading novels was undertaken 116.5 times a year; reading a short story (64 times); reading a biography, memoir, or history (34 times), and reading poetry (22 times).

The writing of a novel, short story or poetry is mainly undertaken as a hobby. While a high proportion of those who write plays and biographies/memoirs do so as a hobby, many also write for serious study or for paid work. A third of people who wrote a play did so for serious study while a quarter did so for paid work.

• MUSIC

Nearly two in three (62 per cent) Australians participated in music in the past year, with over half attending live events (57 per cent) and 15 per cent creatively participating. Most of those who creatively participated in music played a musical instrument (11 per cent of all surveyed), while fewer had sung (five per cent), or written or composed music (four per cent).

Australian participation in the arts.

Nearly three quarters of the people whose participation in music was receptive saw ‘other live music’ including pop, rock, country, dance etc. Over one third (41 per cent) of all Australians saw music in this category at least once during the past year, while 22 per cent saw musical theatre/cabaret, 13 per cent classical music, eight per cent opera, and seven per cent new classical/electronic/improvised music or sound art. As might be expected, over 65 year olds were more likely to have attended opera and classical music. New classical, electronic, improvised music or sound art and ‘other live music’ were more likely to be attended by those aged less than 34 years.

Table 10: Levels of creative and receptive participation within music

Art sub-form	Creative participation %
Play a musical instrument	11
Sing	5
Write songs, mix/ compose music	4
None of these (other)	2
Art sub-form	Receptive participation %
Other live music e.g. pop, rock, country, dance, etc	41
Musical theatre, or cabaret	22
Classical music	13
Opera	8
New classical, electronic or improvised music, or sound art	7

Music had the highest frequency of creative participation of all the art forms. For those who claimed to create live music the average frequency was 90 times a year. If a person played a musical instrument the frequency was 113 times a year; for singing it was 97 times a year and writing songs/mixing or composing music it was 54 times a year.

Consumption of recorded music was extremely frequent with those who listen to music doing so 222 times a year on average. Radio and television were the sources that most drove consumption at an average of 270 times a year, while listening to music owned personally was done 214 times a year. Internet streaming of music occurred 112 times a year on average.

Attendance at live music events averaged six times a year, with new classical/electronic/improvised or sound art the most frequently attended (eight times a year). This was followed by other live music (seven and a half times a year); classical music (five times a year); musical theatre and cabaret (three and a half times a year) and opera (three times a year).

Around nine out of ten people who play an instrument, write songs, and mix or compose music, see their involvement as a hobby. The next most common reason for creative participation in music is for serious study.

Australian participation in the arts.

Australian attitudes to the arts

Attitudes towards the arts are becoming more positive.

In 2009 compared with 1999:

- more claimed to like the arts and fewer were neutral or disliked the arts.

More agreed that:

- the arts should be an important part of the education of every Australian
- the arts make for a richer and more meaningful life
- there are plenty of opportunities to get involved in the arts.

And fewer agreed that:

- the arts are too expensive
- the arts tend to attract people who are somewhat elitist or pretentious.

Other key attitudes of interest were:

- Indigenous arts are an important part of Australia's culture (89 per cent agreed)
- the arts should receive public funding (85 per cent agreed)
- it's exciting to see new styles and types of art (81 per cent agreed).

Attitudes to the arts

We asked people to respond to a number of statements about attitudes towards arts, including some from the 1999 survey by Saatchi and Saatchi. This allowed us to measure how Australians attitudes have changed in the past ten years. (see Appendix 1.4 for full details)

To measure overall attitude to the arts we asked people how much they liked or disliked the arts. The results were very positive, with almost eight in 10 claiming to like the arts (43 per cent like, 36 per cent really like). The proportion who 'like or really like the arts' increased by five percentage points compared to 10 years ago. (see Appendix 1.4 for full details)

It was clear in the focus groups that the personal relevance of the arts is enhanced when people creatively participate. As one participant said:

*"When you learn to play an instrument your interest in what others can do grows and you naturally just show more interest than you did before"...*focus group, Sydney.

Those who had creatively participated reported higher levels of liking for the arts (93 per cent of them like/really like the arts). Of those who had neither creatively nor receptively participated in an art form (excluding reading and recorded music), almost half (47 per cent) claimed to still like or really like the arts.

Australian participation in the arts.

This group tended to have:

- more commitments
- less time for the arts
- less money available for the arts
- had creatively and receptively participated in the arts before
- a belief that it's difficult to find the time and there was not enough information on what was available.

On the other hand they have used the internet to research, view or create arts, have a growing interest in Indigenous arts, and have encouraged others to attend arts events.

To measure the nature of Australians' attitudes to the arts several different attitudinal statements were developed and tested. There were high levels of agreement (over 90 per cent agree) with the statement that *'the arts should be an important part of the education of every Australian'*. This reaffirmed the qualitative finding that Australians believe from their own personal experience that education was the crucial link that connected Australians to the arts. There was nearly universal agreement *'people can enjoy both the arts and sport'*. This suggests that most Australians believed that the arts/sports division no longer existed.

Qualitatively this was highlighted by the comments of one key executive in one of Australia's foremost arts organisations who said:

"A few years ago I was unable to tell my colleagues how much I liked sport...the divide was strong on both sides but now I feel completely comfortable talking about my love of sport and the arts...Australia has certainly changed"... stakeholder interview.

Table 11: Attitudes to the arts

Statement	Mean score	% agree
People can enjoy both the arts and sport	4.12	96
The arts should be an important part of the education of every Australian	4.12	90
Indigenous arts are an important part of Australia's culture	4.05	89
The arts should receive public funding	3.97	85
The arts make for a richer and more meaningful life	3.91	80
It is exciting to see new styles and types of art	3.85	81
There are plenty of opportunities to get involved in the arts	3.58	70
The arts should be as much about creating/doing these things yourself as being part of an audience	3.54	67
The arts are an important part of my lifestyle	3.43	59
The arts require understanding to appreciate them fully	3.20	53
The arts are too expensive	3.00	39
The arts tend to attract people who are somewhat elitist or pretentious	2.83	34
The arts are OK they are just not relevant to me	2.71	35
The arts are not really for people like me	2.37	20

Australian participation in the arts.

It was particularly encouraging to find that 89 per cent of Australians believed that 'Indigenous arts are an important part of Australia's culture'. This result can be used in marketing Aboriginal and Torres Strait Islander arts, as many Australians are yet to receptively participate in Indigenous arts – and they want to.

It was heartening to find that the majority of Australian's agreed that the arts should receive public funding. Again alluding to the next section on the benefits provided by the arts; the study uncovered one persistent factor. Australians found it difficult to articulate the benefits of the arts without prompting. As you will see when you read the next section, when prompted, people recognised they agreed with many of the benefit statements they were shown. However, in the focus groups people struggled to explain why the arts were important.

Of all of the attitudinal statements, the highest level of disagreement (74 per cent disagree) was with the statement; *'the arts are not really for people like me'*. In line with widespread national support for public funding of the arts, Australians are also saying that the arts are for them.

One challenge for the arts community is to make the arts relevant to all. At present 35 per cent agree *'the arts are ok they are just not relevant to me'* and 20 per cent saying the arts are not for people like me. There is still a significant job to do to make the arts more relevant and accessible to people who feel this way.

Australian participation in the arts.

The benefits of the arts

Australians more readily linked the arts with individual benefits than community benefits.

The following statements about the arts were recognised (when prompted).

Community benefits:

- creative society - helps people think and work creatively (90 per cent agree) and a way to help people express themselves (92 per cent agree)
- social tolerance - helps us understand others whose lives are different to ours (86 per cent agree)
- communal meaning – helps express and define what it means to be Australian (71 per cent agree)
- sense of belonging - helps me feel part of my local community (53 per cent agree).

Individual benefits:

- human bonding - going to the arts is a great way of spending time with friends (83 per cent agree)
- intellectual growth - exposing us to new ideas and getting us to question things (89 per cent agree)
- inspiration - being inspired by the skill of a great artist (87 per cent agree)
- health and well being – helps deal with stress, anxiety or depression (67 per cent agree).

The finding that arts attendance is driven by spending time with friends suggests that the affinitive nature of arts activities is contributing to a widening exposure to the arts for many.

One area of concern that emerged from the qualitative element of the study was the inability of Australians to clearly articulate the benefits of the arts. It was recognised in the focus group discussions that people consistently struggled to describe the benefits of the arts when asked.

“yes...it's a question I have been asking myself [since I was invited to this focus group discussion] why is the Federal Government interested in increasing the use of the arts...I just cant see what's in it for them”... focus group, Sydney.

Some arts marketers acknowledged in the stakeholder interviews that they weren't always good at articulating the benefits of the arts. While many people could not imagine life without the arts, it was also true that virtually no-one in the focus groups could explain why it was in the nation's interest to promote the arts. Despite this, when prompted people were able to recognise that they agreed with many of the benefit statements they were shown. If the link between the arts and the wide ranging benefits they deliver could be more strongly established it would add even greater value to the arts.

Australian participation in the arts.

The benefits people perceived the arts to bring were seen as either personal or social. Personal or individual benefits from the arts, raised in the focus groups, included intellectual improvement, personal development, open-mindedness, skills and self-esteem. One participant expressed the view that the arts

"...makes you see your life differently"... focus group, Melbourne.

Social benefits raised included affiliation, a more cultured society, greater tolerance of difference and change, acceptance of different cultures/ethnic minorities and an acceptance and appreciation of artists and respect for what they do. It is often about getting people together;

"If I want to see something...I just organise it and make others come with me..." focus group, Melbourne.

Despite an inability to articulate the benefits of the arts the majority of respondents related easily to the benefits raised in the survey (prompted), with high levels of agreement with most statements.

Table 12: Benefits of the arts

Statement	Mean score	% agree
The arts are an important part of helping people to express themselves	4.02	92
I find the skill of a great artist very inspiring	3.99	87
The arts are an important way of helping people think and work creatively	3.97	90
The arts expose us to new ideas and get us to question things	3.97	89
The arts help us to understand others whose lives are different from our own	3.92	86
Going to the arts is a great way of spending time with friends	3.86	83
I feel good when I can express myself creatively	3.82	78
The arts help us express and define what it means to be Australian	3.63	71
The arts help me deal with stress, anxiety or depression	3.58	67
Sometimes, the arts are the only way of saying something important that needs to be said	3.53	67
The arts help me feel part of my local community	3.31	53

The highest levels of agreement were in response to the statements:

- *'the arts are an important part of helping people to express themselves'* (92 per cent),
- *'the arts are an important way of helping people think and work creatively'* (90 per cent),
- *'the arts expose us to new ideas and get us to question things'* (89 per cent)
- *'I find the skill of a great artist very inspiring'* (87 per cent).

These represented personal benefits in that they were based on the ability of the arts to communicate about our own unique emotions, thoughts and experiences and also to promote intellectual development.

Australian participation in the arts.

Other personal benefits included:

- the good feeling from creative expression (78 per cent)
- alleviating stress, anxiety or depression (67 per cent)
- being the only way of saying something important that needs to be said (67 per cent).

These results supported the idea that creating an art work can be relaxing and also helps people to cope with the pressures of everyday life. Two thirds of the population acknowledged that self-expression through art offered health benefits.

Australians also recognised a range of societal benefits from the arts, with highest agreement levels in response to the following statements:

- *'the arts help us to understand others whose lives are different from our own'* (86 per cent)
- *'the arts are a great way to spend time with friends'* (83 per cent)
- *'the arts enable us to express and define what it means to be Australian'* (71 per cent)
- *'the arts help us to feel like a part of the local community'* (53 per cent).

Australians had increased their agreement in the last 10 years with the idea that *'the arts are an important part of helping people to express themselves'*. This theme was strongly supported by the qualitative research which saw many people trying to include a very wide range of activities as being part of the arts. The reason people gave for doing this was illustrated well by a respondent from Melbourne who said:

"You can't judge ... no-one can ...one person's way of expressing themselves might not be my cup of tea but who am I to judge it's not a form of the arts"... focus group, Melbourne.

There was a very strong sense across Australia that expressing yourself was not only highly individualistic but also highly valuable.

*"It's how you get to know who you are, what you believe in, what matters to you ... if you can't express yourself and who you are, then who knows who you are" ...*focus group, Rockhampton.

Australian participation in the arts.

The arts and the internet

The study showed that the internet was impacting significantly on arts consumers:

- Almost a third of all people had used the internet to research, view or create some kind of music, writing or artistic performance in the past 12 months.
- Youth were much more likely to use the internet for the arts. More than half (53 per cent) of all 15-24 year olds used the internet to research, view or create some kind of music, writing or artistic performance in the past year.
- The stakeholders interviewed said that the internet was impacting on their target audiences and their art. They felt that new audiences were emerging and most thought the internet was, in some way, the cause.

With an internet penetration rate of 80 per cent¹ in Australia as at August 2009, the world wide web had become an inextricable part of people's lives and, for most Australians, the internet had transformed the way they consumed and sought information about the arts. It was reported in the stakeholder interviews that arts promotion was in a state of rapid change and the internet had much to do with this evolution. They also found that promoters of arts events were including more and more content on their websites while people in the focus groups were found to be using social network websites (for example Facebook and MySpace) to connect with artists and other arts enthusiasts:

"I will sit in the mall and log on to my writers group and we'll write a story together...I just lose myself for hours." focus group, Melbourne.

There was also increased interactivity with arts audiences through the use of blogs, forums and wikis, which encouraged two-way communication and the sharing of information. People reported that all the typical obstacles to arts participation, such as lack of exposure, awareness, time and cost can all be mitigated through the use of the internet. The internet had great potential to dissolve many of the barriers people experienced while attempting to engage in the arts. Increasingly, the internet offered a positive environment for people to trial the arts, without having to physically attend. The internet was not only a catalyst for promotion, but also a supportive environment for new art forms (for example digital art).

Generation Y, a confident, educated, wealthy and experience-seeking cohort, appeared to be taking advantage of the endless possibilities presented by the teaming of two opposing realms; the 'technological' internet and the 'creative' arts. Australia's educational curriculum also had a part to play, with engagement levels shown to be higher among high school and tertiary students.

The results of the 2009 survey showed that it was those who were already highly engaged in the arts who were using the internet for the arts. Those who used the internet for the arts had higher engagement levels more generally (60 per cent had creatively participated and 97 per cent had receptively participated in the past 12 months).

¹ The internet penetration rate corresponds to the percentage of the total population of a given country or region that uses the internet. An internet user is anyone currently in capacity to use the internet. The person must have available access to an internet connection point and the basic knowledge required to use web technology. Source: www.InternetWorldStats.com

Australian participation in the arts.

In total, 39 per cent of internet users were consuming (rather than creating) art online by researching, watching/listening to, or downloading different art forms. Where previously the arts were promoted in newspapers and very occasionally on TV (only for major arts events), arts events were now advertised online and ticket availability was known within a few simple mouse clicks. This technology was seen to be increasing the spontaneity of arts consumers (*"I want it now"*). As a result the internet was a perfect platform for the marketing of the arts.

The most common use of the internet for the arts was to discover or research an artist or event (32 per cent of all internet users), showing that arts enthusiasts were using the internet as a mechanism for increasing their knowledge and awareness of different arts events occurring. The benefits of researching artists online were expressed by focus group participants;

"You can go on the internet and see if you'll like what it is you are going to see or hear [with regard to an arts event]...what could be better than that?"... focus group, Sydney.

"It means you go knowing stuff about the particular opera story, who's in it... what others think about the production...all sorts of things." ...focus group, Sydney.

Table 13: Online arts consumption

Consuming	% of all internet users	Av occasions per year
Researched or found out more about an artist or art event	35	32
Watched or listened to music online	30	86
First heard about an artist or art event	26	34
Downloaded music online	22	65
Watched/downloaded performances and/or art works by professional artists, excluding music	14	38
Watched/downloaded performances and/or art works by non-professional artists, excluding music	11	43

In terms of creating art online, 16 per cent of all internet users were involved in posting works of art, writing blogs and working with others to create art. Creating art online was the domain of the young, with 41 per cent of all online creators aged 15-24 years. There was a hint of diversity in the ways people were creating works of art online. The most widespread online art creations were writing (eight per cent of all internet users) and visual art/film/video online (seven per cent of all internet users), while the most frequent mode of participation was being involved in an online community or social network concerned with art in some way (average of 82 occasions per year).

Australian participation in the arts.

Table 14: Online arts creation

Creating	% of all internet users	Av occasions per year
Posted your own work of visual art/film/video online	6	20
Participated in an online community or social network concerned with art in some way	5	82
Learned to create music, graphics or stories online	5	38
Wrote own blog	5	48
Posted your own stories/poetry/articles online	3	26
Worked with others through the internet to create visual art/film/video	3	27
Worked with others through the internet to create a story article or poem	2	33
Posted your own music online	2	26
Posted your own book/music/theatre reviews online	2	29
Worked with others through the internet to create music	2	34

The group discussions and expert interviews drew our attention to online communities and social networks which were mechanisms through which people sought the opinions of trusted sources – other arts consumers (rather than the arts experts). Random blog comments from everyday people were reported to be worth much more than the views of professional art critics, and increasingly people were looking for advice from people like themselves before choosing the arts they consumed. With people much more interested in the views on the arts of people like themselves, rather than experts, the implication was that arts was more likely to be consumed if it was perceived to have offered entertainment value. Again this view indicated that the wider benefits of the arts were not fully embedded in the hearts and minds of Australians.

By being an anonymous medium the internet had the potential to avoid the key pitfalls that creative participation in social settings falls into; namely the social stigma of ‘not being very good’:

“[With the internet] You’re on your own...no one to criticise...no-one to judge [Enjoy what you like, discard what you don’t like]” ...focus group, Sydney.

This raises an opportunity to extend the audience of creative participation, where at present it seemed that there was a strong relationship between online and offline behaviour, with those creatively participating online more likely to have creatively participated offline and those receptively participating online also having receptively participated offline.

Internet-based arts consumption and participation was undoubtedly on the rise. However, it remains to be seen whether perceived benefits to the arts sector will carry through to the long term. Possible threats to the sector include a rise in the arts on the internet causing a reduction in paid consumption and a decrease in the perceived specialisation, with the emerging view that ‘with the internet anyone can be an artist’.

See Appendix 1.5 for full details.

Australian participation in the arts.

Australians and Indigenous arts

The study measured attitudes towards Aboriginal and Torres Strait Islander arts as well as attendance levels:

- seventeen per cent of people had a strong interest in Indigenous arts and will continue to have this interest
- forty seven per cent of people claimed that their interest in Indigenous arts was growing
- seventeen per cent of people had attended arts created or performed by Aboriginal or Torres Strait Islander artists.

These results indicated a major opportunity to build the audiences for Indigenous art across Australia.

Aboriginal and Torres Strait Island arts are amongst the oldest art traditions in the world and art has always been an important part of Indigenous life.

The survey found that of the 74 per cent of people who had receptively participated in visual arts and crafts, theatre, dance or music in the past 12 months, nearly a quarter (23 per cent) of them had attended arts created or performed by Aboriginal or Torres Strait Islander artists. This translates to 17 per cent of the population having engaged in Indigenous arts.

Table 15: Levels of receptive participation in Indigenous arts

Indigenous art form	% receptive participation of total sample
Visual arts & crafts	9
Theatre	4
Dance	8
Live music	8

Visual arts and crafts were the most popular Indigenous art form with nine per cent of the total sample engaging. This was followed by dance and live music (each attended by eight per cent of the total sample) and lastly theatre (four per cent of the total sample).

New South Wales and Queensland had higher levels of attendance at Indigenous dance events than Victoria and South Australia. Whilst the Northern Territory appeared to have much higher attendance levels for Indigenous visual arts and crafts compared to the other states these results were only indicative due to the low sample size.

In terms of regional differences in Indigenous arts attendance, dance and live music audiences were more concentrated in rural areas when compared to inner or outer metropolitan areas.

Australian participation in the arts.

There was a relationship between attitudes to Indigenous arts and attendance, with those who had attended an Indigenous arts activity having significantly more positive attitudes. This was not to suggest that attendance caused positive attitudes, or vice versa, but simply that those who were going to see Indigenous art were more likely to favour it. Of those who had attended arts created or performed by Aboriginal or Torres Strait Islander artists, 34 per cent reported having a strong interest in Indigenous arts and would continue to, while 50 per cent said their interest was growing.

Table 16: Relationship between attitudes and receptive participation in Indigenous arts

Attitude	Had receptively participated in Indigenous art %	Had not receptively participated in Indigenous art %
I have a strong interest in Indigenous arts and will continue to	34	14
My interest in Indigenous arts is growing	50	46
My interest in Indigenous arts is declining	3	4
Indigenous arts are of low interest to me and will continue to be low	13	37

However, there was still a small group of people (16 per cent) for which Indigenous arts was of low interest, yet they still attended at times. Perhaps even more surprising was that 60 per cent of people who had not attended Indigenous art in the past 12 months had some sort of interest in it (14 per cent strong and 46 per cent growing). Once again this suggested a real opportunity for the arts sector to address the demand for more Indigenous art experiences.

Australian participation in the arts.

Australian cultural engagement

The study measured the level of participation from the perspective of multicultural Australia, community arts, regional communities, illness and disability, and youth. Community arts involvement is at around a quarter (24 per cent) of the population.

Multicultural results:

- those born here but with at least one parent born overseas showed similar levels of participation to other Australians
- those born overseas in a non English speaking country showed lower levels of creative and receptive participation
- those whose main language at home wasn't English showed lower attendance events.

Those with an illness or disability were also less likely to participate in the arts but many would like to.

Rural areas showed lower participation levels for creative writing, reading and attendance at music events than inner metropolitan areas but they had higher levels of receptive participation in community arts.

Young people in Australia showed higher levels of creative participation than the rest of the population.

The Australia Council's Cultural Engagement Framework (CEF) aims to create opportunities for all Australians to participate in our cultural life. This research was designed with this framework in mind. This section focuses on five key CEF groups; (1) multicultural Australia, (2) people with a serious illness or disability, (3) community arts engagement, (4) regional communities and (5) youth.

Arts in a multicultural Australia

Three groups of multicultural Australians were of interest;

1. Those who were born overseas in a non-English speaking country.
2. Those who were born in Australia but at least one parent was born overseas in non-English speaking country.
3. Those whose main language spoken at home is not English.

In terms of overall engagement levels, those who were born in Australia but at least one parent was born overseas in non-English speaking country showed no significant differences when compared to the average results for the Australian population. However, those born overseas in a non-English speaking country showed significantly lower levels of both creative and receptive participation overall when compared to the total Australian population. Those for whom the main language spoken at home was not English were less likely to attend arts events.

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The nine per cent of people surveyed who were born overseas in a non-English speaking country were more likely than people born in Australia or in another English speaking country to have neither participated in, nor attended, the arts in the past year (27 per cent compared to 19 per cent), and to have neither participated in, nor attended, community arts in the past year (58 per cent not participated nor attended compared to 54 per cent). They were also less likely to have encouraged others to attend the arts. While they had higher levels of agreement for statements such as; *'the arts require understanding to appreciate them fully'* and *'the arts are too expensive'*, they were also more likely to agree that; *'sometimes, the arts are the only way of saying some thing important that needs to be said'* and *'the arts help me deal with stress, anxiety or depression'*.

See Appendix 1.9 for full details.

People with a serious illness or disability

The survey included 12 per cent of people who lived with a serious illness or disability that affected the activities they could do. Not surprisingly they reported much lower levels arts participation – they were more likely than the average Australian to have not creatively or receptively participated in the past 12 months in arts at all.

Those with a disability tended to be:

- older (65+)
- unemployed or retired
- earning less than \$40K household income.

They were likely to experience barriers to creative and receptive participation including cost, not enough opportunities close to home, finding the arts more difficult to access, ill-health, not having anyone to go with, and feeling uncomfortable and being nervous about trying new things.

Of the two thirds (65 per cent) of people with a serious illness or disability who are not creatively participating in arts activities, a third (33 per cent) would like to.

*"When you are limited in what you can do like I am the arts makes a big difference to your life ...more than you would ever understand"...*focus group (person with a disability), Melbourne

There was a tendency for those with a serious illness or disability to have a neutral attitude towards the arts (neither like nor dislike the arts). They were likely to be very interested in participating in the arts nowadays, but not at all interested in attending arts events. Whilst engaging with arts over the internet overcomes the lack of mobility issues, this group of people were less likely than the rest of the population to be internet users.

"the internet is fine...if you have one ...but I don't and lots of people I know like me don't. Nothing replaces the opportunity to get together and personally experience the arts"... focus group (person with a disability), Sydney.

See Appendix 1.10 for full details.

Australian participation in the arts.

Community arts engagement

For this study community arts were defined as ‘when the art has been created as part of a community group together with a professional artist who has been paid for their involvement.’

Of the 80 per cent of people who had creatively or receptively participated in visual arts and crafts, theatre, dance, creative writing or music in the past 12 months, a third (32 per cent) of them engaged in some form of community art. This puts community arts involvement at around a quarter (24 per cent) of the population.

Receptive participation was more common than creative participation; 26 per cent of those who engaged in arts over the year went along and watched community art while 11 per cent creatively participated in a community-based arts activity. Community visual arts and crafts had the most engagement (nine per cent creative and 25 per cent receptive participation), followed by theatre and dance (six per cent, 21 per cent) and music (five per cent, 15 per cent). From a community arts perspective, creative writing was the most commonly participated in art form at nine per cent of those who engaged in arts over the last 12 months.

Those engaging in community arts were more likely than those not engaging in community arts to be female, in part-time paid professional employment and have a postgraduate degree or diploma. They had creatively participated more this year, than last year, because more friends wanted to create art, had receptively participated more this year, than last year, and had attended Indigenous arts in the past 12 months. Community art enthusiasts were also actively using the internet to research, view or create art. They had a very positive attitude to the arts, stating that they really liked the arts. They were also important in arts advocacy by encouraging others to attend arts events (71 per cent had recommended the arts to friends, 49 per cent to a partner or spouse, 50 per cent to extended family, 33 per cent to parent, child or carer, and 20 per cent someone else as part of a program.

While those engaging in community arts were more likely to agree with many of the positive attitudinal statements regarding arts consumption (such as ‘*the arts make for a more richer and meaningful life*’ and ‘*the arts should receive public funding*’), they were no more likely to agree that ‘*the arts help me feel part of my local community*’.

In terms of differences in community arts consumption by location, an examination of the States showed no significant differences in participation levels. However when regional differences were examined, higher receptive participation levels were found in rural areas (33 per cent receptive participation in community arts compared to 26 per cent average sample).

See Appendix 1.6 for full details.

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Regional communities

Many residents of regional communities expressed frustration at the lack of choice in terms of arts participation. A Darwin resident for instance explained the situation in his home town by saying;

"We're not spoilt for choice, 'cause beggars can't be choosers"... focus group, Darwin.

This was particularly the case in the wet season, with a lack of arts events on;

"For six months of the year you've got nothing. The only thing you've got is a cinema and a museum and that's about it"... focus group, Darwin.

However, Darwin was seen to have its own artistic gems;

"...it's a bit isolated but I mean the Aboriginal art here is absolutely amazing."... focus group, Darwin.

Another barrier to participation in regional communities widely reported in the study was the lack of promotion of arts events. Additionally, there was the perception in rural areas that it's not commercially viable for acts to come to their town. Needless to say, many people were prepared to travel (and actually did travel) to attend arts events.

In the survey, rural areas showed significantly lower participation levels for creative writing, reading and attendance at music events than inner metropolitan areas (creative writing: 14 per cent compared to 20 per cent, reading: 56 per cent compared to 86 per cent and music attendance: 54 per cent compared to 61 per cent). Rural residents were more likely than inner and outer metropolitan residents to have had a below average year of receptive participation in the arts compared to the year before. Of those who had a below average year of receptive participation in the arts compared to the year before, more rural than metropolitan residents said the reason was an inability to get to venues. As mentioned previously, levels of receptive participation in community arts were higher for rural residents than for the rest of the population (33 per cent of those who receptively participate in general). Similarly, levels of receptive participation in Indigenous dance (15 per cent of those who receptively participate in general) and live music (16 per cent of those who receptively participate in general) were higher in rural areas rather than metropolitan areas.

A lack of receptive participation in rural areas tended to be blamed on there not being enough opportunities close to home and events being hard to get to. This could also be a reflection of poor transportation options for people living in remote locations.

In terms of attitudes to the arts, rural areas showed higher levels of disagreement with the statement *'there are plenty of opportunities for me to get involved in the arts'* when compared to inner and outer metropolitan areas. This confirmed the issues around lack of mobility for people living in rural areas when attempting to access the arts.

See Appendix 1.7 for full details.

Australian participation in the arts.

Youth

Young people in Australia displayed higher levels of creative participation than the rest of the population. They were more likely to be creatively engaged in visual arts and crafts, theatre and dance, creative writing and music. This was to some degree a reflection of education, with young students more active in creative participation than young workers. Of all those aged 26 and under, secondary school and tertiary students reported significantly higher levels of creative participation in the arts (than employed or unemployed). A total of 71 per cent of secondary school students and 68 per cent of tertiary students aged 26 and under had been involved in at least one art form over the 12 months leading up to the survey. This compared to 51 per cent of those employed and to only 36 per cent of those unemployed 15-26 year olds. Secondary school students also reported higher levels of creative participation in theatre and dance. However, even with high school and tertiary students removed, young people continued to exceed the rest of the population in terms of creative participation and attendance at music events.

Despite lower levels of creative participation, young employed people were more likely to attend music events than young students (76 per cent compared to 59 per cent of secondary school students and 69 per cent of tertiary students). This may in part be due to young employed people having higher disposable incomes than their peers who were studying.

Both creative and receptive arts participation levels among the younger cohort appeared to be on the rise, with this group more likely than the rest to say their involvement in the arts had increased in the last year. With a higher concentration of internet users, young people were engaging with the arts in new and evolving ways.

See Appendix 1.8 for full details.

Influences and advocacy

The most common influence over past and present attendance at the arts comes from within the individual. That is to say that 59 per cent of people said they were their own influence in the past and 75 per cent are still their own influence. Friends are of equal influence both in the past and present (23 per cent). Parents are more likely to influence arts attendance in the past (20 per cent) than the present (four per cent).

Table 17: Past and present influences over arts attendance

	Past %	Present %
Myself	59	75
Friends	23	23
Partner	13	18
Wider family	14	17
Parents	20	4
My place of work	2	4
Teachers at school	11	2
University	2	2
Don't know	2	2

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In terms of encouraging attendance of the arts to other people, the majority (52 per cent) of people have done so to friends or colleagues. About a third of all people (35 per cent) have encouraged a partner/spouse or extended family to attend arts events. Another third (34 per cent) had not encouraged anyone to go and see the arts.

Table 18: Encouraging others to attend the arts

	% encouraged to attend the arts
Friend/colleague	52
Partner/spouse	35
Extended family	35
No one	34
Parent/child/carer	19

See Appendix 1.11 for full details.

Australian participation in the arts.

Segmentation

The analysis of the survey responses identified four attitudinal segments which will have important implications for marketing the arts and in terms of their mindset, receptiveness to the arts and individual situation.

The attitudinal segments are as follows:

The lovers (38 per cent)

'The lovers' are highly engaged with the arts and see the arts as an integral part of their lifestyle. They also hold the view that the arts provide them with a more meaningful and richer life as well as help them feel part of their local community. They have the most intense liking of the arts of all the segments and are using the internet extensively to pursue their interests in the arts. Many already attend Aboriginal or Torres Strait Islander arts events and have also participated in an online community or social network concerned with the arts in some way. They also understand the link between the arts and a creative nation.

The flirthers (26 per cent)

'The flirthers' are more likely to be influenced by friends than the lovers to attend arts events both now and throughout their life. They like the arts, but are not necessarily convinced that arts help them feel part of their local community. However they strongly believe that the arts provide a way of saying some important things that need to be said.

The un-attached (19 per cent)

Of those who have a neutral attitude towards the arts, many have not actually participated in, or attended any, of the main art forms in the past year, and some have never experienced these art forms at all. They lack the fundamental interest in the arts, would rather play/attend sports, believe they personally have no artistic ability (therefore '*it's not something they would do*' because they might feel out of place), or wouldn't enjoy it. Whilst they do not dislike the arts per se, they just cannot see the personal relevance of the arts.

The outsiders (17 per cent)

'The outsiders' believe the arts tend to attract people who are pretentious and elitist. They also believe the arts require a reasonable level of understanding to appreciate them fully and therefore the arts "*are not for them*" because they lack this insight for themselves. They also feel the arts are too expensive. This group tends to be older and retired. They also tend to have lower levels of education and work in unskilled jobs.

Figure 3: Overview of four attitudinal segments

Australian participation in the arts.

Building engagement

The segmentation yielded four distinct ‘mindsets’ regarding the arts which were then crossed with the level of actual arts attendance based on attendance frequency figures. Each individual’s frequency of attendance per year (for all of the art forms attended – excluding literature were added together to obtain an overall attendance score for that individual.

The methodology for forming the behavioural groups of high/medium/no-low attendance involved:

- identifying non-attendees and assigning them into the lowest group (no attendance)
- taking the remaining attendee’s scores and splitting them into three even groups; low, medium and high.

The figure below shows the nine segment solution based on the arts attitudes and arts behaviours that Australians exhibit.

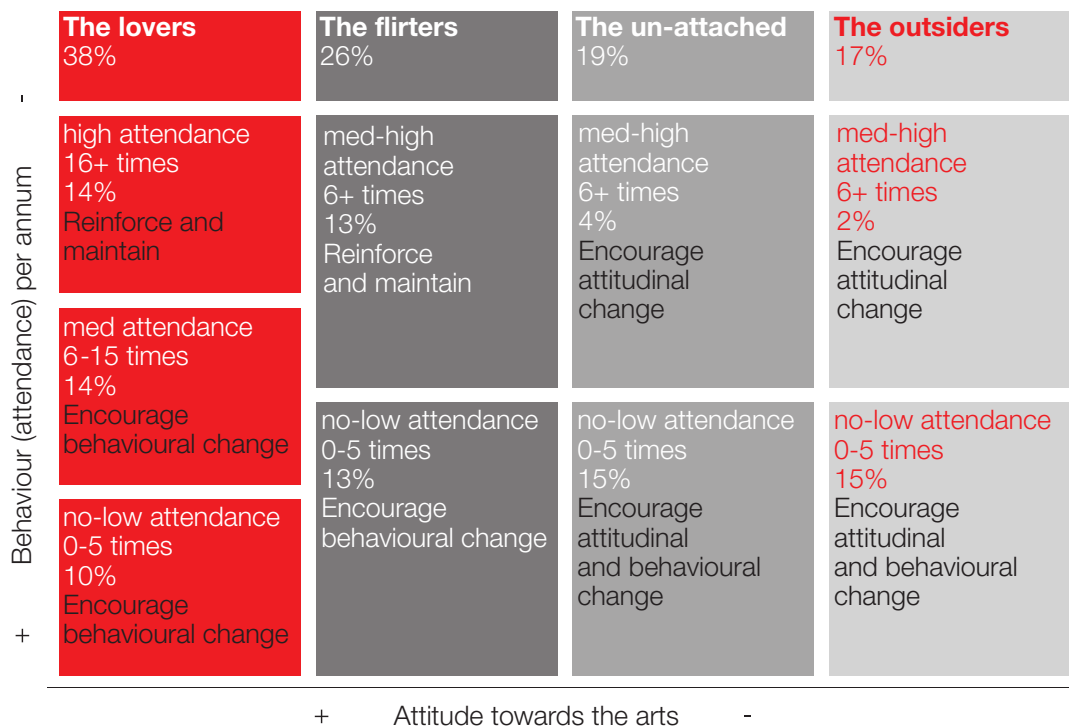


Figure 4: Nine segment solution

Australian participation in the arts.

The profiles of each of the nine segments provides us with insights into the attitudes, motivations and barriers of each group to increased arts participation. Each segment demands different marketing and policy responses.

1. 'The lovers' with high attendance (14 per cent)

More likely to:

- be a professional, a tertiary student/have a degree; aged 15-24 years or, by contrast, to be an 'empty nester'
- use the internet for all arts purposes and hear about arts events first on the internet and to have researched artists there
- have had an above average year of arts participation/ attendance
- have a high frequency of attendance at theatre and other live music
- have participated in and attended community art and Indigenous art
- have used the internet to research, view or create music, writing or an artistic performance and has participated in an online community or social network concerned with the arts in some way
- have encouraged others to attend the arts.

2. 'The lovers' with medium attendance (14 per cent)

More likely to:

- be a manager, professional and female and use the internet regularly and for most arts purposes
- have had a slightly above average year of arts participation/ attendance
- have attended community and Indigenous art and their interest in Aboriginal art is growing
- have been influenced by parents to attend arts in the past and have encouraged friends, colleagues, partner and family to attend the arts.

But are less likely than the high users of 'The lovers' to strongly believe:

- the arts help people think and work creatively
- expressing themselves creatively makes them feel good
- the arts exposes us to new ideas and gets us to question things.

3. 'The lovers' with low attendance (10 per cent)

More likely to:

- be in full time paid employment
- have only completed secondary school
- be aged 35-44 years and 45 – 54 years (career peaking and family life stages) and hence to have a family with most children under 16 years
- have had a below average year for arts participation and attendance because they have had more commitments and less time for the arts this year
- have not attended Indigenous art events nor have they encouraged others to attend the arts.

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4. 'The flirthers' with medium/high attendance (10 per cent)

More likely to:

- have a university degree and be aged 15-34 years and be a professional or sales person
- really like the arts compared to low attendance flirthers (61 per cent vs 32 per cent)
- be a high user of the internet and an above average user for arts research, to view or create music and to get information about arts events/artists
- have had an above/slightly above average year of arts participation and attendance because they had more friends who wanted to go (and fewer commitments)
- have a high frequency of attendance at theatre and other live music
- have used the internet to research, view or create music, writing or an artistic performance and to research or find out more about an artist or event
- be influenced to attend arts currently by friends and through university
- have encouraged friends, colleagues and family to attend the arts
- have participated in the arts and continue to want to participate in the arts (than the low attendance of 'The flirthers' and average sample).

5. 'The flirthers' with no/low attendance (13 per cent)

More likely to:

- be male and highly influenced by friends/partner in attending the arts right now and throughout their life
- be a high user of the internet but a less than average user to research, view or create music or anything regarding the arts
- use the internet for arts participation particularly in regard joining a social community concerned with art
- have had a below average year of arts participation and attendance because they had less money and other limitations
- have not attended Indigenous art; nor have they encouraged others to attend the arts
- believe they were not artistic and there is a lack of opportunities for the arts where they live and they have trouble accessing information on what is available
- their health is also cited as a barrier to attendance as is a fear of trying new things
- have used the internet to research, view or create music, writing or an artistic performance and to research or find out more about an artist or event
- have participated in the arts and continue to want to participate in the arts (than the low attendance of 'The flirthers' and the average sample overall)
- have streamed arts events on the internet [than low attendance of 'The flirthers'.]

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6. 'The un-attached' with medium/high attendance (four per cent)

More likely to:

- cite 'less interest' as a key reason for lower levels of attendance compared to the previous year
- have never participated in the arts
- rather participate in sports activities
- believe that the arts are '*not something someone like me would do*'
- have not encouraged others to attend the arts
- their health is often cited as a barrier to attendance as is a fear of trying new things in general
- have used the internet to research, view or create music, writing or an artistic performance and to find out more about an artist or event
- be influenced to attend arts currently by friends and through university
- have participated in the arts and continue to want to participate in the arts (than the low attendance 'The flirts' and the average sample overall)
- see difficulty of getting access to information, actually getting to events, a lack of opportunities and cost as barriers to attendance of the arts.
In addition – not having anyone to go with is a key barrier for this sub-segment.

7. 'The un-attached' with low/no attendance (15 per cent)

More likely to:

- be male; and have only completed secondary school
- have had an above average year of arts participation and attendance
- cite 'less interest' as a key reason for lower levels of participation and attendance compared to the previous year
- have not participated in nor attended community arts activities/events
- have not attended Indigenous art
- have never participated in the arts
- rather participate in sports activities
- have a high frequency of writing blogs
- believe that attending the arts is '*not something someone like me would do*'
- feel they would be uncomfortable and would not enjoy the arts
- have not encouraged others to attend the arts
- see difficulty to access information, to actually get to events, a lack of opportunities and cost as barriers to attendance of the arts. In addition – not having anyone to go with is a key barrier for this sub-segment.

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8. 'The outsiders' with medium/high attendance (two per cent)

More likely to:

- participate in sports activities than the arts
- think they might feel uncomfortable at an arts event
- have not encouraged others to attend the arts.

9. 'The outsiders' with no/low arts attendance (15 per cent)

More likely to:

- be aged over 65; retired and have had an above average year of arts participation and attendance
- have only completed primary or secondary school
- cite 'less interest' as the reason for lower levels of participation and attendance compared to the previous year
- have not participated in nor attended community arts activities/events
- have not attended Indigenous art
- have never participated in the arts/ be not at all interested in the arts
- rather participate in sports activities
- believe that the arts costs too much
- believe that attending the arts is *'not something someone like me would do'*
- feel they would be uncomfortable and would not enjoy the arts
- believe the arts would be hard to get to
- have not encouraged others to attend the arts
- have a serious illness or disability.

Figure 5: Nine attitudinal and behavioural segment solution

Australian participation in the arts.

Next steps

This research provides a comprehensive picture of the way Australians are involved with the arts and is a benchmark for the health and significance of the arts in Australia. It shows the community strongly supports the arts, that they are interested, and value what the arts can do for them. For the first time, this research helps us to understand community attitudes and values and how these impact on creative and receptive participation.

This research provides the opportunity to:

- devise strategies to overcome the practical barriers to attendance to those who are positive towards the arts
- promote the arts role in building and maintaining social inclusion
- targeting presenters to convince them of the unmet demand for Indigenous arts
- more effectively use the internet to market the arts and encourage attendance.

This research will help arts organisations understand their audiences better and shape what they offer to make the arts even more welcoming and accessible.

For policy makers, this research identifies the key factors that impact on Australian participation in the arts, including education, and the barriers and incentives for participation that can be addressed in future policies and funding strategies.

We believe our role is not just to produce research; it is also to stimulate debate.

We recognise research does not always deliver a clear cut 'answer' to a set of questions or provide clear direction on an issue. The value of research may be more in shedding new light on an issue, enabling people to think about it in a different way or use information to advocate for new ways of doing things. We encourage arts organisations to embrace this research in this way, to see it as a resource they can use, as much a source of inspiration as a mechanism for guiding decisions and assessing effectiveness of strategies. We want to strengthen our relationships with arts organisations and others with an interest in arts related research, and engage actively with other groups for whom arts research can add value.

To make the research as accessible as possible, we have made available the following resources:

- the full report available online at www.australiacouncil.gov.au/participation under a creative commons licence, so that there is greater flexibility in the way the research is used
- an executive summary of the findings online at www.australiacouncil.gov.au/participation and a printed copy in limited edition
- fact sheets on key aspects of the research
- 'think pieces' on various aspects of the research will be available over the next few months.

This is part of a broader strategy to make the Australia Council's online Research Hub more accessible and interactive. But this is not the only way we will be communicating this research.

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We also believe the richness of research can only emerge when people have the opportunity to explore it face to face in less formal briefings – seminars, forums, research meetings. To facilitate this discussion the Australia Council will conduct a series of sector seminars and forums following the formal launch of the research, specifically to engage in a conversation over the findings of the research.

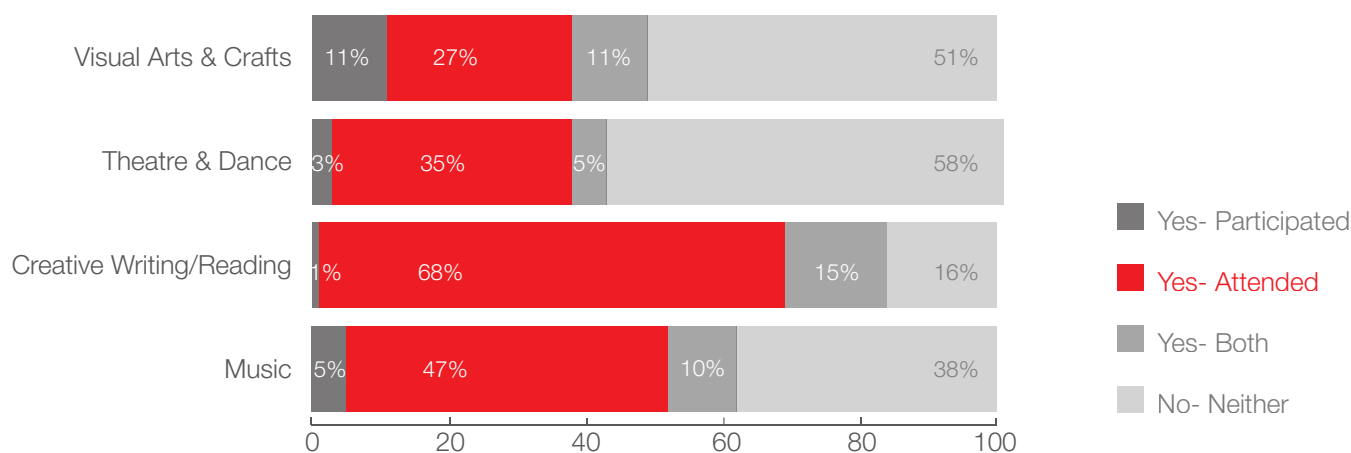
By encouraging this conversation we want to extend the value of this research and to promote its implications for the sector.

Australian participation in the arts.

Appendices

Appendix 1.1: Participation and attendance (engagement)

QB1. I am going to read out a list of art forms. Please tell me which of the following have you personally participated in or attended in the last 12 months (that is since October 08)



Art form	Creative participation only per cent	Receptive participation only per cent	Both creative and receptive participation per cent
Visual Arts & Crafts	11	27	11
Theatre & Dance	3	35	5
Creative Writing/Reading	1	68	15
Music	5	47	10

Base: Total sample.

Appendix 1.2: Engagement by state

Creative participation by state, by percentage

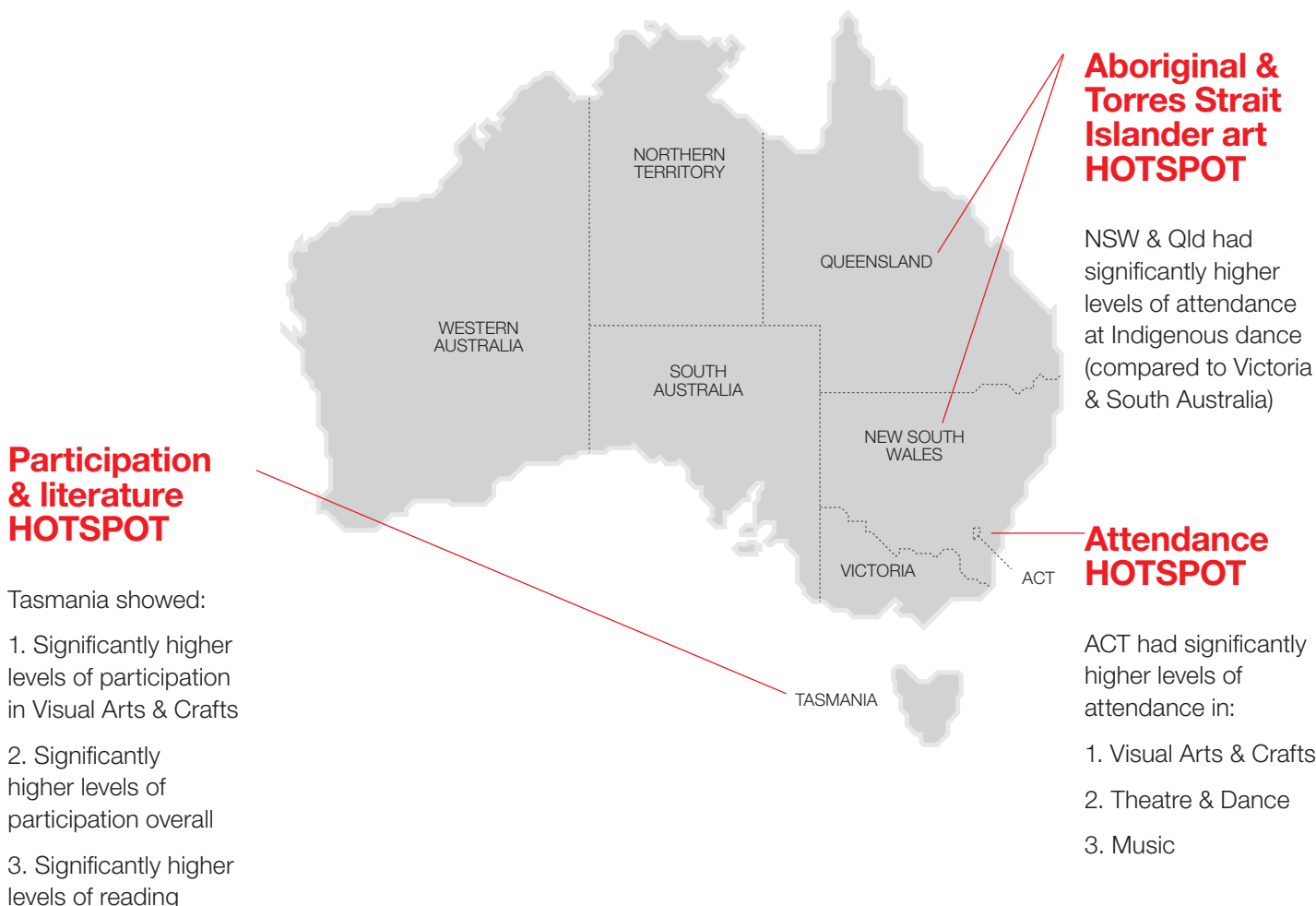
	NSW	VIC	QLD	SA	WA	TAS	NT	ACT	Total
Visual Arts & Crafts	23	21	22	21	22	36	28	25	22
Theatre & Dance	8	9	8	7	7	7	8	8	7
Creative Writing	15	17	15	17	16	22	13	18	16
Music	15	15	14	15	15	18	13	15	15
<i>Creatively participated in at least one art form</i>	41	41	41	40	43	56	33	48	41

Australian participation in the arts.

Receptive participation by state, by percentage

	NSW	VIC	QLD	SA	WA	TAS	NT	ACT	Total
Visual Arts & Crafts	42	38	38	37	37	46	48	63	38
Theatre & Dance	43	44	38	37	39	46	28	58	40
Reading	83	83	83	85	84	92	83	91	84
Music	61	57	56	53	58	62	43	73	57
<i>Receptively participated in at least one art form</i>	92	92	92	93	92	97	96	93	92

State hotspots

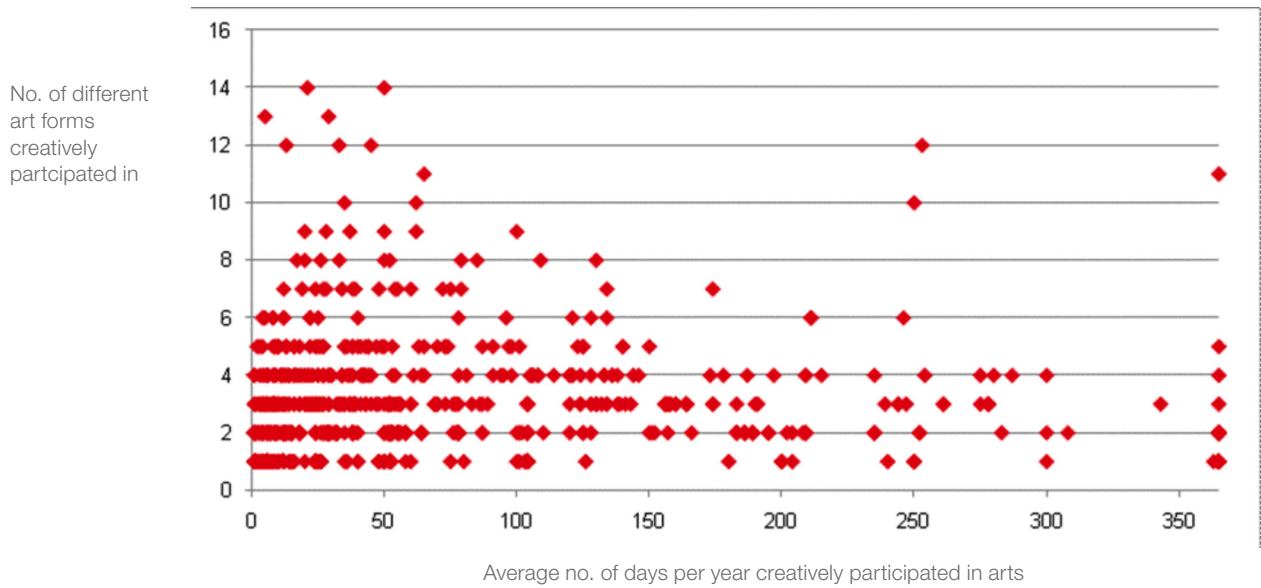


Australian participation in the arts.

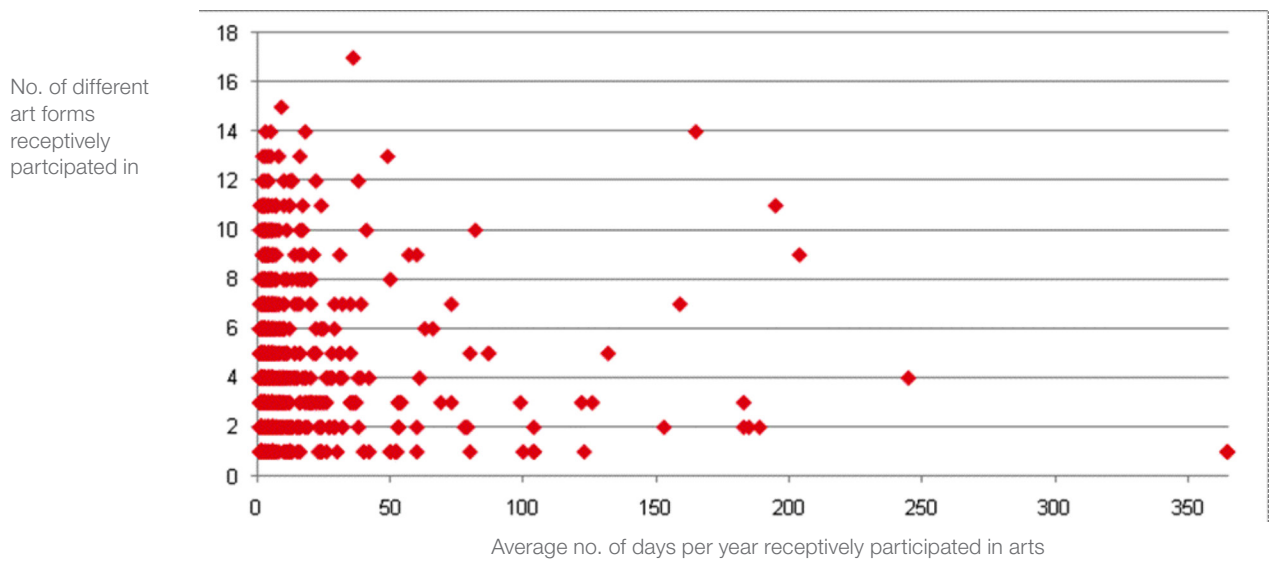
Appendix 1.3: Relationship between creative and receptive participation

Levels of creative and receptive participation in the arts

Creative participation – Number of art forms vs. average number of occasions per year creatively participating



Receptive participation – Number of art forms vs. average number of occasions per year receptively participating



Australian participation in the arts.

Appendix 1.4: Attitudes towards the arts

E3. Overall which one of the following statements is the best description of your own attitude towards the arts ...?

Base: Total sample.

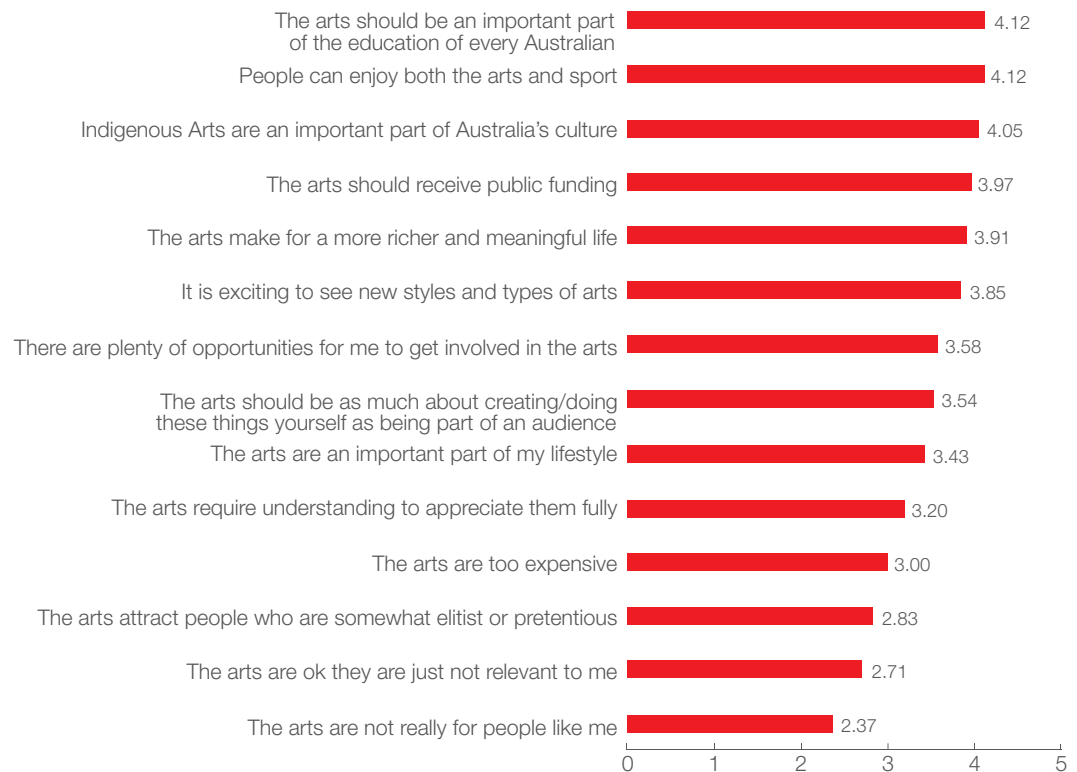
Liking of the arts split by attendance (receptive participation) and participation (creative participation)

Like/really like the arts (79%)	Neither like nor dislike the arts (18%)	Do not like/really do not like the arts (3%)	Total
80% attended at least one art form	43% attended at least one art form	23% attended at least one art form	72% attended at least one art form
48% participated in at least one art form	13% participated in at least one art form	15% participated in at least one art form	41% participated in at least one art form
12% neither attended nor participated	50% neither attended nor participated	75% neither attended nor participated	20% neither attended nor participated

Australian participation in the arts.

E1. I will read out a number of statements about the arts. For each of them could you tell me whether you strongly agree, agree, neither agree nor disagree, disagree, or strongly disagree?

Base: Total sample.



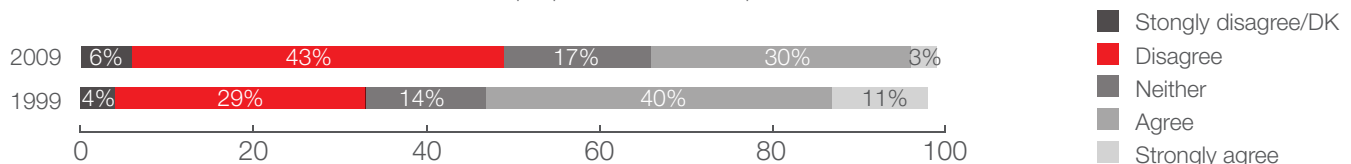
2009 Survey vs 1999 Survey (Saatchi & Saatchi): Liking the arts

Liking of the Arts

	I don't really like the arts per cent	I don't like the arts per cent	Neither like nor dislike per cent	I like the arts per cent	I really like the arts per cent
2009 survey	1	2	18	43	36
1999 survey	3	3	20	41	33

2009 Survey vs 1999 Survey (Saatchi & Saatchi): Attitudes towards the arts

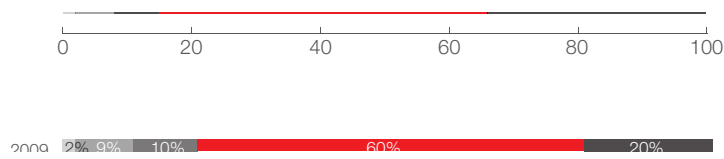
The arts tend to attract people who are elitist or pretentious



Australian participation in the arts.

The arts should be an important part of the education of every Australian

The arts make for a richer and meaningful life

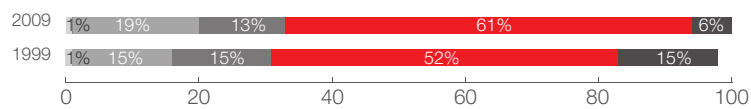


There are plenty of opportunities for me to get involved in the arts

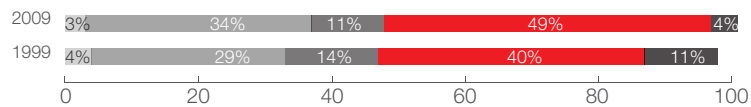


Strongly agree

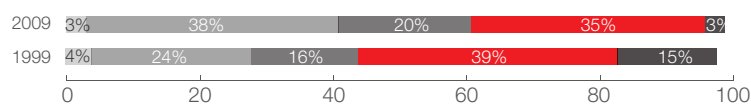
The arts should be as much about creating/doing these things yourself as being part of an audience



The arts require understanding to appreciate them fully



The arts are too expensive



Strongly agree
Agree
Neither
Disagree
Strongly disagree/DK

Australian participation in the arts.

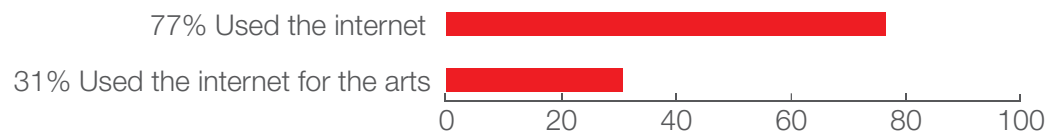
Appendix 1.5: Arts and the internet

QD1. Have you used the internet from home, work, school, or any other location for personal non-business use in the last 12 months?

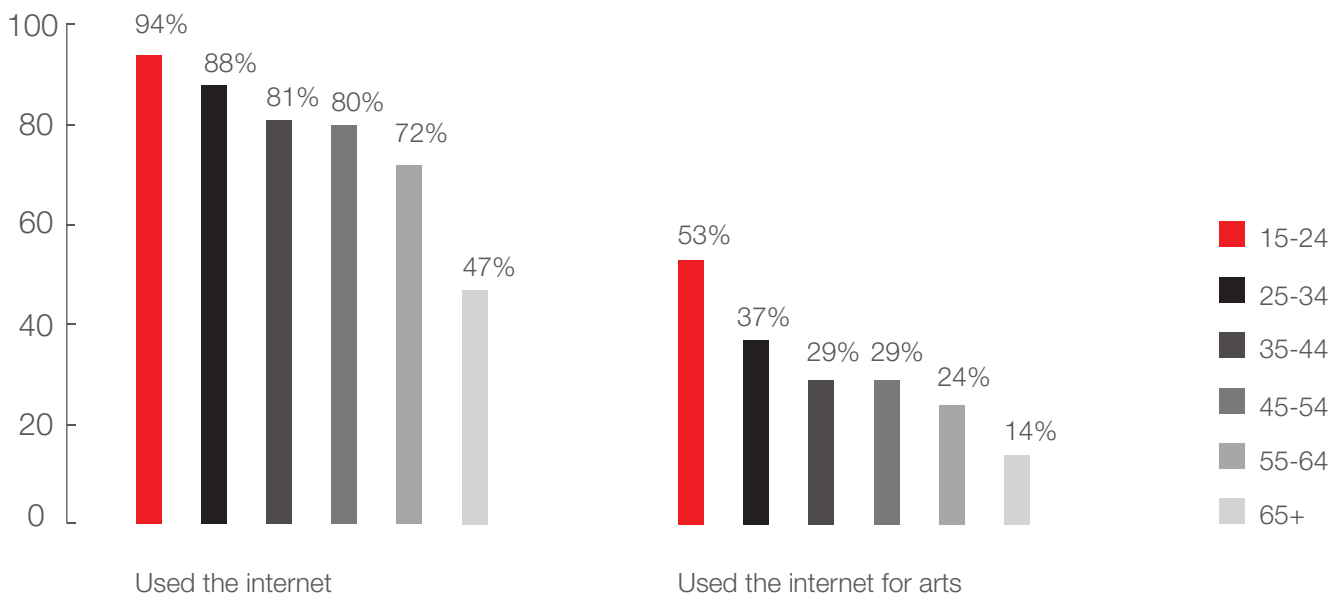
QD2a. Have you ever used the internet to research, view or create any kind of music, writing or artistic performance?

Base: total sample.

Use of the internet vs. Use of the internet for the arts



Use of the internet vs. Use of the internet for the arts by age



QD2. I'm going to read a list of ways in which people have told us they are involved with the arts through the internet. Please answer yes or no if you have done the following in the last 12 months.

Base: those who have used the internet in the last 12 months, n=2322.

Australian participation in the arts.

Online consumers of the arts

		Total (of all internet users)	39%
Research	37	Researched or found out more about an artist or art event	35
		First heard about an artist or art event	26
Experience Music	32	Watched or listened to music online	30
		Downloaded music online	22
Experience other art	16	Watched/downloaded performances and/or art works by professional artists	14
		Watched/downloaded performances and/or art works by non-professional artists	11

Online creators of the arts

		Total (of all internet users)	16%
Visual Art Film/Video	7	Posted your own work	6
		Worked with others through the internet to create work	3
Writing	8	Wrote your own blog	5
		Posted your own stories/poetry/articles	3
		Worked with others through the internet to create a story artical or poem	2
		Posted your own book/music/theatre reviews	2
Music	3	Posted your own music	2
		Worked with others through the internet to create music	2
Social Networks	5	Participated in a community or social network concerned with art in some way	5
Learning	5	Learned to create music, graphics or stories	5

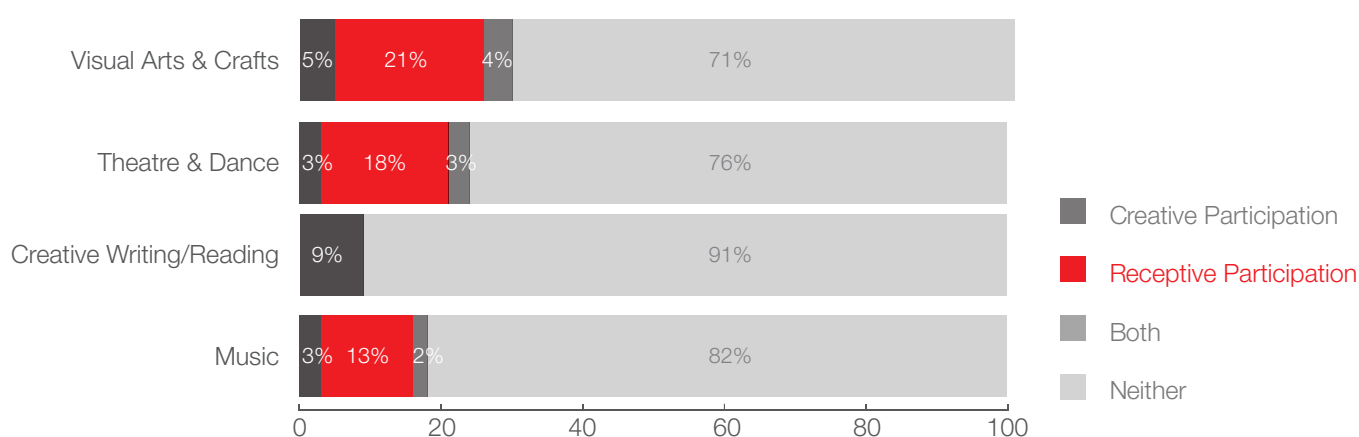
Australian participation in the arts.

Appendix 1.6: Community arts - engagement and attitudes

QB4. Thinking about the arts we have just been talking about that you have participated in or attended in the last 12 months, have any of them been Community Art activities? By this I mean the art has been created as part of a community group together with a professional artist who has been paid for their involvement.

Base: those who participated in and/or attended an art form (at QB1) (Visual Arts and Crafts n=1469, Theatre & Dance n=1271, Creative Writing n=480, Music n=1867)

Engagement with the various community art forms



*Note: no option of 'Receptive Participation' or 'Both' for Creative Writing was provided in the survey

Creative participation in community arts by state, by percentage

	NSW	VIC	QLD	SA	WA	TAS**	NT**	ACT**	Total %
Visual Arts & Crafts	10	10	8	6	10	10	13	4	9
Theatre & Dance	5	7	5	4	4	4	14	8	6
Creative Writing	8	7	11	14	10	5	20	0	9
Music	4	7	6	7	5	8	5	3	5
Participated in at least on art form	16	21	17	15	19	22	26	18	17

**Caution, small base size

Australian participation in the arts.

Receptive participation in community arts by state, by percentage

	NSW	VIC	QLD	SA	WA	TAS**	NT**	ACT**	Total %
Visual Arts & Crafts	24	25	23	21	26	22	18	23	25
Theatre & Dance	22	18	25	14	18	25	28	12	21
Music	15	13	16	12	15	20	31	27	15
<i>Attended at least on art form</i>	33	35	34	24	32	34	42	38	32

**Caution, small base size

Attitudes of those engaging in community arts vs. those not – Mean Scores

Those engaging with community arts scored significantly higher on each of the following attitudinal statements when compared to those not engaging in community arts	Engaged in community arts	Not engaged in community arts
People can enjoy both the arts and sports	4.20	4.10
The arts should be an important part of the education of every Australian	4.26	4.07
Indigenous arts are an important part of Australia's culture	4.14	4.01
The arts should receive public funding	4.11	3.92
The arts make for a more richer and meaningful life	4.18	3.82
It is exciting to see new styles and types of art	4.01	3.79
There are plenty of opportunities for me to get involved in the arts	3.78	3.52
The arts are an important part of my lifestyle	3.90	3.27
the arts require understanding to appreciate them fully	3.09	3.24

Australian participation in the arts.

Appendix 1.7: Regional differences - engagement and attitudes

Creative participation by location, by percentage

	Inner Metropolitan	Outer Metropolitan	Provincial	Rural	Total %
Visual Arts & Crafts	22	23	25	21	22
Theatre & Dance	7	7	9	8	7
Creative Writing	20	16	12	14	16
Music	16	14	13	14	15
<i>Creatively participated in at least one art form</i>	43	42	41	39	41

Receptive participation by location, by percentage

	Inner Metropolitan	Outer Metropolitan	Provincial	Rural	Total %
Visual Arts & Crafts	42	38	41	38	38
Theatre & Dance	43	40	45	39	40
Reading	86	83	84	82	84
Music	61	59	58	54	57
<i>Receptively participated in at least one art form</i>	94	92	92	92	92

Australian participation in the arts.

Appendix 1.8: Youth engagement in the arts

Creative participation – 26 years and under, by percentage

	Secondary school students	Tertiary students	Employed	Unemployed**	Total %
Visual Arts & Crafts	33	28	24	22	22
Theatre & Dance	33	17	12	3	7
Creative Writing	43	38	21	24	16
Music	33	30	28	31	15
<i>Creatively participated in at least one art form</i>	71	68	51	36	41

**Caution, small base size

Receptive participation – 26 years and under, by percentage

	Secondary school students	Tertiary students	Employed	Unemployed**	Total %
Visual Arts & Crafts	35	46	37	29	38
Theatre & Dance	41	46	41	20	40
Reading	80	89	84	72	84
Music	59	69	76	48	57
<i>Receptively participated in at least one art form</i>	92	97	96	88	92

**Caution, small base size

Australian participation in the arts.

Appendix 1.9: Multicultural Australia engagement in the arts

Multicultural Australia - creative participation in arts, by percentage

	Main language spoken at home not English	Born overseas in non-English speaking country	At least one parent born overseas in non-English speaking country	Total %
Visual Arts & Crafts	17	20	22	22
Theatre & Dance	3	3	7	7
Creative Writing	22	13	17	16
Music	9	11	15	15
<i>Creatively participated in at least one art form</i>	38	35	39	41

Multicultural Australia - creative participation in arts, by percentage

	Main language spoken at home not English	Born overseas in non-English speaking country	At least one parent born overseas in non-English speaking country	Total %
Visual Arts & Crafts	31	31	33	38
Theatre & Dance	31	31	35	40
Reading	78	78	80	84
Music	48	49	54	57
<i>Receptively participated in at least one art form</i>	84	88	90	92

Australian participation in the arts.

Appendix 1.10: People with an illness or disability - engagement in the arts

People with an illness or disability - creative participation in arts, by percentage

	people with a serious illness or disability	Total %
Visual Arts & Crafts	19	22
Theatre & Dance	5	7
Creative Writing	16	16
Music	9	15
<i>Creatively participated in at least one art form</i>	35	41

People with an illness or disability - receptive participation in arts, by percentage

	people with a serious illness or disability	Total %
Visual Arts & Crafts	27	38
Theatre & Dance	28	40
Reading	77	84
Music	43	57
<i>Receptively participated in at least one art form</i>	86	92

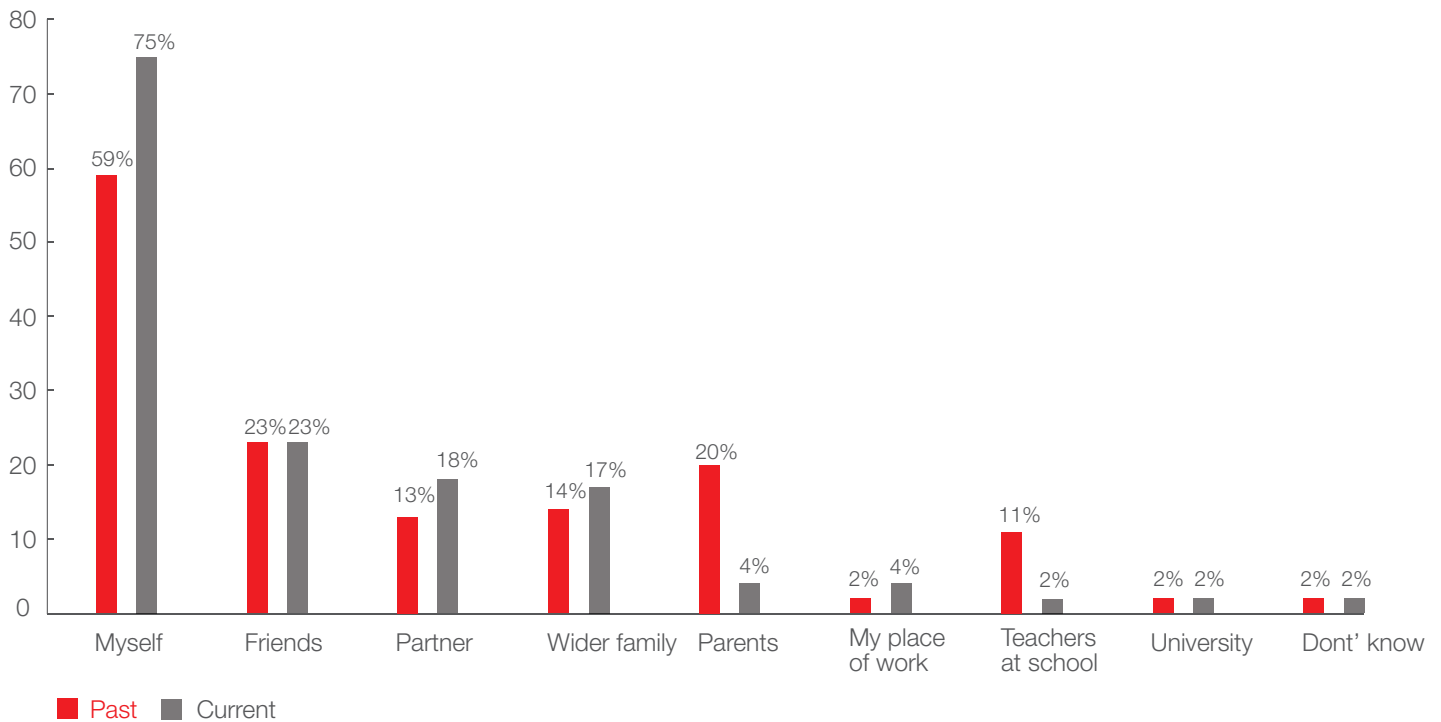
Australian participation in the arts.

Appendix 1.11: Influences over engagement in the arts

QF4. Who currently influences whether you attend the arts? QF5. Thinking back, who were the main influences on whether you attended the arts?

Base: Total sample.

Influences over engagement in the arts – past and present



QF6. In the last 12 months, who, if anyone, have you encouraged to attend any arts events (not participate in, but just attend), in a personal rather than professional capacity?

Influencing others to attend the arts

