

PARLIAMENT OF THE COMMONWEALTH OF AUSTRALIA

Sculpting a National Cultural Plan

Igniting a post-COVID economy for the arts

House of Representatives Standing Committee on Communications and the
Arts

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Chair's Foreword

Australia's artistic output gives enormous value to our society, enriching our lives and creating an economic boost from domestic and international spending. The arts is a broad industry, with a range of skills and talents making up a rich landscape of creative workers.

Engaging with Australia's creative and cultural industries and institutions has proven benefits for mental and physical health, social cohesion and community building, creative thinking, problem solving skills and more. The benefits which flow from a healthy arts industry have never been needed more keenly than right now, as Australia emerges from living with the COVID-19 public health emergency.

A series of devastating events, from the Black Summer 2019-20 bushfires to COVID-19, has landed a series of blows on the creative and cultural industries and institutions. The closure of public venues, performance spaces, community hubs and gatherings put an immediately stop to the way that creative work had been created and shared.

All this at a time when we needed the arts more than ever to help us through the crisis.

As Australians turned to online platforms to engage with the arts, many artists had to change their methods of production and delivery to meet their audience needs. Artists and creative workers who were already working in a largely digital environment, or who had the ability to pivot quickly, were able to continue to provide services. Post-production and video game content was able to continue, and some artists were able to turn to video meeting platforms and online delivery methods.

Digital literacy has become an essential skill for Australia's arts community, and will continue to be in future as the model for a healthy and sustainable arts industry adapts to a post-COVID world.

Australia's creative and cultural industries and institutions have an opportunity now to strengthen the resilience and sustainability of the industry in order to continue to showcase our cultural value to domestic and international audiences.

Improvements to financial literacy and commercialisation opportunity awareness will allow artists to take control of their artistic careers and be ready to launch their creative work to both new and established audiences as we emerge from living with the pandemic.

Australia's school-aged children enthusiastically engage with creative programs in and out of school, and benefit from the creative thinking and physical activity they experience when they engage with the arts. The Australian Curriculum includes the arts as one of the key learning areas, but the benefits of a cross-curriculum approach could unlock the enormous potential of linking creative output with other subjects. Australian could turn STEM to STEAM by including the arts as a cross-curriculum priority and embed visual arts, physical theatre, music and other aspects of the arts into all subjects.

A healthy, sustainable arts industry will allow Australia's creative and cultural industries and institutions to emerge from the COVID-19 public health emergency and allow Australia's arts to reach new heights.

Dr Anne Webster MP
Chair

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Members

Chair

Dr Anne Webster MP (*member from 4 July 2019 to 4 March 2020, Chair from 25 August 2021*) Mallee, VIC

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Dr Katie Allen MP Higgins, VIC

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Secretary	Jason Sherd (<i>from 25 July 2019 to 19 February 2021</i>)
A/g Secretary	Paul Zinkel (<i>from 22 February 2021 to 15 June 2021</i>)
Inquiry Secretary	Kimberley Elliott (<i>from 23 August 2021</i>)
Inquiry Secretary	Aleshia Westgate (<i>until 20 August 2021</i>)
Senior Researcher	Caroline Spencer (<i>until 16 April 2021</i>)
Graduate	Michaela Gillard (<i>until 25 June 2021</i>)
Office Manager	Danny Miletic

Terms of Reference

The Committee will inquire into Australia's creative and cultural industries and institutions including, but not limited to, Indigenous, regional, rural and community based organisations.

The Committee will consider:

- The direct and indirect economic benefits and employment opportunities of creative and cultural industries and how to recognise, measure and grow them;
- The non-economic benefits that enhance community, social wellbeing and promoting Australia's national identity, and how to recognise, measure and grow them;
- The best mechanism for ensuring cooperation and delivery of policy between layers of government;
- The impact of COVID-19 on the creative and cultural industries; and
- Avenues for increasing access and opportunities for Australia's creative and cultural industries through innovation and the digital environment.

List of Recommendations

Recommendation 1

- 1.24 The Committee recommends that, noting the significant short and long-term impacts of the COVID-19 public health emergency on the arts sector, the Commonwealth Government develop a national cultural plan to assess the medium and long term needs of the sector.

Recommendation 2

- 1.25 The Committee recommends that the Commonwealth Government encourage each level of government to develop and administer strategies to grow cultural and creative industries within their own jurisdictions. The levels of government should liaise regularly, and place a strong focus on rural, regional and remote support for the creative and cultural industries
- 1.26 The Committee further recommends that the Commonwealth Government direct the Productivity Commission to inquire into the legislative arrangements which govern funding of artistic programs and activities at all levels of government. The Productivity Commission should consider barriers and opportunities for artistic programs to be established at the different levels of government.

Recommendation 3

- 2.173 The Committee recommends that the Office for the Arts investigate the establishment of a national centre of Indigenous culture and arts of Aboriginal and Torres Strait Islander artwork. The Office for the Arts should ensure that any proposal is co-designed with Indigenous communities and arts bodies.

- 2.174 As part of the co-design process, the Office for the Arts should consider the most culturally appropriate site on which to build a national centre of Indigenous culture and arts; how to create a national network of Aboriginal and Torres Strait Islander galleries in partnership with State/Territory art institutions; and examine how museums and galleries can further improve Indigenous representation and participation across all areas.

Recommendation 4

- 2.175 The Committee recommends the title of the Department of Infrastructure, Transport, Regional Development and Communications be amended to include the Arts.

Recommendation 5

- 2.176 The Committee recommends that the Office for the Arts consider what resourcing or data would be required to create an app which contains a repository of information of current artistic and cultural events.
- 2.177 The Committee further recommends that the Office for the Arts consult with Tourism Australia, and State and Territory Government peak bodies and other industry-relevant entities.

Recommendation 6

- 2.178 The Committee recognises the enormous potential of the interactive games sector for Australia and welcomes the implementation of the Digital Games Tax Offset. The Committee recommends that the relevant Commonwealth Minister report to the Committee on progress 12 months from the commencement of the offset.

Recommendation 7

- 2.179 The Committee notes that the Public Lending Right and Educational Lending Right (PLR/ELR) each attract a single payment and recommends that the Department of Infrastructure, Transport, Regional Development and Communications undertake a review of the PLR/ELR programs to ensure that authors are being appropriately compensated for income lost through free multiple use of their books in public and educational lending libraries.

- 2.180 The Committee further recommends that the Department consult with peak bodies, Australasian Performing Right Association and Australasian Mechanical Copyright Owners Society (APRA AMCOS), authors, and other industry-relevant entities.

Recommendation 8

- 2.181 The Committee recommends that the Commonwealth Government introduce legislation that requires over-the-top (OTT) media services (streaming and video/subscription video on demand services) to allocate at least 20 per cent of their local revenue on new Australian drama, documentary, children's content, commissions, co-productions or acquisitions of content.
- 2.182 The new legislation should also prescribe that OTT services allocate at least 20 per cent of the 20 per cent quota to local children's content and drama.

Recommendation 9

- 3.81 The Committee recommends that the Commonwealth Government consider working with tertiary education providers to develop a program of internships and cadetships which would see students and young people work in regional, small and/or community-focussed galleries, libraries, archives and museums.
- 3.82 The Commonwealth Government should request input from the Office for the Arts, Department of Education, Skills and Employment and Department of Infrastructure, Transport, Regional Development and Communications as well as regional arts and cultural organisations, to develop a pilot program.

Recommendation 10

- 3.83 The Committee notes the urgent funding provided by the Commonwealth Government to the National Archives of Australia to conduct digitisation and preservation work, and recommends that additional funding be provided to the National Film and Sound Archive to conduct similar urgent work.

Recommendation 11

- 4.96 The Committee notes the additional funding allocated to Support Act in the 2021-22 budget, and recommends that the Commonwealth Government continue to monitor and assess the need for further funding to Support Act as the public health emergency continues.
- 4.97 The Committee invites Support Act to update the Committee on its work by June 2022.

Recommendation 12

- 5.63 The Committee recommends that the Commonwealth, State and Territory Education Ministers Meeting consider adding a fourth cross-curriculum priority: 'the Arts'. The Committee recommends that this priority be in addition to (and not a replacement for) the arts as a key learning area.

Recommendation 13

- 5.64 The Committee recommends that there be a minimum threshold of Australian-authored literary texts in the Australian Curriculum.

Recommendation 14

- 5.65 The Committee recommends that the criteria for capital expenditure set out in the *Australian Education Act 2013*, provided for in the Capital Grants Program, include expenditure relating to equipment and facilities for arts, performance and cultural activities.

Recommendation 15

- 6.82 The Committee recommends the Commonwealth Government provide additional funding to the Australian Bureau of Statistics to produce the Cultural and Creative Satellite Accounts annually, gather and publish data on levels and type of employment, trends, revenue, geographic trends across the creative and cultural industries.

Recommendation 16

- 6.83 The Committee recommends the Australian Bureau of Statistics add questions to the Census which better account for the professions of those working in gig economies, and across the creative and cultural industries with recognition of paid and unpaid work.

Recommendation 17

- 6.84 The Committee recommends that the Commonwealth Government ensures that the patent box tax regime is extended to intellectual property relating to the creation of video games and related technology in Australia.

Recommendation 18

- 6.85 The Committee recommends that the Office for the Arts investigate the delivery of an 'Art Starter' portal containing information for artists, and those engaged in the creative economy, at all stages of their careers to enable Australia's arts industry to continue to grow and reach new audiences. The portal should include information on:
- financial literacy, including information on taxation regimes and subsidies;
 - digital literacy;
 - intellectual property and licensing of designs;
 - working with a business mentor to allow readiness for monetisation opportunities;
 - services and support available across government to help businesses through business.gov.au;
 - information on grants and funding opportunities, scholarships and prizes particularly for emerging artists;
 - information for Aboriginal and Torres Strait Islander artists on protecting their work, and accessing advice on moving forward in the global art world; and
 - other information, as required.
- 6.86 The Committee further recommends that the Office for the Arts investigate the potential for an Art Starter portal with other relevant Commonwealth, State and Territory Agencies, and industry peak bodies.

Recommendation 19

- 6.87 The Committee recommends the Office for the Arts investigate ways in which to support regional peak bodies for the creative and cultural arts industries and institutions.

Recommendation 20

- 6.88 The Committee recommends that the Office for the Arts, in collaboration with the Australia Council for the Arts, establish a new 'Local Artistic Champions Program' (akin to the existing Local Sporting Champions Program) to enable emerging Australian student artists, musicians, authors, playwrights, filmmakers, digital artists and game developers to apply for grants to support attendance at competitions, exhibitions, skills development courses relevant to their craft.

Recommendation 21

- 6.89 The Committee recommends that the Office for the Arts establish a Music Access Assistance Program to increase active participation of school students, particularly in low socio-economic, rural and regional areas, in musical endeavours.
- 6.90 The Music Access Assistance Program should provide affordable access to music education opportunities including instruments, music books and other musical equipment.

Recommendation 22

- 6.91 The Committee recommends that the relevant Commonwealth minister(s) report on the progress of the Committee's recommendations by December-2022.

Abbreviations

AAAA	Aboriginal Art Association of Australia
ABC	Australian Broadcasting Corporation
ABS	Australian Bureau of Statistics
ACTF	Australian Children's Television Foundation
ACUADS	Australian Council of University Art and Design Schools
ADA	Australian Digital Alliance
AIATSIS	Australian Institute of Aboriginal and Torres Strait Islander Studies
ALCC	Australian Libraries and Copyright Committee
ALGA	Australian Local Government Association
AMaGA	Australian Museums and Galleries Association
ANA	A New Approach
ANMM	Australian National Maritime Museum
ANZSCO	Australia and New Zealand Standard Occupations
ANZSIC	Australian and New Zealand Standard Industrial Classification
APRA AMCOS	Australasian Performing Rights Associating and Australasian Mechanical Copyright Owners Society
APS	Australian Public Service
ARIA	Australian Recording Industry Association
ASA	Australian Society of Authors

ATYP	Australian Theatre for Young People
BBC	British Broadcasting Corporation
BCAT	Bureau of Communications and Arts Research
CAMD	Council of Australasian Museum Directors
CIAF	Cairns Indigenous Art Fair (CIAF)
CCD	Community Cultural Development
CCSSC	Corporate Shared Services Centre
CDN	Cultural Development Network
CPA	Creative Partnerships Australia
CPI	Consumer Price Index
DAAF	Darwin Aboriginal Art Fair
DAF	Documentary Australia Foundation
DESE	Department of Education, Skills and Employment
DITRDC	Department of Infrastructure, Transport, Regional Development and Communications
ELR	Educational Lending Right
FAHS	Federation of Australian Historical Societies
GDP	Gross Domestic Product
GLAM	Galleries, libraries, archives and museums
GVA	Gross Value Added
HOTE	Home of the Arts
ICOM	International Council of Museums Australia
IGEA	Interactive Games and Entertainment Association
ILC	Indigenous languages and culture
IVAIS	Indigenous Visual Arts Industry Support
KALACC	Kimberley Aboriginal Law and Cultural Centre
LGA	Local Government Area
LOTE	Languages Other Than English
MDCH	Melbourne Digital Concert Hall

MEAA	Media, Entertainment and Arts Alliance
MoAD	Museum of Australian Democracy
NAVA	National Association for the Visual Arts
NETS	National Exhibition Touring Support
NIACA	National Indigenous Arts and Cultural Authority
NISA	National Innovation and Science Agenda
NMA	National Museum of Australia
NPGA	National Public Galleries Alliance
NSLA	National and State Libraries Australia
MCM	Meeting of Cultural Ministers
OECD	Organisation for the Economic Co-operation and Development
PDV	Post, Digital and Visual Effects
PHA	Professional Historians Australia
PLR	Public Lending Right
PPCA	Phonographic Performance Company of Australia
QMF	Queensland Music Festival
QUT	Queensland University of Technology
RAA	Regional Arts Australia
RPGNSW	Regional and Public Galleries of New South Wales
SBS	Special Broadcasting Service Corporation
SDTC	Somebody's Daughter Theatre Company
SPA	Screen Producers Australia
SSI	Settlement Services International
STEM	Science, Technology, Engineering and Maths
STEAM	Science, Technology, Engineering, Arts and Maths
SXSW	South by South West
TNA	Theatre Network Australia

1. Introduction

Overview

- 1.1 Australia's creative and cultural industries and institutions are embedded in our culture, identity and economy. Australia is a cultural heavy-hitter in the world market, with Australian ideas, content, production and artwork recognised for its quality around the world.
- 1.2 Arts and culture make a strong economic contribution to Australia, and in 2016-17 contributed an estimated \$112 billion of Gross Domestic Product (GDP).¹ In addition, emphasis on the intangible benefits the arts and culture deliver to Australians was consistently presented to the Committee as being of unquantifiable value, delivered both within and exported from Australia.
- 1.3 The COVID-19 public health emergency (COVID-19) has brought into sharp focus the important role that creative content has in our everyday lives. Australians were suddenly unable to access live entertainment, go to the cinema, attend galleries and museums, watch an upcoming stand-up comic or enjoy a fringe festival due to the restrictions necessary to curb the spread of the virus.
- 1.4 Creative and innovative approaches have been taken by those in the arts community to pivot to new delivery methods as quickly as possible, providing a variety of new pathways to the arts. Galleries and museums have hosted virtual tours, engaged in social media outreach and light-

¹ Department of Communications and the Arts, 'Cultural and creative activity in Australia 2008-09 to 2016-17', October 2018, p. 7, <https://www.communications.gov.au/publications/cultural-and-creative-activity-australia-2008-09-2016-17>, accessed 2 September 2020; Australia Council for the Arts, 'Valuing the Arts: Annual Report 2018-19', 2019, p. 5, <https://www.australiacouncil.gov.au/about/annual-report-2018-19/>, accessed 9 April 2021.

hearted competitions; live music has moved to platforms like Instagram; the Melbourne International Comedy Festival has hosted *Lockdown Laughs*; the Sydney Opera House launched *Stream*; and many more.

- 1.5 Despite this pivot, the impact of COVID-19 on the arts sector, within Australia and globally, has been vast. The Australia Council for the Arts (Australia Council) stated that:

Venues have shut their doors with little or no notice, organisations have been forced to cancel their programs and activities, and hundreds of thousands of arts workers have had significant negative impacts to their immediate and future livelihoods.²

- 1.6 At the same time, Australians have increasingly relied on the arts during periods of self-isolation and lockdowns as a result of the pandemic, accessing creativity and culture from home more than ever before, with streaming rates for subscription video-on-demand increasing by up to 45.5 per cent.³
- 1.7 The changes and challenges felt across Australia's arts and cultural sector have been brought to the forefront in the face of the COVID-19 public health emergency. The Committee set out to reflect on how Australians interact with arts and culture; the value they deliver; the impact of COVID-19; and ways to re-frame the national conversation around the arts to better support this vital industry.
- 1.8 'Cultural and creative activity is increasingly recognised as an important component of economic growth'.⁴ The Bureau of Communications and Arts Research (BCAR) fact sheet '*Characteristics of Employment and Business Activity in Cultural and Creative Sectors*', notes that in 2016–17 cultural and creative activity 'was valued at \$111.7 billion, an increase of 30 per cent over a decade. This equates to 6.4 per cent of Australia's GDP in 2016–17'.⁵

² A Collette, Australia Council for the Arts, 'Australia Council response to COVID-19', 4 April 2020, Media Release, <https://www.australiacouncil.gov.au/arts-in-daily-life/artist-stories/Australia-Council-response-to-COVID-19/>, accessed 9 April 2021.

³ Screen Australia, *Submission 172*, pp. 3–4.

⁴ Bureau of Communications and Arts Research, *Characteristics of Employment and Business Activity in Cultural and Creative Sectors*, July 2020, p. 2.

⁵ Bureau of Communications and Arts Research, *Characteristics of Employment and Business Activity in Cultural and Creative Sectors*, July 2020, p. 2.

1.9 The BCAR splits the economic contribution of this activity into two components:

- Component 1 is activity in industries which form the supply chains for cultural and creative goods and services. This component comprises gross value added (GVA⁶) and net taxes on products of cultural and creative industries.
- Component 2 is activity in other industries performed by workers in cultural and creative occupations. This component comprises cultural and creative activity being carried out by people employed in industries outside the supply chains defined in component 1.⁷

1.10 The domains that contributed most to cultural and creative activity in 2016-17 were 'design at \$42.8 billion, fashion at \$14.2 billion, and broadcasting, electronic or digital media, and film at \$9.7 billion'.⁸

1.11 In 2016-17 'these four domains contributed 68.2 per cent of cultural and creative activity with all other domains having had a much smaller impact':⁹

The largest contribution to cultural and creative activity was design. This domain increased by 7.3 percentage points as a proportion of total activity, from 31.0 per cent in 2008-09 to 38.3 per cent in 2016-17. Fashion, the second largest domain as a proportion of cultural and creative activity declined by 1.0 percentage point, from 13.8 per cent in 2008-09 to 12.8 per cent in 2016-17. The proportion of broadcasting, electronic or digital media, and film has remained relatively flat, moving from 8.5 per cent in 2008-09 to 8.7 per cent in 2016-17. Literature and print media, the second largest domain in 2008-09 at

⁶ Gross value added: The value of output at basic prices minus the value of intermediate consumption at purchasers' prices. The term is used to describe gross product by industry and by sector. Basic prices valuation of output removes the distortion caused by variations in the incidence of commodity taxes and subsidies across the output of individual industries; Australian Bureau of Statistics, *Glossary of Frequently Used Terms in the Input Output Tables*, [https://www.abs.gov.au/AUSSTATS/abs@.nsf/39433889d406eeb9ca2570610019e9a5/0460a17619210c11ca257801000e4298!OpenDocument#:~:text=Gross%20value%20added%20\(GVA\),describe%20gross%20product%20by%20industry](https://www.abs.gov.au/AUSSTATS/abs@.nsf/39433889d406eeb9ca2570610019e9a5/0460a17619210c11ca257801000e4298!OpenDocument#:~:text=Gross%20value%20added%20(GVA),describe%20gross%20product%20by%20industry), accessed 25 May 2021.

⁷ Bureau of Communications and Arts Research, *Cultural and creative activity in Australia 2008-09 to 2016-17, Appendix A: Methodology*, October 2018, p. 39.

⁸ Bureau of Communications and Arts Research, *Cultural and creative activity in Australia 2008-09 to 2016-17*, October 2018, p. 5.

⁹ Bureau of Communications and Arts Research, *Cultural and creative activity in Australia 2008-09 to 2016-17*, October 2018, p. 19.

14.9 per cent dropped to 8.4 per cent and became the fourth largest domain of cultural and creative activity in 2016-17.¹⁰

1.12 Professor Stuart Cunningham and Dr Marion McCutcheon pointed out the:

...remaining cultural production domains (Visual arts and crafts, Performing arts, Libraries and archives, Museums and Music and composition) all generate considerably smaller GVA than the top four. They share, however, the high growth that characterises much of the creative and cultural industries, all 3.4 per cent per annum or higher and all greater than average growth in GDP.¹¹

The Arts Beyond 2020: A Cultural Plan

1.13 Numerous inquiry participants put forward a national cultural plan as an avenue to better support the arts.¹² A New Approach (ANA) set out that a cultural plan would be a way to coordinate public and private investment and provide vision:

A National Arts, Culture and Creativity Plan (NACC Plan) is a practical way for the Federal Government to facilitate more coherent and effective public and private investments across these industries, as well as legislative, regulatory and policy settings. A NACC Plan will assist with the cultural and creative industries' recovery, while supporting employment and economic growth.¹³

1.14 Associate Professor Shane Homan drew attention to the two national arts blueprints which have existed over the past 25 years in Australia, *Creative Nation* (1994) and *Creative Australia* (2013).¹⁴ Associate Professor Homan advocated for a 'contemporary policy document that produces a cohesive set

¹⁰ Bureau of Communications and Arts Research, *Cultural and creative activity in Australia 2008-09 to 2016-17*, October 2018, p. 19.

¹¹ Professor Stuart Cunningham and Dr Marion McCutcheon, *Submission 45*, p. 41.

¹² See for example Professor Julian Meyrick, *Submission 16*, p. 3; Associate Professor Shane Homan, *Submission 102*, p. 5; Chamber for Arts and Culture Western Australia, *Submission 160*, p. 3; Australian Local Government Association, *Submission 205*, p. 3; Opera Queensland, *Submission 251*, p. 3; City of Perth, *Submission 296*, p. 2; City of Sydney, *Submission 311*, p. 9.

¹³ A New Approach, *Imagining 2030: Executive Summary*, p. 2.

¹⁴ Associate Professor Shane Homan, *Submission 102*, p. 9.

of directions', rather than disjointed funding initiatives that perpetuate industry silos.¹⁵

- 1.15 Access Arts Australia drew attention to the Australian Academy of the Humanities September 2020 working paper, which set out how a 'National Arts, Culture and Creativity Plan would inform more coherent policy settings and investment at all three levels of government'.¹⁶ A national plan has significant sector-wide support, with numerous inquiry participants suggesting it could be modelled after the National Sport Plan, 'Sport 2030'.¹⁷

- 1.16 Arts West Alliance suggested that:

A National Arts and Culture Plan should dovetail with state and territory government plans to ensure cooperation between layers of government, and be developed with leadership from the Australia Council for the Arts and in consultation with the wider arts and cultural industries.¹⁸

- 1.17 Theatre Network Australia (TNA) drew attention to the 'existing infrastructure and comprehensive industry networks' which the Australia Council for the Arts already supports, and suggested that:

Council's strengthened research team, its transparent, arms-length peer assessment processes, and its cooperative working relationship with the Office for the Arts puts it in pole position to drive the development and delivery of the National Arts and Culture Plan.¹⁹

- 1.18 The Chamber for Arts and Culture Western Australia (WA) asserted that the current lack of a national cultural plan means that layers of Government work towards an 'incoherent and unco-ordinated set of programmes'.²⁰ They were of the view that a national cultural plan could create 'clarity within the

¹⁵ Associate Professor Shane Homan, *Submission 102*, p. 9.

¹⁶ Access Arts Australia, *Submission 168*, pp. 5-6.

¹⁷ Regional Arts Australia, *Submission 63*, pp. 15-16; A New Approach, *Submission 131*, pp. 28-29; Theatre Network Australia's Circus and Physical Theatre Advisory Committee, *Submission 141*, p. 4; The Australian Ballet School, *Submission 149*, p. 5; Outback Theatre for Young People, *Submission 155*, p.11; Access Arts Australia, *Submission 168*, p. 6; VicHealth, *Submission 197*, p. 4; Arts West Alliance, *Submission 199*, p. 2; Theatre Network Australia (TNA), *Submission 215*, p. 6; Australian Craft and Design Centres, *Submission 243*, p. 1; artisan, *Submission 246*, p. 1; Chunky Move, *Submission 267*, p. 2; Diversity Arts Australia, *Submission 281*, p. 6;

¹⁸ Arts West Alliance, *Submission 199*, p. 2.

¹⁹ Theatre Network Australia, *Submission 215*, p. 6.

²⁰ Chamber for Arts and Culture Western Australia, *Submission 160*, p. 3.

shorter terms of Government, and also the opportunity to create some fundamental bi-partisan agreement around a longer-term vision'.²¹

- 1.19 The ANA recommended some next steps for the development of a cultural plan:

The current Parliamentary Inquiry into Cultural and Creative Industries and Institutions has provided up-to-date industry intelligence to inform the next steps for a NACC Plan. Following the Inquiries' report, ANA recommends the Federal Government establish an independent process to draft a NACC Plan, drawing on both evidence presented to the Inquiry and the formidable body of current data and research that is publicly available.²²

Establishment of a National Indigenous Arts and Cultural Authority

- 1.20 The Australia Council for the Arts currently supports an interim website for the National Indigenous Arts and Cultural Authority (NIACA) (working title).²³ NIACA is a proposed peak body for First Nations arts and culture, which is currently under consultation. The Australia Council for the Arts is presently acting as an interim secretariat to the First Nations arts and cultural sector and is conducting national consultations on the proposed development of NIACA.²⁴ While the final model for how NIACA would be formed or funded are unclear, respondents to a consultation survey run by Australia Council for the Arts 'were clear that a NIACA should be First Nations owned, led, and run'.²⁵

²¹ Chamber for Arts and Culture Western Australia, *Submission 160*, p. 3.

²² A New Approach, *Imagining 2030: Executive Summary*, p. 2.

²³ National Indigenous Arts and Cultural Authority, 'Working towards a National Indigenous Arts and Cultural Authority', www.niaca.com.au, accessed 15 April 2021.

²⁴ Australia Council for the Arts, 'Welcome to the First Nations Arts Roundtable', 19 March 2021, p. 9, <https://www.australiacouncil.gov.au/workspace/uploads/files/19032021-national-summit-autum-605972ab8ffc6.pdf>, accessed 15 April 2021.

²⁵ Australia Council for the Arts, 'Welcome to the First Nations Arts Roundtable', 19 March 2021, p. 19, <https://www.australiacouncil.gov.au/workspace/uploads/files/19032021-national-summit-autum-605972ab8ffc6.pdf>, accessed 15 April 2021.

- 1.21 Ms Merindah Donnelly, Executive Producer of BlakDance, drew attention to the potential value that the establishment of NIACA would bring to Closing the Gap priorities.²⁶

...what we really need is a national Indigenous arts and cultural peak body that can really effectively ensure that a national and coordinated approach to self-determined Indigenous culture and arts is part of the conversations around things like the refresh of the Closing the Gap. I guess we were really asking what evidence all those levels of government can provide us in demonstrating that this priority is being resourced to actually happen. We're also trying to draw a link to the very obvious way for us in our industry—to support the development of a national Indigenous arts and cultural peak body.²⁷

- 1.22 Further, Ms Donnelly added that BlakDance experienced the bureaucratic complexity of having to be familiar with a range of policies across Australia, stating that it is:

...somewhat limiting to be a national organisation that needs to navigate every states' and territories' different policies or, if they don't have a policy in place, navigate their funding mechanisms.²⁸

- 1.23 Ms Donnelly considered that BlakDance would 'benefit significantly' from the coordination and self-determination facilitated through the NIACA.²⁹ The establishment of NIACA was also supported by TNA, Performing Arts Connections, City of Sydney, and First Nations Performing Arts Sector.³⁰

²⁶ Ms Merindah Donnelly, Executive Producer, BlakDance, First Nations Performing Arts, *Committee Hansard*, Canberra/videoconference, 4 December 2020, p. 30.

²⁷ Ms Merindah Donnelly, Executive Producer, BlakDance, First Nations Performing Arts, *Committee Hansard*, Canberra/videoconference, 4 December 2020, p. 32.

²⁸ Ms Merindah Donnelly, Executive Producer, BlakDance, First Nations Performing Arts, *Committee Hansard*, Canberra/videoconference, 4 December 2020, p. 32.

²⁹ Ms Merindah Donnelly, Executive Producer, BlakDance, First Nations Performing Arts, *Committee Hansard*, Canberra/videoconference, 4 December 2020, p. 30.

³⁰ Theatre Network Australia, *Submission 215*, pp. 2-3; Performing Arts Connections, *Submission 270*, p. 6; First Nations Performing Arts Sector, *Submission 309*, p. 7; and City of Sydney, *Submission 311*, pp. 19-20.

Recommendation 1

- 1.24 The Committee recommends that, noting the significant short and long-term impacts of the COVID-19 public health emergency on the arts sector, the Commonwealth Government develop a national cultural plan to assess the medium and long term needs of the sector.

Recommendation 2

- 1.25 The Committee recommends that the Commonwealth Government encourage each level of government to develop and administer strategies to grow cultural and creative industries within their own jurisdictions. The levels of government should liaise regularly, and place a strong focus on rural, regional and remote support for the creative and cultural industries
- 1.26 The Committee further recommends that the Commonwealth Government direct the Productivity Commission to inquire into the legislative arrangements which govern funding of artistic programs and activities at all levels of government. The Productivity Commission should consider barriers and opportunities for artistic programs to be established at the different levels of government.

About the Inquiry

Objectives and Scope

- 1.27 On 26 August 2020, the Minister for Communications, Cyber Security and the Arts, the Hon Paul Fletcher MP, referred the *Inquiry into Australia's creative and cultural industries and institutions* (the inquiry) to the Standing Committee on Communications and the Arts (the Committee).
- 1.28 As part of the inquiry, the Committee looked into:
- the impact of COVID-19 on the arts;
 - economic and non-economic benefits of creative and cultural industries and institutions;
 - policy delivery across the layers of government; and
 - ways to enhance innovation and the use of the digital environment in the arts.

- 1.29 The Committee heard the strong concerns of many working within Australia's creative and cultural industries and institutions regarding the ongoing impact of COVID-19.

Inquiry Conduct

- 1.30 A media release announcing the inquiry was issued on 27 August 2020, calling for submissions to be made by 22 October 2020.
- 1.31 As the first stage of its inquiry, an online survey was launched on 27 August 2020, which invited individuals working or volunteering in creative or cultural industries to express their views on 'The State of the Arts'. The survey closing date was 22 October 2020.
- 1.32 The survey received 4,871 responses and included both free-text and multiple-choice questions. Respondents were not required to complete all questions. A survey summary is available at Appendix D.
- 1.33 The Committee also invited submissions from more than 200 arts industry bodies, agencies, institutions, academics, think tanks and individuals.
- 1.34 The inquiry received 351 submissions and 46 exhibits, which are listed at Appendix A and B respectively.
- 1.35 The Committee held 4 public hearings, and a list of witnesses and organisations may be found at Appendix C.
- 1.36 The Committee thanks all those who participated in the inquiry for so graciously giving their time to provide evidence of their experiences to the Committee. The Committee acknowledges that it has been a devastating time for those working in Australia's creative and cultural industries, and that it can be difficult to set these experiences out.
- 1.37 The first-hand experiences of those in Australia's creative and cultural industries gave an invaluable insight into the pressures felt since the onset of COVID-19, but also the commitment and passion of those engaged with the arts.

Report Structure

- 1.38 Chapter 2 sets out an overview of the major artistic domains; the current arrangements supporting Australia's creative and cultural industries and institutions, including policy delivery; the role of the Australia Council and the Office for the Arts; how coordination between layers of government operates; and the role of the private sector in the support of arts and culture.

- 1.39 Chapter 3 examines the value of the arts, drawing out their economic and non-economic benefits. The contribution to employment and gross domestic product is discussed alongside the role of the arts in shaping and preserving Australia's cultural identity; supporting the mental health and wellbeing of Australians; and enhancing social cohesion.
- 1.40 Chapter 4 discusses the impact of the COVID-19 public health emergency on the sector, drawing on evidence from submissions, hearings, and survey responses. The impact on employment, and the need to adopt a digital focus, innovate and future-proof Australia's creative and cultural industries and institutions; crisis relief and mental health support to artists, crew and music workers; and Commonwealth Government support provided to support Australia's creative and cultural sectors is highlighted.
- 1.41 Chapter 5 explores the role that the arts plays in the current education policy landscape, drawing out the potential to transition education from a focus on Science, Technology, Engineering and Maths (STEM) to Science, Technology, Engineering, Arts and Maths (STEAM), noting the benefits of STEAM to the future job market and the broader long-term benefits derived from arts in education.
- 1.42 Chapter 6 outlines next steps for the arts beyond 2020-21, and outlines the benefits of introducing a national cultural plan. The unpredictable arts landscape of 2021 and onwards will likely be impacted by COVID-19, and this chapter explores the sustainability of the arts sector.

2. Australia's Creative and Cultural Industries and Institutions

2.1 Australia is home to a vibrant and diverse landscape of creative and cultural industries and institutions (otherwise known as 'the arts'). These industries and institutions are broad-reaching, employing and engaging people within Australia and internationally. The twelve cultural and creative 'domains' recognised by the Australian and New Zealand Standard Industrial Classification (ANZSIC) industry codes, and used by the Australian Bureau of Statistics (ABS), are:

- Museums;
- Environmental heritage;
- Library and archives;
- Literature and print media;
- Performing arts;
- Design;
- Broadcasting, electronic or digital media, and film;
- Music composition and publishing;
- Visual arts and crafts;
- Fashion;
- Other cultural goods and manufacturing and sales; and
- Supporting activities.¹

2.2 Arts funding and policy delivery occurs across Australia at Commonwealth, State and Territory and Local Government levels, as well as through private engagement and support. Identifying what programs and grants are

¹ Australian Bureau of Statistics, *Australian National Accounts: Cultural and Creative Activity Satellite Accounts, Experimental*, 2014, p. 13.

available to individuals or organisations across the creative and cultural sector is complex, and there is no single repository which captures Australia-wide data on arts funding and programs.

- 2.3 Many inquiry participants called for support from Commonwealth, State or Territory and Local Governments, but found it difficult to distinguish which level of Government has responsibility for different areas.²

Major Arts Domains in Australia

- 2.4 Inquiry participants outlined the unique features of sub-sectors of the arts industry and set out the opportunities and challenges felt in each area. It was also noted, however, that Australia's creative and cultural industries and institutions are interconnected and often have symbiotic relationships. For example, Australian literature may be made into a film or television series, or an Australian live performance held in an art gallery.
- 2.5 The Office for the Arts set out that connections may be aesthetic or related to the individuals in the industry. For example, an aesthetic movement may begin in one facet of the arts and spread through others, linking them together through this movement; or, the connection may be between the people employed:

...there are important interconnections between the people employed and practising in these industries. Many people working in these industries share important aspects of their educations and possess closely related skills. In some cases, people move back-and-forth between various industries (for example, between theatre, broadcasting and film). People across these industries share common networks and communities, and many are linked by shared senses of identity and professional association.³

Indigenous Art, Culture and Heritage

- 2.6 Country, culture and community are, for many Aboriginal and Torres Strait Islander people, intrinsically linked and the wellbeing and success of one depends on the health of another.⁴

² Professor Julian Meyrick, *Submission 16*, p. 2; Dr Kate Grenville, *Submission 26*, p. 2; Women's Art Register, *Submission 38*, p. 4; Latrobe City Council, *Submission 23*, p. 5; Mr Gareth Hart, *Submission 130*, p. 2.

³ Department of Infrastructure, Transport, Regional Development and Communications (Office for the Arts), *Submission 293*, p. 7.

⁴ Theatre Kimberley, *Submission 280*, p. 6.

- 2.7 A rapid acceleration in the international market for Indigenous art was noted by Mr Dean Merlino, who stated that: 'A recent piece in the Australian and New Zealand Art Sales Digest has suggested that Indigenous Art has achieved that rare feat of achieving popularity outside of its cultural context.'⁵
- 2.8 The National Association for the Visual Arts (NAVA) set out the enormous economic value of Aboriginal and Torres Strait Islander visual arts:
- It is estimated that the Aboriginal and Torres Strait Islander visual arts industry brings \$400 million to the economy each year. Further, Australia's First Nations tourism has an estimated value of \$8.4 billion annually, catering to 978,000 international visitors and 715,000 overnight domestic trips in the 2017/2018 financial year. In 2018 2019, four Indigenous art fairs alone hosted more than 96,400 visitors, achieved more than \$5 million in art sales, featured work by more than 2,700 artists and made a combined estimated contribution of approximately \$20 million to their regional economies.⁶
- 2.9 The rise in prices for Aboriginal artworks, particularly in the secondary market, places upwards pressure on primary markets, with new works becoming more desirable to collectors.⁷ Further, the secondary market benefits from the Resale Royalty Scheme, with visual artists entitled to five per cent of the resale price (for eligible works), which applies to artworks by living artists, and up to 70 years after an artist's death.⁸
- 2.10 On the other hand, the Aboriginal Art Association of Australia (AAAA) stated that sustainable growth of the consumer market for Indigenous visual arts is 'essential in an environment of finite funding'. AAAA argued that the consumer market is more important than the growth of supply 'fuelled by grants'.⁹
- 2.11 Aboriginal and Torres Strait Islander art and practice supports cultural leadership. Warlayirti Artists suggested that there is a gap in the support of 'culturally relevant economies' which has a dramatic impact on the

⁵ Mr Dean Merlino, *Submission 187*, p. 19.

⁶ National Association for the Visual Arts, *Submission 265*, p. 2.

⁷ Mr Merlino, *Submission 187*, p. 20.

⁸ Mr Merlino, *Submission 187*, p. 20; Department of Infrastructure, Transport, Regional Development and Communications (Office for the Arts), *Submission 293*, p. 34.

⁹ Aboriginal Art Association of Australia, *Submission 334*, p. 5.

wellbeing of young Aboriginal and Torres Strait Islander people. Further, there is a risk of loss at the change of generations:¹⁰

If there is no immediate action now, 60,000 years of knowledge can be lost in the next five to 10 years when the first contact old people, with serious health issues, pass away.¹¹

- 2.12 Kimberley Aboriginal Law and Cultural Centre (KALACC) noted the absence of both a 'National Arts Policy' and a 'National Indigenous Cultural Policy'.¹²

In particular, we are told that policy responsibility for 'Traditional Cultural Expression' or 'Cultural Maintenance' activities sit with [National Indigenous Australians Agency (NIAA)], not with the Office of Arts. But there is no funding in NIAA for 'Traditional Cultural Expression' and there is no policy framework around it.¹³

- 2.13 KALACC made a number of recommendations including:

- development of a national cultural policy;
- inter-agency cohesion and coordination;
- focus on outcomes drawn from the Productivity Commission's draft 'Indigenous Evaluation Strategy';
- strategies around the cultural determinants of health; and
- completion of 'The situation and status of Indigenous cultures and heritage Framework' which is currently under development by the Australian Institute of Aboriginal and Torres Strait Islander Studies (AIATSIS).¹⁴

- 2.14 The City of Sydney emphasised the need to ensure that Aboriginal and Torres Strait Islander cultures are 'at the heart of Australian cultural policy':

...protecting Indigenous Cultural and Intellectual Property and developing programs to share First Nations culture and address barriers to participation and inclusion of Aboriginal and Torres Strait Islander people.¹⁵

¹⁰ Ms Poppy Lever, Manager, Warlayirti Artists, *Committee Hansard*, Canberra/teleconference, 13 November 2020, p. 30.

¹¹ Ms Lever, Warlayirti Artists, *Committee Hansard*, Canberra/teleconference, 13 November 2020, p. 30.

¹² Kimberley Aboriginal Law and Cultural Centre (KALACC), *Submission 64*, p. 3.

¹³ KALACC, *Submission 64*, p. 3.

¹⁴ KALACC, *Submission 64*, p. 9.

¹⁵ City of Sydney, *Submission 311*, p. 18.

- 2.15 In support of this central focus on Aboriginal art and culture, the City of Sydney recommended that local governments Australia-wide receive funding to maintain an Aboriginal and Torres Strait Islander cultural office.¹⁶ The offices could record and share local Aboriginal histories, 'local truth telling activities' and deliver programs to engage with Aboriginal cultures and languages.¹⁷
- 2.16 A number of inquiry participants highlighted the importance of diversity and equality in the arts. Participants identified a need for diversity in all sectors of the arts and a need for more representation of Aboriginal and Torres Strait Islander Australians. One survey respondent stated that 'there needs to be more Indigenous representation and storytelling. The industry is white dominated and we have to do more'.¹⁸
- 2.17 Australian Craft Design Centres highlighted the need for 'First Nations and culturally diverse leadership, employment and participation embedded in all arts organisations' across Australia.¹⁹
- 2.18 The Public Galleries Association of Victoria drew attention to the important work of galleries to provide connection to Aboriginal and Torres Strait Islander art and artists. Public galleries across Victoria hold significant collections of contemporary and historic Aboriginal and Torres Strait Islander artwork in their collections which 'celebrate the local Indigenous people, their history and continuous living culture'.²⁰

Box 2.1 Case study: *Little J and Big Cuz*

Film and television production of Aboriginal and Torres Strait Islander communities influence both domestic and international audiences: Anecdotal evidence finds that shows such as *Redfern Now* 'help to build a greater understanding of Indigenous Australia'.²¹

Little J and Big Cuz is a Logie award-winning Australian animated

¹⁶ City of Sydney, *Submission 311*, p. 20.

¹⁷ City of Sydney, *Submission 311*, p. 20.

¹⁸ Survey summary, p. 10.

¹⁹ Australian Craft Design Centres, *Submission 243*, p. 3.

²⁰ The Public Galleries Association of Victoria, *Submission 239*, p. 4.

²¹ Department of Infrastructure, Transport, Regional Development and Communications (Office for the Arts), *Submission 293*, p. 17.

children's television show. It aims to authentically represent Aboriginal and Torres Strait Islander cultures and peoples.

An impact study of the program has found that, in addition to providing entertainment, it assists Indigenous children's transition to school, celebrates and includes Indigenous cultures in learning environments, and recognises and supports strengths in learners alongside their emotional wellbeing.²² The influence of *Little J and Big Cuz* has been used since the onset of COVID-19:

...during the COVID-19 pandemic, the creators of Little J & Big Cuz, together with ABC and SBS, used the popular animation characters to amplify the importance of thorough handwashing to stop the spread of the virus amongst small children and Indigenous communities. This public health message is of great public interest and can be communicated easier with the help of an adored animation character such as Little J.²³

- 2.19 The Office for the Arts noted that the Commonwealth Government invests approximately \$21 million annually through the Indigenous Visual Arts Industry Support (IVAIS) program towards the operation of over 80 Indigenous-owned art centres, organisations, art fairs, and regional hubs. These provide professional opportunities for more than 8,000 Aboriginal and Torres Strait Islander artists and around 500 Indigenous arts workers.²⁴
- 2.20 Aboriginal art centres serve a valuable role and are 'often at the heart of community life', however the AAAA suggested that there are issues with the current grant landscape, which impacts on the efficacy of art centres.²⁵ AAAA suggested that IVAIS grants are 'seen as the end game rather than a step on the road to financial sustainability'.²⁶ The AAAA stated that in Aboriginal and Torres Strait Islander art centres, the return on the grant dollar decreased by 60 per cent from 2004-05 to 2018-19, adding that:
- In 2004/5 around 20% of total art centre income came from grants \$1 in funding generated \$4 in third party sales;

²² Australian Children's Television Foundation, *Submission 152*, p. 10.

²³ Australian Children's Television Foundation, *Submission 152*, p. 12.

²⁴ Department of Infrastructure, Transport, Regional Development and Communications (Office for the Arts), *Submission 293*, p. 18.

²⁵ Department of Infrastructure, Transport, Regional Development and Communications (Office for the Arts), *Submission 293*, p. 19.

²⁶ Aboriginal Art Association of Australia, *Submission 334*, p. 8.

- By 2018/19, over 40% of total art centre income came from grants \$1 in funding generated \$1.50 in third party sales.²⁷

Protecting Aboriginal and Torres Strait Islander art

- 2.21 Aboriginal and Torres Strait Islander art is an integral part of the cultural identity, history and stories of Aboriginal and Torres Strait Islander peoples and communities. Additionally, evidence from the Standing Committee on Indigenous Affairs in its report on the *inquiry into the impact of inauthentic art and craft in the styles of First Nations peoples* in December 2018 (First Nations inauthentic art report), found that visitors to Australia are keen to experience Indigenous culture, including purchasing souvenirs.²⁸ Analysis by Tourism Research Australia found that 198,000 international visitors purchased Indigenous art, drafts or souvenirs in the 2017-18 financial year.²⁹
- 2.22 The First Nations inauthentic art report stated that the majority of souvenirs in an Indigenous style that are sold in Australia are thought to be inauthentic.³⁰ The report considered the impact this has on Aboriginal and Torres Strait Islander people and Australia, including the negative effect inauthentic art has on Australia's image abroad, and the issue that inauthentic products deny Aboriginal and Torres Strait Islander artists and artisans the opportunity to earn a living by representing their own culture.³¹
- 2.23 Concern regarding inauthentic Indigenous art was also highlighted by a number of inquiry participants. The NAVA commented on the continued problem of fake Indigenous arts being sold in Australia, stating:

Despite numerous calls from the industry to end fake 'Indigenous' arts and craft being sold in Australia, the proliferation of art fraud continues to cheat First Nations artists and communities of income and other opportunities.³²

²⁷ Aboriginal Art Association of Australia, *Submission 334*, p. 8.

²⁸ Standing Committee on Indigenous Affairs, 'Report on the impact of inauthentic art and craft in the style of First Nations peoples', December 2018, Commonwealth of Australia, p. 71.

²⁹ Unpublished data from the Tourism Research Australia, *International Visitor Survey and National Visitor Survey*.

³⁰ Standing Committee on Indigenous Affairs, *Report on the impact of inauthentic art and craft in the style of First Nations peoples*, December 2018, Commonwealth of Australia, p. 1.

³¹ Standing Committee on Indigenous Affairs, *Report on the impact of inauthentic art and craft in the style of First Nations peoples*, December 2018, Commonwealth of Australia, p. 2.

³² National Association for the Visual Arts, *Submission 256*, p. 2-3.

- 2.24 Further, the NAVA drew attention to the harm that inauthentic Indigenous art production causes to Aboriginal and Torres Strait Islander peoples, ‘undermining the role of communities, through misappropriation and exploitation of the stories, imagery, knowledge and heritage embodied in authentic works’.³³
- 2.25 The NAVA suggested the establishment of national, enforceable standards to prevent inauthentic Indigenous art, a recommendation also put forward as urgently requiring action by the AAAA and Creative Victoria.³⁴ A similar recommendation was also made in the Aboriginal and Torres Strait Islander inauthentic art report through the development of a Certification Trade Mark scheme for authentic Aboriginal and Torres Strait Islander art and craft, created in full consultation with relevant stakeholders.³⁵
- 2.26 The NAVA drew attention to ‘the lack of laws protecting Indigenous Cultural Intellectual Property’.³⁶
- 2.27 The AAAA raised concern that Australia presently does not currently support a national gallery dedicated to Aboriginal and Torres Strait Islander visual arts, and suggested that:
- A national gallery would not only showcase the treasure that is [Indigenous Visual Arts], a matter of cultural importance, but would continue to raise awareness locally and for international visitors. It is hard to believe that an increase in awareness would not lead to increased sales.³⁷
- 2.28 A Northern Territory initiative to create a National Aboriginal Art Gallery has been announced, which ‘will host a globally significant Australia-wide art collection from the world’s oldest continuous cultures’ and be located in Alice Springs.³⁸ The status of the project, including a timeline of construction and opening, is unknown.

³³ National Association for the Visual Arts, *Submission 256*, p. 3.

³⁴ Aboriginal Art Association of Australia, *Submission 334*, p. 5; National Association for the Visual Arts, *Submission 256*, p. 4; Creative Victoria, *Submission 308*, p. 8.

³⁵ Standing Committee on Indigenous Affairs, *Report on the impact of inauthentic art and craft in the style of First Nations peoples*, December 2018, Commonwealth of Australia, p. 75.

³⁶ National Association for the Visual Arts, *Submission 256*, pp. 2-3.

³⁷ Aboriginal Art Association of Australia, *Submission 334*, p. 6.

³⁸ Northern Territory Government, *National Aboriginal Art Gallery*, <https://creativeeconomy.nt.gov.au/about-arts-trail/national-aboriginal-art-gallery>, accessed 10 May 2021.

Performing Arts

- 2.29 Australia's performing arts is a vibrant and diverse artistic medium, such as arts and skills which require a performance in front of a public audience including singing, dancing, acting, opera, theatre and circus.
- 2.30 The performing arts consist of creative artists, musicians, writers and performers, who can be freelance/independent or work in groups. Works may be original or reproduced.³⁹
- 2.31 The Bureau of Communications and Arts Research (BCAR) stated that the Gross Value Added (GVA) of the performing arts has 'experienced growth of \$403 million or 30.0 per cent from 2008-09 to 2016-17'.⁴⁰
- 2.32 The Commonwealth Government delivers the National Performing Arts Partnership Framework (the Framework), which gives effect to feedback from extensive public consultation sought in 2018. The Framework replaces a 2011 Framework, and aims to make administrative and funding decisions which will provide 'a mix of funding support to companies in Australia's performing arts sector through mechanisms within our individual jurisdictions as well as coordinated, multilateral government support for a cohort of organisations'.⁴¹ The Framework is facilitated by the Australia Council for the Arts (Australia Council).
- 2.33 Dr Nick Earls stated that the performing arts has a very high economic value, with this sector out-performing the construction and oil and gas extraction sectors:

Actions taken by government to support creative industries have a high likelihood of being economically influential, particularly in the area of employment. According to ABS estimates, for every million dollars of turnover in the creative and performing arts, nine people are employed. The construction industry sees one job per million dollars turnover, and oil and gas extraction 0.25.⁴²

³⁹ Department of Communications and the Arts, 'Cultural and creative activity in Australia 2008-09 to 2016-17', October 2018, p. 27, <https://www.communications.gov.au/publications/cultural-and-creative-activity-australia-2008-09-2016-17>, accessed 2 September 2020.

⁴⁰ Department of Communications and the Arts, 'Cultural and creative activity in Australia 2008-09 to 2016-17', October 2018, p. 27, <https://www.communications.gov.au/publications/cultural-and-creative-activity-australia-2008-09-2016-17>, accessed 2 September 2020.

⁴¹ Meeting of Cultural Ministers, *National Performing Arts Partnership Framework*, p. 4.

⁴² Dr Nick Earls, *Submission 22*, p. 10.

- 2.34 As well as providing a creative outlet for performers, audiences and communities benefit from the performing arts scene through festivals, concerts, events and other performances. CircuitWest set out that there is a recognised relationship between community and the performing arts:

The performing arts sector has also changed over many decades and radically over the last ten years. The sector is now seen as having strong alignment with community building and community development/wellbeing.⁴³

- 2.35 Latrobe City Council set out that, in addition to the clear economic benefits of the performing arts, there were strong non-economic benefits:

Performing arts programs offer shared experiences, enjoyment and opportunities to connect to the community. Public art enhances feelings of safety and supports enjoyment and level of comfort in public spaces. Public festivals enable broad community access to creative programs and experiences.⁴⁴

- 2.36 Sam Lynch stated that the general public's view of 'performing arts' may not be reflective of the full suite of performances available, and was concerned that funding may be allocated to a particular type of performing art aimed at an exclusive audience:

If you stop someone in the street and ask what performing arts means...many will describe the arts, a ballerina on a giant stage, and orchestra in full flight, and opera singer belting out Wagner. Many you stop will also say, that this performing art is "not for people like us". The current funding seems to focus on inner-metro-centric, adult focussed, art-for-art-sake experiences. Numbers of attendees are deceptive because for major performing arts the same customers go time and time again.⁴⁵

- 2.37 Latrobe City Council currently operates the 277 seat theatre and 400 seat hall Latrobe Performing Arts Centre, and is building a 'new 750 seat Performing Arts Centre set in a creative precinct that will also see the establishment of a Creative Industries Training Centre and Incubator'. Latrobe City Council also stated that a lot of regional-scale funding for cultural activity comes from the local government level:

In the regional context, a vast majority of cultural activity is funded and presented by local government owned institutions such as public galleries and

⁴³ CircuitWest, *Submission 1*, p. 1.

⁴⁴ Latrobe City Council, *Submission 23*, pp. 3-4.

⁴⁵ Sam Lynch, *Submission 14*, p. 1.

performing arts centres, as well as other activities such as public programs and public art. Councils act as commissioners, presenters and producers in the creative and cultural industries as this activity has a multiplying effect in the economy; stimulating demand in the hospitality, retail and tourism sectors as well as supply in the construction, logistics and services sectors.⁴⁶

- 2.38 The role of community-focussed theatre was highlighted by Ms Gwendolyn Knox, particularly as communities emerge from restrictions:

The [Community Cultural Development (CCD)] and community focussed theatre works will have a whole new meaning in what they can provide to individuals, small and large communities and business, in the recovery period as they come out of the COVID 19 shut down and other crises. The sector has close links to mental health and community wellbeing. CCD Arts has a fine track record in helping create wellbeing in communities that have had difficulties such as dealing with a pandemic.⁴⁷

- 2.39 The Australian Theatre for Young People (ATYP) raised concerns over a decline in Commonwealth funding for youth arts:

Of greater concern is the long-term decline in Federal Government investment in the performing arts with specific reference to the youth arts. This is having catastrophic implications for the national youth theatre sector and the ATYP. In 2007 there were twenty-two youth theatre companies in receipt of operational funding from the Australia Council. In 2022 there will be seven.⁴⁸

- 2.40 The renowned theatre company at Belvoir St Theatre has been an incubator for Australian performing arts talent, and for more than three decades has been an important centre for Australian theatre:

Both the Upstairs and Downstairs stages at Belvoir St Theatre have nurtured the talents of many renowned Australian artists: actors including Wayne Blair, Cate Blanchett, Sacha Horler, Deb Mailman, Jacqui McKenzie, Robyn Nevin, Leah Purcell, Pamela Rabe, Richard Roxburgh, Hazem Shammass and Toby Schmitz; writers such as Rita Kalnejais, Lally Katz, Kate Mulvany, Tommy Murphy and Matthew Whittet; directors including Benedict Andrews, Wesley Enoch, Eamon Flack, Rachael Maza, Anne-Louise Sarks, Simon Stone and former Artistic Director Neil Armfield.

⁴⁶ Latrobe City Council, *Submission 23*, p. 2.

⁴⁷ Ms Gwendolyn Knox, *Submission 21*, p. 1.

⁴⁸ Australian Theatre for Young People, *Submission 29*, p. 2.

- 2.41 Belvoir St Theatre also tours across Australia and internationally, and receives Commonwealth funding through the Framework, and state funding. Other revenue comes from the box office, development and commercial activities.

Visual Arts, Galleries and Museums

- 2.42 The visual arts include visual media, including craft, design and media arts, and is a major arts sector and employer of artists.
- 2.43 The NAVA is ‘the peak body in Australia for the visual and media arts, craft and design sector’. The NAVA conducts advocacy work, provides advice and ‘support to artists and arts workers as well as professional development, resources and training’. The NAVA’s Code of Practice for the Professional Australian Visual Arts, Media, Craft and Design Sector sets national best practice standards for the contemporary arts industry.⁴⁹ A major revision of the Code of Practice is underway.⁵⁰
- 2.44 Visual arts are supported by the Office for the Arts through a range of initiatives, including:
- Artbank—program which acquires the work of living, Australian contemporary artists and makes the collection available to the general public through a leasing program;⁵¹
 - the Resale Royalty Scheme—a scheme under which visual artists and other right-holders are entitled to five per cent of the sale price of eligible artworks resold commercially for \$1,000 or more;⁵² and
 - the Visual Arts and Craft Strategy—a nationally-coordinated joint package of funding agreed by the Commonwealth, state and territory governments. Funding is provided for individual artists, arts and craft organisations, arts events, artist-run initiatives and touring exhibitions.⁵³

⁴⁹ National Association for the Visual Arts, *Submission 265*, p. 1.

⁵⁰ National Association for the Visual Arts, *Revising the Code of Practice: A Collaborative Plan*, <https://visualarts.net.au/code-of-practice/revising-code-practice-collaborative-plan/#:~:text=NAVA%20is%20proposing%20to%20deliver,and%20Company%2C%20and%20Accessible%20Arts>, accessed 26 May 2021.

⁵¹ Office for the Arts, *Visual Arts and Craft Strategy*, <https://www.arts.gov.au/what-we-do/visual-arts>, accessed 6 May 2021.

⁵² Office for the Arts, *Visual Arts and Craft Strategy*, <https://www.arts.gov.au/funding-and-support/resale-royalty-scheme>, accessed 6 May 2021.

⁵³ Office for the Arts, *Visual Arts and Craft Strategy*, <https://www.arts.gov.au/departmental-news/visual-arts-and-craft-strategy>, accessed 6 May 2021.

Museums and Gallery Spaces

2.45 The International Council of Museums Australia (ICOM) Australia stated that museums and galleries have a special significance in telling stories:

Museums and galleries are where Australia's stories are collected, preserved, interpreted and shared. In some cases, their collections are of national significance; in others they represent the interests of a specific place, community, or ethnic group.⁵⁴

2.46 Museums and gallery spaces are 'key parts of the creative and cultural industries and institutions', and can include museums and galleries at a national, state, regional and community scale, and 'historic sites, botanic and zoological gardens, research centres, Indigenous cultural centres, and Keeping Places'.⁵⁵

2.47 Stories, art, heritage and history are collected, cared for and presented and are trusted institutions to tell Australian stories. The Australian Museums and Galleries Association (AMaGA) stated that museums and galleries are 'central to wellbeing, identity, and maintaining social cohesion' and 'are critical contributors to national and regional economies'.⁵⁶

2.48 With more than 2,500 museums and galleries across Australia, museums are a key way that Australians encounter and engage with the arts and an important part of the arts ecosystem. Australia's museums and galleries include:

- the 22 state and national institutions;
- the 250 or so public galleries and museums operated by local governments, both regional and metropolitan;
- over 70 university-run art, historical, archaeological and science museums;
- over 100 Indigenous art centres, mostly in remote regions; and
- over 2,000 volunteer-run, community organisations acting as community anchors and custodians of Australia's distributed national collection spread across regional and rural Australia.⁵⁷

⁵⁴ International Council of Museums Australia (ICOM Australia), *Submission 148*, p. 1.

⁵⁵ Australian Museums and Galleries Association, *Submission 151*, p. 1.

⁵⁶ Australian Museums and Galleries Association, *Submission 151*, p. 1.

⁵⁷ Australian Museums and Galleries Association, *Submission 151*, p. 2.

- 2.49 In 2018-19, more than 10.6 million people had visited the national collecting institutions.⁵⁸ ICOM Australia also noted that Australians are frequent visitors to museums:

A significant proportion of Australians engage with museums: according to the Australian Bureau of Statistics (ABS), in 2017-18, 30% of Australian adults and 45% of Australian children had visited a museum at least once in the previous 12 months.⁵⁹

- 2.50 The important and multi-faceted role that museums play in large and small communities was noted by ICOM Australia, including the connections museums facilitate at a personal level:

The sector provides employment in communities large and small, in every corner of Australia, both as direct employers and indirectly through the broader visitor economy. Through providing opportunities for volunteering, museums are also an important source of community connection and wellbeing for many people, particularly older Australians. Museums are the life-blood of many small and remote communities, sustaining connections to culture, and building social meaning at a collective and individual level.⁶⁰

- 2.51 Warlayirti Artists outlined how important artistic centres are in Indigenous communities, beyond being a place to exhibit art:

We are a place for many languages, laws and culture to be expressed through paintings and stories, and for tradition to continue through that. It's not only an important cultural...healing and mental health space for communities. It's one of the few culturally relevant Aboriginal owned places within community, a place for elders and young people to come and be safe, to meditate, to heal and to work together.⁶¹

- 2.52 Regional historical sites and organisations were put forward as important centres for bringing together volunteers and community members, and bringing direct and indirect economic benefits:

In rural and regional Australia, these organisations are likely to be of great significance through the contribution they make to the economy by facilitating heritage tourism via their museums, walking tours, signage, etc. The cities of

⁵⁸ Australian Museums and Galleries Association, *Submission 151*, p. 1.

⁵⁹ ICOM Australia, *Submission 148*, p. 1.

⁶⁰ ICOM Australia, *Submission 148*, p. 2.

⁶¹ Ms Poppy Lever, Manager, Warlayirti Artists, *Committee Hansard*, Canberra/teleconference, 13 November 2020, p. 31.

Albany and Broome in WA and Port Fairy in Victoria are excellent examples, where historical society museums attract many thousands of visitors each year.⁶²

- 2.53 There are more than 1,200 community history and heritage associations across Australia, with more than 120,000 members and volunteers, which curate collections, undertake historical research and hold exhibitions to engage visitors.⁶³ The Federation of Australian Historical Societies valued the cultural heritage work conducted by these associations at \$150 million.⁶⁴

Shared Services between National Collecting Institutions

- 2.54 In 2016, the National Museum of Australia (NMA) established the Cultural and Corporate Shared Services Centre (CCSSC) as part of the NMA's 'capability and commitment to better utilise Commonwealth resources and build on the collaborative relationships that currently exist between the national collecting institutions'.⁶⁵
- 2.55 The CCSSC is a shared services centre which supports cultural and small corporate agencies within the Australian Public Service (APS), and was initially formed to support the Museum of Australian Democracy (MoAD). The CCSSC provides services to meet 'the unique business requirements of cultural agencies', and is intended to support the Commonwealth Government's 'commitment to a smaller, smarter and more productive and sustainable public sector'. CCSSC provides corporate services such as IT support, finance, payroll, records management and accessibility.⁶⁶
- 2.56 The NMA initially received \$8.9 million in funding from the Public Service Modernisation Fund over three years to enable the other agencies to migrate to the CCSSC. The NMA outlined to the Joint Standing Committee on the National Capital and External Territories that benefits to participating agencies included: access to high quality services; compliance in areas such as security and records management; standardisation of enterprise resource

⁶² Federation of Australian Historical Societies, *Submission 32*, p. 2.

⁶³ Federation of Australian Historical Societies, *Submission 32*, p. 1.

⁶⁴ Federation of Australian Historical Societies, *Submission 32*, p. 1.

⁶⁵ National Museum of Australia, *Submission 59 to the Joint Standing Committee on the National Capital and External Territories*, p. 8.

⁶⁶ National Museum of Australia, *Submission 59 to the Joint Standing Committee on the National Capital and External Territories*, p. 8.

planning platforms; and, aggregated purchasing power for contracts and services.⁶⁷

- 2.57 Centralising certain services allows agencies and institutions to refocus existing resources to where they are most needed, reducing duplication and enhancing collaboration.⁶⁸ Agencies and shared services include: finance and payroll services for the Australian Institute of Aboriginal and Torres Strait Islander Studies (AIATSIS), and MoAD's payroll services.
- 2.58 In the 2019-20 financial year, the NMA delivered five additional services to agencies, and updated its digital asset management system (DAMS).⁶⁹

Screen Content

- 2.59 Australia's screen sector is a major cultural industry, creating jobs, promoting Australia to international audiences and telling Australian stories. The creation of screen content draws in film and video production, post-production, broadcasters and channel providers, and also other art forms including 'the performing arts, music and design'.⁷⁰ Several organisations, such as Screen Australia, Ausfilm, and the Australian Children's Television Foundation (ACTF), play a significant role in supporting and promoting the work of Australia's cultural industries both at home and abroad.
- 2.60 Screen Australia, the Commonwealth agency responsible for the screen production sector, set out the significance of the sector to the Australian labour market and economy:

The sector broadly spends about \$3½ billion a year on production in places throughout Australia, employing approximately 31,000 people while contributing a total value-add of \$5.3 billion to the economy. Downstream from this production activity is a raft of distribution channels and businesses.

⁶⁷ National Museum of Australia, *Submission 59 to the Joint Standing Committee on the National Capital and External Territories*, pp. 8-9.

⁶⁸ National Museum of Australia, Annual Report 2018-19, Activity 6, <https://www.transparency.gov.au/annual-reports/national-museum-australia/reporting-year/2018-2019-14>, accessed 26 May 2021.

⁶⁹ National Museum of Australia, Annual Report 2018-19, Activity 6, <https://www.transparency.gov.au/annual-reports/national-museum-australia/reporting-year/2019-20-11>, accessed 26 May 2021.

⁷⁰ Screen Australia, *Submission 172*, p. 5.

Just one, theatrical exhibition and distribution, is estimated to employ approximately 11,000 additional people.⁷¹

- 2.61 Prior to the effects of COVID-19, the screen sector had been growing, with the sector's value growing by 7.2 per cent from 2011-12 to 2015-16.⁷² Indirect economic impacts flowed from the screen sector's consumption of goods and services:

Screen production requires extensive use of goods and services, including rental services, financial services and electricity. Productions book accommodation in towns, eat at local restaurants and film at Australian locations, including in regional and remote areas. For example, the first series of *Mystery Road* was shot in the Kimberley region in Western Australia and brought an estimated \$5.8 million to the state.⁷³

- 2.62 Screen Australia funds the development and production of Australian drama, documentaries and content for children and supports projects for cinema, television and online environments. Screen Australia also administers the Producer Offset program and is the 'competent authority for international official co-production',⁷⁴ and has a particular role in growing the sector:

We support the development of our screen industry — its people, projects and businesses — to promote the growth of screen culture in Australia and internationally through festivals, markets, events and outreach. Of particular note, our Indigenous department has supported Aboriginal and Torres Strait Islander storytellers for more than 25 years, creating award-winning and critically acclaimed titles, from *Redfern Now* and *Mystery Road* to *Total Control*.⁷⁵

- 2.63 Screen Australia works with Ausfilm, the ACTF, public broadcasters and state and territory governments to provide funding to projects.
- 2.64 Ausfilm is a partnership between government and private industry, and includes the Commonwealth and state governments, 'major studio

⁷¹ Mr Graeme Mason, Chief Executive Officer, Screen Australia, *Committee Hansard*, Canberra/teleconference, 4 December 2020, p. 12.

⁷² Screen Australia, *Submission 172*, p. 5.

⁷³ Screen Australia, *Submission 172*, p. 5.

⁷⁴ Mr Graeme Mason, Screen Australia, *Committee Hansard*, Canberra/teleconference, 4 December 2020, p. 12.

⁷⁵ Mr Graeme Mason, Screen Australia, *Committee Hansard*, Canberra/teleconference, 4 December 2020, p. 12.

complexes, production service providers and leading post, digital visual effects and sound/music studios'.⁷⁶ Subscription fees from its 56 members fund the operation of Ausfilm, along with a grant from the Office for the Arts.

- 2.65 Ausfilm promotes the Australian film industry and the Governments' incentive programs to overseas markets, with a particular focus on the United States of America. Ausfilm promotes the Commonwealth Government's 'Screen Production Incentive Scheme', which includes the Location Offset, Post Digital & Visual Effects (PDV) Offset and Producer Offset. Ausfilm also promotes the:

...official Co Production Program and the various State government screen incentives on behalf of the Australian Government; diverse locations; sound stages; post-production and visual effects companies; and award-winning filmmaking talent. Ausfilm is the gateway for international filmmakers looking to film, post and/or co-produce in Australia.⁷⁷

- 2.66 The ACTF is a not-for-profit organisation 'with a singular purpose to deliver quality screen content for children all over Australia, and all over the world'. The ACTF provides a number of services and support, including funding script development; capacity building for producers and emerging talent; investing in production; promotion, distribution and advocacy for children's content; and developing education resources.⁷⁸

- 2.67 The Commonwealth Government contributed funding of \$2.89 million, and state and territory governments contribute smaller amounts. Additional income comes from sales and distribution.⁷⁹

- 2.68 Australian children's television content is sold around the world, and is a strong performer:

...children's television in particular is a real soft-diplomacy weapon for Australia, because our shows go to 120 countries around the world and people get to see the kinds of values Australia has and the kind of place Australia is. For Australian children themselves, and for the people who grew up watching children's television, these programs really are a nation-building national

⁷⁶ Ausfilm, *Submission 137*, p. 2.

⁷⁷ Ausfilm, *Submission 137*, p. 2.

⁷⁸ Australian Children's Television Foundation, *Submission 152*, p. 2.

⁷⁹ Australian Children's Television Foundation, *Submission 152*, p. 2.

asset. We've had 30 years or more of focusing on children's content, and I think it's an unsung but really appreciated asset.⁸⁰

2.69 Australian children's content has won major International awards and been distributed around the world. Children's drama *Hardball* was noted as an example of a particularly successful Australian children's drama winning a number of prestigious awards, including the Prix Jeunesse, Banff Rockie Award and an International Emmy Award. *Hardball* has been purchased by the BBC, as well as German, French and South African broadcasters.⁸¹

2.70 The success story of children's television show *Bluey* was highlighted by a number of inquiry participants. *Bluey* is funded by Screen Australia and Screen Queensland, was co-commissioned by the Australian Broadcasting Corporation (ABC) and British Broadcasting Corporation (BBC), and is produced by Ludo Studio. Screen Australia drew attention to the international attention *Bluey* receives:

What's exciting about that is that Disney have taken that show, in America, and are actually playing it with an Australian voice track. That's the first time, to my knowledge—in my 30 years of working in global production and distribution—that an Australian kids' show has been played in America with an Australian voice, which is incredible. That's the point of difference for our content.⁸²

2.71 The sector was stated to function as an employer and training ground for practitioners. The ACTF referred to the role of children's drama as a 'talent accelerator' and 'talent escalator' for crew and cast. Australian stars like Nicole Kidman, Margot Robbie and Sean Keenan were highlighted as having started their careers in children's drama.⁸³

2.72 The indirect economic benefits of Australian children's content were also raised, with particular mention of the variety of regional and remote filming locations for Australian children's television which benefit from productions taking place.

⁸⁰ Ms Jenny Buckland, Chief Executive Officer, Australian Children's Television Foundation, *Committee Hansard*, Canberra/teleconference, 4 December 2020, p. 13.

⁸¹ Australian Children's Television Foundation, *Submission 152*, p. 3.

⁸² Mr Graeme Mason, Screen Australia, *Committee Hansard*, Canberra/teleconference, 4 December 2020, p. 14.

⁸³ Australian Children's Television Foundation, *Submission 152*, p. 5.

Box 2.2 *MaveriX*

MaveriX, a live-action children's drama will be filmed in Alice Springs in 2021, bringing a film crew and cast to the area for a few months to complete the film shoot. The project was highlighted as supporting local businesses as well as creating traineeships and employment opportunities for the area.

Beyond the direct economic benefits of filming on location in regional Northern Territory, the area will be showcased in the production as a destination for future tourism when it is broadcast on ABC ME in Australia, and on Netflix around the world.

The ACTF stated that children's content has a particularly long life as the target audience is new every few years, meaning the content can be shown repeatedly.⁸⁴

- 2.73 The value of Australian children seeing characters who look and sound like them and their families was highlighted as helping children learn that 'stories like theirs are worth telling'.⁸⁵ According to the ACTF, the ability of drama to allow a viewer to see experiences from another person's perspective is linked to encouraging understanding and acceptance.
- 2.74 The educational role of Australian children's content was also noted, and the ACTF set out its role in providing resources for teachers to help students understand the construction and themes in films, and develop literacy and creative skills by engaging with storytelling.⁸⁶

Australia as a Filming Location

- 2.75 Australian filming locations were stated to be drivers of domestic and international tourism, with Victoria's Hepburn Shire (the location of Mad Max and Picnic at Hanging Rock) and Kettering and Bruny Island in Tasmania (The Kettering Incident) benefiting from extra visibility. Research conducted by Deloitte Access Economics found that 230,000 international tourists visit or extend their trip to Australia each year as a result of having

⁸⁴ Screen Australia, *Submission 172*, p. 6.

⁸⁵ Australian Children's Television Foundation, *Submission 152*, p. 8.

⁸⁶ Australian Children's Television Foundation, *Submission 152*, p. 9.

seen Australian film and television content. Deloitte estimated that this generated \$725 million in tourism expenditure.⁸⁷

- 2.76 Ausfilm noted the rise of 'footloose' productions ('a production that does not take place in the jurisdiction from which it originated') which make use of Australian filming locations:

...there is a significant amount of transnational production that occurs on an annual basis. The phenomenon of transnational production or what is also called "footloose" or "runaway" production is not new. For many decades producers have travelled to locations other than their home base and in the process employed local cast and crew and engaged local service providers.⁸⁸

- 2.77 Ausfilm was established 'to market the locations, talent and incentives available to attract footloose filmmaking' and has a subsidiary organisation, Ausfilm USA Inc., which is located in Los Angeles.⁸⁹ Ausfilm estimated that 'approximately \$4.2 billion worth of international footloose location and Post, Digital and Visual Effects (PDV) spending has occurred in Australia in the last two decades'.⁹⁰

- 2.78 Although foreign production in Australia has grown, its growth has not been consistent. Ausfilm stated that Australia's foreign production has not grown as consistently as other countries due to the Location Offset, which at 16.5 per cent, was 'not competitive'. One-off top-ups have been granted by the Commonwealth Government, which top the offset up to 30 per cent to be more internationally attractive.⁹¹

- 2.79 In 2018, \$140 million was allocated to the Location Incentive Program by the Commonwealth Government to top the Location Offset up to 30 per cent for eligible large-scale international productions which film in Australia.⁹² In July 2020, the Commonwealth Government extended the program to 2026-27 and allocated a further \$400 million.⁹³ The program is expected to generate

⁸⁷ Screen Australia, *Submission 172*, pp. 5-6.

⁸⁸ Ausfilm, *Submission 137*, p. 3.

⁸⁹ Ausfilm, *Submission 137*, pp. 2-3.

⁹⁰ Ausfilm, *Submission 137*, p. 6.

⁹¹ Ausfilm, *Submission 137*, p. 6.

⁹² Ausfilm, *Submission 137*, p. 7.

⁹³ Department of Infrastructure, Transport, Regional Development and Communications (Office for the Arts), *Submission 293*, p. 30.

more than \$4 billion in production. Ausfilm outlined some other benefits to this program:

This will now enable Australia to attract inward investment that could have gone to other locations around the world, but will instead [be] spent in Australia, employing thousands of Australians and providing work for production and post-production services companies; as well as flowing out into the wider economy to non-screen businesses that provide services and goods such as hospitality, timber for set construction, specialised ropes and cranes for rigging, freight, accommodation and transport to name a few.⁹⁴

- 2.80 Inquiry participants who work in the screen sector (as actors, content creators or writers) called for a greater focus on creating local productions which tell Australian stories, rather than importing international productions. One inquiry participant stated that local productions would be a better long-term plan for the screen sector:

...productions from abroad will only hire those already established in the industry. The odds of a young actor from Australia being hired or a relatively unknown young screenwriter having the opportunity to join these productions is very little.⁹⁵

Reforms to Screen Sector Policy

- 2.81 The ACTF drew attention to the Commonwealth Government response to the Supporting Australian Stories on Screen Options Paper, and stated that a number of reforms will be brought in, including:

- Simplify existing regulations and provide greater flexibility for commercial broadcasters;
- Reduce the expenditure requirement for subscription broadcasters;
- Ask streaming services operating in Australia to report on their level of investment in Australian content;
- Harmonise the Producer Offset for film and television production to 30 per cent;
- Provide \$30 million over 2 years in additional funding to Screen Australia from 1 July 2021 to invest in Australian film, drama, documentary and children's content; and

⁹⁴ Ausfilm, *Submission 137*, p. 7.

⁹⁵ Name Withheld, *Submission 12*, p. 1.

- Provide \$20 million over 2 years in additional funding to the ACTF from 1 July 2021 to boost development, production and distribution of high quality Australian children's content.⁹⁶

2.82 The ACTF also noted that it is 'supported by interconnected policy levers which are currently in a state of transition and reform, in response to a rapidly changing viewing environment'.⁹⁷

2.83 Latrobe City Council suggested the creation of incentives for media and film production in regional areas that 'attach traineeships for local creatives in partnership with Councils and higher education providers'.⁹⁸

Impact of the COVID-19 Public Health Emergency

2.84 COVID-19 had an enormous negative impact on the operation of the screen sector, with some effects felt immediately as productions were shut down and some felt over a longer timeframe:

Large-scale production was brought to a halt by COVID-19 as governments and industry quickly realised the risk posed to cast and crew. Some documentary and drama production forged ahead, but faced additional costs and disrupted timelines. Most postproduction, digital and visual effects (PDV), and animation services have been able to adapt and continue during the pandemic, but now face a shortage of work in future months due to the disrupted production pipeline and resourcing issues.⁹⁹

2.85 Screen Australia highlighted the work undertaken to support the industry in light of COVID-19's devastating impact on the sector:

Of course, COVID-19 has drastically impacted the Australian screen sector. Our agency has provided a range of support measures during this time. We've worked with industry and government to create world-leading guidelines. We've contributed more than \$2 million in funding to development. We contributed \$1 million in emergency funding to productions forced to shut down and have since provided an additional \$7.4 million to projects that could start again in a COVID-safe way. We've provided COVID-19 support to projects that have a combined budget of around \$333 million. We're administering the Temporary Interruption Fund on behalf of the government,

⁹⁶ Australian Children's Television Foundation, *Submission 152*, p. 4.

⁹⁷ Australian Children's Television Foundation, *Submission 152*, p. 4.

⁹⁸ Latrobe City Council, *Submission 24*, p. 6.

⁹⁹ Screen Australia, *Submission 172*, p. 2.

with 24 projects already approved for cover and 14 set to enter production in 2021.¹⁰⁰

- 2.86 The impact of COVID-19 on Australia's creative and cultural industries and institutions is examined in further detail in the next chapter.

Literature

- 2.87 Australia's literature industry is a major contributor to the arts in Australia, promoting Australian stories both within the country and abroad. These stories are often diverse, and include the works of Aboriginal and Torres Strait Islander communities and marginalised communities.¹⁰¹ Alongside telling stories, the literature industry in Australia is closely connected to Australian schools, universities, libraries and literacy programs.¹⁰²
- 2.88 In the 2016-17 financial year, the cultural and creative economy was estimated to contribute \$111.7 billion to the Australian economy.¹⁰³ However, a report by A New Approach (ANA) argued that a more accurate understanding of the arts contribution to the Australian economy is through the GVA.¹⁰⁴ Within the creative domains, literature and print media was found to be in the top four cultural production domains, generating \$9.5 billion in GVA in 2016-17.¹⁰⁵ Of the total GVA of culture and creative activity, literature, print and media was found to account for 10.9 per cent.¹⁰⁶ In comparison, the remaining cultural production domains were found to generate considerably smaller GVA than literature and print media.¹⁰⁷
- 2.89 The Australia Council is the primary Commonwealth Government agency for the literature industry in Australia.¹⁰⁸ The Australia Council

¹⁰⁰ Mr Graeme Mason, Screen Australia, *Committee Hansard*, Canberra/teleconference, 4 December 2020, p. 12.

¹⁰¹ Ms Grace Lucas-Pennington, Ms Allanah Hunt, Ms Jasmin McGaughey, *Submission 122*, pp. 1-2.

¹⁰² Dr Menzies-Pike, Sydney Review of Books, *Committee Hansard*, Canberra/teleconference, 13 November 2020, p. 23.

¹⁰³ A New Approach, *Submission 131*, p. 7.

¹⁰⁴ A New Approach, *Submission 131*, p. 7.

¹⁰⁵ Professor Stuart Cunningham and Dr Marion McCutcheon, *Submission 45*, p. 41.

¹⁰⁶ A New Approach, *Submission 131*, p. 8.

¹⁰⁷ Professor Stuart Cunningham and Dr Marion McCutcheon, *Submission 45*, p. 41.

¹⁰⁸ Australia Council for the Arts, *Literature*, Office for the Arts, <https://www.australiacouncil.gov.au/artforms/literature/>, accessed 6 May 2021.

predominantly supports writers through grants provided directly to writers, as well as the publishing industry.¹⁰⁹ Additionally, the Australia Council offers grants to programs and organisations that assist in the development of writer's skills, professional development, and presentation of work.¹¹⁰

- 2.90 Decreases in funding for the Australia Council were noted by inquiry participants. Mr Nick Earls stated that:

While author incomes have been falling long before COVID-19, federal government support for authors and their incomes has been falling too. Australia Council funding for literature has decreased 44 per cent since 2013. While CAL [Copyright Agency Limited] and some other non-government grants have emerged, they have not made up the shortfall, and nor should they have to, as government should remain willingly and significantly involved.¹¹¹

- 2.91 Ms Sophie Cunningham, who served as the Chair of the Literature Board of the Australian Council from 2012-2014, stated that much of this decrease is due to the abolition of literature programs such as Get Reading, Books Alive and the Book Council.¹¹²

- 2.92 Shortages of funding were stated to contribute to financial pressure felt by writers. A number of inquiry participants referred to a figure of just under \$13,000 per annum as the annual income for writers and illustrators, 'the lowest income in the arts sector'.¹¹³ Dr Charlotte Wood stated that this figure may actually be too high:

On average the literary writer's income is not the widely quoted \$13,000 a year, but \$4,000 a year from their books, which of course means we need other work to survive. That work is piecemeal, freelance, poorly paid, and very unstable... Australia Council funding for literature has fallen 44 per cent in the last six years, and literature receives less than half the money the Australia Council gives to other art forms.¹¹⁴

¹⁰⁹ Australia Council for the Arts, *Literature*, Office for the Arts, <https://www.australiacouncil.gov.au/artforms/literature/>, accessed 6 May 2021.

¹¹⁰ Australia Council for the Arts, *Literature*, Office for the Arts, <https://www.australiacouncil.gov.au/artforms/literature/>, accessed 6 May 2021.

¹¹¹ Mr Nick Earls, *Submission 22*, p. 4.

¹¹² Ms Sophie Cunningham, *Submission 128*, p. 1.

¹¹³ Ms Ann James, *Submission 260*, p. 3.

¹¹⁴ Dr Charlotte Wood, Private capacity, *Committee Hansard*, Canberra/teleconference, 13 November 2020, p. 24.

- 2.93 Other inquiry participants also commented on the importance of early career grants, stating it afforded them the time and freedom to explore various styles and genres of writing, while also giving them sense of confidence. Acclaimed Australian author Helen Garner stated that: 'It was the greatest gift that I've ever received. It gave me two things. It gave me time, and it gave me the sense of being trusted.'¹¹⁵
- 2.94 The essential nature of grants provided by the Australia Council was also highlighted as a way for new writers to be able to pursue their careers in authorship. Christos Tsiolkas, the award winning Australian author, stated that:
- I know that if it wasn't for a grant from the Australia Council that I received during the writing of my third novel, and if it hadn't been for the championing of my work by Australian literary festivals and publishers, I might have very easily given up. It is hard to maintain the discipline and labour of being a writer when you need to work, pay the rent or a mortgage. My partner and I don't have children. If we did, the stakes would have been even higher.¹¹⁶
- 2.95 Inquiry participants highlighted the integral nature of literature in Australia, and the importance of supporting the Australian literature community.¹¹⁷ Dr Charlotte Wood highlights that writers and authors are directly linked with a range of arts, advocating its significance:
- We can be considered primary producers for many diverse forms of the creative arts, from books to films, theatre, opera, television, games and other 'products'.¹¹⁸
- 2.96 Alongside this, inquiry participants also advocated for the ability of literature to assist in community-building, emphasising its positive effect on social cohesion, social wellbeing, and the promotion of mental health.¹¹⁹ Others highlighted the educational importance of literature in Australia, citing its benefit in improving literacy and numeracy.¹²⁰

¹¹⁵ Ms Helen Garner, Private capacity, *Committee Hansard*, Canberra/teleconference, 13 November 2020, p. 23.

¹¹⁶ Mr Christos Tsiolkas, *Submission 193*, p. 2.

¹¹⁷ Professor Gail Jones, *Submission 24*, p. 2; Ms Hannah Kent, *Submission 114*, p. 1; Ms Sophie Cunningham, *Submission 128*, p. 1; Writing WA, *Submission 144*, pp. 1-2.

¹¹⁸ Dr Charlotte Wood, *Submission 127*, p. 1.

¹¹⁹ Dr Charlotte Wood, *Submission 127*, p. 1.

¹²⁰ Dr Charlotte Wood, *Submission 127*, p. 1; Mr Nick Earls, *Submission 22*, p. 5.

- 2.97 The importance of Australian literature for its contribution towards enriching Australian society was also advocated, as opposed to just its monetary value:

A thriving literary sector, which I think we all want, is one that can support poets, experimental writers, critics, essayist, romance novelists and the many, many writers whose books will never sell big or win prizes but whose work, nonetheless, enriches and expands our shared culture.¹²¹

- 2.98 Diversity within the literature sector, especially the promotion of stories by Aboriginal and Torres Strait Islander authors, was highlighted. Ms Lucas-Pennington, Ms Allanah Hunt, and Ms McGaughey, who are Aboriginal and Torres Strait Islander literary practitioners, commented on the importance of Aboriginal and Torres Strait Islander storytelling:

First Nations writing is an impactful and fast-growing sector of the publishing industry in Australia and, while engaging readers and writers across the country and internationally, needs more financial support.¹²²

- 2.99 Further, books by Aboriginal and Torres Strait Islander authors are consistently underrepresented in the Australian literary scene.¹²³ Mr Tsiolkas commented that Aboriginal and Torres Strait Islander stories are uniquely Australian and therefore require the specific support of the Australian literature industry:

In these last twenty years it has been thrilling to read the works of writers such as Alexis Wright, telling Indigenous Australia stories in a distinctly new voice that also owes its song to a history that stretches back into the millennia. American publishers and the UK government are never going to fund the initial grants and residencies that assisted writers like Alexis to nurture and explore her craft. That is our nation's work.¹²⁴

- 2.100 The essential nature of community organisations in the writing community was identified for their ability to develop writers' skills and advocate for their interests.¹²⁵ These include organisations such as the Australian Society of Authors, Writers WA, Writers Victoria, Writing SA, Writing NT, Writing

¹²¹ Dr Menzies-Pike, Sydney Review of Books, *Committee Hansard*, Canberra/teleconference, 13 November 2020, p. 23.

¹²² Ms Grace Lucas-Pennington, Ms Allanah Hunt, Ms Jasmin McGaughey, *Submission 122*, p. 1.

¹²³ Ms Grace Lucas-Pennington, Ms Allanah Hunt, Ms Jasmin McGaughey, *Submission 122*, p. 2.

¹²⁴ Mr Christos Tsiolkas, *Submission 193*, p. 2.

¹²⁵ The Australian Society of Authors, *Submission 315*, p. 4; Writing NSW, *Submission 83*, p. 1.

SA, and the Australian Young Adult Literature Alliance. Such organisations were credited with providing a network of support for new and emerging writers, providing mentors and linking them into a community.¹²⁶

Mr Tsiolkas, among others, stated that these organisations are under-resourced: 'That infrastructure is really, really threadbare at the moment'.¹²⁷

- 2.101 As with many Australian industries, the literature industry was not immune to the effects of the COVID-19 pandemic, despite the increase in individuals turning to literature during this time.¹²⁸ Outside of an income from book sales, it was raised that the major income streams for writers were considerably affected due to the pandemic, with Dr Charlotte Wood noting:

COVID is destroying the livelihoods of writers in many ways, through the loss of their day jobs in lots of cases, but also by eviscerating three major income streams from writers outside of their books, which are public speaking, university teaching and freelance writing.¹²⁹

- 2.102 JobKeeper was highlighted as an Australian Government initiative assisting writers during the COVID-19 pandemic, however this was noted as mostly applying to a writer's day job, and not to their writing-related work.¹³⁰ This included those who worked in teaching positions in universities and within creative writing schools, which was stated to be a major income stream for writers.¹³¹ However, due to these staff losing their jobs within the universities, it was stated that JobKeeper was unavailable to these individuals, leaving authors and writers without financial support.¹³²

¹²⁶ Ms Christos Tsiolkas, Private capacity, *Committee Hansard*, Canberra/teleconference, 13 November 2020, p. 27.

¹²⁷ Ms Christos Tsiolkas, Private capacity, *Committee Hansard*, Canberra/teleconference, 13 November 2020, p. 27.

¹²⁸ Ms Meredith Curnow, *Submission 145*, p. 2; Ms Tegan Bennet Daylight, *Submission 177*, p. 2.

¹²⁹ Dr Charlotte Wood, Private capacity, *Committee Hansard*, Canberra/teleconference, 13 November 2020, p. 24.

¹³⁰ Dr Charlotte Wood, Private capacity, *Committee Hansard*, Canberra/teleconference, 13 November 2020, p. 27.

¹³¹ Dr Charlotte Wood, Private capacity, *Committee Hansard*, Canberra/teleconference, 13 November 2020, p. 27.

¹³² Dr Charlotte Wood, Private capacity, *Committee Hansard*, Canberra/teleconference, 13 November 2020, p. 27.

Music

- 2.103 The music industry in Australia is expansive, and accounts for a range of artists and genres. The Australian music industry consists of live music, the performing arts, radio, screen content, music composition and publishing, and gigging in clubs and pubs. It also boasts a large network of teachers, youth groups and ensembles, and a strong community network.
- 2.104 According to research undertaken by ANA, the performing arts and music composition and publishing accounts for a combined 2.3 per cent of the total GVA of the cultural and creative industries.¹³³ However, the music industry is intrinsically entwined with a range of other creative industries, including broadcasting, digital media, film, and supporting activities, and arts education.¹³⁴
- 2.105 With too many to mention, Australia has a long history of globally successful artists such as AC/DC, Kylie Minogue, Keith Urban, For King & Country, Bee Gees, Little River Band, Air Supply, Men at Work, Helen Reddy, Natalie Imbruglia, Midnight Oil, The Seekers, Savage Garden, Rick Springfield, The Vines, The Divinyls, INXS, Olivia Newton-John, and Slim Dusty.
- 2.106 More recently Australian musicians and artists have distinguished themselves at home and abroad. Antonio Gambale, an Australian screen composer, was nominated for two Emmy awards; Sia, Gotye, Courtney Barnett, Vance Joy, Rufus du Sol, 5 Seconds of Summer, Alex Lahey, Alison Wonderland, Middle Kids, Tash Sultana, Dean Lewis, Amy Shark, Stella Donnelly, Troye Sivan, PNAU, Flume, and Gand of Youths, to name a few, are writing, recording, and appearing on global stages and screens; Tones and I's hit single Dance Monkey topped the UK singles chart for 11 weeks, was top of the charts in 20 territories, and top-five in the US; 5 Seconds of Summer's first three albums all charted at No. 1 in the US, a feat never achieved before by an Australian group; Flume and the Australian Chamber Orchestra win Grammys; improvising jazz trio The Necks are named the best band in the world by the New York Times; Tina Arena was awarded a 'Chevalier des Arts' by France; and Tame Impala were awarded Best International Group at the Brit Awards in the United Kingdom.¹³⁵

¹³³ A New Approach, *Submission 131*, p. 8.

¹³⁴ A New Approach, *Submission 131*, pp. 8-9.

¹³⁵ APRA AMCOS, *Submission 320*, pp. 16-17; PriceWaterhouseCoopers, 'Australian Entertainment & Media Outlook 2020-2024', <https://www.pwc.com.au/industry/entertainment-and-media-trends->

- 2.107 First Nations artists such as Kid Laroi, Birdz, Jessica Mauboy, Electric Fields, Ursula Yovich, Thelma Plum, Baker Boy, Kaleena Briggs, Kev Carmody, Troy Cassar-Daley, Leah Flanagan, Warumpi Band, Alice Skye, Gurrumul, Archie Roach, Tasman Keith, Bunna Lawrie, No Fixed Address, Dan Sultan, and Yothu Yindi are producing music across all genres from reggae, pop, rock, folk, country, jazz, soul, rap and classical and garnering international acclaim.
- 2.108 Music makes a significant contribution to the Australia economy. Our artists, songwriters, and bands are household names globally ‘across a diversity of genres, succeeding on the international stage than ever before.’¹³⁶
- 2.109 The Australasian Performing Rights Association and Australasian Mechanical Copyright Owners Society (APRA AMCOS), highlighted the value of the Australian music industry:
- more than half of the population attends live music with every dollar spent on live music in Australia, three dollars’ worth of benefits are returned to the wider Australian community;
 - one in seven Australians make music and over 40,000 Australian songwriters were paid royalties for their works last year;
 - at the Sounds Australia & Australia House industry market at South By Southwest (SXSW) in early 2019, there were 54 Australian artists in market;
 - over the last five years, APRA AMCOS’ foreign revenue generated from the performance of Australian music overseas has doubled; and
 - there are now more Australian music artists, across a diversity of genres, succeeding on the international stage than ever before.¹³⁷
- 2.110 Ernst and Young’s 2020 report, *The economic contribution of Australia’s Live Entertainment Industry*, noted that in particular, the Live Entertainment Industry contributed an estimated \$36.5 billion to Australia’s economy in 2019.¹³⁸ They added that in 2019, live performance (contemporary music and

[analysis/outlook/music.html#:~:text=Australia's%20total%20music%20market%20came,the%20mid%20point%20forecast%20scenario](#), accessed 9 June 2021.

¹³⁶ Australasian Performing Rights Association (APRA), Australasian Mechanical Copyright Owners Society (AMCOS), *Submission 320*, p. 6.

¹³⁷ APRA AMCOS, *Submission 320*, p. 6.

¹³⁸ Ernst and Young, *The economic contribution of Australia’s Live Entertainment Industry, How COVID-19 impacted the industry?*, December 2020, p. 5.

contemporary music festivals) and venue-based live music (all venue based live music events) contributed:

- 34 per cent of the live entertainment industry total economic output in 2019, contributing approximately \$12.5 billion to the Australian economy; with
- approximately 42,066 total jobs across the sector in 2019, with total industry value add estimated at \$5.7 billion.¹³⁹

2.111 However, like many other sectors, the live entertainment industry was heavily impacted by the pandemic. The report's analysis estimated:

...that the total economic output from live music shows and events is estimated to fall by \$10.8bn from 2019 to the end of 2020. Total jobs that could be lost is estimated at 36,194 by the end of 2020, with industry value add estimated to fall by \$4.9bn over the same period.¹⁴⁰

2.112 Music streaming was able to provide a supplementary revenue stream to artists during this time, becoming the largest driver of industry revenues. PriceWaterhouseCoopers in its *Australian Entertainment & Media Outlook 2020-2024* noted:

Music-streaming has become the pumping heart of the industry, and as COVID-19 continues to drive an acceleration in digital behaviours, it has become a vital pillar to defend revenues in the sector throughout 2020. As of June 2020, Spotify has accumulated 138 million subscribers globally, with monthly active users up to 299 million, having increased subscription penetration in all regions.

In 2015 revenue related to the digital distribution of music (including downloads and consumer spend on music streaming services) came in at A\$336m. That figure had risen to A\$882m in 2019, and is expected to surge to A\$1.44b by 2024, with a forecast of 10.31 percent CAGR [compound annual growth rate].¹⁴¹

¹³⁹ Ernst and Young, *The economic contribution of Australia's Live Entertainment Industry, How COVID-19 impacted the industry?*, December 2020, p. 6.

¹⁴⁰ Ernst and Young, *The economic contribution of Australia's Live Entertainment Industry, How COVID-19 impacted the industry?*, December 2020, p. 6.

¹⁴¹ PriceWaterhouseCoopers, 'Australian Entertainment & Media Outlook 2020-2024', <https://www.pwc.com.au/industry/entertainment-and-media-trends-analysis/outlook/music.html#:~:text=Australia's%20total%20music%20market%20came,the%20mid%20point%20forecast%20scenario>, accessed 9 June 2021.

2.113 The Australian Government provides \$27.5 million in funding to support Australia's music industry through the Australian Music Industry Package. The package includes:

- The Live Music Australia program provides grant funding of \$20 million over four years, from 2020–21, to enable Australian businesses to host more Australian live music events featuring home grown artists.
- The Women in Music Mentor program, provides \$2 million over four years from 2019–20, for mentorship programs and professional training. The Women in Music Mentor program is being delivered by the Australian Independent Record Labels Association(AIR).
- The Indigenous Contemporary Music program provides \$2 million over four years from 2019–20, to establish a national development program for Indigenous musicians and bands.
- Additional funding of \$2 million over four years from 2019–20, for the Contemporary Music Touring Program administered by the Australia Council, which funds Australian musicians to perform their own work on tour in Australia, with a priority on regional and remote locations.
- Funding of \$1.5 million over four years from 2019–20 for Sounds Australia to enable the Australian music industry to capitalise on emerging markets, including in Asia.¹⁴²

Digital Media, including Video Games

2.114 The video game industry is one of the fastest-growing arts sectors having surpassed movies, television, and video on demand services to becoming the biggest earning media sector globally. The Australian gaming sector has found success in both the local and overseas markets, demonstrating a competitive advantage in game development.¹⁴³ Video game development can be classified as both a creative and technological industry, and video game developers are recognised as having highly transferrable skills within the arts, technology, design and commerce sectors.¹⁴⁴

¹⁴² Department of Infrastructure, Transport, Regional Development and Communications, Office for the Arts, 'Contemporary music', <https://www.arts.gov.au/what-we-do/performing-arts/contemporary-music>, accessed 9 June 2021.

¹⁴³ Interactive Games & Entertainment Association (IGEA), *Submission 27*, p. 3-4; Design Institute of Australia, *Submission 125*, p. 4.

¹⁴⁴ IGEA, *Submission 27*, p. 3.

- 2.115 The Interactive Games and Entertainment Association (IGEA) commented on the diverse workforce involved in developing games, stating that:

Game development relies on and develops talent in almost all creative disciplines, from screen and visual arts, to music and sound, and writing and design. The making of video games requires almost every kind of artistic input and arguably involves more artists and creative practitioners than any other medium.¹⁴⁵

- 2.116 Australian-made video games were identified as providing an opportunity to express uniquely Australian or iconic stories, or by setting them in an Australian landscape.¹⁴⁶ The IGEA highlighted the game *Storm Boy* by Blowfish Studio, which is based on the classic Australian story by Colin Thiele about a boy and his pelican, as well as the second instalment of the official Australian Open video game series (*AO Tennis 2*), created by the Melbourne-based Big Ant Studios, as two video games that achieve this.¹⁴⁷

- 2.117 The benefits of video games outside of entertainment value were raised by inquiry participants. Benefits included video games for education; assisting with dementia; reducing obesity; and assisting injury rehabilitation. Further benefits include assisting in delivering novel approaches to police training; mental health; and anti-family violence initiatives.¹⁴⁸

- 2.118 Mr Benjamin Cronshaw advocated the long-term educational value of video games, in encouraging young people to learn and develop a range of interests:

I learnt much of my historical knowledge and gained an interest in history and geography through playing the Ages of Empires and Total War series. I am now completing my Bachelor of Arts (Honours) in Ancient World Studies.¹⁴⁹

- 2.119 According to the IGEA 2020 Australian Game Development Survey, the Australian game development industry employed 1,245 people, and earned

¹⁴⁵ Design Institute of Australia, *Submission 125*, p. 4; IGEA, *Submission 27*, p. 3.

¹⁴⁶ Mr Benjamin Cronshaw, *Submission 2*, p. 1.

¹⁴⁷ IGEA, *Submission 27*, p. 2.

¹⁴⁸ Creative Victoria, *Submission 308*, p. 5; Country Arts SA, *Submission 110*, p. 1; Mr Benjamin Cronshaw, *Submission 2*, p. 1.

¹⁴⁹ Mr Benjamin Cronshaw, *Submission 2*, p. 1.

\$184.6 million in revenue in 2020.¹⁵⁰ This is a 29 per cent increase in revenue since 2019, with 87 per cent of total revenue coming from overseas markets.¹⁵¹

2.120 However, IGEA also noted that in 2018-19, of every \$100 earned by the global video game industry, only 5 cents was earned by Australian developers. Further, IGEA drew attention to the small size of the Australian video game industry, highlighting that both the United Kingdom and Canada have industries that are ten times the size of the Australian industry.¹⁵²

2.121 Unlike others in the arts industry, IGEA stated that the video game sector in Australia was minimally affected by the COVID-19 pandemic. Instead, IGEA highlighted a higher demand for the video games during the pandemic:

The popularity of video games surged in Australia and the world as people sought out games as a crucial way to stay positive, occupied and connected to their family and friends during isolation.¹⁵³

2.122 IGEA noted that, although there was still some harm to the video game sector, game development remained largely resilient to the pandemic. IGEA explained that this is largely due to the digital nature of game development work, with most able to work remotely and some expanding their market during this time.¹⁵⁴ 'Unlike virtually all non-essential sectors of our economy, many Australian game development studios were hiring – not firing – during COVID'.¹⁵⁵ IGEA noted that new, emerging and growth-focused studios were more at risk during the pandemic.¹⁵⁶

2.123 Despite its relative success during the pandemic, and its consistent growth as an industry, inquiry participants raised concern regarding a lack of

¹⁵⁰ IGEA, 'Australian Game Development Industry Counts \$185 Million in Revenue', <https://igea.net/2021/01/australian-game-development-industry-counts-185-million-in-revenue/>, accessed 17 May 2021.

¹⁵¹ Interactive Games & Entertainment Association, 'Australian Game Development Industry Counts \$185 Million in Revenue', <https://igea.net/2021/01/australian-game-development-industry-counts-185-million-in-revenue/>, accessed 17 May 2021.

¹⁵² IGEA, *Submission 27*, p. 4.

¹⁵³ IGEA, *Submission 27*, p. 6.

¹⁵⁴ IGEA, *Submission 27*, p. 6.

¹⁵⁵ IGEA, *Submission 27*, p. 6.

¹⁵⁶ IGEA, *Submission 27*, p. 6.

government funding in the video games industry. IGEA highlighted that game development is the only area of the arts that does not receive funding or support from the Commonwealth Government, unlike its overseas counterparts.¹⁵⁷

Australia is one of the only advanced economies in the world that offers no federal funding or production incentives for video game developers...video game development is the only part of the Australian creative and cultural sector that is not provided with, or able to access any federal arts support.¹⁵⁸

- 2.124 IGEA suggested that this lack of funding may be causing the small size of the Australian game development industry, despite the high level of skill game developers in Australia possess:

This is the reason why the Australian game development industry is less than a tenth of the size of the same industry in either Canada or the UK and earns less revenue than even New Zealand's games sector.¹⁵⁹

- 2.125 To increase Australia's competitiveness on the international game development market, inquiry participants put forward the idea of tax offsets for the industry.¹⁶⁰ Such an initiative was recently announced by the South Australian Government, which enables video game studios to claim a 10 per cent rebate on costs incurred to develop a game in South Australia, the first policy of its kind in Australia.¹⁶¹

¹⁵⁷ IGEA, *Submission 27*, p. 7.

¹⁵⁸ IGEA, *Submission 27*, p. 8.

¹⁵⁹ IGEA *Submission 27*, p. 8.

¹⁶⁰ IGEA, *Submission 27*, p. 8.

¹⁶¹ Creative Victoria, *Submission 308*, p. 11; Professor Stuart Cunningham and Dr Marion McCutcheon, *Submission 45*, p. 34; South Australian Film Corporation, 'Australia-first rebate for video game development now open as SAFC launches new suite of programs', <https://www.safilm.com.au/latest-news/australia-first-rebate-for-video-game-development-now-open-as-safc-launches-new-suite-of-programs/>, accessed 17 May 2021.

2.126 IGEA explained that federal tax offsets, alongside federal grant funding to the sector, would allow the Australian game development industry to become more competitive in the global market, whilst allowing individuals in the sector to stay in Australia, instead of moving overseas. IGEA asserted that this would significantly change the game development industry.

Grant funding gives our emerging talent the best chance to succeed and stay in Australia, while a tax offset in particular will level the global playing field and act as a lightning rod for investment.¹⁶²

2.127 In the 2021-22 budget, the Commonwealth Government announced the Digital Games Tax Offset. This initiative offers a 30 per cent refundable tax offset for eligible businesses that spend a minimum of \$500,000 on qualifying Australian games expenditure.¹⁶³ The Commonwealth Government stated that qualifying criteria would be defined in consultation with the game development industry.

Commonwealth Government Support

2.128 The Australian Government supports creative and cultural industries through the Office for the Arts, which sits within the Department of Infrastructure, Transport, Regional Development and Communications, and through the Australia Council.

2.129 The Office for the Arts develops policies and programs to support the arts and culture by working closely with its portfolio agencies: the Australian Council for the Arts, Screen Australia and Creative Partnerships Australia.

2.130 The Office for the Arts' programs and policies encourage 'excellence in the arts, help to protect our cultural heritage and support public access to and participation in, arts and culture in Australia'.¹⁶⁴ Key arts support mechanisms include:

- the Australian Screen Production Incentive, which includes a 30 per cent rebate for eligible television and film content;
- the Resale Royalty Scheme, which entitles visual artists to a payment of 5 per cent of resale price for eligible works;

¹⁶² IGEA, *Submission 27*, p. 8.

¹⁶³ Department of Prime Minister and Cabinet, *Australia's Digital Economy – Investment Incentives*, <https://digitaleconomy.pmc.gov.au/fact-sheets/investment-incentives>, accessed 21 May 2021.

¹⁶⁴ Department of Infrastructure, Transport, Regional Development and Communications, *Office for the Arts: What we do*, <https://www.arts.gov.au/what-we-do>, accessed 23 March 2021.

- the Public Lending Right and Educational Lending Right schemes, which compensates eligible Australian book creators and publishers for lost income resulting from their books being freely available in libraries;
- Prime Minister's Literary Awards: up to \$100,000 is awarded in each category, with \$80,000 for each winner and \$5,000 each for shortlisted entries. All prizes are tax-free;
- Cultural Gifts Program, which aims to encourage people and organisations to donate cultural items to eligible organisations;
- Artbank, a collection of over 10,800 pieces of Australian artwork owned by the Australian Government and leased out to individuals, companies, all levels of government and Australian embassies.¹⁶⁵

2.131 The Office of the Arts can draw on the BCAR for research on trends, developments, and issues in the sector.¹⁶⁶

2.132 Another important function of the Office for the Arts is its Indigenous Repatriation program, which works to facilitate the repatriation of Aboriginal and Torres Strait Islander ancestral remains and sacred objects from overseas and domestic museums, universities and private collections.¹⁶⁷

2.133 The Australia Council is the principal arts funding, advisory and development body, supporting 'all facets of the creative process' and investing in 'activity that directly and powerfully contributes to Australia's creative and cultural industries'.¹⁶⁸

State and Territory Government Support

2.134 State and Territory Governments have responsibility for a range of cross-sectoral arts and cultural policies and programs, with each jurisdiction supporting their own arts and cultural agencies or departments, galleries and libraries.

¹⁶⁵ Department of Infrastructure, Transport, Regional Development and Communications (Office for the Arts), *Submission 293*, pp. 34-36; Artbank, About Artbank, <https://www.artbank.gov.au/about-artbank>, accessed 3 September 2020.

¹⁶⁶ Bureau of Communications and Arts Research, Our work, <https://www.communications.gov.au/what-we-do/bureau-communications-research/our-work>, accessed 9 September 2020.

¹⁶⁷ Office for the Arts, Indigenous Repatriation, <https://www.arts.gov.au/what-we-do/cultural-heritage/indigenous-repatriation>, accessed 9 September 2020.

¹⁶⁸ Australia Council for the Arts, *Submission 333*, p. 38.

- 2.135 The Tasmanian, South Australian, New South Wales, Western Australian, Northern Territory, Queensland and Australian Capital Territory Governments all have current creative and cultural strategies, with duration of plans ranging from a 4 year plan in South Australia, through to an undetermined duration of time in some jurisdictions.¹⁶⁹ Presently, Victoria's 'Creative State 2021-25' is under development.¹⁷⁰
- 2.136 The Western Australian Department of Local Government, Sport and Cultural Industries has taken steps to support cultural and creative spaces through its development of the 'Western Australian Cultural Infrastructure Map', which maps cultural infrastructure, including 'buildings, places, spaces and technology necessary for arts and cultural education'.¹⁷¹ Another arts map which operates nationally is the Live Music Office's national 'Live Music Map'.¹⁷² Developed in conjunction with South Australia's Music Development Office, it hosts a compilation of venues, music organisations,

¹⁶⁹ Tasmanian Government: Cultural and Tourism Development, 'Cultural and Creative Industries Recovery Strategy: 2020 and Beyond', https://www.stategrowth.tas.gov.au/ctd/ccir_strategy?SQ_VARIATION_270621=0, accessed 1 April 2021; Government of South Australia, 'Arts and Culture Plan South Australia 2019-2021', <https://www.dpc.sa.gov.au/responsibilities/arts-and-culture/arts-plan>, accessed 1 April 2021; New South Wales Government, 'Arts 2025', <https://www.create.nsw.gov.au/about-us/our-work/arts-2025/>, accessed 1 April 2021; Government of Western Australia, Department of Local Government, Sport and Cultural Industries, 'Strategic Directions 2016-2031', https://www.dlgsc.wa.gov.au/docs/default-source/culture-and-the-arts/arts-leadership-group/arts-leadership-group-strategic-directions-2016-2031.pdf?sfvrsn=8446dc6b_2, accessed 1 April 2021; Northern Territory Government, Department of Tourism, Sport and Culture, 'Creative Industries Strategy NT 2020-2024', https://dtsc.nt.gov.au/_data/assets/pdf_file/0009/888975/creative-industries-strategy-nt-2020-2024.pdf, accessed 1 April 2021; Queensland Government, Arts Queensland, 'Creative Together 2020-2030: A 10-Year Roadmap for arts, culture and creativity in Queensland', 1 October 2020, <https://www.arts.qld.gov.au/news/creative-together-launch>, accessed 1 April 2021; and Australian Capital Territory (ACT) Government, artsACT, '2015 ACT Arts Policy', June 2015, https://www.arts.act.gov.au/_data/assets/pdf_file/0020/744023/2015-ACT-Arts-Policy.pdf, accessed 1 April 2021.

¹⁷⁰ Creative Victoria, 'Creative State 2021-25', <https://creative.vic.gov.au/creative-state>, accessed 1 April 2021.

¹⁷¹ Government of Western Australia, Department of Local Government, Sport and Cultural Industries, 'WA Cultural Infrastructure Map', <https://waculturalmap.mysocialpinpoint.com.au/cm#/>, accessed 1 April 2021.

¹⁷² Associate Professor Shane Homan, *Submission 102*, p. 3.

promoters, recording studios, and radio (amongst others) in an interactive map which assists bands and managers when planning tours.¹⁷³

- 2.137 Symphony Services Australia put forward a 'Cultural Tourism Map and curating activities for local audiences and 'travel bubble' target markets' as an avenue to unlock 'Australia's creative and cultural potential'.¹⁷⁴
- 2.138 Notably, in addition to the Commonwealth Government's COVID regulations, all State and Territory Governments coordinate their response to the public health emergency, and apply regulations pertaining to social distancing, venue capacity, and restrictions for the holding of festivals, events, and live performances.¹⁷⁵

Local Government Support

- 2.139 Local Governments play an increasingly important role in community art and cultural activities.¹⁷⁶ The Australian Local Government Association's (ALGA) has coverage of every jurisdiction in Australia except the Australian Capital Territory which does not have a local government.¹⁷⁷ ALGA outlined its structure of representation for the 537 local governments across Australia, and how:

...local governments play a critically important role in amenity, shaping 'places' in which people live and work. Many councils also have community cultural development embedded into their corporate and strategic documents.¹⁷⁸

- 2.140 The Gold Coast cultural precinct 'Home of the Arts (HOTA)' hosts live music, theatre, dance, comedy, opera, children's shows and more, and is the largest public gallery outside a capital city in Australia. HOTA opened in May 2021, and received funding from the City of Gold Coast. The City of Gold Coast's masterplan for the precinct 'could include new and refurbished

¹⁷³ Associate Professor Shane Homan, *Submission 102*, p. 3; Live Music Office, 'Live Music Map', <https://livemusicoffice.com.au/livemusicmap/>, accessed 1 April 2021.

¹⁷⁴ Symphony Services Australia, *Submission 169*, p. 4.

¹⁷⁵ APRA AMCOS, 'State & Territory COVID Restrictions for Nightclubs & Music Events in Australia', 21 January 2021, https://www.apraamcos.com.au/about-us/news-and-events/state-territory-covid-restrictions-for-nightclubs-music-events-in-australia#_89321, accessed 1 April 2021.

¹⁷⁶ A New Approach, *Submission 131*, p. 17.

¹⁷⁷ Australian Local Government Association, *Submission 205*, p. 2.

¹⁷⁸ Australian Local Government Association, *Submission 205*, p. 2.

arts facilities, the great terrace, and completion of the outdoor artscape works'.¹⁷⁹

2.141 Brimbank City Council highlighted the importance of Local Government in the delivery of creative and cultural activities, 'to act in unison, federal, state and local government cultural and creative policies need to talk to each other and be compatible'.¹⁸⁰ Brimbank City Council was of the view that shared financial contributions to the arts between layers of government is imperative, and put forward regular consultation 'with representatives across the local government sector on policy developments' as a recommendation.¹⁸¹

2.142 Regional Arts Australia drew attention to the 'front face' of local government, and their 'significant connection to the performing arts centres and to the galleries' across Australia.¹⁸²

Our colleagues at Performing Arts Centres Australia have done a lot of research and connection in this space where we see that local government owns about 80 per cent of the performing arts centres and directly manages 66 per cent of them.¹⁸³

2.143 Regional and Public Galleries of New South Wales (RPGNSW) noted that the majority of RPGNSW's members are local government entities, and explained the significant role Local Government plays in public gallery funding arrangements across NSW:

...46 per cent local government funding, 13 per cent state government funding, one per cent Australia Council for the Arts funding and less than one per cent other federal funding. On average, commercial income and philanthropy offsets 37 per cent of the running costs of these public galleries.¹⁸⁴

¹⁷⁹ City of Gold Coast, 'HOTA Project', <https://new.goldcoast.qld.gov.au/Services/Projects-works/HOTA-Project>, accessed 1 June 2021.

¹⁸⁰ Brimbank City Council, *Submission 33*, p. 6.

¹⁸¹ Brimbank City Council, *Submission 33*, p. 6.

¹⁸² Ms Ros Abercrombie, Executive Director, Regional Arts Australia, *Committee Hansard*, Canberra/teleconference, 13 November 2020, p. 17.

¹⁸³ Ms Ros Abercrombie, Executive Director, Regional Arts Australia, *Committee Hansard*, Canberra/teleconference, 13 November 2020, p. 17.

¹⁸⁴ Mr Brett Adlington, Vice President, Regional and Public Galleries of NSW, *Committee Hansard*, Canberra/videoconference, 5 February 2021, p. 19.

2.144 Over the past decade the per capita cultural expenditure has increased by 11 per cent, with ANA noting that:¹⁸⁵

...the steady and sustained increase in per capita expenditure suggests local governments are seeing the relevance and benefit of creative and cultural activities in the communities they serve.¹⁸⁶

2.145 Creative Economy considered there to be significant disparity in the capacity of Local Governments to invest in arts and culture, finding that increases in investment are 'mainly in the large metropolitan areas':¹⁸⁷

If we leave it only to a local government level, we have inequity in terms of access to cultural and creative industries. There is inequity in the development of that.¹⁸⁸

2.146 The Cultural Development Network (CDN) put forward the 'National Local Government Cultural Forum', which operated from 2013 – 2018, as a cost-effective model for national cooperation and agenda setting.¹⁸⁹ This forum, convened by the CDN, was supported by the Office for the Arts, the Australia Council, the ALGA and Australia's eight capital cities.¹⁹⁰ The CDN stated:

The Cultural Forum became the clearing house for research and development on national planning and evaluation frameworks for the creative and cultural industries, which are now carried forward into the sector.¹⁹¹

Coordination Between Layers of Government

2.147 Local, State and Territory Governments and Commonwealth Governments all make contributions towards cultural expenditure, together contributing 'more than \$6.86 billion of public funds to arts and culture each year.'¹⁹²

¹⁸⁵ A New Approach, *Submission 131*, p. 17.

¹⁸⁶ ANA, 'Insight research series: Report one', 2019, p. 17.

¹⁸⁷ Ms Helene George, Chief Executive Officer, Creative Economy, *Committee Hansard*, Canberra/videoconference, 19 February 2021, p. 34.

¹⁸⁸ Ms Helene George, Chief Executive Officer, Creative Economy, *Committee Hansard*, Canberra/videoconference, 19 February 2021, p. 34.

¹⁸⁹ Cultural Development Network, *Submission 71*, p. 12.

¹⁹⁰ Cultural Development Network, *Submission 71*, p. 3.

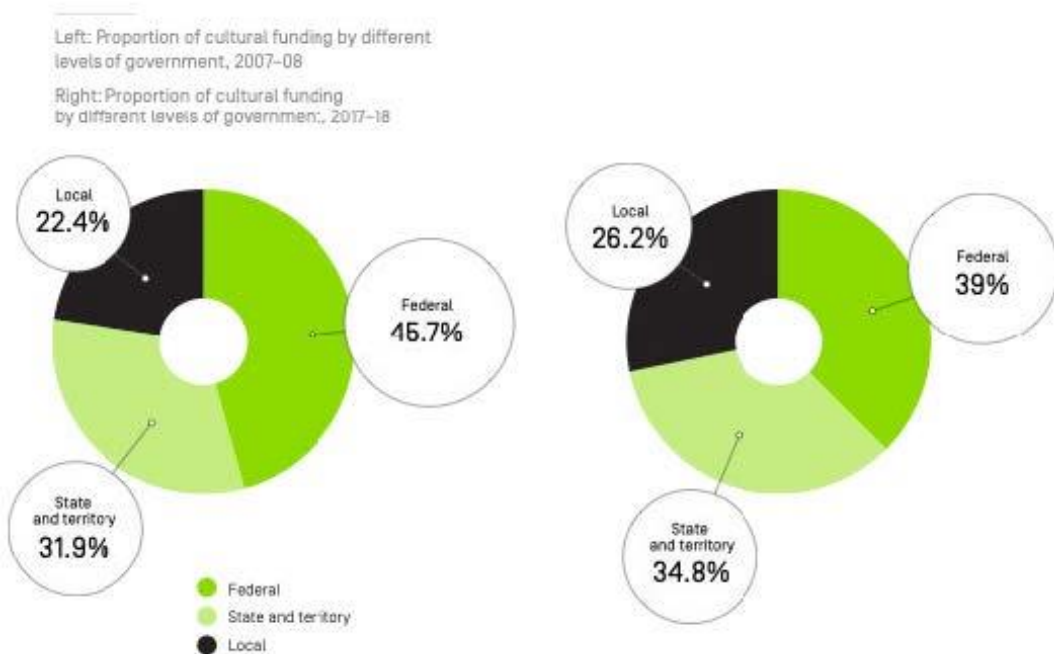
¹⁹¹ Cultural Development Network, *Submission 71*, p. 3.

¹⁹² Australia Council for the Arts, *Submission 333*, p. 34.

2.148 ANA found that from 2007-08 to 2017-18 there have been significant changes to the sources of cultural public funding, with local government playing an increasingly important role:

In that period, local government per capita expenditure has increased by 11%, while state and territory government expenditure has increased by 3.9%. The federal government is committing 18.9 per cent less expenditure per capita to culture compared with a decade ago.¹⁹³

2.149



Source: *A New Approach*, Submission 131, p. 17.

¹⁹³ *A New Approach*, Submission 131, p. 17.

2.150 Coordination between layers of government has previously occurred through mechanisms such as the Meeting of Cultural Ministers (MCM). National Cabinet accepted recommendations to disband this meeting on 23 October 2020, with Cultural Ministers indicating that they will continue to meet informally.¹⁹⁴ The Review of COAG Councils and Ministerial Forums noted that:

It is important to recognise the diversity between and within jurisdictions and the disparate nature of the challenges faced across the federation—where appropriate, decisions should be principles-based and allow individual jurisdictions to determine the best way to achieve agreed outcomes.¹⁹⁵

2.151 Creative Victoria identified the review of the MCM as holding potential ‘impetus for a common approach and agenda’ while Create NSW noted that Cultural Ministers resolved to continue to work collaboratively following the dissolution of the MCM, with particular focus on:

- First Nations arts and culture
- Culturally and linguistically diverse arts and culture
- Arts and disability
- Children and young people’s arts and culture
- The Digital Culture Strategy
- Cultural research and data collections.¹⁹⁶

2.152 As the announcement of the disbandment of the MCM occurred shortly after the close date for submissions to this inquiry, some inquiry participants’ views proposed an expansion of to the MCM.¹⁹⁷ Professor Julian Meyrick suggested the MCM as an avenue for ‘more active and bipartisan’ communications across jurisdictions with suggestions of an expanded

¹⁹⁴ Department of Infrastructure, Transport, Regional Development and Communications, ‘Meeting of Cultural Ministers’, arts.gov.au/mcm, accessed 30 March 2021.

¹⁹⁵ Peter Conran AM, Department of Prime Minister and Cabinet, ‘Review of COAG Councils and Ministerial Forums’, October 2020, p. 3, <https://www.pmc.gov.au/sites/default/files/final-report-review-coag-councils-ministerial-forums.pdf>, accessed 30 March 2021.

¹⁹⁶ Creative Victoria, *Submission 308*, p. 8; Create NSW, *Submission 346*, p. 23.

¹⁹⁷ PVI Collective, *Submission 74*, p. 4; Ms Esther Anatolitis, *Submission 92*, p. 3; Country Arts South Australia, *Submission 110*, p. 3; Outback Youth Theatre, *Submission 155*, p. 10; Stage Queensland, *Submission 170*, p. 2; Guildhouse, *Submission 174*, p. 5; THE RABBLE, *Submission 188*, p. 3; Arts West Alliance, *Submission 199*, p. 2; ArtsHub, *Submission 204*, p. 4; Ms Therese Virtue, *Submission 213*, p. 2; Australian Festivals Association, *Submission 245*, p. 1; Dr Alison Richards, *Submission 300*, p. 3.

meeting.¹⁹⁸ The Design Institute of Australia proposed that a representative of the ALGA ‘should be given full membership on the group in recognition of the importance of local government planning decisions on the work of designers’.¹⁹⁹

2.153 ALGA made the point that access to ‘[l]ocal programs and opportunities’ is ‘greatly enhanced’ through collaboration between all levels of government and the private sector.²⁰⁰

2.154 Theatre Kimberley put forward a cultural policy map as a potential avenue to facilitate clear information, guidance and direction on the mandate of different groups and levels of government:

Australia would benefit from having an Australia-wide Arts and Culture policy presented in clear, accessible language and info graphics. Each layer of Governments’ role and responsibilities could be clearly listed and publicly available. Existing Arts organisations (of all sizes) and information about each could be included and searched by discipline and/or location. Together these could provide an Australian Arts and Culture comprehensive map of what exists, their mandate and opportunities that may exist. Gaps in disciplines, communities excluded or with specific needs, and community preferences, would be clearly identified, and strategies could be developed to address these, and funding made available to implement agreed activities.²⁰¹

2.155 Also in favour, Ms Esther Anatolitis suggested that the Productivity Commission conduct a ‘review or industry mapping to understand the full scope and scale of the creative and cultural industries’.²⁰²

2.156 The Australia Council for the Arts offers online ‘Electorate Profiles’ in which a federal electoral division can be selected to discover the level of

¹⁹⁸ Professor Julian Meyrick, *Submission 16.1*, p. 2.

¹⁹⁹ The Design Institute of Australia, *Submission 125*, p. 3. The following inquiry participants also supported the expansion of the MCM to include local government: A New Approach, *Submission 131*, p. 19; Stage Queensland, *Submission 170*, p. 3; Guildhouse, *Submission 174*, p. 4; VicHealth, *Submission 197*, p. 4; Arts West Alliance, *Submission 199*, p. 2; The Australian Council of University Art and Design Schools and The Australian Council of Deans and Directors of Creative Arts, *Submission 202*, p. 4; Australian Festivals Association, *Submission 245*, p. 1; Ms Gabrielle de Vietri, *Submission 269*, pp. 1-2.

²⁰⁰ Australian Local Government Association, *Submission 205*, p. 2.

²⁰¹ Theatre Kimberley, *Submission 280*, p. 5.

²⁰² Ms Esther Anatolitis, *Submission 92*, p. 2.

engagement in that electorate, and the number of individuals working in the arts.²⁰³

2.157 In discussing how a new national conversation around arts and culture could take place, Professor David Throsby advocated for coordination across all levels of government in their response to the arts and culture, suggesting that this 'larger framework is a cultural policy statement or a cultural policy framework which can be articulated by the centre'.²⁰⁴ Also in favour, Professor Julian Meyrick called for 'better coordination' through 'some kind of coordinated cultural plan'.²⁰⁵

2.158 TAFE NSW considered there to be a need for more formal consultation in the development of arts policy, and put forward:

Regular round table representatives from local, state and federal agencies to collaborate and identify projects and outcomes, together with think tank opportunities would be well served by the creation of a Federal/ State steering committee for the arts.²⁰⁶

Private Sector

2.159 Private sector support and involvement with the arts from individuals and private business is substantial; funding for the arts is estimated to have grown 'from \$221.1 million in 2009-10 to between \$268.5 million and \$279.8 million in 2015-16', with funding also growing in real terms over the past six years.²⁰⁷

2.160 Private support includes donations, investment, partnerships and volunteering, with Creative Partnerships Australia presenting one mechanism to achieve this. Creative Partnerships Australia is the Australian Government's agency dedicated to promoting private giving and investment in the creative and cultural sectors, and builds capacity amongst the arts

²⁰³ Australian Council for the Arts, *Electorate Profiles*, <https://www.australiacouncil.gov.au/research/electorate-profiles/>, accessed 26 May 2021.

²⁰⁴ Professor David Throsby, private capacity, *Committee Hansard*, Canberra/teleconference, 13 November 2020, p. 10.

²⁰⁵ Professor Julian Meyrick, Chief Investigator, Laboratory Adelaide, *Committee Hansard*, Canberra/teleconference, 13 November 2020, p. 10.

²⁰⁶ TAFE NSW, *Submission 299*, p. 3.

²⁰⁷ Bureau of Communications and Arts Research, 'Private sector support for the arts in Australia', June 2017, p. 2 and 9, <https://www.communications.gov.au/publications/private-sector-support-arts-australia>, accessed 9 September 2020.

community to fundraise and develop their income streams.²⁰⁸ Ms Fiona Menzies of Creative Partnerships Australia outlined the motivations for private donations to the arts:

...there's a very clear impact of supporting these projects in a range of areas, from education to a more socially cohesive country, a happier country, a richer country. Those are the impacts that private donors and business supporters of the arts are trying to achieve, and they do like to do it in partnership with government.²⁰⁹

- 2.161 The importance of private sector funding was advocated in conjunction with the three tiers of government.²¹⁰

Local programs and opportunities to participate and engage arts and culture are greatly enhanced by arts and cultural programs provided by states and territories, the Commonwealth and the private sector.²¹¹

- 2.162 The City of Sydney suggested the Committee:

Initiate and/or invest in public-private partnerships to provide innovative finance models and collaborative investment in cultural infrastructure for production and presentation.²¹²

- 2.163 ANA identified collaboration and cohesive policies across levels of government as an inhibitor to growth of private investment in creative and cultural spaces:

One of the things that we are hearing is frustration at a national level over the lack of a contemporary approach, with updated policies and a connected set of investments across government. That would create confidence in philanthropic investment into this space.²¹³

- 2.164 One participant stated that they had turned to private funding, and suggested that Screen Australia host a list of not-for-profits and institutions

²⁰⁸ Creative Partnerships Australia, About Us, <https://creativepartnershipsaustralia.org.au/about-us/>, accessed 23 September 2020.

²⁰⁹ Ms Fiona Menzies, Chief Executive Officer, Creative Partnerships Australia, *Committee Hansard*, Canberra/teleconference, 4 December 2020, p. 10.

²¹⁰ Municipal Association of Victoria, *Submission 294*, p. 2.

²¹¹ Australian Local Government Association, *Submission 205*, p. 2.

²¹² City of Sydney, *Submission 311*, p. 14.

²¹³ Ms Kate Fielding, Program Director, ANA, *Committee Hansard*, Canberra/teleconference, 13 November 2020, p. 4.

that accept submissions for private funding to ease the financial burden on the government to provide funding for screen content.²¹⁴

Concluding Comments

- 2.165 The effective delivery and support of the arts across Australia is fundamental to the arts ecosystem. The Committee notes the important role that the Office for the Arts has in working with layers of Government and the private sector to improve Australia's collective cultural and arts ambitions. The Committee also notes that despite its important role, the Office for the Arts is no longer elevated to the title level of the Department of Infrastructure, Transport, Regional Development and Communications.
- 2.166 The Committee considers that, in order to ensure the important role of the Office of the Arts is appropriately emphasised, the title of the Department of Infrastructure, Transport, Regional Development and Communications should be amended to include the Arts.
- 2.167 Developing a cohesive forum for discussion and collaboration across layers of Government and private sector presents opportunities to better achieve Australia's collective cultural and arts ambitions. The Committee notes the existence of different forms of art 'maps' which exist at local and national scales, including the Live Music Office Live Music Map. This type of data collation is a valuable resource for the community to engage with the arts by attending a performance and supporting local or touring musicians. The Committee considers that a map of Australia's creative undertakings, including performances, installations, galleries and other forms of artistic expression would be of great value to the community. As noted above, international tourists are seeking out Aboriginal and Torres Strait Islander visual arts and experiences as well as visiting filming locations as they holiday or travel to other Australian regions. An Australia-wide arts and culture map would encourage Australians to explore their local area, or have new artistic experiences, as well as attract international visitors to experience our unique and incredible land and culture.
- 2.168 The video game industry is one of the fastest growing arts sectors globally. Australia is currently growing its development capabilities and has seen significant success globally with games like *Crossy Road* from Melbourne studio Hipster Whale. The Australian Government has acknowledged the significant potential of the game industry and announced its support with

²¹⁴ Name Withheld, *Submission 12*, p. 2.

the Digital Games Tax Offset – a 30 per cent refundable tax offset for eligible businesses that spend a minimum of \$500,000 on qualifying Australian games expenditure. The Committee notes and strongly endorses the tax offset. The Committee wants to ensure the implementation of the tax offset is supporting the industry and has recommended that the Government provide a progress report to the Committee twelve months from its commencement.

- 2.169 The Australian Government provides compensation to Australian creators and publishers in recognition of income lost through free multiple use of their books in public and educational lending libraries through the Public Lending Right and Educational Lending Right programs.²¹⁵ It is unclear, however, whether the appropriate level of compensation is currently provided, particularly for digital editions. Books can be potentially loaned up to thousands of times and digital copies exponentially more. It is important to provide some certainty that Australian authors are being appropriately compensated for their work. The Committee therefore recommends that these programs be reviewed.

Supporting Indigenous Art

- 2.170 The lack of a national gallery dedicated to Australia's Aboriginal and Torres Strait Islander artists is a gap in the representation of Aboriginal and Torres Strait Islander arts and culture. For the only art truly unique to this country, this deserves consideration and greater recognition. An Aboriginal and Torres Strait Islander national gallery would serve to highlight the work of Australia's Indigenous artists throughout the long history of its creation and through to contemporary and emerging artists.
- 2.171 An Aboriginal and Torres Strait Islander national gallery would be an important platform for domestic and international audiences, and reinforce the intrinsic value of this art. The new gallery should be focussed on supporting Indigenous artists; particularly through employment and artistic direction, in order to ensure that the art is presented authentically and in a culturally appropriate manner.

²¹⁵ Department of Infrastructure, Transport, Regional Development and Communications, *Office for the Arts: 'Australian Lending Right Schemes (ELR/PLR)'*, [https://www.arts.gov.au/funding-and-support/lending-rights#:~:text=Public%20Lending%20Right%20\(PLR\)%20and,public%20and%20educational%20lending%20libraries](https://www.arts.gov.au/funding-and-support/lending-rights#:~:text=Public%20Lending%20Right%20(PLR)%20and,public%20and%20educational%20lending%20libraries), accessed 10 June 2021.

2.172 The Committee also notes the recommendation of the Standing Committee on Indigenous Affairs in its report on the *inquiry into the impact of inauthentic art and craft in the styles of First Nations peoples* 'that IP Australia develops a Certification Trade Mark scheme for authentic Aboriginal and Torres Strait Islander art and craft, created in full consultation with relevant stakeholders'.²¹⁶ The Committee supports that recommendation, and reiterates it in this report.

Recommendation 3

2.173 The Committee recommends that the Office for the Arts investigate the establishment of a national centre of Indigenous culture and arts of Aboriginal and Torres Strait Islander artwork. The Office for the Arts should ensure that any proposal is co-designed with Indigenous communities and arts bodies.

2.174 As part of the co-design process, the Office for the Arts should consider the most culturally appropriate site on which to build a national centre of Indigenous culture and arts; how to create a national network of Aboriginal and Torres Strait Islander galleries in partnership with State/Territory art institutions; and examine how museums and galleries can further improve Indigenous representation and participation across all areas.

Recommendation 4

2.175 The Committee recommends the title of the Department of Infrastructure, Transport, Regional Development and Communications be amended to include the Arts.

Recommendation 5

2.176 The Committee recommends that the Office for the Arts consider what resourcing or data would be required to create an app which contains a repository of information of current artistic and cultural events.

2.177 The Committee further recommends that the Office for the Arts consult with Tourism Australia, and State and Territory Government peak bodies and other industry-relevant entities.

²¹⁶ Standing Committee on Indigenous Affairs, *Report on the impact of inauthentic art and craft in the styles of First Nations peoples*, December 2019, p. xxi.

Recommendation 6

- 2.178** The Committee recognises the enormous potential of the interactive games sector for Australia and welcomes the implementation of the Digital Games Tax Offset. The Committee recommends that the relevant Commonwealth Minister report to the Committee on progress 12 months from the commencement of the offset.

Recommendation 7

- 2.179** The Committee notes that the Public Lending Right and Educational Lending Right (PLR/ELR) each attract a single payment and recommends that the Department of Infrastructure, Transport, Regional Development and Communications undertake a review of the PLR/ELR programs to ensure that authors are being appropriately compensated for income lost through free multiple use of their books in public and educational lending libraries.
- 2.180** The Committee further recommends that the Department consult with peak bodies, Australasian Performing Right Association and Australasian Mechanical Copyright Owners Society (APRA AMCOS), authors, and other industry-relevant entities.

Recommendation 8

- 2.181** The Committee recommends that the Commonwealth Government introduce legislation that requires over-the-top (OTT) media services (streaming and video/subscription video on demand services) to allocate at least 20 per cent of their local revenue on new Australian drama, documentary, children's content, commissions, co-productions or acquisitions of content.
- 2.182** The new legislation should also prescribe that OTT services allocate at least 20 per cent of the 20 per cent quota to local children's content and drama.

3. The Value of the Arts

Overview

- 3.1 The benefits derived from Australia's creative and cultural industries and institutions can be considered through both an economic and non-economic lens. Economically, cultural and creative activity was worth an estimated \$112 billion in 2016-17.¹ While the non-economic influence of the arts in Australia is more difficult to quantify, it plays a vital role in 'identity and national pride and how we represent Australia to the world'.²
- 3.2 Australians are strong supporters of arts and culture; in 2019, eighty-four per cent of the population aged 15 and older acknowledged the significant positive impact of arts and creativity.³ Research by A New Approach (ANA) stated that 'middle Australians' held a strong belief that Australia should support the arts due to the public value the arts and culture provide.⁴ Further, while not all art forms appeal to all people, 98 per cent of Australians engaged with the arts in some form.⁵

¹ Australia Council for the Arts, 'Valuing the Arts: Annual Report 2018-19', 2019, p. 5, <https://www.australiacouncil.gov.au/about/annual-report-2018-19/>, accessed 9 April 2021.

² Ms Kate Fielding, Program Director, A New Approach, *Committee Hansard*, Canberra/teleconference, 13 November 2020, p. 2.

³ Australia Council for the Arts, 'Creating Our Future: Results of the National Arts Participation Survey', August 2020, p. 41, <https://www.australiacouncil.gov.au/research/wp-content/uploads/2020/08/Creating-Our-Future-Results-of-the-National-Arts-Participation-Survey-PDF.pdf>, accessed 6 January 2021.

⁴ A New Approach, *Submission 131*, pp. 1-2.

⁵ A New Approach, *Submission 131*, pp. 2-5; Australia Council for the Arts, 'Creating Our Future: Results of the National Arts Participation Survey', August 2020, p. 126,

- 3.3 Inquiry participants put forward the view that art is at the heart of Australia's culture. David Woods stated that: 'Art doesn't just benefit identity and wellbeing and community, it is these things and without it they all suffer'.⁶
- 3.4 Communicating the value of the arts is not always straightforward, and does not always translate easily to digital platforms; the way output and impact are measured in order to secure and appropriately acquit funding is not always suited to the current realities of arts delivery. Dr Catriona Menzies-Pike, Editor of the *Sydney Review of Books* noted:
- What we're asked to report on is how many people we can gather in a room, what our audiences are like and who we speak to in a particular area. A journal like the *Sydney Review of Books* publishes to an international audience...We can't gather that information. The idea of 30 people who come to a weekend workshop being a more significant audience than the tens of thousands of people who read our work internationally is laughable.⁷
- 3.5 Concern that the arts are judged by ill-suited measures was further expressed by Regional and Public Galleries NSW (RPG NSW):
- Too often governments judge the success or failure of arts and cultural activity on audience size or income earned, these tangible measures often miss the value of arts Australia's creative and cultural industries and institutions practice and engagement in building synergies within communities and supporting healthy and engaged societies.⁸
- 3.6 Laboratory Adelaide highlighted the need to 'recognise, respect and incorporate the non-economic forms of value in the methods it recommends to evaluate the important work done by the sector'.⁹ In a similar vein, Creative Economy stated that 'the arts and cultural industries justifying themselves only in terms of economics is reductionist and that has increased the volatility of the sector'.¹⁰

<https://www.australiacouncil.gov.au/research/wp-content/uploads/2020/08/Creating-Our-Future-Results-of-the-National-Arts-Participation-Survey-PDF.pdf>, accessed 6 January 2021.

⁶ David Woods, *Submission 6*, p. 1.

⁷ Dr Catriona Menzies-Pike, Editor, *Sydney Review of Books*, *Committee Hansard*, Canberra/teleconference, 13 November 2020, p. 28.

⁸ Regional and Public Galleries NSW, *Submission 42*, pp. 1-2.

⁹ Laboratory Adelaide, *Submission 58*, p. 4.

¹⁰ Ms Helene George, Chief Executive Officer, Creative Economy, *Committee Hansard*, Canberra/videoconference, 19 February 2021, p. 31.

- 3.7 The high-performing nature of the arts was raised by inquiry participants.¹¹ National Exhibition Touring Support (NETS) Australia, which tours exhibitions to audiences across Australia, made the point that:

In 2019, 96 volunteers contributed to NETS projects. It is a testament to the commitment of the sector that so much is delivered for so little; however this is not an argument for austerity. If the sector were appropriately resourced, the economic and social benefits would be magnified, building a more cohesive and resilient nation into the future.¹²

- 3.8 Kate Larsen stated that cultural and creative industries are critical for Australia's future, now more than ever:

Participation in and connection to arts and culture have never been so important. Faced with an extraordinary level of disruption and loss, Australian communities need assistance to recover, heal and commemorate through coming together, share their stories, develop resilience for the future, and return the balance towards positive social cohesion and wellbeing.¹³

- 3.9 The value the cultural and creative industries' provides to Australia cannot be measured in economic value alone. It provides an unquantifiable cultural and social value to our health and wellbeing, society, education and Australia's identity in the world.

- 3.10 As home to the 'world's longest continuously living culture', Australia boasts a unique and invaluable artistic and cultural identity.¹⁴ The Standing Committee on Indigenous Affairs, in its *Report the impact of inauthentic art and craft in the style of First Nations peoples*, eloquently highlighted how integral First Nations art and craft is to Australia's cultural identity:

First Nations art and craft is not simply a collection of design elements in some artistic media presentation. They are in fact a representation of cultural songlines. Art is therefore integral to the cultural identity, stories and history

¹¹ See for example: Sydney Review of Books, *Submission 132*, p. 5; The Australian Ballet School, *Submission 149*, p. 3; and Australian Writers' Guild, *Submission 178*, p. 12.

¹² NETS Australia, *Submission 183*, p. 3.

¹³ Kate Larsen, *Submission 25*, p. 3.

¹⁴ Ms Alison Murphy-Oates, Managing Director, Moogahlin Performing Arts, First Nations Performing Arts, *Committee Hansard*, Canberra/videoconference, 4 December 2020, p. 28.

of First Nations peoples. It is about a continuous celebration and preservation of that history and cultures.¹⁵

- 3.11 This rich cultural heritage of storytelling passed down by Aboriginal and Torres Strait Islander Peoples and Australia's creative and cultural industries and institutions are at the heart of Australia's unique cultural identity, and set out that the arts allows Australians to see their own stories and values reflected as well as showcasing our skills for international audiences.

Economic Benefits of the Creative Economy (Prior to the COVID-19 Public Health Emergency)

Employment

- 3.12 In 2016, the cultural and creative economy employed 868,098 people, accounting for 8.1 per cent of Australia's national workforce.¹⁶ Further, arts and cultural activity delivers considerable spill-over benefits to other areas of the economy including tourism, transportation, hospitality, construction and agriculture.¹⁷ International Council of Museums (ICOM) Australia stated that the 'cultural sector is a critical employer in Australia'.¹⁸
- 3.13 A New Approach (ANA) highlighted the strength of jobs involved in the creation of new intellectual property, which employ 593,840 people with work in this area 'growing at nearly twice the rate of the Australian workforce'.¹⁹

¹⁵ Standing Committee on Indigenous Affairs, *Report the impact of inauthentic art and craft in the style of First Nations peoples*, p. xi.

¹⁶ A New Approach, *Submission 131*, p. 9.

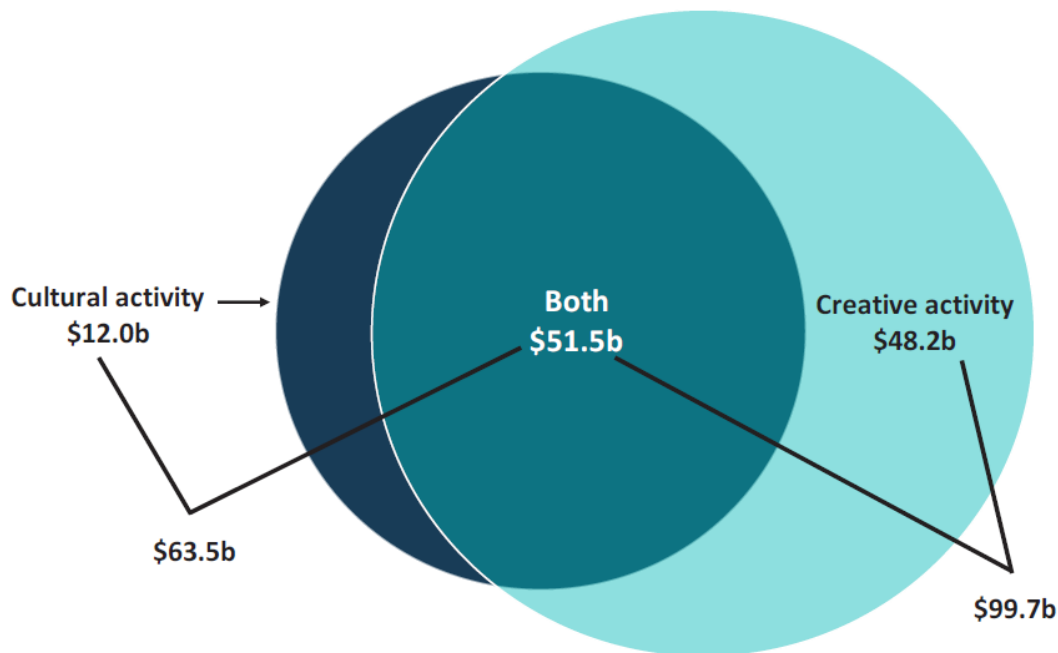
¹⁷ A New Approach, *Submission 131*, p. 10.

¹⁸ International Council of Museums (ICOM Australia), *Submission 148*, p. 2; Data calculated using the 6-digit ANZSCO codes, in the ABS 2016 Census TableBuilder, based on the definition of cultural and creative economy used by BCAR to produce the Cultural and Creative Activity Satellite Accounts. It includes 43 industry classes and 132 cultural and creative occupations (ABS 2016).

¹⁹ A New Approach, *Submission 131*, p. 9.

Contribution to Gross Domestic Product

Figure 3.1 Cultural and creative activity, 2016-17



Source: Bureau of Communications and Arts Research, Department of Communications and the Arts, 'Cultural and creative activity in Australia 2008-09 to 2016-17', October 2018, p. 7.

3.14 In 2016-17, the cultural and creative economy contributed \$111.7 billion to the Australian economy, or 6.4 per cent of Gross Domestic Product (GDP).²⁰ Of this figure the cultural and creative industries accounts for \$91 billion, or 5.2 per cent of the whole economy.²¹ The 12 domains of the creative and cultural industries are listed below in descending order of contribution to Gross Value Added (GVA).²²

²⁰ A New Approach, *Submission 131*, p. 7.

²¹ A New Approach, *Submission 131*, p. 7.

²² Bureau of Communications and Arts Research, Department of Communications and the Arts, 'Cultural and creative activity in Australia 2008-09 to 2016-17', October 2018, pp. 7-8; A New Approach, *Submission 131*, p. 8.

Table 3.1 Creative and cultural industry GVA by domain 2016-17

Domain	GVA (\$m)
Design	42,813
Fashion	14,249
Broadcasting, electronic or digital media and film	9,707
Literature and print media	9,371
Visual arts and crafts	2,480
Performing arts	1,749
Environmental heritage	1,278
Supporting activities	1,225
Other cultural goods manufacturing and sales	1,005
Libraries and archives	991
Museums	653
Music composition and publishing	148

Source: Bureau of Communications and Arts Research, Department of Communications and the Arts, 'Cultural and creative activity in Australia 2008-09 to 2016-17', October 2018, p. 8.

- 3.15 ANA drew attention to the significant role the Australian public plays as the largest investor in creative and cultural goods and services, and stated that in the 2015-16 year, 'Australians spent about \$25 billion, about \$50 a week, on creative and cultural goods'.²³
- 3.16 There is also a strong market for Aboriginal and Torres Strait Islander creative products and experiences. The Office for the Arts stated that 'Australia's Indigenous tourism has an estimated value of \$5.8 billion annually, catering to 910,000 international visitors and 688,000 overnight domestic trips in 2016'.²⁴

²³ Ms Kate Fielding, Program Director, A New Approach, *Committee Hansard*, Canberra/teleconference, 13 November 2020, p. 4.

²⁴ Department of Infrastructure, Transport, Regional Development and Communications (Office of the Arts), *Submission 293*, p. 14.

- 3.17 Nearly 830,000 international tourists engaged with Aboriginal and Torres Strait Islander arts while in Australia in 2017, an increase of 41 per cent since 2013. This incorporates increased attendance at Aboriginal and Torres Strait Islander performances as well as attendance at art, craft or cultural displays.
- 3.18 In 2017, 'nearly 830,000 international tourists engaged with First Nations arts while in Australia' (an increase of 41 per cent since 2013) which included 'First Nations performances as well as attendance at art, craft or cultural displays'.²⁵
- 3.19 International tourist engagement with Aboriginal and Torres Strait Islander arts and activities was particularly significant with 'one in four international arts tourists engaged with Aboriginal and Torres Strait Islander arts (24%) as did more than one in four international tourists travelling in school tour groups (28%)'.²⁶
- 3.20 The Australia Council for the Arts highlighted that Aboriginal and Torres Strait Islander creative products and activities also make a significant economic contribution to regional areas. They identified:
- Engagement with First Nations arts was higher for international arts tourists who travelled outside capital cities. More than a third of these travellers attended a First Nations arts activity in 2017 (36%), compared to 24% of international arts tourists overall.
 - Arts tourists who visited regional areas of the NT had particularly high levels of engagement – eight in ten attended a First Nations arts activity while visiting Australia in 2017 (79%), more than triple the numbers of international arts tourists overall (24%). Of arts tourists who visited Darwin, 63% attended a First Nations arts activity in Australia.
 - Arts tourists who visited regional SA (53%), regional QLD (46%), and Adelaide (42%) were also highly engaged with First Nations arts while visiting Australia.²⁷
- 3.21 Regional art fairs such as the Cairns Indigenous Art Fair (CIAF) and Darwin Aboriginal Art Fair (DAAF) have received global recognition: 'The New York Times recognised the Top End of Australia as a place to visit in 2018, partly due to the international interest surrounding DAAF'.²⁸

²⁵ Australia Council for the Arts, *International Arts Tourism, Connecting Cultures*, 2018, p. 20.

²⁶ Australia Council for the Arts, *International Arts Tourism, Connecting Cultures*, 2018, p. 20.

²⁷ Australia Council for the Arts, *International Arts Tourism, Connecting Cultures*, 2018, p. 20.

²⁸ Australia Council for the Arts, *International Arts Tourism, Connecting Cultures*, 2018, p. 20.

- 3.22 Some inquiry participants, however, commented on the perceived imbalance between how much Australia exports in creative goods compared to its imports.
- 3.23 The ANA identified Australia as having ‘one of the biggest [cultural] trade deficits in the world’.²⁹ For every dollar that Australia exports in creative goods, Australia imports \$8, while for every dollar of creative services exported, Australia imports \$2.³⁰ ANA put forward that the current state of affairs indicates Australia ‘is not effectively identifying and leveraging our comparative advantages in creating goods and services for the global market’.³¹
- 3.24 Creative and cultural activity GVA made up 5.6 per cent of total GVA, which is comparable to the contribution of education, and is almost twice the contribution of agriculture, fishing and forestry.³² Professor Stuart Cunningham and Dr Marion McCutcheon set out that the arts has made a strong contribution over the last decade, as seen in Figure 3.2:

[The arts’] proportional contribution of 5.6 per cent of GVA has in fact been constant since 2008-09, maintaining its position in the economy alongside strong growth in some sectors...which underlines the strong growth that is happening in some sectors within the creative and cultural industries.³³

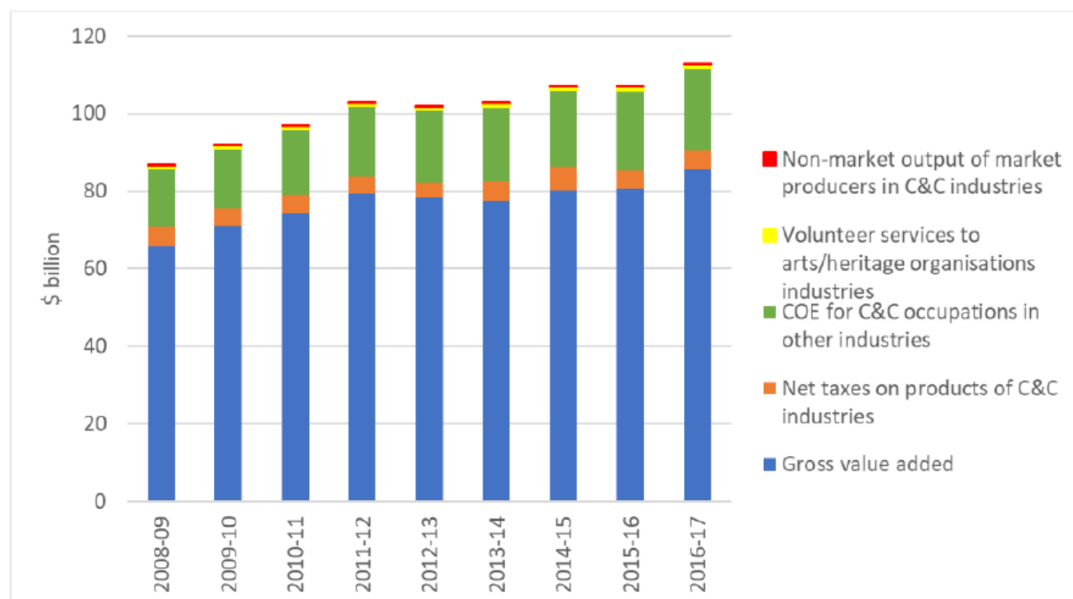
²⁹ A New Approach, ‘Transformative: Impacts of Culture and Creativity’, November 2019, p. 6, <https://www.humanities.org.au/new-approach/report2/>, accessed 26 May 2021.

³⁰ A New Approach, ‘Transformative: Impacts of Culture and Creativity’, November 2019, p. 6, <https://www.humanities.org.au/new-approach/report2/>, accessed 26 May 2021.

³¹ A New Approach, ‘Transformative: Impacts of Culture and Creativity’, November 2019, p. 6, <https://www.humanities.org.au/new-approach/report2/>, accessed 26 May 2021.

³² Professor Stuart Cunningham and Dr Marion McCutcheon, *Submission 45*, p. 10.

³³ Professor Stuart Cunningham and Dr Marion McCutcheon, *Submission 45*, p. 10.

Figure 3.2 Contribution of creative activity to GDP, 2008-09 to 2016-17

Source: Professor Stuart Cunningham and Dr Marion McCutcheon, Submission 45, p. 11.

3.25 When considering the per capita public expenditure on arts and culture as a proportion of GDP, Australia is below the Organisation for Economic Co-operation and Development (OECD) average, and has fallen by 4.9 per cent from 2007-08 to 2017-18.³⁴

Non-Economic Benefits

3.26 The non-economic benefits of Australia's arts and culture sector are diverse and wide-reaching. The Australian Council identified that the arts in Australia is beneficial to individual wellbeing, community connection, and sustains more cohesive and inclusive communities.³⁵ The ANA identified five key areas which derive value from arts, culture and creativity including:

- community, society and place;
- national identity;
- health and wellbeing;
- education; and

³⁴ A New Approach, 'The Big Picture: public expenditure on artistic, cultural and creative activity in Australia', *Insight Research Series: Report One*, 2019, p. 5, <https://www.humanities.org.au/new-approach/report1/>, accessed 26 May 2021.

³⁵ Australia Council of the Arts, *Submission 333*, pp. 2-3.

- international engagement through ‘soft power’.³⁶

3.27 The non-economic benefits of Australia’s creative and cultural industries and institutions have been consistently highlighted by inquiry participants, who set out the dedication of practitioners to make a strong non-economic contribution:

The preparedness of creative workers to accept sub-optimal incomes—or to volunteer with no expectation of financial return—points to the extremely high value they place on creative work and the significant non-economic benefits that they contribute to society.³⁷

3.28 In considering an evaluation framework for the creative and cultural sector, Laboratory Adelaide suggested that: ‘There is no value-neutral way of evaluating culture’.³⁸ Rather, they recommend ‘a balance of methods’ to appraise the worth derived from creative and cultural experiences, considering a range of measures necessary to gauge the, at times, intangible impact of various creative and cultural activities.³⁹

3.29 Outback Theatre for Young People described the ‘profound’ benefits of engagement with the arts as a way to:

...enhance community, social wellbeing and promote Australia’s national identity, and in particular, the identity of rural Australia, which is often missing, inauthentic or superimposed across our Nation’s stages.⁴⁰

3.30 The Australia Council for the Arts asserted that cultural and creative industries benefit all Australians, not only in contributing to the Australian GDP and employment numbers, and stated that: ‘These figures don’t account for the many flow-on economic benefits to quality of life, confidence, health, tourism, education, trade and reputation’.⁴¹

3.31 FASTLab Research Centre emphasised the ‘intangible but undeniable worth of knowing our nation creates great software, films, TV, radio, music, theatre, dance, design, media, writing, marketing and architecture’.⁴²

³⁶ A New Approach, *Submission 131*, pp. 13-16.

³⁷ Professor Stuart Cunningham and Dr Marion McCutcheon, *Submission 45*, p. 21.

³⁸ Laboratory Adelaide, *Submission 58*, p. 3.

³⁹ Laboratory Adelaide, *Submission 58*, p. 4.

⁴⁰ Outback Theatre for Young People, *Submission 155*, p. 9.

⁴¹ Australia Council of the Arts, *Submission 333*, p. 2.

⁴² FASTLab Research Centre, *Submission 237*, p. 9.

FASTLab Research Centre examined a survey of creative industries business owners and self-employed creatives conducted by Queensland University of Technology. Survey respondents reported that the pandemic had impacted negatively on a number of sectors and communities including:

- cultural tourism (63 per cent);
- community participation (48 per cent);
- restricted opportunities for young people (61 per cent);
- Aboriginal and Torres Strait Islander people (44 per cent);
- culturally and linguistically diverse groups (35 per cent); and
- people with intellectual disability (39 per cent).⁴³

3.32 Professional Historians Australia (PHA) put forward the importance of historical research and history to Australia's national identity. PHA emphasised the importance of connection, both to place and the past, and the influence this has on one's 'personal identity'.⁴⁴

3.33 The individual and community benefits from creative and cultural access and participation are well known, improving mental health outcomes, and 'promoting communication, cooperation and shared identity'.⁴⁵

Telling Australian Stories

3.34 The value placed on Australian content is apparent both locally and internationally. The Australian Children's Television Foundation (ACTF) stated that: 'When we watch Australian films, hear Australian stories or see art that reflects our land and cultural experiences, we feel affirmed and acknowledged'.⁴⁶

⁴³ Queensland University of Technology, *Submission 344*, p. 6.

⁴⁴ Professional Historians Australia, *Submission 194*, p. 2.

⁴⁵ Latrobe City Council, *Submission 23*, p. 4.

⁴⁶ Associate Professor Josephine Caust, *Submission 78*, p. 2.

3.35 Children's television serves to affirm and validate the identity of Australian children, especially for marginalised groups.⁴⁷ Australia's reputation for high quality children's television programs, such as *Bluey* and *Little J & Big Cuz*, have a vast impact beyond economic success.⁴⁸ The ACTF put forward that:

...children's television in particular is a real soft-diplomacy weapon for Australia, because our shows go to 120 countries around the world and people get to see the kinds of values Australia has and the kind of place Australia is. For Australian children themselves, and for the people who grew up watching children's television, these programs really are a nation-building national asset.⁴⁹

3.36 Public broadcasters such as the Australian Broadcasting Corporation (ABC) and the Special Broadcasting Service Corporation (SBS) are considered a staple of the Australian arts community, providing platforms for various Australian works. The ABC asserted that it sits 'at the heart of Australia's creative and cultural industries' and drew attention to the important role it plays 'as an engine of creative development, employment and innovation for these sectors'.⁵⁰

3.37 The ABC stated that in 2019-20, ABC radio stations reached 3.2 million people, featuring live Australian concerts, and promoting young Australian artists through the classical ABC Young Performers Awards, and the contemporary radio station Triple J, which hosts the annual Hottest 100, and which ensures that its music playlist comprises of approximately 60 per cent Australian artists.⁵¹

3.38 Additionally, the ABC is a key commissioner of Australian scripted content, spending \$489 million in the last five years, and prioritising the promotion of Indigenous works.⁵² In a similar vein, the SBS stimulates the Australian production industry by telling Australian stories including multilingual,

⁴⁷ Australian Children's Television Foundation, *Submission 152*, pp. 8-9.

⁴⁸ Ms Jenny Buckland, Chief Executive Officer, Australian Children's Television Foundation, *Committee Hansard*, Canberra/videoconference, 4 December 2020, p. 13.

⁴⁹ Ms Jenny Buckland, Chief Executive Officer, Australian Children's Television Foundation, *Committee Hansard*, Canberra/videoconference, 4 December 2020, p. 13.

⁵⁰ Australian Broadcasting Corporation, *Submission 322*, p. 6.

⁵¹ Australian Broadcasting Corporation, *Submission 322*, p. 2.

⁵² Australian Broadcasting Corporation, *Submission 322*, pp. 5-6.

multicultural and Indigenous stories which are not available on other major networks or streaming services.⁵³

- 3.39 SBS programming includes broadcasting of content in Languages Other Than English (LOTE), which SBS stated has been important in reaching Australian LOTE communities, especially during the COVID-19 pandemic.⁵⁴ SBS broadcasting also provides an effective mechanism for cooperation and delivery of policy between layers of government, as demonstrated in their coverage of Aboriginal and Torres Strait Islander content delivered by National Indigenous Television, assisting in Closing the Gap objectives and supporting social cohesion in Australia with a range of programmes.⁵⁵

Mental Health

- 3.40 The arts play an important role in supporting the mental health and wellbeing of many Australians. The support found through creative and cultural engagement has been particularly vital since the onset of COVID-19, with numerous inquiry participants noting the way that many Australians have turned to the arts.⁵⁶ Theatre Network Australia's Circus and Physical Theatre Advisory Committee highlighted the enormous potential for the arts to alleviate strain on the mental health support system:

...our research shows that for every dollar invested for a child in a circus training program, seven dollars are potentially saved in their future mental health costs.⁵⁷

- 3.41 The particular importance of engaging in a creative activity in times of difficulty, such as the COVID-19 public health emergency, was articulated by Writing WA:

Reading for personal well-being and good mental health must also be added to this list of non-economic benefits. In the era of disruption in which we currently live, where Australians are dealing simultaneously with the stresses of the climate crisis, pandemic, multiple environmental disasters, and a

⁵³ SBS, *Submission 304*, pp. 5-6.

⁵⁴ SBS, *Submission 304*, p. 2.

⁵⁵ SBS, *Submission 304*, p. 3.

⁵⁶ See for example: Department of Infrastructure, Transport, Regional Development and Communications (Office of the Arts), *Submission 293*, p. 27; Institute of Professional Editors, *Submission 72*, p. 4; Penguin Random House Australia, *Submission 145*, p. 2; Art Association of Australian & New Zealand, *Submission 268*, p. 2.

⁵⁷ Theatre Network Australia's Circus and Physical Theatre Advisory Committee, *Submission 141*, p. 3.

cultural assault on truth and science-based information, it is interesting to note that Australian publishers report upticks in sales/downloads of non-fiction books and peer-reviewed content.⁵⁸

- 3.42 Also, depictions of mental health issues on screen, in literature and other mediums vary significantly, however, ‘well told and properly handled stories about mental health issues have a positive effect on people who suffer those issues’.⁵⁹ For example, the Australian Writers’ Guild stated that portrayals of self-harm which ‘emphasise the negative consequences of suicide on those left behind or indicate alternative courses of [action have] been observed to have positive, educative effects’.⁶⁰

Box 3.1 Somebody’s Daughter Theatre Company

Somebody’s Daughter Theatre Company (SDTC) is a community arts organisation with over 40 years’ experience working with marginalised women and at-risk young people. Current or former SDTC program participants supported SDTC’s work, and outlined their positive experiences and outcomes from participating. One participant, a ‘17 year old disadvantaged indigenous youth’ shared their experience of the program’s benefits:

Before I found SDT I was a drop out with multiple drug addictions and problems at home with the family, I felt I never would have a future. This program is so much more than ‘drama’ - it lets me express myself, and because of that I can perform and help the audience feel they not alone.

...

I’ve had multiple people, such as my friends and family - even STRANGERS, come up to me and tell me how the play we did at that time affected them and helped them grow as a person.⁶¹

- 3.43 The ability to create positive intergenerational change, engage the most vulnerable in society and develop a profound sense of self-worth was echoed by others who had participated in SDTC’s programs.⁶²

⁵⁸ Writing WA, *Submission 144*, p. 3.

⁵⁹ Australian Writers’ Guild, *Submission 178*, p. 6.

⁶⁰ Australian Writers’ Guild, *Submission 178*, p. 6.

⁶¹ Somebody’s Daughter Theatre Company, *Submission 235*, p. 12.

⁶² Somebody’s Daughter Theatre Company, *Submission 235*, pp. 7-17.

3.44 The impact of SDTC's performances on their audiences is also of significant value, with 80 per cent of mainstream audiences reporting that attending a SDTC performance or workshop 'changed the way they view people – they are more empathetic and less judgmental'.⁶³

3.45 THE RABBLE, 'an artist-led company who create experimental feminist artworks', has found that engaging with the arts can significantly improve wellbeing.⁶⁴ THE RABBLE noted research by the Australia Institute, which found that '73 per cent of Australians agree that the arts have improved their mood and quality of life during the pandemic'.⁶⁵

3.46 Mr Dean Merlino considered that the arts can have benefits for mental health:

Regular participation in creative activities such as community choirs and community theatre, painting classes, literary groups and the like, form social bonds, build self-esteem and reduce social isolation. It can also improve mental health by decreasing anxiety and depression.⁶⁶

3.47 ArtsHub recognised the important role of the arts in improving mental health outcomes, recommending that greater support be given to the arts, 'through such means as art-based programs in schools, aged-care homes and community centres which focus on building resilience, reducing anxiety and encouraging connection'.⁶⁷

3.48 Theatre Network Australia asked its members what Australia would be like without arts and cultural activities. Responses reported by Theatre Network Australia were stark, focusing on individual isolation, strained healthcare systems, and the view that '[y]ou may as well live on Mars'.⁶⁸

3.49 Castlemaine State Festival asserted that the arts 'should be regarded as an integral part of our health and wellbeing', and as such warrants support, 'Not only in the "good times" but in times of emergency or crisis such as

⁶³ Somebody's Daughter Theatre Company, *Submission 235*, p. 4.

⁶⁴ THE RABBLE, *Submission 188*, p. 1.

⁶⁵ THE RABBLE, *Submission 188*, p. 2.

⁶⁶ Mr Dean Merlino, *Submission 187*, p. 17.

⁶⁷ ArtsHub, *Submission 204*, p. 3.

⁶⁸ Theatre Network Australia, *Submission 215*, p. 5.

natural disasters and COVID, they time and again play a critical role in sustaining community spirit.’⁶⁹

3.50 In considering the supports needed for early career writers, Dr Charlotte Wood, advocated for a writing ecosystem, however ‘in terms of what writers as individuals need, I don't think we do need a lot of training or assessments about our mental health. We just need money’.⁷⁰ This sentiment was supported by Dr Wood’s colleagues, Ms Helen Garner and Mr Christos Tsiolkas.

3.51 Mr St John Cowcher stated that involvement with the arts could have positive physical health effects as well:

I personally work for an organisation that uses positive creative engagement in hospital and can attest to the exceptionally positive impact that creative interactions have had on the lives of sick children, their families and the front line health workers I work alongside most weeks.⁷¹

Enhancing Social Cohesion

3.52 The importance of the arts, particularly in supporting communities during COVID-19, was raised by inquiry participants.

3.53 Ms Kate Larsen suggested that ‘participation in and connection to arts and culture have never been so important’.⁷² Many survey respondents wrote of the importance of the arts for Australian society and its positive effect on community:

It educates, builds empathy, brings communities together, engages people of different age groups to come together...It enables people to feel welcome, encouraged and positive about where they live.⁷³

3.54 Lake Macquarie City Council outlined the extensive schedule of cultural programs, over 2,800, which it supports annually.⁷⁴ Programs include visual arts classes for children and adults; early literacy programming; artist,

⁶⁹ Castlemaine State Festival, *Submission 50*, p. 4.

⁷⁰ Dr Charlotte Wood, private capacity, *Committee Hansard*, Canberra/teleconference, 13 November 2020, p. 27.

⁷¹ Mr St John Cowcher, *Submission 10*, p. 1.

⁷² Ms Kate Larsen, *Submission 25*, p. 3.

⁷³ Survey summary, p. 7.

⁷⁴ Lake Macquarie City Council, *Submission 50*, p. 3.

author and illustrator talks and workshops; and a range of creative festivals. Substantial benefits are delivered to the community through:

- establishing a regional town as vibrant cultural hub;
- facilitating accessible places for community engagement and development for all members of a community;
- provision of free access to visual art and creative pursuits;
- building connections between artists, students and community members; and
- fostering social cohesion, reducing social isolation and promoting a strong sense of community identity.⁷⁵

3.55 Fairfield Local Government Area (LGA) in Western Sydney 'is an area with high social needs' which is recognised as one of the most diverse communities in Australia. Almost 54 per cent of residents were born overseas, while 52 per cent come from countries where English was not their first language.⁷⁶ Fairfield is home to a vibrant range of cultural and creative organisations, such as Guntawang Aboriginal Women's weaving and arts group; Al-Muntada's Iraqi folkloric music; and, the Mandeian Women's Union's cultural exhibition.⁷⁷ Fairfield LGA highlighted the special role that diversity has within the artistic community, and stated that: 'There is a depth and richness in our communities' cultural and artistic practices not found in other areas of Australia.'⁷⁸

Box 3.2 DRILL Performance Company

DRILL Performance Company is a youth dance company in Hobart which offers accessible dance opportunities for young people across the state. DRILL works in low socioeconomic areas through its school program, Dance Nexus, which is designed to remove barriers around cost, accessibility and transport, so that all students may participate and benefit from dance, regardless of their background.⁷⁹

DRILL creates a safe and inclusive community for many young people and their families to connect to, providing a platform for self-expression, self-discovery, mentorship and forging strong friendships and support networks.

⁷⁵ Lake Macquarie City Council, *Submission 50*, p. 4.

⁷⁶ Fairfield City Council, *Submission 208*, p. 3.

⁷⁷ Fairfield City Council, *Submission 208*, p. 3.

⁷⁸ Fairfield City Council, *Submission 208*, p. 8.

⁷⁹ DRILL Performance Company Inc., *Submission 207*, p. 2.

Many DRILL participants have experienced mental health issues or issues with social connectedness, and our programs allow them to build resilience and a support network to make positive change in their lives.⁸⁰

DRILL reaches thousands of young Tasmanians each year; participants have commented that the program has 'built confidence, improved physical fitness, promoted positive body image, provided relief from stress and mental illness, given them focus for their futures'.⁸¹

3.56 Documentary Australia Foundation (DAF) stressed the importance of documentary film to social wellbeing, the promotion of Australia's national identity and community representation, including:

- Increased awareness & conversation – at the community level
- Increased knowledge & understanding – within the community
- Increased community connection - which could include new or improved networks, engagement or partnerships
- Improved community action -for example new community programs, initiatives, events, resources or campaigns
- School and educational outcomes – including evidence of learning, increase knowledge and skill development
- New research – for the film, on the issue in the film, or on the film.⁸²

3.57 Social cohesion is also enhanced by the holding of community-scale events, which allow people to come together to celebrate the arts and cultural scene. Folk festivals were particularly highlighted to present a valuable opportunity for community engagement:

Folk aligns itself with cultural policies of community participation, cultural diversity and social inclusion and is a flagship for fostering and promoting our diverse national identity. Folk festivals create a common ground for the expression of this culture through grass roots, community and participatory activities while at the same time juxtaposing these with entertainment experiences of the highest quality.⁸³

⁸⁰ DRILL Performance Company Inc., *Submission 207*, p. 2.

⁸¹ DRILL Performance Company Inc., *Submission 207*, p. 2.

⁸² Documentary Australia Foundation, *Submission 228*, p. 11.

⁸³ Folk Federation of NSW, *Submission 98*, p. 3.

- 3.58 The village and community of Cobargo has struggled in the wake of the devastating bushfires of the 2019-20 summer, with stresses further compounded by COVID-19 and the cancellation of the Cobargo Folk Festival in 2020 (twice) and 2021. The substantial loss of this event has become plain to festival organisers (all volunteers), who have dedicated their time to recovery efforts:

...the festival's many supporters - performers, audience, stallholders, suppliers, other folk festivals and folk clubs - have rallied around Cobargo in the aftermath of the fire. This group has contributed a very significant portion of the almost \$700,000 raised by the Cobargo Community Bushfire Recovery Fund Inc. and we are very grateful for this support. The community recovery projects now underway in Cobargo, Quaama and elsewhere in our district would not have got off the ground with these generous contributions.⁸⁴

- 3.59 While community and social connection may manifest in different mediums, the consistent shared values of developing a shared sense of belonging through engagement with art and culture was highlighted by inquiry participants.⁸⁵

Preservation of Australian History and Culture

- 3.60 The substantial responsibility of Australian social record-keeping falls to our cultural institutions, such as the Australian War Memorial, the Museum of Australian Democracy, the National Gallery of Australia, and the National Museum of Australia, among others. These institutions provide an important preservation and curation service, as well as providing visitors, artists, social historians and many others valuable insights into Australia's cultural heritage, social history, and our national identity:

We provide Australians with access to their cultural heritage. The information that we steward offers a window into what it means to live in Australia and be Australian, and underpins so much of the research and innovation in the humanities landscape.⁸⁶

- 3.61 Galleries, libraries, archives and museums (GLAM), as well as community centres, play an important role in enhancing wellbeing, fostering shared

⁸⁴ Yuin Folk Club, *Submission 167*, p. 2.

⁸⁵ See for example: The Push, *Submission 189*, p. 5; Theatre Network Australia, *Submission 215*, p. 5; Professor Robyn Ewing, *Submission 230*, p. 2; and Contemporary Arts Organisations Australia, *Submission 76*, p. 2.

⁸⁶ CPSU, *Submission 210*, p. 6.

values, and supporting social cohesion and community engagement with cultural and creative events, pursuits and experiences across Australia. The National Public Galleries Alliance put forward the view that:

Australia's extensive network of public galleries is pivotal to community enrichment by engaging audiences with art, ideas and diverse cultural practices. Through their exhibitions, public and education programs, and support of artists, public galleries inspire participation in conversations about the world in which we live. They promote learning, foster critical thinking and encourage creative expression in ways that benefit local economies, change lives and impact positively on community health and wellbeing.⁸⁷

3.62 Arts organisations present an opportunity to explore and embrace feelings of 'belonging', 'mateship', and 'have the ability to transport people into other people's worlds, providing opportunities for empathy and greater social cohesion'.⁸⁸ Suggesting alternative arts models for regional Australia, Professor Rachel Fensham and colleagues put forward regional centres as arts hubs for a diversity of performing arts practices, operating in partnership with local government, which could help develop a thriving local arts scene.⁸⁹ Possible benefits include 'growth in tourism, employment opportunities, civic pride and night-life activities'.⁹⁰

3.63 The Council of Australasian Museum Directors (CAMD) highlighted the importance of museums in Australia's cultural landscape in providing connection to both the history and within the Australian community:

By researching, conserving, curating and sharing our heritage museums have built authority and trust with the community. In celebrating and interpreting this heritage museums also contribute to our social cohesion.⁹¹

3.64 Furthermore, CAMD stated that public value studies assessed the perspective of citizens suggest essential values of museums include:

- Creation of new knowledge and awareness;

⁸⁷ National Public Galleries Alliance, *Submission 184*, p. 2.

⁸⁸ Professor Rachel Fensham, Dr Jennifer Beckett, Dr Lynne Kent and Associate Professor Paul Rae, *Submission 248*, p. 4.

⁸⁹ Professor Rachel Fensham, Dr Jennifer Beckett, Dr Lynne Kent and Associate Professor Paul Rae, *Submission 248*, p. 6.

⁹⁰ Professor Rachel Fensham, Dr Jennifer Beckett, Dr Lynne Kent and Associate Professor Paul Rae, *Submission 248*, p. 6.

⁹¹ Council of Australasian Museum Directors, *Submission 328*, p. 2.

- The development of society;
- Establishing cultural capital in society (including understanding and empathy);
- Individual social development;
- Diverse economic contributions.⁹²

3.65 The value of public galleries, libraries, museums and archives during mandatory lockdown was considerable, as ‘lifelong learning and social cohesion arguably became more important in a locked down world, with many seeking to reskill or link to local community services as a result of the economic downturn’.⁹³ The State Library of Western Australia experienced a more than 100 per cent increase in monthly membership applications, as well as a 50 per cent increase in online and phone inquiries.⁹⁴

3.66 As demand for online resources increased, issues arose in relation to copyright laws. The Australian Digital Alliance and Australian Libraries Copyright Committee set out some these difficulties:

- Some copyright laws designed to apply to hardcopy materials do not apply when those materials are digitised.
- Similarly, some copyright laws only apply when the activity is done in person and cease to apply when a recording is made or the activity is done online through platforms such as Zoom.
- In many cases, it is unlawful to use material where the owner of that material cannot be found and attributed.⁹⁵

3.67 According to the Australian Digital Alliance and Australian Libraries Copyright Committee, these laws are ‘stifling an entire genre of artists from emerging in Australia’.⁹⁶

3.68 Volunteer-supported historical societies were highlighted for the work they do to promote community cohesion and preserve Australia’s history. The Federation of Australian Historical Societies (FAHS) set out that volunteer organisations in rural and regional areas have enormous value:

Although voluntary community organisations directly employ few people, they play many important social and cultural roles that bring benefits both to

⁹² Council of Australasian Museum Directors, *Submission 328*, p. 9.

⁹³ Australian Digital Alliance and Australian Libraries Copyright Committee, *Submission 206*, p. 3.

⁹⁴ Australian Digital Alliance and Australian Libraries Copyright Committee, *Submission 206*, p. 3.

⁹⁵ Australian Digital Alliance and Australian Libraries Copyright Committee, *Submission 206*, p. 3.

⁹⁶ Australian Digital Alliance and Australian Libraries Copyright Committee, *Submission 206*, p. 4.

individuals and to their communities. These include assistance to local economies and therefore to employment.

In rural and regional Australia, these organisations are likely to be of great significance through the contribution they make to the economy by facilitating heritage tourism via their museums, walking tours, signage, etc. The cities of Albany and Broome in WA and Port Fairy in Victoria are excellent examples, where historical society museums attract many thousands of visitors each year. If facilitated to reopen and expand, community institutions will be in a better position to continue to attract tourists and to stimulate their local economies.⁹⁷

- 3.69 The FAHS suggested linking up tertiary students studying relevant fields with organisations who would benefit from the assistance:

One way of providing such stimulus stimulating while providing employment, would be to establish a system of cadetships to appoint young people who have been trained in the arts and cultural industries (including information studies) to work as cadet advisers to community organisations. Much of this would focus on the better management and protection of collections, including digitisation.⁹⁸

Concluding Comment

- 3.70 Australia's creative and cultural industries and institutions make an enormous economic contribution and, until the COVID-19 public health emergency, were growing and expanding to reach new international audiences.
- 3.71 The undeniable economic value of the arts may take time to reach its former heights, but as Australia emerges from living in the COVID-19 pandemic, the arts has an opportunity to grow even further.
- 3.72 The non-economic benefits of the arts are vast, and have been highlighted by recent events. The act of creating something artistic, whether it is a painting, comedy performance, novel, play, or piece of music, is intrinsically good for people. Australia's cultural identity evolves as creative workers continue to represent Australian life and tell Australian stories to domestic and international audiences.

⁹⁷ Federation of Australian Historical Societies, *Submission 32*, p. 2.

⁹⁸ Federation of Australian Historical Societies, *Submission 32*, p. 2.

- 3.73 The mental health benefits of creating and participating in creative work have been highlighted as Australians turn to the arts during restrictions to combat the spread of COVID-19. The Committee notes the research set out by Theatre Network Australia's Circus and Physical Theatre Advisory Committee that 'for every dollar invested for a child in a circus training program, seven dollars are potentially saved in their future mental health costs'.⁹⁹
- 3.74 The Committee considers that participation in the arts at a young age could be a significant investment in mental health, as well as physical health. The Committee encourages schools, families, and people of any age to join a local arts group, including physical theatre and circus, visual arts, music, dance and more. Engagement with the arts has many benefits, and local organisations provide a valuable outlet for Australians to make new connections and support mechanisms as well as supporting the arts.
- 3.75 The Committee commends the work of groups such as Somebody's Daughter Theatre Company (SDTC) for the work they do with young people and marginalised women to encourage storytelling and support networks to build.

Supporting Regional Galleries, Libraries, Archives and Museums

- 3.76 Australia's stories reside in locations beyond the major national collecting institutions. Regional voices and stories tell the unique social history of Australia, with thousands of historic and art objects in collections across the country at risk of being forgotten or damaged.
- 3.77 With the inability to travel overseas, Australians are discovering locations and experiences in their own backyard. Regional galleries, libraries, archives and museums may benefit from increased traffic of domestic visitors. Visitors, in turn, may benefit from learning more about Australia's history, art and culture.
- 3.78 Regional and smaller cultural institutions may not attract the next generation of museum professionals as much as the large, Canberra-based national collecting institutions. The Committee considers that incentives or encouragement for tertiary-level students in relevant fields to conduct internships in regional areas would create opportunities to share cutting-edge research and approaches, and create opportunities for the next generation of professionals.

⁹⁹ Theatre Network Australia's Circus and Physical Theatre Advisory Committee, *Submission 141*, p. 3.

- 3.79 The Committee notes the recommendation from the Federation of Australian Historical Societies for cadetships which would link students and young people with relevant training and community organisations in need of support. The Committee considers that an expanded program of internships and cadetships would be an excellent way to help emerging arts and culture professionals enter the workforce, and help smaller, regional or community-focussed organisations grow.
- 3.80 The Committee also notes the Governments intent to provide additional funding to the National Archives. The National Archives of Australia is the largest archival institution in Australia and plays a fundamental role of securing, preserving, and maintaining the nation's history. The Committee endorses the Government's proposal to provide additional funding and recommends that it be allocated in a timely manner to ensure that the most vulnerable documents, film and other at-risk materials recording our history are not lost.

Recommendation 9

- 3.81 **The Committee recommends that the Commonwealth Government consider working with tertiary education providers to develop a program of internships and cadetships which would see students and young people work in regional, small and/or community-focussed galleries, libraries, archives and museums.**
- 3.82 **The Commonwealth Government should request input from the Office for the Arts, Department of Education, Skills and Employment and Department of Infrastructure, Transport, Regional Development and Communications as well as regional arts and cultural organisations, to develop a pilot program.**

Recommendation 10

- 3.83 **The Committee notes the urgent funding provided by the Commonwealth Government to the National Archives of Australia to conduct digitisation and preservation work, and recommends that additional funding be provided to the National Film and Sound Archive to conduct similar urgent work.**

4. The Impact of COVID-19 on the Arts

- 4.1 The COVID-19 public health emergency (COVID-19) has left an indelible mark on the arts in Australia, and has touched the life of every person who creates, consumes, contributes to or benefits from the arts.
- 4.2 The arts industry, as well as the artistic experience, has been devastated by COVID-19 as events, venues, markets and access to art were shut down in order to protect Australians from the virus.
- 4.3 Ironically, the need for creative experiences and the joy brought by participating in art was critical to peoples' ability to endure the economic and social disruption and damage caused by the pandemic.
- 4.4 A number of inquiry participants drew attention to the important role that connection to the arts has in promoting good mental health, and highlighted how much Australians have relied on the arts to help with coping with the uncertainty of the times.¹
- 4.5 The Museum of Contemporary Art described the way that the arts help people deal with different stages of a crisis:

In times of crisis – bushfires, pandemics – the arts have the capacity to give people ways of coping, imagining a future beyond the crisis. At the end of this current crisis, the world will be very different. Connection and relationships will be paramount to build and sustain community. The arts will be more important than ever – to assist with the aftermath in terms of mental health, to

¹ Michelle Leonard OAM, *Submission 5*, p. 1; Jo Lane, *Submission 6*, p. 3; Ms Gwendolyn Knox, *Submission 21*, p. 1; Latrobe City Council, *Submission 23*, p. 3.

encourage confidence, to give people hope and encourage them to engage again in wider society.²

- 4.6 People employed in the creative and cultural sector have been disproportionately affected by loss or reduction of employment, reduced income and the temporary and permanent closures resulting from the pandemic.³ In considering the impact on arts and recreation businesses, A New Approach (ANA) stated:

It could be years before this industry division fully recovers, due to the public's discomfort with being in shared spaces like live performance venues. Ongoing social distancing requirements and the risk of events and venues being shut down is likely to continue undermining both consumer and investor confidence in the sector.⁴

- 4.7 Inquiry participants put forward the view that Australia's creative and cultural industries and institutions were in a poor position before the challenges of last year emerged. Ms Kate Larsen stated that:

Arguably, Australia's arts, cultural and creative industries were already at their most vulnerable before the impact of this year's bushfires, four-year funding announcements from Australia Council for the Arts, and the ongoing impact of COVID-19.⁵

Employment

- 4.8 The Australian Bureau of Statistics' (ABS) labour market data for the Arts and Recreation Services industry (which is part of the creative and cultural sector) indicates that the pandemic has had a significant negative impact.⁶ The toll of the public health emergency on the overall arts labour market was vast, with employment falling by 872,000 people between March and May 2020.⁷

² Museum of Contemporary Art, *Submission 97*, p. 1.

³ A New Approach, *Submission 131*, p. 3.

⁴ A New Approach, *Submission 131*, p. 3.

⁵ Ms Kate Larsen, *Submission 25*, p. 2.

⁶ Department of Infrastructure, Transport, Regional Development and Communications (Office of the Arts), *Submission 293*, p. 23.

⁷ Department of Infrastructure, Transport, Regional Development and Communications (Office of the Arts), *Submission 293*, p. 23.

- 4.9 The ABS stated, however, that employment data on the effect of the public health emergency was not available at a granular level, and explained that ABS reporting on this issue is ‘done on a different basis to the cultural and creative sector as defined for the purpose of the Government’s sector analysis’.⁸
- 4.10 As a result of these different reporting approaches it is difficult to isolate recent employment numbers for the cultural and creative sectors and accurately assess the impact of the public health emergency.
- 4.11 Notably, the arts and recreation category is broad reaching, and includes areas such as sport, zoos and gambling, which the Committee does not consider to be part of the arts and culture sector.⁹ Nevertheless, arts and recreation was ‘the second hardest hit industry with regard to jobs lost’, and the sector’s recovery was dramatically slower than that of the hardest hit sector, Accommodation and Food.¹⁰
- 4.12 Arts and recreation industry employees’ average work hours decreased by 21 per cent between the March and June quarters of 2020, compared with the all industry average decrease of five per cent. Further:
- The numbers of filled jobs within the Arts and Recreation Services industry experienced the largest decline in jobs across all industry divisions (-19 per cent) between the March quarter and June quarter 2020.¹¹ This was greater than the all industry average of 6 per cent decline over the period.¹¹
- 4.13 The Department of Infrastructure, Transport, Regional Development and Communications (DITRDC), which houses the Office of the Arts, referred to payroll data from the ABS (see Figure 3.1) which shows employment based on single-touch payroll data for ‘selected industry subdivisions of the cultural and creative sectors against the employment level of the week ending 14 March 2020 (the 100th reported case of COVID-19 in Australia)

⁸ Department of Infrastructure, Transport, Regional Development and Communications (Office of the Arts), *Submission 293*, p. 23.

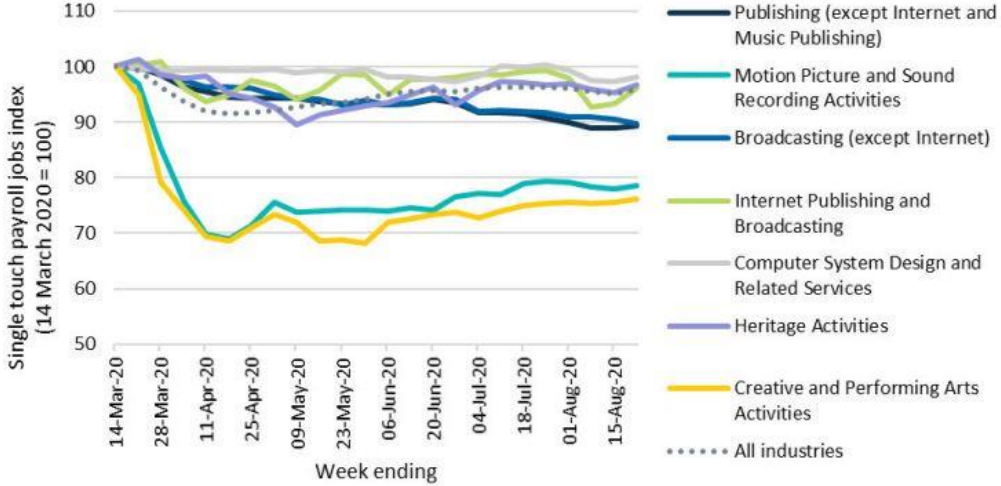
⁹ business.gov.au, ‘Arts and recreation services industry’, 7 April 2021, <https://www.business.gov.au/planning/industry-information/arts-and-recreation-services-industry>, accessed 10 April 2021.

¹⁰ Office of the Arts stated that ‘This is reflected in the ABS figures between 5 and 19 September, where Accommodation and Food has increased payroll numbers by 5.5% but Arts and Recreation only 1.1%.’ Department of Infrastructure, Transport, Regional Development and Communications (Office of the Arts), *Submission 293*, p. 23.

¹¹ Department of Infrastructure, Transport, Regional Development and Communications (Office of the Arts), *Submission 293*, p. 23.

and against the employment level for all industries to the week ending 22 August 2020'.¹²

Figure 4.1 Weekly Payroll Jobs and Wages



4.14 Source: ABS, 2020, *Weekly Payroll Jobs and Wages in Australia*, Week ending 22 August 2020 (in the *Officer of the Arts*, Submission 293, p. 24).

4.15 The data shows that while all selected subdivisions of the creative and cultural sector were negatively impacted, some fields were more strongly impacted than others. Creative and performing arts, and motion picture and sound recording activities, as seen in the graph below, were significantly affected, whereas computer system design and related services were more resilient to the pandemic's impact.

¹² Department of Infrastructure, Transport, Regional Development and Communications (Office of the Arts), *Submission 293*, p. 24.

Figure 4.2 Employment by full-time and part-time status in the creative and cultural sector

Subdivision	Change in the number of employed persons between February and August 2020		
	Full-time	Part-time	Total
Publishing (except Internet and Music Publishing)	-26%	24%	-17%
Motion Picture and Sound Recording Activities)	-12%	-20%	-16%
Broadcasting (except Internet)	25%	-14%	16%
Computer System Design and Related Services	-1%	29%	-2%
Heritage Activities	7%	-21%	-0%
Creative and Performing Arts Activities	-34%	10%	-13%

Source: [Labour Force, Detailed, Industry, Occupation and Sector, Quarterly, August 2020, Table 06.](#)

*These figures are an original time-series which may be affected by seasonal variations. These data should be interpreted with caution due to small sample sizes and may be subject to volatility.

Source: *Labour Force Detailed Industry Occupation and Sector, Quarterly, August 2020, Table 06, (in the Office of the Arts, Submission 293, p. 25).*

- 4.16 While COVID-19 has impacted the rates of employment within the creative and cultural sector, it has impacted the availability of work across subdivisions of the sector differently.¹³ A drop in the overall number of full-time workers has occurred across all subdivisions except heritage activities and broadcasting, with broadcasting experiencing an increase in employment levels of 16 per cent, and activities returning to pre-COVID employment levels.¹⁴
- 4.17 COVID-19 impacted employment of arts practitioners in different ways, with COVID-safe guidelines in some schools resulting in the prohibition of group singing, while policies limiting 'the use of wind instruments in group settings have resulted in a dramatic loss of employment for music teachers and education for students, particularly those preparing for their HSC'.¹⁵
- 4.18 Creative and performing arts activities include 'Performing Arts Operation: Creative Artists, Musicians, Writers and Performers and Performing Arts Venue Operation ANZSIC industry classes'. This subdivision has been particularly affected by COVID-19.¹⁶ This sector comprises 45,400 employees

¹³ Department of Infrastructure, Transport, Regional Development and Communications (Office of the Arts), *Submission 293*, p. 24.

¹⁴ Department of Infrastructure, Transport, Regional Development and Communications (Office of the Arts), *Submission 293*, p. 24.

¹⁵ Live Music Office, *Submission 319*, p. 7.

¹⁶ Department of Infrastructure, Transport, Regional Development and Communications (Office of the Arts), *Submission 293*, p. 31.

of whom 25,370 or 63 per cent received the Government's JobKeeper payments in April 2020.¹⁷

Analysis by the BCAR found that up to around 90 per cent of the cultural and creative sector workforce could be eligible for JobKeeper, subject to their employer meeting further eligibility criteria.¹⁸

Artists' Lived Experience of the Pandemic

4.19 The COVID-19 public health emergency has had a profound impact on those working across Australia's arts and culture sector. At the launch of the inquiry, the Committee conducted an online survey into the state of the arts tailored to those working across the arts and cultural sector. The survey received 4,871 responses and was the second-most participated in survey conducted by a House committee. The results highlighted the experiences of artists and arts sector workers with key issues including:

- employment;
- artistic engagement;
- health and wellbeing;
- financial stress and Government support; and
- digital pivoting.¹⁹

4.20 The complete shutdown of arts events exacerbated the experience of chronic vulnerability and uncertainty across interdependent industries, such as tourism and hospitality which rely on cultural events for their success.²⁰

4.21 The impact of COVID-19 on the performing arts was further noted by Australian Performing Arts Market, which pointed to data collected through the 'I Lost My Gig Australia' survey, which 'reports more than 12,000 respondents losing income of almost \$340 million since March 2020, impacting almost 660,000 industry participants'.²¹

4.22 Ms Gwendolyn Knox stated that the effect of the pandemic had been devastating 'I personally have had all my bookings cancelled indefinitely. At

¹⁷ Department of Infrastructure, Transport, Regional Development and Communications (Office of the Arts), *Submission 293*, p. 31.

¹⁸ Department of Infrastructure, Transport, Regional Development and Communications (Office of the Arts), *Submission 293*, p. 31.

¹⁹ Survey summary, pp. 6-11.

²⁰ Performing Lines, *Submission 233*, p. 2-3; John Cowcher, *Submission 10*, p. 1.

²¹ Australian Performing Arts Market, *Submission 163*, p. 2.

63 years of age and living remotely of Indigenous descent, my chances of re-entry to the sectors could be very challenging.’²²

- 4.23 Respondents to the Committee’s survey highlighted the wide-spread reduction in work due to the period, with some respondents noting the loss of all or some their work, leading to substantial financial loss and hardship.²³ Others explained the loss in income was partially due to an inability to travel interstate and overseas during the pandemic, or as a result of venue closures.

Box 4.1 In artists’ own words

Artists set out their experiences of the COVID-19 public health emergency, and described the sense of loss – including loss of income, sense of self, creative ability and motivation:

Almost everyone I know who works in the arts has lost part or all of their work. The scale of the mental health and financial impact is enormous. For dancers and dance teachers, the sudden decrease in physical activity has caused physical health problems as well.²⁴

All of our overseas tours have been cancelled due to the very strict border closure rules of the Australian government...the extra costs associated with this are making it impossible to tour work nationally and internationally...Works have been cancelled due to the fact dancers cannot rehearse and theatres have closed. Most of our work has dried up and it’s very hard to plan for the future...²⁵

It's been seven months since the last time my choir has performed live. Some chorus-specific events have moved online, but it isn't the same. The social dynamic, the feeling of being amongst my colleagues isn't there in the same way as it was pre-pandemic and it is heartbreaking that we, among others in the arts industry whom are doing worse than us volunteers, have suffered this devastating blow to what is part of our livelihoods.²⁶

²² Ms Gwendolyn Knox, *Submission 21*, p. 1.

²³ Survey summary, pp. 6, 9.

²⁴ Survey summary, p. 6.

²⁵ Survey summary, p. 9.

²⁶ Survey summary, p. 6.

Isolation de-skills you, especially if you are a writer and an introvert already. I have lost social confidence, and feel that as an independent artist I have even less status than I had before, and really worry about making any sort of living in the months ahead. With the lack of arts bailouts, I grieve the damage being done to my sector, and the squandering of a generation of hard work by theatre artists. This is the latest in a long line of arts-bashing, and I must admit I'd tired, semi-defeated, thinking about leaving the profession altogether. Feeling a bit stunned and paralysed.²⁷

I'm living now in poverty more than ever before.²⁸

I have lost what was full time work as a stage manager and had to take a much lower paying full time role outside the industry. I have had the opportunity to work casually a few hours a week on some creative developments but nowhere near my previous capacity or wage.²⁹

I lost all work (7 productions) between March and September. This includes 2 shows overseas. Several of these will now never happen.³⁰

- 4.24 Further, respondents stated their inability to work in the arts had negatively affected both physical and psychological health.³¹ Some responses explained that this was due to the increased financial stress from the sudden lack of work, as well as being unable to connect with community or partake in their form of art. One respondent stated that: 'The arts connects me to my community, it has helped me with my mental health.'³²

²⁷ Survey summary, p. 9.

²⁸ Survey summary, p. 9.

²⁹ Survey summary, p. 6.

³⁰ Survey summary, p. 6.

³¹ Survey summary, p. 6.

³² Survey summary, p. 9.

- 4.25 The role of Commonwealth Government in supporting the arts and cultural sector was discussed frequently in survey responses, with discussions of 'funding' mentioned 1,539 times throughout the survey, while 'support' and 'Government' were mentioned 1,143 and 790 times respectively.³³ One survey respondent commented that: 'Grants are hard to obtain, taxable, and not able to provide a writer with more than a year at most. Usually just a few months'.³⁴
- 4.26 A desire for further funding to reduce job insecurity was also presented, with one respondent stating that: 'We need to reduce, and ideally, drastically reduce job insecurity and burn-out in the sector. Instead, Australia should ensure reliable and ongoing funding to arts organisations...'.³⁵
- 4.27 A move to online delivery was a theme in survey responses, with respondents commenting that they had adapted to online practices, and accepted more digital work.³⁶ Some respondents had participated in online performances, although they found these to be less successful in comparison to in-person performances: 'I have done some online performances via zoom but engagement and ability to charge for tickets is a lot lower than live performance'.³⁷
- 4.28 Artists who could have continued to work stated that the restrictions on movement had meant that they could not attend their studios, which had significant financial impacts for them. Ms Jo Lane, a visual artist, set out that:
- ...artists were even told it was illegal to go to their studios, the only venue for them to produce work with which to make income (while construction workers were allowed to continue working on sites).³⁸

³³ Survey summary, p. 8.

³⁴ Survey summary, p. 10.

³⁵ Survey summary, p. 8.

³⁶ Survey summary, p. 9.

³⁷ Survey summary, p. 6.

³⁸ Ms Jo Lane, *Submission 17*, p. 2.

- 4.29 The Castlemaine State Festival outlined that a combination of artists not being able to open facilities, host events or attend studios and the fact that restrictions on movements had stopped people from visiting had been a significant double blow:

In Mt Alexander Shire the impact on activity has been substantial. Locally a range of artistic activities such as dance schools, a children's circus, art classes, open studios have all been cancelled for months on end. A vibrant live music scene has also been shut down. The Castlemaine Art Museum has been closed. This has been further exacerbated by the lock down of Melbourne prohibiting visitation.³⁹

Commonwealth Government Support

- 4.30 Key forms of Commonwealth Government support to individuals in response to the pandemic were through the JobKeeper and JobSeeker payments.⁴⁰ A list of Commonwealth Government funding targeted towards supporting the arts and cultural sector is at Appendix E.

- 4.31 The Department of the Treasury (the Treasury) outlined the support delivered through JobKeeper to all industries:

The first phase of JobKeeper (March to September 2020) supported around 1 million businesses, covering over 3.8 million employees.

To date, the first quarter of the extension phase (October to December 2020) has supported around 525,000 businesses, covering an average of 1.6 million employees.⁴¹

- 4.32 The Treasury noted that data was not available for the second quarter of the extension phase (January to March 2021) at the time of reporting.⁴² For the period of 30 March 2020 to 31 January 2021, Treasury stated that, overall, '1,458,349 JobSeeker Payment claims were granted.'⁴³

³⁹ Castlemaine State Festival, *Submission 54*, p. 5.

⁴⁰ Department of Treasury, Labour Market Policy Division, Answers to questions on notice, public hearing, Canberra, 5 February 2021, pp. 1-2.

⁴¹ Department of Treasury, Labour Market Policy Division, Answers to questions on notice, public hearing, Canberra, 5 February 2021, p. 1.

⁴² Department of Treasury, Labour Market Policy Division, Answers to questions on notice, public hearing, Canberra, 5 February 2021, p. 2.

⁴³ Department of Treasury, Labour Market Policy Division, Answers to questions on notice, public hearing, Canberra, 5 February 2021, p. 2.

4.33 Within the arts and recreation category, '\$560 million, 25,000 organisations and 122,000 employees' received support from the JobKeeper payment.⁴⁴

4.34 In addition, the Bureau of Communications and Arts Research (BCAR) and the Office of the Arts explained that:

According to Australian Taxation Office (ATO) data, 25,370 people in the Creative and Performing Arts subdivision of the ANZSIC Arts and Recreation Services Division received JobKeeper payments in April 2020. As at February 2020, there were 45,400 employees in this subdivision, of whom around 40,000 are employed in the private sector. This means that around 63 per cent of employees in this subdivision were in receipt of JobKeeper payments in April 2020 based on employment levels prior to the pandemic.⁴⁵

4.35 The total cultural and creative workforce, including creatives working in non-creative fields, is 868,098 people.⁴⁶ Comprehensive data on how this wider cultural and creative cohort has been affected by the pandemic is unclear.

Sector Response to Support

4.36 A number of inquiry participants noted the essential support that they received through programs including JobKeeper and JobSeeker, but some expressed dissatisfaction, concern and confusion towards the types of support packages available.⁴⁷

4.37 The JobKeeper and JobSeeker payments have eligibility criteria which have been criticised as not recognising the 'gig economy' nature of the arts and culture sector.⁴⁸

4.38 The National Association for the Visual Arts (NAVA) was critical of the way different areas of government recognise work, and highlighted a lack of understanding regarding the suspension of mutual obligations as cause of

⁴⁴ Mrs Belinda Robertson, Assistant Secretary, Labour Market Policy Division, The Treasury, *Committee Hansard*, Canberra/videoconference, 5 February 2021, p. 9.

⁴⁵ Bureau of Communications and Arts Research and DITRDC, 'Characteristics of Employment and Business Activity in Cultural and Creative Sectors', *Fact Sheet*, 13 July 2020, p. 4, <https://www.communications.gov.au/publications/characteristics-employment-and-business-activity-cultural-and-creative-sectors-fact-sheet>, accessed 10 April 2021.

⁴⁶ A New Approach, *Submission 131*, p. 9.

⁴⁷ See for example: Festive Factory, *Submission 287*, p. 11; Dr Greg Pritchard, *Submission 46*, p. 2; Think Tank Assembly, *Submission 66*, p. 3; The Usefulness of Art, *Submission 263*, p. 17.

⁴⁸ Mr Abe Watson, *Submission 52*, p. 13.

confusion. NAVA made the point that ‘currently Centrelink don't recognise being an artist as a profession. The [Australian Tax Office] do by their tax ruling of being a professional artist, but Centrelink don't.’⁴⁹

- 4.39 Dr Catriona Menzies-Pike, Editor of the Sydney Review of Books (SRB), suggested that there has been a ‘failure of design’ in the Commonwealth Government’s response to the public health emergency in the way that an organisation’s public engagement with art and culture was measured which stopped SRB from receiving emergency funding.⁵⁰ Dr Menzies-Pike suggested that, ‘looser funding criteria for the emergency packages would have allowed organisations like the SRB to commission a lot of writers to do work during this fallow period’.⁵¹

- 4.40 In a similar vein, Dr Gail Jones raised concern at the categorisation of jobs and the exclusion of writers from Commonwealth support packages:

Most writers’ work is not recognized as a ‘job’; if it were, if there were a definition of ‘writer’ as a category of honourable labour (such as it is, for example, in Germany and France), writers would be eligible for Jobmaker and Jobseeker benefits. This may be ‘blue-sky’ thinking, but I look forward to a future in which forms of precarious labour, like writing, are recognized as jobs.⁵²

- 4.41 The peak body for performing arts, screen production and live entertainment sectors, Media, Entertainment and Arts Alliance (MEAA) represents approximately 8,000 members.⁵³ MEAA contended that:

The major challenge that our members confronted during the pandemic, flowing from the immediate cessation of work, was their inability to secure JobKeeper benefits. We estimate—and we think our estimates are reliable—

⁴⁹ Ms Penelope Benton, Acting Chief Executive Officer, National Association for the Visual Arts, *Committee Hansard*, Canberra/teleconference, 13 November 2020, p. 40.

⁵⁰ Dr Catriona Menzies-Pike, Editor, Sydney Review of Books, *Committee Hansard*, Canberra/teleconference, 13 November 2020, p. 26.

⁵¹ Dr Catriona Menzies-Pike, Editor, Sydney Review of Books, *Committee Hansard*, Canberra/teleconference, 13 November 2020, p. 26.

⁵² Dr Gail Jones, *Submission 24*, p. 4.

⁵³ Mr Matthew Chesher, Director Legal and Policy, Media, Entertainment and Arts Alliance, *Committee Hansard*, Canberra/teleconference, 19 February 2021, p. 36.

that roughly half of our members in the entertainment sector were unable to access JobKeeper due to eligibility constraints.⁵⁴

4.42 The Stradbroke Chamber Music Festival raised concerns about Commonwealth Government support packages for arts organisations::

The federal government has earmarked \$70 billion for JobKeeper but financial support for the arts sector remains comparatively small. After months of lobbying, the sector was finally advised of a \$250m support package, at the end of June. This “bailout” comprises \$75m in a highly competitive grant program, \$90m in loans, \$50m to Screen Australia, and the remaining dollars go to federal government funded arts organisations (Fletcher, June 25, 2020). This is at odds with the Australia Institute’s call for a \$750 million rescue package for the arts industry (Farr 2020) in April. It is also unclear how, or whether, any of the funds will trickle down to the individuals who make art, perform the art, and live by the art.⁵⁵

4.43 ACE Open, a small-to-medium sized contemporary visual arts organisation in South Australia, received support through ‘the JobKeeper package and the cash flow stimulus’, and which enabled it to maintain economic activity while its physical spaces were closed.⁵⁶ It added that:

ACE Open was able to quickly respond to closures and pivot a physical exhibition of digital media works to a digital platform in a way that maintained the integrity of the work and increased access for audiences nationally and internationally, as well as continue to pay artists and writers for work/s presented online while the physical gallery was shutdown.⁵⁷

4.44 The Australian Academy of the Humanities noted that 95 per cent of creative and cultural businesses are small to medium sized businesses which includes many sole traders:

As with other industries, they have been hard hit by COVID-19 and there is evidence of disproportionate impacts. The Australian Bureau of Statistics’ latest labour force data shows revenues crashing and jobs losses in the order of 50 percent in some sectors.⁵⁸

⁵⁴ Mr Matthew Chesher, Director Legal and Policy, Media, Entertainment and Arts Alliance, *Committee Hansard*, Canberra/teleconference, 19 February 2021, p. 36.

⁵⁵ Stradbroke Chamber Music Festival, *Submission 70*, p. 4.

⁵⁶ ACE Open, *Submission 156*, p. 1.

⁵⁷ ACE Open, *Submission 156*, p. 2.

⁵⁸ The Australian Academy of the Humanities, *Submission 257*, p. 2.

- 4.45 The National Public Galleries Alliance (NPGA) asserted that without support:

The viability of some small-to-medium organisations is threatened due to the financial impact of long-term closures caused by COVID-19. This is particularly true for volunteer-run organisations reliant on visitors through their doors for income.⁵⁹

Commonwealth Government Budget Measures for 2021-22

- 4.46 On Tuesday, 11 May 2021, the Commonwealth Government announced budget measures to support Australia's creative and cultural sectors.

- 4.47 An additional \$85.4 million was allocated to the National Collecting Institutions for financial years 2021-22 and 2022-23, including \$32.4 million to directly support the delivery of public services and programs by eight major institutions. Capital works allocated funding for five of the institutions will assist with preserving Australia's cultural heritage, including:

- upgrades to public areas and replacement of the fire safety system at the Australian National Maritime Museum (ANMM);
- restoration work at the Bundanon Homestead and repairs to the Boyd Education Centre;
- replacement of end-of-life assets at the NGA to improve safety and support the ongoing care of the Gallery's collection valued at \$6.2 billion;
- refurbishment of the House of Representatives Chamber and critical building maintenance works at Old Parliament House; and
- replacement of the NLA's Heating Ventilation and Air Conditioning system.⁶⁰

- 4.48 The Australian Children's Television Foundation (ACTF) received an additional \$11.9 million over four years from 2021-22 to support the development and distribution of children's content.⁶¹

⁵⁹ National Public Galleries Alliance, *Submission 184*, p. 5.

⁶⁰ Department of Infrastructure, Transport, Regional Development and Communications, *Budget 2021-22*, <https://www.communications.gov.au/departamental-news/budget-2021-22>, accessed 12 May 2021. The National Collecting Institutions receiving the additional funding include: The Australian National Maritime Museum; Bundanon Trust; Museum of Australian Democracy; National Film and Sound Archive; National Gallery of Australia; National Library of Australia; National Museum of Australia; National Portrait Gallery of Australia; and, Old Parliament House.

- 4.49 Additional targeted support in response to the effects of COVID-19 were also announced by the Commonwealth Government, including the extension of the Temporary Interruption Fund to the end of 2021; the Supporting Cinemas' Retention, Endurance and Enhancement of Neighbourhoods (SCREEN) Fund to support independent cinemas; extension of the Restart Investment to Sustain and Expand (RISE) Fund for productions, festivals and events; reinstatement of the Producer Offset Rate for Australian film, set to 40 per cent as an ongoing measure; and grants for the Culture, Heritage and Arts Regional Tourism (CHART) Program.
- 4.50 Further funding for the mental health support service Support Act was also allocated.

Crisis Relief and Mental Health Support Services

- 4.51 Support Act is 'Australia's only charity providing crisis relief and mental health support to artists, crew and music workers'.⁶² Support Act was established in 1997 with the help of the Australasian Performing Right Association and Australasian Mechanical Copyright Owners Society (APRA AMCOS) and the Australian Recording Industry Association and Phonographic Performance Company of Australia (ARIA PPCA), and delivers crisis relief services to workers as a result of ill health, injury, mental health problem or other crises. Support Act has operated a wellbeing helpline since 2018, which is a free, confidential counselling service available to anyone working in the music or arts.⁶³
- 4.52 The public health emergency's immediate impact on the arts industry led to a huge demand for Support Act's services:

I guess it comes as no surprise when I say our services were quickly overwhelmed when the pandemic hit. We initially actually had to halt our crisis relief program while we tried desperately to raise funds to underwrite our response. I am pleased to say we received a fantastic response from both the music industry and music lovers across the country, who very quickly

⁶¹ Department of Infrastructure, Transport, Regional Development and Communications, *Budget 2021-22*, <https://www.communications.gov.au/departmental-news/budget-2021-22>, accessed 12 May 2021.

⁶² Mr Clive Miller, Chief Executive Officer, Support Act, *Committee Hansard*, Canberra/teleconference, 4 December 2020, p. 40.

⁶³ Support Act, *Who We Are*, <https://supportact.org.au/about-support-act/>, accessed 21 April 2021.

started to miss being able to go and see live music and also understood the very real challenges facing the artists and musicians they love.⁶⁴

- 4.53 The Commonwealth Government, through the Office of the Arts, gave a grant of \$10 million to provide crisis relief and wellbeing support for those workers affected by the public health emergency.⁶⁵ Support Act also receives funds from the music industry and its supporters, including from donations, sponsorship, community fundraising, appeals and promotions.
- 4.54 The Commonwealth Government's funding was highlighted by Support Act for the major impact it had on the ability to provide services:
- ...the real game changer for us came when the Australian government, through the Office for the Arts, committed \$10 million to Support Act in April to support our activities. That was really fantastic. It enabled us to scale up and provide financial support to artists, crew and music workers who were at risk of being evicted from their homes because they couldn't pay the rent or the mortgage, couldn't pay their utilities bill, couldn't fix the car, couldn't pay the kids' school fees or whatever it was.⁶⁶
- 4.55 Support Act indicated that by December 2020, half of the Commonwealth funding had been used to provide services and support. The 'safety net' provided by JobKeeper and JobSeeker was highlighted as being 'absolutely incredible' but the forthcoming reductions in the amounts to be received were also noted.⁶⁷
- 4.56 Support was able to be provided for arts workers battling mental health issues such as anxiety, depression and isolation. The helpline was extended with some of the Commonwealth Government funding, and Aboriginal and Torres Strait Islander community engagement social workers to allow reach to a different cohort of artists for the first time. Other initiatives include early intervention mental health and wellbeing programs:

We're currently providing mental health first aid training to hundreds of artists, artists' managers and crew, and this is really having a noticeable impact on the way people are engaging in the conversation around mental

⁶⁴ Mr Clive Miller, Chief Executive Officer, Support Act, *Committee Hansard*, Canberra/teleconference, 4 December 2020, p. 40.

⁶⁵ Support Act, *Who We Are*, <https://supportact.org.au/about-support-act/>, accessed 21 April 2021.

⁶⁶ Mr Clive Miller, Chief Executive Officer, Support Act, *Committee Hansard*, Canberra/teleconference, 4 December 2020, p. 40.

⁶⁷ Mr Clive Miller, Chief Executive Officer, Support Act, *Committee Hansard*, Canberra/teleconference, 4 December 2020, p. 40.

health. We hope it will really move the needle when it comes to helping to reduce the stigma and encourage more people to undertake help-seeking behaviours.⁶⁸

- 4.57 Six social workers are employed as part of the crisis relief programs, who process and assess applications for crisis relief, identify non-financial supports including referrals for people at risk of homelessness or mental health support. The helpline is managed by a not-for-profit Employee Assistance Program (EAP) with trained clinicians to provide counselling.
- 4.58 In March 2021, the Commonwealth Government announced that a further \$10 million would be allocated to Support Act to allow a quick response for the ‘artists, crew and music workers including sound and lighting technicians, managers, booking agents, promoters, venue workers and roadies still affected by COVID-19’.⁶⁹

Changing Models of Delivery: a Digital Focus

- 4.59 The challenges presented to Australians in 2020 and 2021 included bushfires, flooding, and the pandemic. These highlighted the need for industries, businesses, communities and individuals to innovate, pivot and adjust to new unanticipated realities. As one survey respondent stated:

We have had to adapt all work for artists and creative organisations to recognise the huge stress on the community. We have changed the way we work, administer, contract manage and support the arts and artists.⁷⁰

- 4.60 Another outlined how they had changed their business or work model in response to the pandemic: ‘Adapted my practice online; accepted more online publishing commissions; accepted commissions which engage creatively with the subject of the pandemic. Focalised/streamlined my projects’.⁷¹

⁶⁸ Mr Clive Miller, Chief Executive Officer, Support Act, *Committee Hansard*, Canberra/teleconference, 4 December 2020, p. 40.

⁶⁹ Office for the Arts, *COVID-19 Update*, <https://www.arts.gov.au/covid-19-update#:~:text=11%20April%202021%20%E2%80%94%20extension%20of,move%20their%20projects%20into%20production>, accessed 12 May 2021.

⁷⁰ Survey summary, p. 9.

⁷¹ Survey summary, p. 9.

- 4.61 As a result of COVID-19, ANA stated that ‘some creative and cultural industries have found ways to transition online (or were already there), and new types of digital consumption and engagement are emerging’.⁷² This digital transformation is accompanied by significant potential to increase accessibility to cultural and creative experiences.⁷³
- 4.62 A clearer picture has emerged of the longer-term impacts of the new ways of operating. The Australia Council for the Arts’ COVID-19 Audience Outlook Monitor is a tracking study which measures trends and audience sentiments surround the arts and cultural sector. Four ‘phases’ of the survey were conducted in May, July and September 2020, and March 2021.⁷⁴ In May 2020, 75 per cent of all audiences participated in a form of online or digital arts and culture activities, which dropped to 70 per cent in September 2020.⁷⁵
- 4.63 By contrast, as restrictions began to ease, the March 2021 phase of the survey found that 47 per cent of all audiences continued to participate in arts and culture activities online.⁷⁶ Although there was a marked decrease in digital attendance between May 2020 and March 2021 as venues were able to hold live events (with restricted numbers), there is evidence that attendance in some form will continue regardless of the format:

...those who have recently attended a performance in person are also more likely to be participating online (51% compared to 47% nationally), as both behaviours are driven by audiences’ strong engagement with arts and culture.⁷⁷

⁷² A New Approach, *Submission 131*, p. 25.

⁷³ A New Approach, *Submission 131*, p. 25.

⁷⁴ The Australia Council for the Arts, ‘COVID-19 Audience Outlook Monitor 2021’, 4 March 2021, <https://www.australiacouncil.gov.au/research/audience-outlook-monitor/>, accessed 9 April 2021.

⁷⁵ The Australia Council for the Arts, ‘Phase 3 COVID-19 Audience Outlook Monitor Australia Snapshot Report’, September 2020, p. 14, <https://www.australiacouncil.gov.au/research/wp-content/uploads/2020/09/COVID19-Audience-Outlook-Monitor-Phase-3.pdf>, accessed 9 April 2021.

⁷⁶ The Australia Council for the Arts, ‘COVID-19 Audience Outlook Monitor 2021’, 4 March 2021, <https://www.australiacouncil.gov.au/research/audience-outlook-monitor/>, accessed 18 March 2021.

⁷⁷ The Australia Council for the Arts, ‘March 2021 Audience Outlook Monitor Australia Snapshot Report’, 4 March 2021, p. 17, https://www.australiacouncil.gov.au/research/wp-content/uploads/2021/03/Audience-Outlook-Monitor_March2021_National_Snapshot_Report.pdf, accessed 18 March 2021.

- 4.64 This research also found that 37 per cent of users pay for online content (September 2020 levels were 39 per cent), indicating that there is ‘an enduring market for premium digital experiences’.⁷⁸
- 4.65 Solutions and conversations around innovation and pivoting in response to the pandemic focused heavily on digital responses, however Think Tank Dance Assembly raised concerns around this approach :

The digital realm is not the singular solution to resuscitate dance in this time of crisis. Live practice has to be reimagined and this innovative research needs to be led by artists, and those artists need to be paid for this work.⁷⁹

- 4.66 Ms Lamorna Nightingale drew attention to the flexibility of smaller companies and businesses in their capacity to meet the social-distancing requirements resulting from the pandemic:

At this time when larger companies are struggling with safety considerations involving large audiences, smaller companies can offer more intimate experiences for audiences and are able to pivot more quickly with creative solutions to the issues raised by COVID-safe compliance.⁸⁰

Livestreamed Events

- 4.67 The loss of live music performances has been profound, and APRA AMCOS asserted that since the lockdown in March 2020:

...it is fair to say that the Australian live music industry fell off a cliff. It has had a dramatic impact on APRA, and cost revenue specifically. We were down on our revenue forecasts by some \$25 million in the last financial year. In this current financial year, we were originally forecasting group revenue of approximately \$520 million. We now see that as sitting at about \$450 million. That is a combination of the direct impact on venues not being able to present live music because of COVID restrictions, but then there has been a domino effect where, for instance, radio stations have been impacted in terms of

⁷⁸ The Australia Council for the Arts, ‘COVID-19 Audience Outlook Monitor 2021’, 4 March 2021, <https://www.australiacouncil.gov.au/research/audience-outlook-monitor/>, accessed 18 March 2021.

⁷⁹ Think Tank Dance Assembly, *Submission* 66, p. 8.

⁸⁰ Ms Lamorna Nightingale, *Submission* 40, p. 2.

advertising revenue, which flows through and impacts the royalties we collect and pass on to our members.⁸¹

- 4.68 In response to the inability to tour, livestreamed music performances have been embraced by many in the music industry, and more broadly across the performing arts.⁸² The PPCA contended that:

While the consumption of music through online streaming remains steady, and for some artists has become their only income stream, revenues raised from digital music platforms or virtual concerts cannot replace the loss of opportunities and income derived from live touring and public performance royalties. These difficulties are also compounded by the current Australian legislative framework which does not provide robust protection or safeguards for music rights holders and artists from the scourge of unauthorised use of their work online, when their content is uploaded by third parties on commercial platforms which deliver minimal or no remuneration to the rights holders and artists for the use of an artist's work on these platforms.⁸³

- 4.69 Livestreaming creative performances was commonly noted by inquiry participants, with benefits for artists and peripheral arts workers noted to include improved digital skills, revenue and wider audience reach.⁸⁴

- 4.70 Musica Viva Australia experienced some success in implementing a 'pay-what-you-can model' for attendance at digital-streamed events:

We wanted to offer a performance at anything from \$5 to \$25, acknowledging that many people were impacted economically at the time but wanted to keep that sense of paying for a ticket and valuing the artist's work. The number of people who were really happy to pay at the high end, as well as those who clearly valued the opportunity to access music at a lower amount, was quite interesting.⁸⁵

⁸¹ Mr Dean Ormston, Chief Executive Officer, Australasian Performing Right Association and Australasian Mechanical Copyright Owners Society (APRA AMCOS), *Committee Hansard*, Canberra/teleconference, 13 November 2020, p. 44.

⁸² Phonographic Performance Company of Australia, *Submission 147*, p. 2.

⁸³ Phonographic Performance Company of Australia, *Submission 147*, p. 2.

⁸⁴ Ms Xani Colac, *Submission 93*, p. 6; Settlement Services International, *Submission 129*, pp. 11-12; Australian Digital Alliance and Australian Libraries Copyright Committee, *Submission 206*, p. 1; Lakespeare and Co, *Submission 226*, p. 4; Australian Live Music Business Council, *Submission 298*, p. 7; Create NSW, *Submission 346*, p. 32.

⁸⁵ Ms Anne Frankenberg, Deputy Chief Executive Officer, Musica Viva Australia, *Committee Hansard*, Canberra, 4 December 2020, p. 27.

- 4.71 Despite these examples of successful online delivery, Dr Charlotte Wood explained that the transition to online events has not always been financially successful for bookstores and authors. Book launches and author conversations, particularly for emerging writers, are usually an integral part of a book promotion campaign. Although these forms of promotion have been adapted to online formats, Dr Wood expressed concern at the drop in revenue:

One very well-established bookseller here in Sydney who has been running constant online events told me that it hasn't been translating to sales in the way it would with an in-store event. With a few surprising exceptions, event related books sales are down by 90 per cent.⁸⁶

- 4.72 Similarly, Writers South Australia stated that despite the 'entrepreneurial response' of writers' centres to support events, workshops, book launches and similar in a remote environment, they 'broadly suffered significant financial losses, and expect more to come with Australia in recession and travel restrictions limiting the earning potential of event-based organisations'.⁸⁷
- 4.73 The experience of digital fatigue was noted by the Australia Council which found that 'some audiences are tiring of digital experiences and face barriers to online participation'.⁸⁸
- 4.74 First Nations Performing Arts Sector contended that while some Aboriginal and Torres Strait Islander artists have turned to online platforms, others have not 'because they not have the skills or desire to do so'.⁸⁹ One artist shared: 'I am not an online artist, and believe I should leave that online world to those who have always specifically created content and art for that medium I long for live theatre'.⁹⁰
- 4.75 Entertainment Assist stated that 'the entertainment industry is amongst the first to close, and amongst the last to resume, leaving many individuals, sole

⁸⁶ Dr Charlotte Wood, private capacity, *Committee Hansard*, Canberra/teleconference, 13 November 2021, p. 28.

⁸⁷ Writers South Australia, *Submission 277*, p. 6.

⁸⁸ The Australia Council for the Arts, 'COVID-19 Audience Outlook Monitor 2021', 4 March 2021, <https://www.australiacouncil.gov.au/research/audience-outlook-monitor/>, accessed 18 March 2021.

⁸⁹ First Nations Performing Arts Sector, *Submission 309*, p. 6.

⁹⁰ First Nations Performing Arts Sector, *Submission 309*, p. 6.

traders and small businesses out of work for longer periods than those in other sectors'.⁹¹

Online Classes

- 4.76 Digital classrooms have become a popular medium for outreach and public engagement, but this medium may not suit all mediums or artists⁹² Ausdance National highlighted that while 'some small businesses have been able to pivot their offerings (e.g. shifting dance classes online via Zoom), others have found it either unprofitable or an unsatisfactory way of teaching and learning in dance'.⁹³
- 4.77 Sydney Dance Company noted that while they have rapidly adjusted to deliver online content, not all content have been financially profitable. While some digital outputs, such as online classes, have been easily monetised, the Sydney Dance Company has been unable to monetise 'artistic content due to the complexities and expense of licenses and union agreements'.⁹⁴
- 4.78 While the transition to online learning has presented challenges, Writing Western Australia (Writing WA) have found this to uncover opportunities 'with the creation of new content and resources that deliver increased value for education providers and consumers'.⁹⁵ This new content adds 'value specifically in the digital environment', and Writing WA suggested stimulus funding to support content development and marketing as an avenue through which this innovation could be further explored.⁹⁶
- 4.79 Ms Xani Kolac stated that as a music teacher she found it necessary to learn to teach music via online and digital platforms to safeguard her income.⁹⁷

⁹¹ Entertainment Assist, *Submission 153*, p. 2.

⁹² Professor Terry Flew and Katherine Kirkwood, *Submission 344*, p. 5; Think Tank Dance Assembly, *Submission 66*, p. 6; The Australian Ballet School, *Submission 149*, p. 7; Sydney Dance Company, *Submission 212*, p. 7.

⁹³ Ausdance National, *Submission 306*, p. 6.

⁹⁴ Sydney Dance Company, *Submission 212*, p. 4.

⁹⁵ Writing Western Australia (WA), *Submission 144*, p. 4.

⁹⁶ Writing Western Australia (WA), *Submission 144*, p. 5.

⁹⁷ Ms Xani Kolac, *Submission 93*, p. 5.

- 4.80 The Australian Youth Orchestra also ceased in-person training and moved to digital platforms stating:

Our plan was to provide 600 places during 2020 – this was reduced to 240 in person and we created 125 new online program places. We have been unable to deliver any in-person music teacher mentor training this year and the number of in classroom sessions was significantly reduced due to school restrictions on visitors and musical activity in particular singing.⁹⁸

Equity of Access

- 4.81 Equity of access to arts and cultural activities for all was identified as of importance by many stakeholders.⁹⁹ Not all people living in Australia enjoy the same access to arts and cultural participation, production or consumption, with particular groups including Aboriginal and Torres Strait Islander peoples, those affected by socioeconomic disadvantage, regional or older people, those from culturally and linguistically diverse backgrounds, and people living with disability facing greater barriers.¹⁰⁰

- 4.82 Diversity Arts noted some benefits, and some challenges, in moving to online events:

Diversity Arts has moved our launches, talks and events online, as have many of our partners, and many people living in regional or remote places and artists living with disability have reported that digital access has led to greater access for them (online attendance, captioning, sign language interpreters). However, there are a range of limitations for organisations and audiences to access including hardware and software costs, online subscriptions (webinars, services such as Zoom), reliable internet, technical support, and the need to invest in new ways to engage with audiences.¹⁰¹

- 4.83 Create NSW found that certain groups wanted to participate digitally with arts more than others. This included people with disability (71 per cent), caregivers to older adults (66 per cent) and parents of children aged under

⁹⁸ Australian Youth Orchestra, *Submission 302*, p. 3.

⁹⁹ See for example: Professor Rachel Fensham, *Submission 248*, p. 7; Country Arts South Australia, *Submission 110*, p. 4; Settlement Services International, *Submission 129*, p. 11; and Arts Access Australia, *Submission 168*, p. 1.

¹⁰⁰ Diversity Arts Australia, *Submission 281*, p. 7; Department of Infrastructure, Transport, Regional Development and Communications (Office of the Arts), *Submission 293*, p. 19; City of Sydney, *Submission 311*, p. 7; Create NSW, *Submission 346*, p. 15.

¹⁰¹ Diversity Arts Australia, *Submission 281*, p. 9.

six (68 per cent).¹⁰² Further, 45 per cent of people with disability were found to be more likely to want an option to attend performances either in-person or watch a livestream. This was compared with an average of 36 per cent for all respondents. Create NSW suggests confirms 'the role for digital in expanding access to the arts'.¹⁰³

- 4.84 Although there has been significant uptake by regional artists in webinars, seminars and online sales, regional audiences have faced challenges in accessing online content. Regional Arts Australia (RAA) drew attention to the 'digital divide' which continues to exclude some Australians from participation in the arts.¹⁰⁴ According to a survey by Regional Arts New South Wales, 'three quarters of respondents of the respondents reported connectivity issues'.¹⁰⁵ Furthermore, issues with the availability of the National Broadband Network (NBN) were identified:

For those not currently using the NBN, 24% have applied, 24% intend to apply, 14% do not plan to apply and for 38%, the NBN is not available. For those with NBN network connections, 68% have been connected for less than 2 years. For those who have applied for an NBN connection more than 20% have waited more than 12 months, while 40% have been waiting 6-12 months.¹⁰⁶

- 4.85 The experience of digital exclusion and inequity appears to be determined by the type of arts or culture organisation and their location; national institutions and organisations based in capital cities generally experience fewer barriers and have 'better access to skills' compared with the rest of the arts and culture sector.¹⁰⁷ Ms Indigo Holcombe-James drew attention to limited digital inclusion in Indigenous art centres and regional community museums:

Although the buildings in which Indigenous art centres are situated tend to be digitally connected, this does not always extend to the artists themselves, with digital participation remaining the preserve of the non-Indigenous art centre managers. In turn, although community museums are increasingly using online cataloguing platforms, the digital inequity confronted by their elderly

¹⁰² Create NSW, *Submission 346*, p. 32.

¹⁰³ Create NSW, *Submission 346*, p. 32.

¹⁰⁴ Regional Arts Australia, *Submission 63*, p. 9.

¹⁰⁵ Regional Arts Australia, *Submission 63*, p. 9.

¹⁰⁶ Regional Arts Australia, *Submission 63*, p. 10.

¹⁰⁷ Ms Indigo Holcombe-James, *Submission 218*, p. 2.

volunteers profoundly influences their capacity to accurately and effectively catalogue these items, thereby impeding their accessibility.¹⁰⁸

- 4.86 RAA noted that ‘access to digital platforms, services and resources is not equal’, which RAA suggested was a restraining factor in the capacity of their members’ practice, and businesses in response to COVID-19.¹⁰⁹ In a similar vein, Latrobe City Council asserted that:

In regional areas a capacity and resource gap is limiting access to digital engagement as audiences, artists, producers and presenters do not have the network infrastructure or available equipment to view or broadcast livestream and video content.¹¹⁰

- 4.87 Latrobe City Council added that there are structural inequalities in regions with significant social and economic disadvantage, and suggested target investment to establish ‘community based media production capability, and training programs that enable local creative capacity could unlock digital export as a viable option for regional creative industries’.¹¹¹

Concluding Comments

- 4.88 The enormous disruption of the COVID-19 public health emergency had immediate and shocking effects on all sectors of the economy. Australia’s creative and cultural industries and institutions were hit by the effects of the emergency as venues such as theatres, galleries, performance spaces and classes were closed.
- 4.89 Some were able to move to online platforms to deliver classes, livestream music or comedy performances, and create digital content in response to the restrictions. Others were less able to transition, with a range of barriers experienced including lack of access to digital connectivity, lack of resourcing to create or move content to the digital space, lack of suitability of the medium of art to the digital space, and issues regarding access by the audience.

¹⁰⁸ Ms Indigo Holcombe-James, *Submission 218*, p. 2.

¹⁰⁹ Regional Arts Australia, *Submission 63*, p. 9.

¹¹⁰ Latrobe City Council, *Submission 23*, p. 6.

¹¹¹ Latrobe City Council, *Submission 23*, p. 6.

- 4.90 Australians have been living with some level of restrictions, rules and uncertainty for some time now, and this may continue as global efforts to control the public health emergency continue.
- 4.91 The work already undertaken by individuals and organisations creating Australia's arts to strengthen their ability to survive will most likely continue to serve them well as Australians adapt to the pandemic and its challenges. However, there are enormous risks that many individuals and organisations will not be able to continue to create the way they have in the past, or continue at all.
- 4.92 The Committee is grateful to all those who took the time to participate in the inquiry, during what was a stressful and uncertain time. The Committee appreciates that Australia's artistic community is experiencing unprecedented hardships at a time when the need for artistic content has been extremely high.
- 4.93 The arts has undoubtedly helped a great number of Australians to cope with the pressures of the pandemic, with the isolation of living with lockdowns, and the uncertainty that is now part of our lives.
- 4.94 The Committee commends the work of Support Act in delivering crisis relief and mental health support. This type of support has never been more vital to those working as artists, crew or music workers. The Committee appreciates the need for this type of service, and recognises the funding provided by the Commonwealth Government to allow this type of in-industry support to be provided. The Committee notes the recent announcement of a further \$10 million in funding for Support Act to allow further crisis support to be provided.
- 4.95 The Committee encourages arts workers in need of crisis relief or mental health services to seek help from Support Act.

Recommendation 11

- 4.96 **The Committee notes the additional funding allocated to Support Act in the 2021-22 budget, and recommends that the Commonwealth Government continue to monitor and assess the need for further funding to Support Act as the public health emergency continues.**
- 4.97 **The Committee invites Support Act to update the Committee on its work by June 2022.**

5. STEM to STEAM

Overview

- 5.1 School education in Australia is a responsibility of State and Territory Governments, including the registration and regulation of all schools and the operation of government schools. Schools, from Foundation to Year 10, receive funding from both their State or Territory Government and the Commonwealth Government, and ‘national education policy is decided by all governments working together through the National Cabinet’.¹
- 5.2 Australian, State and Territory government ministers responsible for education attend the Education Ministers Meeting, which is a forum for collaboration and decision-making on early childhood education and care; school education; higher education; and international education. The meeting is chaired by the Commonwealth Minister for Education. The National School Reform Agreement is ‘a joint agreement between the Commonwealth, States and Territories to lift student outcomes across Australian schools’.²
- 5.3 In 2020, 65.6 per cent of students in Australia attended Government schools, while 34.4 per cent of students attended Non-Government schools.³ The

¹ Department of Education, Skills and Employment, ‘Quality Schools Package: How are schools funded in Australia?’, 19 January 2021, <https://www.dese.gov.au/quality-schools-package/fact-sheets/how-are-schools-funded-australia>, accessed 29 March 2021.

² Department of Education, Skills and Employment, The National School Reform Agreement, <https://www.dese.gov.au/quality-schools-package/national-school-reform-agreement> accessed 24 May 2021.

³ Department of Education, Skills and Employment, ‘Quality Schools Package: How are schools funded in Australia?’, 19 January 2021, <https://www.dese.gov.au/quality-schools-package/fact-sheets/how-are-schools-funded-australia>, accessed 29 March 2021.

State and Territory Governments are the majority public funders of Government schools while the Commonwealth Government is the majority public funder of Non-Government schools.⁴

5.4 The Australian Curriculum guides what students should learn, regardless of where they live or the school they attend. It includes:

- eight key learning areas—English, Mathematics, Science, Humanities and Social Sciences, Health and Physical Education, Languages, Technologies and the Arts;
- seven general capabilities—literacy, numeracy, information and communication technology capability, critical and creative thinking, personal and social capability, intercultural understanding, and ethical understanding; and
- three cross-curriculum priorities—sustainability, Asia and Australia's engagement with Asia, and Aboriginal and Torres Strait Islander histories and cultures.⁵

5.5 As one of the 8 key learning areas, the arts is set out in the Australian Curriculum as:

...a learning area that draws together related but distinct art forms. While these art forms have close relationships and are often used in interrelated ways, each involves different approaches to arts practices and critical and creative thinking that reflect distinct bodies of knowledge, understanding and skills. The curriculum examines past, current and emerging arts practices in each art form across a range of cultures and places.

The Australian Curriculum: The Arts comprises five subjects:

- Dance;
- Drama;
- Media Arts;
- Music; and
- Visual Arts.⁶

⁴ Department of Education, Skills and Employment, 'Quality Schools Package: How are schools funded in Australia?', 19 January 2021, <https://www.dese.gov.au/quality-schools-package/fact-sheets/how-are-schools-funded-australia>, accessed 29 March 2021.

⁵ Department of Education, Skills and Employment, 'Australian Curriculum', <https://www.dese.gov.au/australian-curriculum>, accessed 12 April 2021.

Arts Benefits in Education

- 5.6 Research by the Macquarie School of Education, Macquarie University, explained that:

Arts-rich learning has a powerful impact on equalising educational disadvantage experienced by young children who are economically disadvantaged, improving emergent literacy, and giving children an advantage in all areas of school readiness.⁷

- 5.7 Inquiry participants drew attention to the value of arts and cultural education at all ages of a child's schooling journey; from Macquarie School of Education's focus on early learning in the arts, through to the University of Melbourne's focus on positive outcomes derived for young adults through their engagement with theatre, who found that:

... connection can lead to students being given opportunities they might not otherwise receive because they're perceived as 'difficult' or 'stupid' improving their educational outcomes, which has knock-on effects into their adult years.⁸

- 5.8 The 2019 National Arts Participation Survey found that Australians increasingly agree that 'the arts and creativity impact child development' with 63 per cent agreeing with this statement, representing an increase of 13 per cent from 2016.⁹ Further, the proportion of Australians who agree that 'the arts should be an important part of education' has increased by 12 per cent up to 73 per cent.¹⁰

- 5.9 In a similar vein, Symphony Services Australia added that:

An arts-rich education has been shown to improve students' engagement at school, their motivation and memory, and increases the creative skills that a post-COVID workforce will require. The business leaders of the future will

⁶ Australian Curriculum, *The Arts: Introduction*, <https://www.australiancurriculum.edu.au/f-10-curriculum/the-arts/introduction/>, accessed 25 May 2021.

⁷ Macquarie School of Education, Macquarie University, *Submission 158*, p. 3.

⁸ Dr Jennifer Beckett, Professor Rachel Fensham, Dr Lynne Kent, Associate Professor Paul Rae, *Submission 248*, p. 5.

⁹ Australia Council for the Arts, 'Creating Our Future: Results of the National Arts Participation Survey', August 2020, p. 63, <https://www.australiacouncil.gov.au/research/creating-our-future>, accessed 12 April 2021.

¹⁰ Australia Council for the Arts, 'Creating Our Future: Results of the National Arts Participation Survey', August 2020, p. 63, <https://www.australiacouncil.gov.au/research/creating-our-future>, accessed 12 April 2021.

require creative thinking and there is a strong correlation between engagement with the arts in childhood, and later innovation and entrepreneurship.¹¹

5.10 The National Association for the Visual Arts (NAVA) highlighted the well-known benefits students derive from arts education including:

...creativity, innovation, agility, intellectual curiosity, resourcefulness, exploratory thinking, communication, teamwork, problem solving, emotional judgement, professional ethics, global citizenship, entrepreneurship and the courage to take risks. These qualities are essential for the 21st century working environment. Further, Australians believe that when children are exposed to, and participate in, arts and culture they develop better self-esteem, self-expression, social and intellectual skills, and preparation for the future.¹²

5.11 The Australian Society of Authors (ASA) drew attention to the 'substantial body of research that attests to the significant and diverse benefits of music generally and music education more specifically'.¹³ ASA drew attention to the following benefits derived from music education:

- Improves learning capacity;
- Boosts academic performance in English, Maths and Science;
- Supports reading and numeracy skills;
- Improves cognitive connectivity and efficiency;
- Increases attention stamina and focus;
- Decreases stress and anxiety;
- Improves self-regulation;
- Hones neural synchronisation to enhance learning;
- Improves social skills and personal wellbeing; and
- Heightens empathy and valuing of diversity.¹⁴

5.12 Dr Kate Grenville highlighted that Australian literature is an important learning resource:

Australian books create Australian course content for schools and universities. This matters because it's an important way in which students learn to think

¹¹ Symphony Services Australia, *Submission 169*, p. 3.

¹² National Association for the Visual Arts, *Submission 256*, p. 6.

¹³ Australian Society of Authors, *Submission 327*, p. 4.

¹⁴ Australian Society of Authors, *Submission 327*, pp. 4-5.

about the society they're part of, and of which they'll become citizens. Without a rich body of our own Australian literature, the education of Australian young people becomes second-hand British or American.¹⁵

5.13 While acknowledging the 'essential' nature of the arts in schools, A New Approach (ANA) drew attention to the importance of engaging 'young people who are not engaged in the school system'. The capacity for the arts to connect disengaged young people with education is found in the work of Somebody's Daughter Theatre Company (SDTC). SDTC uses the arts 'as the bridge to education and inclusion', working in extremely marginalised communities.¹⁶ Of the young people SDTC has worked with, 90 per cent have completed their relevant year level at school.¹⁷

5.14 ANA also drew attention to the very high participation rate in creative programs by school-aged children:

The participation rate for young people aged five to 14 is 95.6 per cent. That's participation in creating or performing outside of school. This is an area where young people love participating. Those school programs are absolutely essential to create shared experiences amongst student bodies to develop the skills and connections that we know, from the evidence, have an incredible impact on their learning across a whole range of different ways. School based programs are fantastic.¹⁸

Snapshot of Australia's Arts Education Landscape

5.15 Arts education in schools is supported at State, Territory and Commonwealth Government levels. The Australian Curriculum arts component comprises the following:

The curriculum is based on the assumption that all students will study the five arts subjects from Foundation to the end of primary school. Schools will be best placed to determine how this will occur. From the first year of secondary school (Year 7 or 8), students will have the opportunity to experience one or more arts subjects in depth. In Years 9 and 10, students will be able to

¹⁵ Dr Kate Grenville, *Submission 26*, p. 3.

¹⁶ Somebody's Daughter Theatre Company, *Submission 235*, p. 2.

¹⁷ Somebody's Daughter Theatre Company, *Submission 235*, p. 4.

¹⁸ Ms Kate Fielding, Program Director, A New Approach, *Committee Hansard*, Canberra/videoconference, 13 November 2020, p. 7.

specialise in one or more arts subject. Subjects offered will be determined by state and territory school authorities or individual schools.¹⁹

5.16 All States and Territories follow the above model, as well as any unique arts education programs or curriculum they have developed. For example, the Queensland Government supports the following programs and organisations:

- Creative Generation—State Schools Onstage: Queensland's largest youth performing arts event with more than 1500 students;²⁰
- Creative Generation Excellence Awards in Visual Art, which recognises and promotes excellence in senior visual art education throughout Queensland state and non-state schools;²¹
- Artist in Residence—program partnership with the Queensland Department of Education and Queensland Art Gallery and Gallery of Modern Art;²² and
- Queensland Music Festival (QMF) — grant to support state school engagement in the QMF Score It! Film Composition Program.

5.17 The Tasmanian Government drew attention to the importance of leveraging collaborative partnerships to support arts offerings. In 2018, Tasmanian high school media teachers were given a unique opportunity to get an up close look at what it takes to make the smash-hit ABC comedy *Rosehaven*, allowing them to 'to see how a professional production team works together'. Then-Minister for Education and Training, Jeremy Rockliff, stated that the opportunity had many benefits and had been a collaborative effort and were organised by the *Rosehaven* production team, Screen Tasmania and the Department of Education:

During the visits, teachers have had dedicated time with the producers getting an overview of the development and production of the series and have been on the shooting set - in the thick of the action and behind the monitors watching with the director.

¹⁹ The Australian Curriculum, 'The Arts: Structure', <https://www.australiancurriculum.edu.au/f-10-curriculum/the-arts/structure/>, accessed 12 April 2021.

²⁰ Queensland Government, Creative Generation—State Schools Onstage, <https://creativegeneration.education.qld.gov.au/cgen>, accessed 12 April 2021.

²¹ Queensland Government, Creative Generation— Excellence Awards in Visual Art, <https://creativegeneration.education.qld.gov.au/visual-art>, accessed 12 April 2021.

²² Queensland Government, In residence, <https://creativegeneration.education.qld.gov.au/visual-art/inresidence>, accessed 12 April 2021.

This has enabled the teachers to learn more about the skills involved in filming on location, costume, production design and editing on a major professional production.²³

- 5.18 In a similar vein, the Victorian Government has worked to link artists with education and, in response to the COVID-19 public health emergency, created the Creative Workers in Schools program to support 150 creative workers to undertake a 6 month residency in a Victorian government primary or secondary school.²⁴ During the program, creative workers receive training and mentorship and ‘will work with teachers and students to design and deliver a creative project that will support learning across the Victorian Curriculum from Foundation to Year 10’.²⁵
- 5.19 The Western Australian highlighted its commitment to providing quality curriculum so that students become ‘confident, creative learners and active, informed citizens who contribute positively to society’.²⁶ The Western Australian Government drew attention to their pre-primary to Year 10 program, which they also provide further funding to develop a range of teacher support materials:

The Arts learning area comprises of five subjects: Dance, Drama, Media Arts, Music and Visual Arts. The Arts Curriculum is written on the basis that all students will study at least two Arts subjects from Pre-primary to the end of Year 8. It is a requirement that students study a performance subject and a visual subject each year. Having had that opportunity, students are then able to determine whether to continue into Years 9 and 10 with further specialisation.²⁷

- 5.20 Furthermore, the Western Australia Government offers Dance, Design, Drama, Media Production and Analysis, Music, Visual Arts, and Creative

²³ Jeremy Rockliff, Minister for Education and Training and Michael Ferguson, Acting Minister for the Arts, ‘Teachers take a tour on set of Rosehaven’, *Media Release*, 26 July 2018, http://www.premier.tas.gov.au/releases/teachers_take_a_tour_on_set_of_rosehaven, accessed 25 May 2021.

²⁴ Creative Victoria, *Creative Workers in Schools*, <https://creative.vic.gov.au/grants-and-support/programs/creative-workers-in-schools>, accessed 25 May 2021.

²⁵ Creative Victoria, *Creative Workers in Schools*, <https://creative.vic.gov.au/grants-and-support/programs/creative-workers-in-schools>, accessed 25 May 2021.

²⁶ Western Australian Government, *Submission 354*, p. 2.

²⁷ Western Australian Government, *Submission 354, Attachment 1*, p. 2.

Industries as ATAR, general and Vet industry specific levels, respectively, throughout Year 11 and 12.²⁸

5.21 The Western Australian Government also provides funding for the following organisations:²⁹

- Western Australian Primary Schools Massed Choir;
- Western Australian Government Schools Music Society;
- Performing Arts Perspectives;
- FORM Creative Schools Program;
- The Literature Centre;
- Pulse Perspectives;
- Gifted and Talented Arts;
- Teacher Development Schools; and
- Australian Children's Television Foundation (ACTF)

5.22 The Northern Territory Government drew attention to the importance of arts education, and the Territory's Indigenous languages and culture (ILC) program. The Northern Territory Government stated that the ILC curriculum 'encourages students to engage with cultural knowledge and content within the conceptual framework of a specific language and community'.³⁰ Approximately 1,200 students from Years 4 to 12 are enrolled in regular music and perform arts curriculum programs.³¹

²⁸ Western Australian Government, *Submission 354, Attachment 1*, pp. 6-9.

²⁹ Western Australian Government, *Submission 354, Attachment 3*, pp. 1-2.

³⁰ Northern Territory Government, *Submission 352*, p. 1.

³¹ Northern Territory Government, *Submission 352*, p. 2.

5.23 Additionally, the Northern Territory Government also invest in the following programs:

- Exit Art – an annual visual arts exhibition held at the Museum and Art Gallery.
- Artists in Schools Grants – a program that provides students, teachers and the community with first-hand opportunities to work with professional artists in all art forms.
- Professional teaching organisations including: Art Educators of the NT, Drama Territory, Australian Teachers of Music-NT, and Australian Teachers of Media-NT.³²

5.24 NAVA emphasised the importance of a healthy and vibrant arts and cultural sector, recommending key art forms be included as core mandatory subjects in national curriculum; the inclusion of creativity across all facets of education delivery in schools; expansion of the Artist in Schools programs; and access to student loans for anyone studying arts and creative courses at TAFE or university.³³

5.25 Dr Alison Richards asserted that:

The most recent reforms to Higher Education funding will only further exacerbate this unfortunate trend, with cuts to communication and creative arts, especially performing arts, programs already evident as universities struggle with unprecedented budgetary shortfalls. While no doubt an unintended consequence of efforts to encourage students into STEM programs, the impact on teaching, learning and research pathways supporting work in the creative and cultural industries is likely to be catastrophic.³⁴

Music Education in Australia

5.26 Education is managed by State and Territory Governments with music education demonstrating considerable variability between types of schools.³⁵

5.27 There has been an effort to standardise music education in Australia within the National Curriculum.³⁶ The Australian Curriculum was initially

³² Northern Territory Government, *Submission 352*, p. 2.

³³ National Association for the Visual Arts, *Submission 256*, p. 7.

³⁴ Dr Alison Richards, *Submission 300*, p. 6.

³⁵ Alberts and The Tony Foundation, *Exhibit 30*, pp. 33-34.

³⁶ Alberts and The Tony Foundation, *Exhibit 30*, p. 33.

introduced by the Australian Government in December 2010, and has since undergone continuous reviews.³⁷

- 5.28 The Australian Curriculum covers major areas of education, but has been criticised for not sufficiently covering music education and providing little to no direction in this area.³⁸ Alberts and The Tony Foundation highlighted that this leaves school principals with the ability to determine the level and depth of music education within each school.³⁹
- 5.29 Mr Tim Hansen, a specialist music teacher from New South Wales, was of the view that music education, and music success, depends on funding at all levels of the 'arts ecosystem'. Specifically, he was of the view that the 'grass level' of music, organisations such as youth orchestras, required more an increase in funding.⁴⁰ This included funding for those professionals providing training and expertise to educate young musicians, therefore making such teaching more affordable for professional-level musicians to undertake:
- It doesn't have to be billions and billions of dollars; it just has to be enough so that they can function and the professionals involved — say, the conductor, the director and the tutors — can make a living doing it. Again, we're not going to be driving around in Mercedes. I'm not asking for that. It's a job; it's not a hobby. It's how people pay the rent and save up for their future, just like with any other job.⁴¹
- 5.30 Musica Viva Australia tours to more than 250,000 primary school children across Australia, in regional and metropolitan areas, and provides curriculum-aligned digital resources and teacher professional development. Musica Viva supports specialist music teachers and generalist classroom teachers to bring music education to students, along with delivering concerts and educational programs. Young Australian musicians can participate in a

³⁷ Australian Curriculum, 'About the Australian Curriculum', <https://www.australiancurriculum.edu.au/about-the-australian-curriculum/>, accessed 12 May 2021.

³⁸ Alberts and The Tony Foundation, *Exhibit 30*, p. 33.

³⁹ Alberts and The Tony Foundation, *Exhibit 30*, p. 33.

⁴⁰ Mr Tim Hansen, private capacity, *Committee Hansard*, Canberra/videoconference, 19 February 2021, p. 29.

⁴¹ Mr Tim Hansen, private capacity, *Committee Hansard*, Canberra/videoconference, 19 February 2021, p. 29.

national Masterclass program, the FutureMakers artistic leadership program, competitions and championships.⁴²

5.31 Musica Viva critiqued the lack of current data on the music education landscape, and noted that the 2013 Music Council of Australia's Research Report, *Music to our Ears* found that:

- 63% of primary schools offer no classroom music;
- 34% of secondary schools offer no classroom music;
- Only in the states of Queensland and Tasmania is music a part of the primary school curriculum in government schools and taught by specialist music teachers;
- Less than a quarter of government schools (primary and secondary) offer a program that would meet the standard of music education in the National Review; and
- Over three quarters of independent schools meet this standard.⁴³

5.32 Further, Musica Viva found that:

A common element of all studies has been the issue of lack of specialist music teachers, and the lack of skills and confidence among generalist classroom teachers tasked with teaching music. A driver of this is the lack of music training available to pre-service teachers, an area of Commonwealth oversight.⁴⁴

5.33 The Roundtable of Instrumental, Vocal and Music Education Organisations (RIVMEO), raised concern that 'where public schools have instrumental and vocal music programmes, band, orchestra, choir, in most cases these are organised and resourced by the parent body'.⁴⁵ This leads to barriers to participation for children attending schools in low socio-economic areas:

There is a huge equity issue here. Many programmes have shown that learning an instrument and participating in band, orchestra or choir is highly effective among students who are disadvantaged.⁴⁶

⁴² Musica Viva Australia, *Submission 272*, p. 2.

⁴³ Musica Viva Australia, Answers to questions on notice, public hearing, Canberra, 4 December 2020, p. 2.

⁴⁴ Musica Viva Australia, Answers to questions on notice, public hearing, Canberra, 4 December 2020, p. 2.

⁴⁵ Roundtable of Vocal, Instrumental and Music Education Organisations, *Submission 330*, p. 4.

⁴⁶ Roundtable of Vocal, Instrumental and Music Education Organisations, *Submission 330*, p. 4.

Turning STEM into STEAM

5.34 Science, Technology, Engineering and Mathematics (STEM) subjects are a major focus of the Australian Curriculum, with ‘significant funding’ provided through the Department of Education, Skills and Employment (DESE) ‘for initiatives to improve the teaching and learning of STEM in early learning and schools’.⁴⁷ While acknowledging the value of STEM subjects, numerous inquiry participants suggested that the focus on STEM should be reframed to STEAM (Science, Technology, Engineering, Arts and Mathematics).⁴⁸ Dr Megan Walsh elaborated:

...the data shows us that a focus on STEM is unbalanced, that scholastic performance and learning improves through a combination of arts with science, technology, engineering and mathematics. As an educator for over thirty years I have witnessed these learning improvements first hand when the arts are combined with STEM subjects.⁴⁹

5.35 Professor Stuart Cunningham and Dr Marion McCutcheon suggested that Australia develop a new research and development body, modelled after the United Kingdom’s charity Nesta, which operates as an ‘innovation agency to create social good’.⁵⁰ Professor Cunningham and Dr McCutcheon proposed ‘Nesta AU’:

...should start as a research unit with a remit to develop targeted research and information that facilitates a more productive and holistic approach to innovation with a specific brief to effectively incorporate CCII into innovation policy, programs and strategy. It could be funded by government at all three levels and by philanthropy.⁵¹

⁴⁷ Department of Education, Skills and Employment, ‘Support for Science, Technology, Engineering and Mathematics (STEM)’, 22 October 2020, <https://www.dese.gov.au/australian-curriculum/support-science-technology-engineering-and-mathematics-stem>, accessed 13 April 2021.

⁴⁸ See for example: Australian Theatre for Young People, *Submission 29*, p. 4; The Pack Australia, *Submission 39*, pp. 8-9; Australian Children’s Television Foundation, *Submission 152*, p. 10; Stage Queensland, *Submission 170*, p. 3; Australian Academy of the Humanities, *Submission 257*, pp. 3-4; and Ms Barbara Doran, *Submission 282*, pp. 1-2.

⁴⁹ Dr Megan Walsh, *Submission 34*, p. 2.

⁵⁰ Professor Stuart Cunningham and Dr Marion McCutcheon, *Submission 45*, p. 27; Nesta, *About us*, <https://www.nesta.org.uk/about-us/>, accessed 13 April 2021.

⁵¹ Professor Cunningham and Dr McCutcheon, *Submission 45*, p. 27.

- 5.36 Ms Barbara Doran's submission drew attention to the creativity and experimentation which the arts facilitate, suggesting that 'this is a space that is also common to engineers, designers, scientists, technical innovators and inventors'.⁵²
- 5.37 This was further echoed by the Australian Council of University Art and Design Schools (ACUADS), who highlighted the central role of arts in Australian society, and the importance of centring it within education.
- It is not only a matter of emphasising the centrality of the arts and cultural industries to our society, it is also about centring it within education, from primary school and secondary school to tertiary education, where the creative arts prepare individuals for the challenges of a changing world. A key dimension is to better enable engagement with the creative arts across all year levels of the Australian Curriculum; including through cross-disciplinary opportunities such as STEAM.⁵³
- 5.38 One survey respondent also stated that: 'the A in 'STEAM' is there for a reason. The ability to think creatively is fundamental to innovation. Imagination and vision are the building blocks of social progress'.⁵⁴
- 5.39 The Council of Australasian Museum Directors (CAMD) drew attention to the work of CAMD museums which 'make a substantial contribution to learning and education especially in STEM, civics and the humanities. Australasian museums contribute significantly to the quality of schools education programs in these areas and achieve global benchmarks for student visits in formal educational groups'.⁵⁵

Cross-Curriculum Priorities

- 5.40 The Australian Curriculum has three areas identified as priorities in the 2008 Melbourne Declaration on Educational Goals for Young Australians (Melbourne Declaration). The priorities identified are:
- Aboriginal and Torres Strait Islander Histories and Cultures;
 - Asia and Australia's Engagement with Asia; and
 - Sustainability.

⁵² Ms Barbara Doran, *Submission 282*, p. 1.

⁵³ Australian Council of University Art and Design Schools, *Submission 202*, p. 5.

⁵⁴ Survey summary, p. 7.

⁵⁵ Council of Australasian Museum Directors, *Submission 328*, p. 8.

- 5.41 As identified priorities, these will ‘give students the tools and language to engage with and better understand their world at a range of levels’, and ‘provide national, regional and global dimensions which will enrich the curriculum through development of considered and focused content that fits naturally within learning areas’.⁵⁶ The Australian Curriculum sets out that:

Each priority has an introductory statement that outlines the reason for its inclusion and describes how it is viewed in the curriculum. The priorities have all been developed around three key concepts that are seen as fundamental to learning for that priority. Each concept is further developed through two or more organising ideas that provide a scaffold for relating and developing content knowledge, understanding and skills for the priority and learning areas. The organising ideas are embedded in the content descriptions and elaborations of each learning area as appropriate. Taken as a whole, the set of organising ideas provides a coherent framework that reflects the essential learning and skills for the priority.⁵⁷

- 5.42 Inquiry participants drew attention to the interconnected nature of the arts, and highlighted the benefits that come from linking the arts with other key learning areas. Inquiry participants also called for a stronger focus on the arts within the Australian Curriculum.⁵⁸

Skills for Employability: the Future Jobs Market

- 5.43 Stage Queensland suggested that the nature of arts and cultural experiences ‘encourage ‘out of the box’ thinking and innovation - skills very much needed in our future workforce’.⁵⁹ Further, the arts encourages creative thinking and an atmosphere that ‘there is no ‘right’ or ‘wrong’ when participating or interpreting creative and cultural activities’.⁶⁰
- 5.44 Lakespeare and Co. suggested cultural activities enrich ‘every element of people’s lives’ and the artistic practice thereof provides valuable employment opportunities for artists.⁶¹

⁵⁶ Australian Curriculum, *Cross-Curriculum Priorities*, <https://www.australiancurriculum.edu.au/f-10-curriculum/cross-curriculum-priorities/>, accessed 25 May 2021.

⁵⁷ Australian Curriculum, *Cross-Curriculum Priorities*, <https://www.australiancurriculum.edu.au/f-10-curriculum/cross-curriculum-priorities/>, accessed 25 May 2021.

⁵⁸ Mr Connor Sweeney, *Submission 13*, p. 1.

⁵⁹ Stage Queensland, *Submission 170*, p. 3.

⁶⁰ Stage Queensland, *Submission 170*, p. 3.

⁶¹ Lakespeare and Co., *Submission 226*, p. 2.

- 5.45 The long-term benefits of reading for children and adults alike were put forward by Australian Publishers Association, noting that:

Reading for pleasure has been revealed as the most important indicator of the future success of a child and improvements in literacy, at any point in life, can have a profound effect on an individual.⁶²

- 5.46 Moreover, literacy skills ‘underpin strong family relationships, better health choices and an individual’s capacity (and confidence) to gain employment’, with particular value to be found in reading through Australian stories, history, culture, values and geography.⁶³

- 5.47 The National Arts Participation Survey found that, ‘One in two Australians agree that the arts have a big or very big impact on *building creative skills that will be necessary for the future workforce*’ [sic].⁶⁴ Furthermore:

Creative skills have been integral to the fast-growing industries in Australia over the past decade and prior to COVID-19, the creative economy was growing at a rate nearly twice that of the Australian workforce.⁶⁵

- 5.48 ANA suggested the creative and cultural industries are ‘sunrise industries’ where young people are looking to these sectors to provide ‘the future jobs of the nation’.⁶⁶

Pre COVID...our best estimate of the workforce size is that about 5.9 per cent of the Australian population were working within the combined cultural and creative industries space. Jobs in the creative economy, as a per cent of the total Australian workforce, was 3.7 per cent in 1986 and 5.5 per cent in 2016.⁶⁷

- 5.49 This significant pre-COVID growth suggests that the workforce of creative and cultural industries were experiencing growth at ‘nearly twice the rate of

⁶² Australian Publishers Association, *Submission 224*, p. 4.

⁶³ Australian Publishers Association, *Submission 224*, p. 4.

⁶⁴ Australia Council for the Arts, ‘Creating Our Future: Results of the National Arts Participation Survey’, August 2020, p. 63, <https://www.australiacouncil.gov.au/research/creating-our-future>, accessed 25 May 2021.

⁶⁵ Australia Council for the Arts, ‘Creating Our Future: Results of the National Arts Participation Survey’, August 2020, p. 63, <https://www.australiacouncil.gov.au/research/creating-our-future>, accessed 25 May 2021.

⁶⁶ Mr Rupert Myer, Reference Group Chair, A New Approach, *Committee Hansard*, Canberra/teleconference, 13 November 2020, p. 5.

⁶⁷ Ms Kate Fielding, Program Director, A New Approach, *Committee Hansard*, Canberra/teleconference, 13 November 2020, p. 5.

the Australian workforce'.⁶⁸ Despite this growth, ANA made the point that while innovation is driven by creativity 'this proven relationship' is ill-understood in Australia, there is a current knowledge gap in our understanding of the impact of the cultural and creative economy that is 'putting our future economic stability and growth at risk'.⁶⁹

5.50 The Burnie Arts Council drew attention to the work of American paediatrician, Dr Laura Jana, who 'suggests that 65% of students today will work in jobs that don't currently exist'.⁷⁰ The Burnie Arts Council made the point that employability is reliant on 'creative capability', which can be summarised as:

- creativity;
- communication;
- collaboration;
- critical thinking; and
- curiosity.⁷¹

5.51 Echoing this position, the Stradbroke Chamber Music Festival pointed out the enduring attention creative skills and a STEAM approach have received, which 'were highlighted by Gonski 2.0 and the Australian Curriculum as skills for a future Australian workplace'.⁷²

5.52 In a similar vein, Writing Western Australia expressed concern that despite a need for future workers to possess 'hard specialist knowledge skills' in conjunction with 'critical thinking, communication, collaboration, connectivity, creativity, and culture', the 'Federal Government's recent Higher Education Bill, which significantly increases the cost of humanities degrees, can be expected to discourage access to tertiary education in areas critical for Australia's future economy'.⁷³

5.53 The Australia Council for the Arts noted the importance of the creative and cultural industries, their role in education, and their capacity to 'shape and adapt to the rapid transformation of traditional industries and to new forms

⁶⁸ Ms Kate Fielding, Program Director, A New Approach, *Committee Hansard*, Canberra/teleconference, 13 November 2020, p. 5.

⁶⁹ A New Approach, *Submission 131*, p. 9.

⁷⁰ Burnie Arts Council, *Submission 274*, p. 4.

⁷¹ Burnie Arts Council, *Submission 274*, p. 4.

⁷² Stradbroke Chamber Music Festival, *Submission 70*, p. 4.

⁷³ Writing Western Australia, *Submission 144*, p. 2.

of productivity'.⁷⁴ The Australia Council for the Arts made suggestions for strategic interventions focused on:

- investing in:
 - cultural production and cross-portfolio collaboration;
 - digital capacity building;
 - health, mental health and wellbeing;
 - access for young people to arts and culture;
 - upscale existing programs;
- leveraging:
 - domestic tourism;
 - corporate and individual donations;
 - support entrepreneurship and collaboration;
 - the establishment of a cultural and creative industries portfolio;
- empower:
 - Australia's international brand and export growth;
 - ensure economic recovery strategies include focus on creative and cultural industries and workers;
 - First Nations arts to support self-determination and Close the Gap; and
 - social cohesion, national unity and cultural diversity through the arts.⁷⁵

5.54 Financial literacy and education on small business was noted as an important skill for artists.

Artists and boards of directors would benefit from more education in financial literacy...more financial literacy and economic independence need to be established to create healthier and more stable communities.⁷⁶

5.55 Ms Sue Blakey and Mr Steve Scott noted that they had to learn a range of skills to create a successful small business in the creative industries:

Alongside my artistic training, I have had to learn the principals of successfully running a small business. How to market, how to respond professionally anytime of the day or night to any kind of query from national

⁷⁴ Australia Council for the Arts, *Submission 333*, p. 4.

⁷⁵ Australia Council for the Arts, *Submission 333*, pp. 5-6.

⁷⁶ Warlayirti Arts, *Submission 271*, p. 1.

or international enquiries, how to protect our small business from unfair treatment, how to expand and add to the 'products' we offer.⁷⁷

- 5.56 Music Victoria asserted the importance of government support for professional development and development of business acumen for artists.⁷⁸ Music Victoria advocated the idea for a program linking established businesses to new businesses to provide mentoring.⁷⁹ Furthermore, professional development was highlighted as necessary, with support from the Commonwealth Government to set up resources to educate artists on how to access further streams of income and better market their skills, becoming self-sufficient.⁸⁰

Concluding Comment

- 5.57 Australians recognise the importance of arts education throughout formal and informal schooling, and the improved educational outcomes which an arts education delivers. Placing greater emphasis on a STEAM approach supports foundational skills which may readily be applied to other disciplines or careers. Supporting our young people to critically analyse and think creatively presents only opportunity, with cross-sectoral benefits to be gained.
- 5.58 A stronger, and more integrated, focus on the arts within the Australian Curriculum may lead to more developed creative thinking and problem solving skills and create flow-on benefits for Australian children as they prepare to enter the job market.
- 5.59 Creative engagement also has strong positive outcomes for mental health. There is emerging evidence that social and mental wellbeing can be enhanced through participation in arts-based programmes. Studies show that people who play instruments have better connectivity between their left and right brains; people who write about their experiences daily may have stronger immune system function; crafting, drawing and painting can help focus the mind, similar to meditation; and arts is being used as an effective treatment for patients with dementia. The then Department for

⁷⁷ Ms Sue Blakey and Mr Steve Scott, *Submission 287*, p. 10.

⁷⁸ Music Victoria, *Submission 192*, p. 5.

⁷⁹ Music Victoria, *Submission 192*, p. 4.

⁸⁰ Music Victoria, *Submission 192*, p. 5.

Communications and the Arts in its report *The Social and Economic Benefits of Improving Mental Health*, stated:

Davies et al. have established that people with high levels of arts participation experience significantly better mental wellbeing than those with medium, low or no participation. They have shown that two or more hours a week of arts participation is needed to achieve this outcome. For children and young people, participating in arts activities can have a positive effect on self-confidence, self-esteem, relationship building and a sense of belonging (all associated with resilience and mental wellbeing). Research into Queensland Ballet's Ballet for Seniors program found that participants perceived positive wellbeing outcomes after participating in the program.⁸¹

5.60 The report also highlighted the additional a number of additional mental health benefits:

In addition to promoting mental health and wellbeing across the population, art making can assist people to improve wellbeing and socially reconnect after an episode of mental illness. A 2009 collaborative research project between La Trobe University, Mind Australia and Prahran Mission reviewed the evidence about art making by people with mental health conditions. The researchers found that art-making enhanced emotional exploration and expression, participation and learning, thought processes, new perspectives, spiritual growth, political voice and social expression, and the development of interpersonal relationships.⁸²

5.61 The Committee supports embedding the arts in the Australian Curriculum and turning STEM to STEAM, and would like to see consideration of the arts as a cross-curriculum priority in future. This priority should complement the arts as a key learning area, and not replace it. Making the arts a cross-curriculum priority would unlock the potential benefits that come from linking creative expression and creative thinking with other key learning areas such as history, mathematics and science.

⁸¹ Department for Communications and the Arts, *Response to Productivity Commission issues paper, The Social and Economic Benefits of Improving Mental Health*, April 2019, p. 4.

⁸² Department for Communications and the Arts, *Response to Productivity Commission issues paper, The Social and Economic Benefits of Improving Mental Health*, April 2019, p. 4.

- 5.62 The Committee was pleased to see the Creative Victoria program Creative Workers in Schools, which paired artists with schools as a response to the COVID-19 public health emergency. The Committee would support consideration of a similar program at a national level, which would have the dual benefit of strengthening the role of the arts in the education system and also providing income and recognition for Australia's arts practitioners.

Recommendation 12

- 5.63 The Committee recommends that the Commonwealth, State and Territory Education Ministers Meeting consider adding a fourth cross-curriculum priority: 'the Arts'. The Committee recommends that this priority be in addition to (and not a replacement for) the arts as a key learning area.

Recommendation 13

- 5.64 The Committee recommends that there be a minimum threshold of Australian-authored literary texts in the Australian Curriculum.

Recommendation 14

- 5.65 The Committee recommends that the criteria for capital expenditure set out in the *Australian Education Act 2013*, provided for in the Capital Grants Program, include expenditure relating to equipment and facilities for arts, performance and cultural activities.

6. Next Steps

Overview

- 6.1 Australia's creative and cultural industries and institutions have weathered significant challenges due to the COVID-19 public health emergency (COVID-19). Planning for a future where policy decisions pertaining to cultural and creative industries are made in consultation with industry and all levels of government is critical.
- 6.2 Looking to the future, Australia has opportunities to reframe the narrative around its creative and cultural industries to reposition them as economic and cultural powerhouses. The next steps to support these invaluable industries as Australia gradually re-opens and adjusts to operating 'with-COVID', and eventually 'post-COVID', require careful consideration and planning.
- 6.3 Inquiry participants considered what 'moving forward' post-COVID might look like, and many noted the important role that the arts would play in helping people move on from the public health emergency:

As we move forward from COVID_19 every child needs to be able to dream, every towns superstar need a stage to play on and everyone who has been faithfully staying at home need to have a chance to one day go back to their favourite seat and enjoy the great creativity of Australia.¹
- 6.4 A survey respondent set out that the arts would be able to help society as it moves out of living with COVID-19:

¹ CircuitWest, *Submission 1*, p. 1.

The arts have a significant role to play in the imagining of a COVID-normal future. It is our sector that will lead this countries COVID recovery - building, narrating and capturing the stories of our time and the culture of our future.²

Importance of Arts Recognition

6.5 Recognition of the important contribution the arts, artists, and those working across the creative and cultural industries make was identified by numerous inquiry participants.

6.6 In support of greater recognition and funding for the arts, Mr William McBride asserted that:

Continual lack of investment in and commitment to the arts leads directly to a lack of understanding and recognition about the work artists do, and the immense value it brings to society.³

6.7 Settlement Services International (SSI) suggested that while newcomer artists to Australia and creative entrepreneurs are able to make a significant contribution to the Australian economy they face challenges including a lack of 'peer networks and recognition, limited English proficiency and in some cases, visa status restricting work rights'.⁴ These difficulties 'can have a profound impact on the options available for newly arrived artists to secure income through creative employment'.⁵

6.8 Professor Julian Meyrick suggested that support for the arts and culture goes beyond public funding, and is tied into 'bestowing public recognition and respect'. Professor Meyrick suggested that a new 'bipartisan chapter' in to cultural policymaking should include:

Evaluation methods and frameworks that, while supplying the aggregate data needed to make arts and culture accountable to government for the public assistance they receive, also make sense to artists and creative and cultural organisations, and recognise the full value they give to Australian society and the economy.⁶

² Survey summary, p. 10.

³ Mr William McBride, *Submission 60*, p. 1.

⁴ Settlement Services Australia, *Submission 129*, p. 4.

⁵ Settlement Services International, *Submission 129*, p. 4.

⁶ Professor Julian Meyrick, *Supplementary Submission 16.1*, pp. 1-2.

- 6.9 The view that cultural and artistic recognition is entwined with the amount of data available was reiterated by Castlemaine State Festival, which suggested collaboration between Federal and State Governments to ‘develop research methodologies for measuring the community and social wellbeing impacts of the Creative Industries’.⁷ The ability to accurately measure the reach of the cultural and creative industries has policy implications for the way public discourse on the arts is framed.

Expanded Data Collection

- 6.10 Data tracking and analysis of the amount of on non-government expenditure on arts and culture has been gathered by a range of agencies including the Australian Bureau of Statistics (ABS), Creative Partnerships Australia (CPA), the Bureau of Communications and Arts Research and the now defunct Meeting of Cultural Ministers.⁸
- 6.11 Data on non-government expenditure on arts and culture is collected on:
- household expenditure on arts, cultural and creative goods and services;
 - private sector support, including from individuals, businesses, and trusts/foundations; and
 - on the revenue side, the earned income of arts, cultural and creative organisations, and of individual creators.⁹
- 6.12 The key measurement tool used by the ABS is the ‘Cultural and Creative Satellite Accounts’ which offer insight into the value of these industries.¹⁰ The satellite accounts are based on the Australia and New Zealand Industry Classification (ANZIC) and the Australia and New Zealand Standard Occupations (ANZSCO) and measure:
- i. activity in the industries which form supply chains for cultural and creative goods and services;
 - ii. activity in other industries performed by workers in cultural and creative occupations;

⁷ Castlemaine State Festival, *Submission 54*, p. 4.

⁸ A New Approach, Answers to questions on notice, public hearing, Canberra, 13 November 2020, pp. 1-5.

⁹ A New Approach, Answers to questions on notice, public hearing, Canberra, 13 November 2020, p. 1.

¹⁰ A New Approach, Answers to questions on notice, public hearing, Canberra, 13 November 2020, p. 5.

- iii. volunteer services to arts and heritage organisations; and
- iv. non-market output of market producers in the cultural and/or creative industries—this captures the value of goods and services supplied by non-profit institutions for free, or at prices that are not economically significant, because the production is supported by charitable contributions and other transfers.¹¹

6.13 A New Approach (ANA) suggested that data collection through the cultural and creative satellite accounts is ad hoc, with data first collected by the ABS for the 2008-09 financial year, with this analysis repeated by the Bureau of Communications and Arts Research for the 2016-17 financial year, and in 2020 for the 2017-18 financial year.¹² Further, ANA contended that as the occupation and industry satellite codes are shared with New Zealand and ‘embedded within international agreements about national accounts’ they are difficult to be adjusted, with any changes to them reducing the capacity for reliable commensurability across longitudinal data sets.¹³ ANA suggest that:

As a consequence, it is almost impossible for the National Accounts and related satellite accounts to keep up with the rapid pace of industry change. This is problematic, given the ABS industry codes were developed in 1993, the occupation codes were developed in 1999, and neither system has been revised since 2006.

As a consequence, the codes often don’t reflect existing 21st century industries and job roles, nor have capacity to rapidly adapt to the many industries and occupations that don’t currently exist but will in the future. In a sector as agile as the cultural and creative industries, this means the key measurement tool is inadequate for measuring the phenomena at hand.¹⁴

6.14 Ms Esther Anatolitis, an arts advocate and consultant, drew attention to the limited data currently collected on the scope of the creative and cultural

¹¹ Meeting of Cultural Ministers Statistics Working Group, ‘Measuring the economic value of cultural and creative industries’, April 2018, <https://www.arts.gov.au/mcm/publications>, accessed 14 April 2021.

¹² A New Approach, Answers to questions on notice, public hearing, Canberra, 13 November 2020, p. 5.

¹³ A New Approach, Answers to questions on notice, public hearing, Canberra, 13 November 2020, p. 5.

¹⁴ A New Approach, Answers to questions on notice, public hearing, Canberra, 13 November 2020, p. 5.

industries and institutions and their economic and non-economic impacts.¹⁵ Ms Anatolitis added that presently, 'We don't know, for example, how many creative practitioners and unincorporated organisations there are, nor the value of their work'.¹⁶ This lack of data 'thwarts effective policy and investment', and Ms Anatolitis suggested additional questions be added to the 2021 Census under 'Income and Work' and 'Unpaid Work' to effectively capture all professional activity (rather than allowing only one professional activity to be recorded) as well as hours spent on creative practice and hours worked.

- 6.15 In a similar vein, Professor David Throsby put forward the lack of data on cultural statistics as an issue of significant concern, and 'strongly recommended that the Committee urge the Federal Government to re-establish the National Centre for Culture and Recreation Statistics of the ABS'.¹⁷
- 6.16 A number of inquiry participants also supported this suggestion for Government gather more data on the creative and cultural sector, patterns of work, and the sector's economic value and breadth.¹⁸

Digital Platforms

- 6.17 Digital platforms provide opportunities to connect, engage and explore the diversity of experiences arts and culture present.¹⁹ The expansion of digital platforms presents opportunities to develop 'smart art' in our cities, which 'engage the public and make them feel connected to their environment'.²⁰
- 6.18 Smart art can come in a diversity of forms and serves as the embodiment of the success a Science, Technology, Engineering, Art and Mathematics (STEAM) approach can produce. Smart art has been used successfully in Sydney as a wayfinding technology, with users downloading an app which

¹⁵ Ms Esther Anatolitis, *Submission 92*, pp. 1-2.

¹⁶ Ms Esther Anatolitis, *Submission 92*, p. 1.

¹⁷ Professor David Throsby, *Submission 53*, p. 5.

¹⁸ Professor Julian Meyrick, *Submission 16*, p. 7; Left Bank Co., *Submission 27*, pp. 2, 8; Professor David Throsby, *Submission 53*, p. 4; Cultural Development Network, *Submission 71*, p. 13.

¹⁹ See: Ms Indigo Holcombe-James, *Submission 218*, pp. 1-3.

²⁰ Heather Shipman, 'Smart Art for Smart Cities', *Advances in Science, Technology and Innovation*, conference paper, 11 January 2019, p. 253, https://link.springer.com/chapter/10.1007%2F978-3-030-01662-3_27, accessed 21 October 2020.

uses a device's location to detect nearby points of interest.²¹ Heather Shipman explained the benefits of the map:

Particularly useful for mapping culture walks, the app is beneficial to locals and tourists alike. New digital content can be uploaded quickly and effortlessly, resulting in a highly sustainable product, as there is no need to waste energy and resources constantly updating print materials, and eliminating potential litter as a result.²²

6.19 Barbara Doran was of the view that in the face of 'zoom fatigue', 'enhanced design and more elegant platforms will be sought to support longer term shifts in how we live and work'.²³ Ms Doran suggested that innovative new digital platforms will facilitate:

- link gamification and new ways of working;
- health applications in augmented and virtual reality in areas such as educating for complex conditions such as dementia and psychosis and injury/ physical rehabilitation;
- new forms of tourism;
- smart cities and place making
- engaging platforms for online collaboration; and
- Working with complex problems such as climate change and crisis response.²⁴

6.20 Professor Terry Flew and Ms Katherine Kirkwood of Queensland University of Technology (QUT) drew attention to the increased use of digital platforms for teaching music which proliferated in response to COVID. They suggested that in the future, 'Digital will not necessarily replace in-person interactions, but be a valuable supplement.'²⁵

6.21 In considering the arts' 'stronger engagement with digital platforms', Think Tank Dance Assembly stressed the need for artist-led responses, noting the

²¹ Heather Shipman, 'Smart Art for Smart Cities', *Advances in Science, Technology and Innovation*, conference paper, 11 January 2019, p. 253, https://link.springer.com/chapter/10.1007%2F978-3-030-01662-3_27, accessed 21 October 2020.

²² Heather Shipman, 'Smart Art for Smart Cities', *Advances in Science, Technology and Innovation*, conference paper, 11 January 2019, p. 253, https://link.springer.com/chapter/10.1007%2F978-3-030-01662-3_27, accessed 21 October 2020.

²³ Barbara Doran, *Submission 282*, p. 3.

²⁴ Barbara Doran, *Submission 282*, p. 3.

²⁵ Professor Terry Flew and Ms Katherine Kirkwood, *Submission 344*, p. 6.

inefficacy of ‘heavily designed schemes and programs that require a certain type of practice or response or proposal’.²⁶ Rather, they emphasised the need for flexibility, and the opportunity for artists to direct, and be reimbursed for research into new methods of live practice.²⁷

- 6.22 Kimberley Aboriginal Law and Cultural Centre (KALACC) drew attention to Mabu Jila, a digital platform it is establishing for sharing traditional cultural expression:

Mabu Jila is a platform to incentivize and encourage young people in communities to use existing and available technology [smart phones] to record and then upload and share specific aspects of traditional cultural expression ie. eg. a five minute film on how to perform a specific dance.²⁸

- 6.23 Mr Wesley Morris made the point that, with support from the Western Australian Government, KALACC is developing Mabu Jila as a ground up approach to teaching culture, ‘We know that there are lots of media organisations out there, but what we’re talking about here is a platform that is specifically designed to share and distribute traditional cultural practice’.²⁹
- 6.24 Opportunity to collaborate, innovate and learn about digital platform engagement may also be drawn from existing organisations and resources. National and State Libraries Australia (NSLA) pointed out their libraries are already innovative ‘experts in public engagement’, and their limitations are only resources and legislation.³⁰
- 6.25 ANA point out that while digital platforms have many strengths, revenue-raising is not always simple, as ‘online audiences are accustomed to receiving digital arts and cultural content for free’.³¹

Digital Copyright Exemptions

- 6.26 Future-proofing and the ability to pivot were highlighted in evidence from the Australian Libraries and Copyright Committee (ALCC) and the Australian Digital Alliance (ADA). The ALCC and the ADA drew attention

²⁶ Think Tank Dance Assembly, *Submission 66*, p. 7.

²⁷ Think Tank Dance Assembly, *Submission 66*, p. 8.

²⁸ Kimberley Aboriginal Law and Cultural Centre, *Submission 64*, p. 10.

²⁹ Mr Wesley Morris, Coordinator, Kimberley Aboriginal Law and Cultural Centre, *Committee Hansard*, Canberra/teleconference, 13 November 2020, p. 35.

³⁰ National and State Libraries Australia, *Submission 89*, p. 4.

³¹ A New Approach, *Submission 131*, p. 26.

to flexible copyright laws as an enabler for innovation. In considering current Australian copyright law, their joint submission raised concern that:

Australian law permits the use of certain material without a license for 'research or study', 'criticism or review', or 'reporting the news' among other purposes which serve the public interest. However, the list of purposes for which copyright material may be used is rigid and ill suited to the modern age where innovative new uses are being developed all the time. Unless an activity falls within one of the fixed categories of allowable uses under the Act, it is prohibited.³²

- 6.27 Also in favour, Professor David Throsby, Dr Jan Zwar and Dr Paul Crosby suggested extending the Public Lending Right (PLR) and Educational Lending Right (ELR) schemes which presently ensure Australian authors are paid for their work when lent from libraries.³³ Their submission suggested extending this scheme:

One practical policy initiative would be to recognise the digital component of book borrowing by extending PLR and ELR payments to include digital lending by libraries.³⁴

- 6.28 ALCC and ADA pointed to the value of flexible copyright exemptions and their capacity to transition to digital delivery, and highlighted the flexibility enjoyed at international institutions due to flexible copyright exemptions. by the American libraries immediate switch to online story times, the historic film collections of British Film Institute and Cineteca Milano, both of which are available online, and the ability of US and Canadian schools and universities to shift to online classes without the need to negotiate additional licenses.³⁵ ALCC and ADA commented that such 'initiatives cannot be replicated in Australia because they are either not supported by our existing law or fall into a copyright grey area which places a high legal risk on institutions'.³⁶

³² The Australian Digital Alliance and the Australian Libraries and Copyright Committee, *Submission 206*, p. 5.

³³ Professor David Throsby, Dr Jan Zwar and Dr Paul Crosby, *Submission 338*, p. 5.

³⁴ Professor David Throsby, Dr Jan Zwar and Dr Paul Crosby, *Submission 338*, p. 5.

³⁵ The Australian Digital Alliance and the Australian Libraries and Copyright Committee, *Submission 206*, p. 5.

³⁶ The Australian Digital Alliance and the Australian Libraries and Copyright Committee, *Submission 206*, p. 5.

- 6.29 The Office for the Arts commented that while new technologies have a significant impact on how we work, ‘creative skills, requiring original thought and innovation’ are ‘particularly resistant to automation’ and are therefore ‘likely to face relatively higher demand in the future’.³⁷

Content Obligations

- 6.30 Content obligations regulate the annual transmission and program quota requirements which apply to broadcasting license holders’ programming of Australian television and radio. The requirements for commercial television broadcasting license holders are set out in the *Broadcasting Services (Australian Content and Children’s Television) Standards 2020* (the Standards) with changes introduced from 1 January 2021.³⁸
- 6.31 Screen Producers Australia (SPA) outlined the outgoing system for commercial free-to-air television quotas:
- 860 points of first-release Australian drama in prime time over three years;
 - 20 hours of first-release Australian documentary per year;
 - 260 hours of children’s (C) programs per year (of which 130 hours must be first release, 25 hours must be first release Australian children’s drama, and eight hours must be repeat programs); and
 - 130 hours of preschool (P) programming per year.³⁹
- 6.32 The new Standards require ‘commercial television broadcasting licensees to broadcast a minimum of 250 points of first release Australian programs’.⁴⁰ Points may be accrued through eligible programs including:
- commissioned Australian drama programs, including drama classified as C (children’s) or P (preschool);
 - commissioned Australian children’s programs (non-drama);
 - commissioned Australian documentary programs; or
 - acquired Australian films.’⁴¹

³⁷ Department of Infrastructure, Transport, Regional Development and Communications (Office of the Arts), *Submission 293*, p. 12.

³⁸ Department of Infrastructure, Transport, Regional Development and Communications, Answers to questions on notice, public hearing, Canberra, 5 February 2021, p. 5.

³⁹ Screen Producers Australia, *Submission 316*, p. 13.

⁴⁰ Department of Infrastructure, Transport, Regional Development and Communications, Answers to questions on notice, public hearing, Canberra, 5 February 2021, p. 5.

- 6.33 Points are calculated by multiplying the number of hours of Australian content broadcast by the points allocated per hour to each genre. Considerations are made for production budget or licence fee, with more points allocated for larger budget programs.⁴² For example, a first release Australian drama program with a 'production budget of less than or equal to \$450,000 per hour' receives 1.5 points per hour broadcast, whereas a 'production budget of more than \$1,400,000 per hour' receives 7 points per broadcast.⁴³
- 6.34 Further, commercial television broadcasters must broadcast 55 per cent 'Australian content between 6 am and midnight on primary channels' and '1,460 hours of Australian content between 6 am and midnight on non-primary channels'.⁴⁴
- 6.35 The Australian Directors' Guild supported the requirement of a 55 per cent content quota. They noted that this does not ensure new drama, children's programs and documentary content will screen, and can be comprised of 'news, sports, lifestyle, cheap format shows and old films and television shows'.⁴⁵ The Australian Directors' Guild added that:
- These changes weaken the drama, documentary and children's content quotas for subscription and free-to-air television and have stopped short of transitioning and extending the rules to new media platforms like Netflix, Amazon Prime and Disney+. This will leave many in the industry stranded.⁴⁶
- 6.36 In a similar vein, SPA asserted that under the new Standards 'the amount of drama, children's and documentary commissioning will reduce substantially in the coming years'.⁴⁷

⁴¹ Department of Infrastructure, Transport, Regional Development and Communications, Answers to questions on notice, public hearing, Canberra, 5 February 2021, p. 5.

⁴² Department of Infrastructure, Transport, Regional Development and Communications Answers to questions on notice, public hearing, Canberra, 5 February 2021, p. 6.

⁴³ Department of Infrastructure, Transport, Regional Development and Communications, Answers to questions on notice, public hearing, Canberra, 5 February 2021, p. 6.

⁴⁴ Australian Communications and Media Authority, 'Australian content on commercial TV', 21 December 2020, <https://www.acma.gov.au/australian-content-commercial-tv>, accessed 31 March 2021.

⁴⁵ Australian Directors' Guild, *Submission 221*, p. 3.

⁴⁶ Australian Directors' Guild, *Submission 221*, p. 4.

⁴⁷ Screen Producers Australia, *Submission 316*, p. 14.

- 6.37 Creative Economy supported the introduction of a ‘local content quota across all digital platforms’.⁴⁸ They pointed to the need for ‘Australian voice, identity and cultural expression’ within Australia’s local, regional and international reach, predicting increased expenditure on creative and cultural industries as an outcome of local content quotas.
- 6.38 The Department of Infrastructure, Transport, Regional Development and Communications (DITRDC) was of the view that the changes to content quotas which harmonised the Australian Screen Production Incentive offset to 30 per cent for film and television ‘provide a more consistent and standardised offset arrangement’.⁴⁹
- 6.39 Support for local content quotas was also expressed by a number of other inquiry participants including Ms Janet Watson Kruse, The Rabble, Melbourne Jazz Co-operative, Ms Fiona Press, Writers South Australia, APRA AMCOS and Australian Writers’ Guild.⁵⁰ Concerns regarding a reduction or loss of content quotas focused on the fear that there would be ‘a loss of Australian voices on our screens’.⁵¹

In April the federal government temporarily suspended local content quotas for international streaming services. This immediately reduced investment in producing Australian content and employment across film and media from writers to directors, set design to costume, actors to technicians, and has flow-on effects for the production sector which had already been impacted by widespread shutdowns. Mandating the development of local content is not only essential to the creative economy but sustaining of a national identity.⁵²

- 6.40 The Australian Guild of Screen Composers suggested that Commonwealth Government changes to content regulation and incentives ‘will have a

⁴⁸ Creative Economy, *Submission 286*, p. 2.

⁴⁹ Mr James Penprase, Assistant Secretary, Department of Infrastructure, Transport, Regional Development and Communications, *Committee Hansard*, Canberra/videoconference, 5 February 2021, p. 1.

⁵⁰ Ms Janet Watson Kruse, *Submission 182*, p. 1; THE RABBLE, *Submission 188*, p. 4; Australian Recording Industry Association (ARIA), *Submission 198*, pp. 6-7; Melbourne Jazz Co-operative, *Submission 252*, p. 2; Ms Fiona Press, *Submission 262*, pp. 1-2; Writers South Australia, *Submission 277*, p. 7; APRA AMCOS, *Submission 320*, p. 52; Ms Kate Larson, *Submission 25*, p. 14; Professor David Throsby, *Submission 53*, p. Australian Writers’ Guild, *Submission 178*, pp. 1-3.

⁵¹ Australian Recording Industry Australia (ARIA), *Submission 198*, pp. 6-7.

⁵² City of Sydney, *Submission 311*, p. 10.

dramatic flow-on effect to the economic and cultural output and job situation by July 2022'.⁵³

6.41 On 25 March the Government introduced the Broadcasting Legislation Amendment (2021 Measures No. 1) Bill 2021. The proposed measures in the Bill would, among other measures, 'reduce regulatory burden on subscription television broadcasting licensees by halving the annual expenditure requirement for Australian drama programming from 10 per cent to 5 per cent and amend on an ongoing basis.'⁵⁴

6.42 The Minister for Communications, Urban Infrastructure, Cities and the Arts, the Hon Paul Fletcher, in his second reading speech elaborated on the rationale to halve the annual expenditure requirement for Australian drama programming:

These amendments will reduce the regulatory burden on channel providers and licensees, and form part of a broader set of reforms to the regulation of Australian content announced by this government on 30 September 2020. These reforms include measures to: modernise Australian content rules for commercial free-to-air broadcasters (including simplifying and reducing obligations); and provide greater support for the production and distribution of Australian content, particularly in drama, documentary and children's content.

The changes to the drama expenditure requirement for subscription broadcasters included in the bill reform unsustainable obligations on the industry and create a more consistent regulatory framework. They are part of a package of measures that will enable Australians to continue to have access to Australian content across a range of mediums, regardless of whether they prefer to watch free-to-air television, subscription television or streaming services.⁵⁵

Video Game Industry

6.43 Australians spent \$3.6 billion on video games in in 2019, with the sector generating 'approximately twice the combined economic activity of film and music'.⁵⁶ In contrast to the global video games development sector, the

⁵³ Australian Guild of Screen Composers, *Submission 220*, p. 2.

⁵⁴ Broadcasting Legislation Amendment (2021 Measures No. 1) Bill 2021, *Explanatory Memorandum*, p. 2.

⁵⁵ The Hon Paul Fletcher MP, Minister for Communications, Urban Infrastructure, Cities and the Arts, Minister's second reading speech, 25 March 2021, p. 1.

⁵⁶ Interactive Games and Entertainment Association (IGEA), *Submission 27*, p. 4.

Australian sector is comparatively small and employs 1,275 workers, and generated \$143.5 million in income over 2018-19.⁵⁷

- 6.44 Operating in a digital space has allowed the industry a degree of resilience to the restrictions imposed by COVID-19, with Interactive Games and Entertainment Association (IGEA) noting its members were largely able to minimise negative impacts, with developers able to continue to create, publish and sell games throughout the pandemic.⁵⁸ Further, the popularity of video games experienced a surge as Australians sought new ways to connect with friends and family while physically distant.⁵⁹ IGEA noted that:

Sadly, game development is the only part of the entire Australian arts sector that receives no federal arts support, despite \$750+ million being provided to the creative and cultural sectors annually. As a result of this policy gap, Australia is one of the most expensive places to make games in the world, and among the least competitive for attracting investment. With the right policies in place, our industry can generate \$1 billion a year in (almost all export) revenue and employ 10,000 fulltime workers within the decade.⁶⁰

- 6.45 IGEA put forward recommendations to align regulations around the video game industry to those supporting the film and television industry.⁶¹ They suggested the Commonwealth Government introduce tax offsets for video game production, and the restoration of the Australian Interactive Games Fund or a similar scheme.⁶² These recommendations were also made by the Senate Standing Committee on Environment and Communications in its report, *The future of Australia's video game development industry* in April 2016.

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⁵⁷ IGEA, *Submission 27*, p. 3.

⁵⁸ IGEA, *Submission 27*, p. 6; Creative Victoria, *Submission 308*, p. 13.

⁵⁹ IGEA, *Submission 27*, p. 6.

⁶⁰ IGEA, *Submission 27*, p. 3.

⁶¹ IGEA, *Submission 27*, p. 6.

⁶² IGEA, *Submission 27*, p. 6; Creative Victoria, *Submission 308*, p. 3.

⁶³ Senate Standing Committee on Environment and Communications, 'The future of Australia's video game development industry', April 2016, pp. 73-74; IGEA, *Submission 27*, p. 3.

- 6.46 The role for state government support was put forward as a model for consideration in 2016 inquiry, *The future of Australia's video game development industry*, with the report noting the support provided by the Victorian Government through:
- Assigned Production Investment – Games;
 - Games Release; and
 - Games Professional Placements.⁶⁴
- 6.47 The Commonwealth Government Response to the Standing Committee on Environment and Communications' video games inquiry noted the recommendation to 'introduce a funding scheme based on the former Australian Interactive Games Fund', and suggested the National Innovation and Science Agenda (NISA) 'includes measures that are available for certain kinds of business models within the games industry'.⁶⁵
- 6.48 Further, the Commonwealth Government did not support the recommendation to introduce 'a refundable tax offset for Australian expenditure in the development of game titles'. Rather, the existing measures in place, such as \$1.1 billion through NISA over four years from 2015, the Entrepreneurs' Programme and the R&D Tax Incentive.⁶⁶
- 6.49 The Commonwealth Government introduced the Digital Games Offset in the 2021-22 budget, which introduced a 30 per cent refundable tax offset for businesses that spend a minimum of \$500,000 on qualifying Australian games expenditure.⁶⁷ This is capped at \$20 million per eligible business.
- 6.50 In the 2021-22 budget, the Commonwealth Government announced the introduction of a patent box policy to increase research and development.⁶⁸ This is currently limited to the biotechnology and medical technology

⁶⁴ Senate Standing Committee on Environment and Communications, 'The future of Australia's video game development industry', April 2016, p. 29.

⁶⁵ Government Response to Senate Standing Committee on Environment and Communications, 'The future of Australia's video game development industry', January 2018, p. 5.

⁶⁶ Government Response to Senate Standing Committee on Environment and Communications, 'The future of Australia's video game development industry', January 2018, p. 6.

⁶⁷ PriceWaterhouseCoopers, 'Federal Budget 2021 Insights: Tax incentives to encourage innovation', <https://www.pwc.com.au/publications/federal-budget-2021/analysis-and-insights/tax-incentives-to-encourage-innovation.html>, accessed 8 June 2021.

⁶⁸ Australian Trade and Investment Commission, 'New A\$206m patent box to boost biotech and medtech innovation', 13 May 2021, <https://www.austrade.gov.au/international/invest/investor-updates/2021/new-a206m-patent-box-to-boost-biotech-and-medtech-innovation>, accessed 4 June 2021.

sectors, providing a 17 per cent concessional tax rate for corporate income derived directly from medical and biotechnology patents.⁶⁹ This form of policy may also benefit the game development industry.

- 6.51 The video game industry and gaming technology industry are the predominant sectors applying for trademarks, and may benefit from a patent box policy.⁷⁰
- 6.52 A patent box is a policy tool to reduce corporate tax levied on income generated by certain types of intellectual property, including patents. A patent box regime targets the last stage of the commercialisation state of the innovation lifecycle, providing tax relief as either a reduced tax rate or a tax break for a portion of the patent box income. Patent box policies are designed to encourage two behaviours: incentivising research and development investment and innovation, and attracting mobile intellectual property income. This is often achieved through reduction in tax rates ranging from five to fifteen per cent.⁷¹
- 6.53 A patent box policy will also reduce the incentive to transfer patents and intellectual property outside of Australia, ensuring ownership of successful innovation remains in the country.⁷² PriceWaterhouseCoopers highlights that through boosting continuing investment in innovation opportunities in Australia, patent box policies have potential to deliver long-term outcomes for the Australian economy.⁷³
- 6.54 The Department of Industry, Innovation and Science, Office of the Chief Economist and Melbourne Institute of Applied Economic and Social Research listed possible benefits of a patent box tax regime as: preventing

⁶⁹ Ian Zhou, Parliamentary Library, 'Patent box regime', Budget Review 2021-22, https://www.aph.gov.au/About_Parliament/Parliamentary_Departments/Parliamentary_Library/pubs/rp/BudgetReview202122/PatentBoxTaxRegime#:~:text=The%20patent%20box%20tax%20regime,%E2%80%939322%20income%20year%20onwards, accessed 8 June 2021.

⁷⁰ Melbourne Institute of Applied Economic and Social Research, 'Patent Box Policies', pp. 19-21.

⁷¹ Department of Industry, Innovation and Science (Office of the Chief Economist), 'Patent Box Policies', pp. 1, 5.

⁷² PriceWaterhouseCoopers, 'Federal Budget 2021 Insights: Tax incentives to encourage innovation', <https://www.pwc.com.au/publications/federal-budget-2021/analysis-and-insights/tax-incentives-to-encourage-innovation.html>, accessed 8 June 2021.

⁷³ PriceWaterhouseCoopers, 'Federal Budget 2021 Insights: Tax incentives to encourage innovation', <https://www.pwc.com.au/publications/federal-budget-2021/analysis-and-insights/tax-incentives-to-encourage-innovation.html>, accessed 8 June 2021.

tax avoidance; inducing investment in innovation activities; an increase in the incentives to patent; and, more profits for firms and small business.⁷⁴

- 6.55 Qualifying intellectual property varies across countries implementing these schemes, and can include patents, trademarks, designs, know-how, domain names, business names, models, and software copyright.⁷⁵ Eligibility for the scheme also differs in countries, with most programs requiring the economic owner of the intellectual property to be a taxpayer of the relevant country.⁷⁶

Responsiveness to Restrictions

- 6.56 COVID-19 has demonstrated that the ability for artists to pivot to new modes of program delivery, artistic expression and innovate is invaluable. Latrobe City Council highlighted the radical change to operating models for regional performing arts centres.⁷⁷ While Latrobe City has had the capacity to develop an operating model which can successfully pivot, 'it is contingent on the producers of performing arts content also being able to pivot.'⁷⁸
- 6.57 The ability of artists to be responsive to challenges is not new. Professor Stuart Cunningham and Dr Marion McCutcheon drew attention to the way portfolio careers (or adaptive, 'gig' work) are the norm in regional Australia 'as creative professionals respond to economic challenges as well as changes in consumer and audience preferences'.⁷⁹
- 6.58 Professor Paul Rae and colleagues points to the 'digital pivot' that many organisations have been forced towards, and the struggle to monetise digital content.⁸⁰ While many organisations have struggled, this has led to new opportunities and business models, such as the Melbourne Digital Concert Hall (MDCH):

Launched in late March 2020 as a strategy to support Australian musicians who had lost work, MDCH produces multiple online concerts on a weekly basis, each for a \$24 'admission' charge. Eighty-three percent of the ticket price

⁷⁴ Office of the Chief Economist, 'Patent Box Policies', pp. 8-10.

⁷⁵ Office of the Chief Economist, 'Patent Box Policies', p. 5.

⁷⁶ Office of the Chief Economist, 'Patent Box Policies', pp. 2-8.

⁷⁷ Latrobe City Council, *Submission 23*, p. 5.

⁷⁸ Latrobe City Council, *Submission 23*, p. 5.

⁷⁹ Professor Stuart Cunningham and Dr Marion McCutcheon, *Submission 45*, p. 24.

⁸⁰ Professor Paul Rae, Professor Alyson Campbell, Ms Sonia Soares, Dr Caitlin Vincent and Dr Caroline Wake, *Submission 247*, p. 5.

goes directly to the performing artists, and MDCH has successfully raised more than \$700,000 for 300+ musicians between March and October 2020⁸¹

- 6.59 Professor Rae and colleagues suggest that this mode of arts delivery presents opportunity ‘to make the cultural sector more inclusive, more accessible and more viable in a post-pandemic era’.⁸²

Sustainability of the Arts Industry

- 6.60 Inquiry participants drew attention to Commonwealth Government funding for arts and cultural activities, with numerous suggestions to increase funding to the Australia Council for the Arts.⁸³

The Australia Council for the Arts supports all parts of the sector, from independent artists through small-to-medium sized companies and the National Partnership Organisations such as the symphony orchestras. Symphony Services Australia supports LPA’s call for an additional \$100 million (or \$25 million per annum over four years) to the Australia Council to drive economic and social recovery post COVID-19, further unlocking Australia’s creative and cultural potential.⁸⁴

- 6.61 In a similar vein, other inquiry participants advocated for an overall increase in sector-wide funding, including ‘backbone funding’ which comprises ‘stable, operational multi-year grants including annual CPI increases’.⁸⁵
- 6.62 One inquiry participant suggested that as a result of the difficult to entry they have experienced in their local arts community, there are insufficient opportunities and suggested ‘local and federal funding agencies become aware of this and increase funding to smaller, local based productions with rural opportunities and low production web series for streaming sites’.⁸⁶

⁸¹ Professor Paul Rae, Professor Alyson Campbell, Ms Sonia Soares, Dr Caitlin Vincent and Dr Caroline Wake, *Submission 247*, p. 6.

⁸² Professor Paul Rae, Professor Alyson Campbell, Ms Sonia Soares, Dr Caitlin Vincent and Dr Caroline Wake, *Submission 247*, p. 6.

⁸³ Ms Lamorna Nightingale, *Submission 40*, p. 2; Symphony Services Australia Limited, *Submission 169*, pp. 4-5; Diversity Arts Australia, *Submission 281*, p. 2; Prying Eye Productions, *Submission 303*, p. 10.

⁸⁴ Symphony Services Australia Limited, *Submission 169*, p. 4.

⁸⁵ Opera Queensland, *Submission 251*, p. 6; Diversity Arts Australia, *Submission 281*, p. 4.

⁸⁶ Name withheld, *Submission 12*, p. 1.

- 6.63 A survey respondent suggested that international models may provide an example of a different structure of funding:

Provide more long term support for artists- Emulate models like Germany or Finland, and pay a living wage for what is largely done for free. Provide pathways for training and early career artists - have Centrelink recognise arts work in all levels and forms. Art is work. Acknowledge that.⁸⁷

- 6.64 The view that many small to medium organisations which are ‘chronically understaffed’ should receive more funding was reinforced by several inquiry participants including Therese Virtue OAM, who suggested an ‘arts led recovery’ from COVID-19.⁸⁸

- 6.65 Women’s Art Register suggested that the benefits and employment opportunities of the creative and cultural industries could be expanded through:

Strategic and targeted policies and an ongoing funding structure for longstanding grass roots arts communities such as ours, would go a long way to securing the precarious position of such organisations, and to enhance the community service and arts outcomes they demonstrate.⁸⁹

- 6.66 Fairfield City Council suggested that as a result of current funding structures ‘artists and arts workers are often employed on a contract basis or in positions that are grant dependent’.⁹⁰

- 6.67 APRA AMCOS suggest funding structures and screen incentives ‘could better support local talent’, and highlighted the potential support screen offsets could provide.⁹¹

- 6.68 One survey respondent suggested that funding for accessibility be made available:

We need funding to make events accessible - Auslan, captions etc. - for all artists, it shouldn’t just be up to disabled people and orgs to do this. Access

⁸⁷ Survey summary, p. 8.

⁸⁸ Therese Virtue OAM, *Submission 213*, p. 3; Australia Craft and Design Centres, *Submission 243*, p. 6; artisan, *Submission 246*, p. 5.

⁸⁹ Women’s Art Register, *Submission 38*, p. 2.

⁹⁰ Fairfield City Council, *Submission 208*, p. 6.

⁹¹ APRA AMCOS, *Submission 320*, p. 36.

should be done by everyone. Keep accessible events post COVID Keep easy and quick grants application processes.⁹²

Attracting Major Creative and Cultural Events

Film and Television Content

6.69 Ausfilm drew attention to Australia's unique advantages, and noted the:

...winning combination of some of the best talent globally—both in front of and behind the camera—state-of-the-art studio facilities, incredibly talented and creative post-production and visual effects studios, and locations which can double for almost anywhere in the world.⁹³

6.70 The Office for the Arts suggested that due to Australia's 'containment' of COVID-19, and the Commonwealth Government's announcement in July 2020 of a \$400 million boost to the location incentive program, Australia is an increasingly attractive destination.⁹⁴ In this environment of comparative stability, Ausfilm has experienced 'an increase of over 300 per cent' in inquiries when compared with the same time in 2019, which equates to \$2.1 billion in production inquiries.⁹⁵

6.71 International film productions in Queensland (Nine Perfect Strangers, Thor: Love and Thunder, Escape From Spiderhead, Thirteen Lives, Baz Luhrmann's Elvis biopic) and Melbourne and Canberra (Blacklight) have brought in significant benefits.

COVID-Safe Festivals and Live Events

6.72 With the ever evolving COVID-19 restrictions in 2020 and 2021, social-distancing regulations mean large-scale festivals moved online. Examples include the 67th Sydney Film Festival: Virtual Edition and Awards,

⁹² Survey summary, p. 8.

⁹³ Ms Katie Marks, Chief Executive Officer, Ausfilm, *Committee Hansard*, Canberra/videoconference, 4 December 2020, p. 13.

⁹⁴ Dr Stephen Arnott, First Assistant Secretary, Office for the Arts, Department of Infrastructure, Transport, Regional Development and Communications, *Committee Hansard*, Canberra/videoconference, 4 December 2020, p. 7; Office for the Arts, Department of Infrastructure, Transport, Regional Development and Communications, '\$400 million boost for Australian screen industry', 17 July 2020, <https://www.arts.gov.au/departamental-news/400-million-boost-australian-screen-industry>, accessed 16 April 2021.

⁹⁵ Ms Katie Marks, Ausfilm, *Committee Hansard*, Canberra/videoconference, 4 December 2020, p. 13.

Melbourne International Film Festival, Isol-Aid Music Festival, Woodford Folk Festival, Sydney Writers' Festival, and Splendour in the Grass XR.

- 6.73 While acknowledging that the live performing arts industry is inherently framed around an in-person experience, asserting that digital adaptations can 'never deliver the same experience', the Sydney Dance Company drew attention to their success in adapting to digital spaces.⁹⁶ Commencing in late March, the Sydney Dance Company has delivered online dance classes to over 65,000 paid attendees.⁹⁷
- 6.74 Latrobe City Council suggested support for 'community-led public festivals to transition to online or blended delivery' as a means to ensure a more resilient model of program delivery through inbuilt flexibility.⁹⁸

Concluding Comment

- 6.75 It is vital to ensure that Governments have the most current and relevant information with which to make informed policy and legislative decisions. There is no single repository which captures Australia-wide data on arts funding and programs. Economic and employment data on arts and culture in Australia, particularly on paid and unpaid work, has not been collected by the Australian Bureau of Statistics since 2014. The Australian Museums and Galleries Association (AMaGA) recommended 'include relevant questions in the Census and improve the Australian Bureau of Statistics datasets that inform the Cultural and Creative Satellite Accounts' as a way to measure the 'direct and indirect economic benefits and employment opportunities of creative and cultural industries.'⁹⁹ The Committee agrees with this recommendation.
- 6.76 As noted in Chapter 2, the video game industry is one of the fastest growing arts sectors globally. The video game industry and gaming technology industry are the predominant sectors applying for trademarks. The advancement of technology has changed the way games are designed, shared and played. The importance of all Intellectual Property rights in this process should not be overlooked and is now a priority when a new project

⁹⁶ Ms Anne Dunn, Executive Director, Sydney Dance Company, *Committee Hansard*, Canberra/teleconference, 13 November 2020, pp. 48-49.

⁹⁷ Ms Anne Dunn, Executive Director, Sydney Dance Company, *Committee Hansard*, Canberra/teleconference, 13 November 2020, pp. 48-49.

⁹⁸ Latrobe City Council, *Submission 23*, p. 6.

⁹⁹ Australian Museums and Galleries Association, *Submission 151*, p. 2.

is initiated. A patent can be granted for inventions that are not already in the public environment and allows the holder to take action against the invention being copied or used without permission. The recently announced patent box policy is designed to encourage incentivising research and development investment and innovation, and attract mobile intellectual property income. These two attributes are particularly beneficial to support the development of Australia's video game industry. The Committee recommends that the Commonwealth Government consider expanding the patent box tax regime to the video game industry.

Art Starter Portal

- 6.77 The Committee appreciates the complexity and challenge of trying to turn art into your sole income, and notes the dedication of inquiry participants engaged in creative work to continue to make and share their work.
- 6.78 As the past year has shown, change can happen very quickly and without warning, leaving a stark gap between the skills required for an arts-based income pre- and post-COVID-19.
- 6.79 The Committee considers that a focus on artist digital and financial literacy will help artists to acclimatise to the changing economy and society as we move past COVID-19. Digital platforms for art delivery may remain, or even increase, as it becomes a more 'normal' way to consume artistic creations. Digital sales, monetisation opportunities and protection of intellectual property will likely be necessary skills and abilities in a future arts landscape.
- 6.80 The Committee considers that an online portal administered by the Office for the Arts would be an immense value-add for those engaged (or aspiring to be engaged) in creative work, and could include information on:
- financial literacy, including information on taxation regimes and subsidies;
 - digital literacy;
 - intellectual property;
 - working with a business mentor to allow readiness for monetisation opportunities;
 - information on grants and funding opportunities; and
 - information for Aboriginal and Torres Strait Islander artists on protecting their work, and accessing advice on moving forward in the global art world.

- 6.81 An 'Art Starter' online portal would allow a landing page for emerging and established artists to access up-to-date information, submit queries or suggest new features, and learn new skills to help empower Australia's creative community to showcase their work to domestic and international audiences.

Recommendation 15

- 6.82 The Committee recommends the Commonwealth Government provide additional funding to the Australian Bureau of Statistics to produce the Cultural and Creative Satellite Accounts annually, gather and publish data on levels and type of employment, trends, revenue, geographic trends across the creative and cultural industries.

Recommendation 16

- 6.83 The Committee recommends the Australian Bureau of Statistics add questions to the Census which better account for the professions of those working in gig economies, and across the creative and cultural industries with recognition of paid and unpaid work.

Recommendation 17

- 6.84 The Committee recommends that the Commonwealth Government ensures that the patent box tax regime is extended to intellectual property relating to the creation of video games and related technology in Australia.

Recommendation 18

- 6.85 The Committee recommends that the Office for the Arts investigate the delivery of an 'Art Starter' portal containing information for artists, and those engaged in the creative economy, at all stages of their careers to enable Australia's arts industry to continue to grow and reach new audiences. The portal should include information on:
- financial literacy, including information on taxation regimes and subsidies;
 - digital literacy;
 - intellectual property and licensing of designs;

- working with a business mentor to allow readiness for monetisation opportunities;
- services and support available across government to help businesses through business.gov.au;
- information on grants and funding opportunities, scholarships and prizes particularly for emerging artists;
- information for Aboriginal and Torres Strait Islander artists on protecting their work, and accessing advice on moving forward in the global art world; and
- other information, as required.

6.86 The Committee further recommends that the Office for the Arts investigate the potential for an Art Starter portal with other relevant Commonwealth, State and Territory Agencies, and industry peak bodies.

Recommendation 19

6.87 The Committee recommends the Office for the Arts investigate ways in which to support regional peak bodies for the creative and cultural arts industries and institutions.

Recommendation 20

6.88 The Committee recommends that the Office for the Arts, in collaboration with the Australia Council for the Arts, establish a new 'Local Artistic Champions Program' (akin to the existing Local Sporting Champions Program) to enable emerging Australian student artists, musicians, authors, playwrights, filmmakers, digital artists and game developers to apply for grants to support attendance at competitions, exhibitions, skills development courses relevant to their craft.

Recommendation 21

6.89 The Committee recommends that the Office for the Arts establish a Music Access Assistance Program to increase active participation of school students, particularly in low socio-economic, rural and regional areas, in musical endeavours.

- 6.90 The Music Access Assistance Program should provide affordable access to music education opportunities including instruments, music books and other musical equipment.**

Recommendation 22

- 6.91 The Committee recommends that the relevant Commonwealth minister(s) report on the progress of the Committee's recommendations by December 2022.**

Dr Anne Webster MP
Chair

A. Submissions

- 1 CircuitWest
- 2 Mr Benjamin Cronshaw
- 3 Mr Malcolm Moir
- 4 Ms Penelope Cain
- 5 Ms Michelle Leonard OAM
- 6 Mr David Woods
- 7 *Confidential*
- 8 Mr Neil Thompson
- 9 Mr Craig Brown
- 10 Mr St John Cowcher
- 11 Mr Brendan Jelley
- 12 *Name Withheld*
- 13 Mr Connor Sweeney
- 14 Sam Lynch
- 15 Audio Technik
- 16 Professor Julian Meyrick
 - 16.1 Supplementary to submission 16
- 17 Ms Jo Lane
- 18 Mr Nick Schlieper
- 19 Mr Jon Perring

- 20 Lowensteins Arts Management Pty Ltd
- 21 Ms Gwendolyn Knox
- 22 Dr Nick Earls
- 23 Latrobe City Council
- 24 Professor Gail Jones
- 25 Kate Larsen
- 26 Dr Kate Grenville
- 27 Interactive Games & Entertainment Association (IGEA)
- 28 Centre for Stories
- 29 Australian Theatre for Young People
- 30 Professor Peter Tregear
- 31 Adelaide Fringe Festival
- 32 Federation of Australian Historical Societies
- 33 Brimbank City Council
- 34 Dr Megan Walch
- 35 City of Darwin
- 36 Malcolm Knox
- 37 Left Bank Co.
- 38 Women's Art Register
- 39 The Pack Australia Pty Ltd
- 40 Ms Lamorna Nightingale
- 41 Helen Garner
- 42 Regional and Public Galleries NSW
- 43 CMoore Hardy
- 44 Mrs Ajhriahna Henshaw
- 45 Professor Stuart Cunningham and Dr Marion McCutcheon
- 46 Dr Greg Pritchard
- 47 World Crafts Council - Australia
- 48 Dr Damien Ricketson

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- 49 Ms Ruth Hazleton
- 50 Lake Macquarie City Council
- 51 Stephen Luby, Ruby Entertainment
- 52 Abe Watson
- 53 Prof David Throsby
- 54 Castlemaine State Festival
- 55 Schwartz Media
- 56 Mr John Edwards
- 57 City People Pty. Ltd.
- 58 Laboratory Adelaide: The Value of Culture
- 59 Circus Monoxide
- 60 Mr William McBride
- 61 Mr Tom Pritchard
- 62 Odissi Dance Company
- 63 Regional Arts Australia
- 63.1 Supplementary to submission 63
- 64 KALACC
- 65 Katherine Dorrington
- 66 Think Tank Dance Assembly
- 67 Michael Robotham
- 68 Jeremy Hastings
- 69 Peter Carey
- 70 Stradbroke Chamber Music Festival
- 71 Cultural Development Network
- 72 The Institute of Professional Editors (IPEd)
- 73 APHIDS
- 74 pvi collective
- 75 NT Writers' Centre
- 76 Contemporary Arts Organisations Australia

- 77 Ms Susan Hayes
- 78 A/Prof Josephine Caust
- 79 Tim Hansen
- 80 Telstra
- 81 La Mama
- 82 Ms Lynette Smith
- 83 Writing NSW
- 84 Museums & Galleries of NSW
- 85 Polyglot Theatre
- 86 GLAM Peak
- 87 Museum of Contemporary Art Australia
- 88 Mr Justin Ractliffe
- 89 National and State Libraries Australia (NSLA)
- 90 *Confidential*
- 91 The Australian Children's Laureate Foundation (ACLF)
- 92 Ms Esther Anatolitis
- 93 Miss Xani Kolac
- 94 Ms Suzanne Leal
- 95 Professor Terry Flew and Distinguished Professor Stuart Cunningham
- 96 Malthouse Theatre
- 97 Ms Jill Smith
- 98 Folk Federation of NSW
- 99 SGS Economics and Planning
- 100 Ms Tracy Sorensen
- 101 Dr Jane Gleeson-White
- 102 A/Prof Shane Homan
- 103 Ms Linda Baker
- 104 Mr Paul Jackson
- 105 Barking Gecko Theatre

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- 106 *Name Withheld*
- 107 Nintiringanyi Cultural Training Centre's - Miriki Performing Arts
- 108 Be You Inc
- 109 *Confidential*
- 110 Country Arts SA
- 111 Australian Library and Information Association
- 112 Arts Industry Council of South Australia
- 113 *Confidential*
- 114 Ms Hannah Kent
- 115 Mr Sam Cooney
- 116 ANZSA
- 117 Trent Dalton, HarperCollins Publishers Australia
- 118 Kim Williams
- 119 Terri-Ann White
- 120 Perth Festival
- 121 Dr Leah Kaminsky
- 122 Grace Lucas-Pennington, Allanah Hunt and Jasmin McGaughey
- 123 Allen & Unwin
- 124 Ms Judith White
- 125 Design Institute of Australia
- 126 Ogilvy Australia
- 127 Dr Charlotte Wood
- 128 Ms Sophie Cunningham
- 129 Settlement Services International (SSI)
- 130 Gareth Hart
- 131 A New Approach
- 132 Sydney Review of Books
- 133 The Balnaves Foundation
- 134 Ms Bron Batten

- 135 Arts OutWest
- 136 Renew Australia
- 137 AusFilm
- 138 Varuna
- 139 Melbourne Fringe
- 140 Media Entertainment & Arts Alliance (MEAA)
- 141 Theatre Network Australia's Circus and Physical Theatre Advisory Committee
- 142 Wheeler Centre
- 143 UQP
- 144 Writing WA
- 145 Meredith Curnow
- 146 CP Consulting
- 147 Phonographic Performance Company of Australia
- 148 International Council of Museums Australia (ICOM Australia)
- 149 The Australian Ballet School
- 150 The Dax Centre
- 151 Australian Museums and Galleries Association
- 152 Australian Children's Television Foundation
- 153 Entertainment Assist (HPC) Ltd
- 154 City of Casey
- 155 Outback Theatre for Young People
- 156 ACE Open
- 157 Australian Music Centre Ltd
- 158 Macquarie School of Education, Macquarie University
- 159 Australasian Council of Deans of Arts, Social Sciences and Humanities
- 160 Chamber for Arts and Culture WA
- 161 Kelly+Partners Chartered Accountants
- 162 Patrick School of the Arts

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- 163 Australian Performing Arts Market
 - 164 Australian Jazz Think Tank
 - 165 Screenrights
 - 166 Museums & Galleries Queensland
 - 167 Yuin Folk Club Inc
 - 168 Arts Access Australia
 - 169 Symphony Services Australia Limited
 - 170 Stage Queensland
 - 171 Belvoir St Theatre
 - 172 Screen Australia
 - 173 Arts Mid North Coast
 - 174 Guildhouse
 - 175 Louise Denson
 - 176 National Growth Areas Alliance
 - 177 Dr Tegan Bennett Daylight
 - 178 Australian Writers' Guild
 - 179 Arts Law Centre of Australia
 - 180 Agency Projects
 - 181 Carclew
 - 182 Ms Janet Watson Kruse
 - 183 NETS Australia
 - 184 National Public Galleries Alliance (NPGA)
 - 185 Greater Sydney Orchestra
 - 186 Dr Liz Giuffre and Dr Shelley Brunt
 - 187 Mr Dean Merlino
 - 188 THE RABBLE
 - 189 The Push Incorporated
 - 190 Ms Kathryn Gray
 - 191 Perth Institute of Contemporary Arts

- 192 Music Victoria
- 193 Christos Tsiolkas
- 194 Professional Historians Australia
- 195 Sydney Fringe Festival
- 196 Green Music Australia
- 197 VicHealth
- 198 Australian Recording Industry Australia (ARIA)
- 199 Arts West Alliance
- 200 Australian Production Design Guild
- 201 Footscray Community Arts Centre
- 202 The Australian Council of University Art and Design Schools (ACUADS) & DDCA
- 203 Australian Museums and Galleries Association (Victoria)
- 204 ArtsHub
- 205 Australian Local Government Association
- 206 Australian Digital Alliance/Australian Libraries Copyright Committee
- 207 DRILL Performance Company Inc.
- 208 Fairfield City Council
- 209 James Ricketson
- 210 CPSU
- 211 Lisa Paulsen
- 212 Sydney Dance Company
- 213 Therese Virtue OAM
- 214 Elizabeth Dax
- 215 Theatre Network Australia
- 216 *Name Withheld*
- 217 Lucy Guerin Inc
- 218 Ms Indigo Holcombe-James
- 219 Arena Theatre Company

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- 220 Australian Guild of Screen Composers
- 221 Australian Directors' Guild
- 222 Ailsa Piper
- 223 Western Edge Youth Arts
- 224 Australian Publishers Association
- 225 Australian Theatre Live
- 226 Lakespeare & Co
- 227 Copyright Agency
- 228 Documentary Australia Foundation
- 229 Playwave and Shopfronts Arts Co-Op
- 230 Professor Robyn Ewing
- 231 Ms Katherine Dixon, Simon Faulkner and Penny Ikinger
- 232 Ms Helen O'Neill
- 233 Performing Lines
- 234 Mr Rhys Ryan
- 235 Somebody's Daughter Theatre Company
- 235.1 Supplementary to submission 235
- 236 Multicultural Arts Victoria
- 237 FASTLab Research Centre
- 238 *Name Withheld*
- 239 Public Galleries Association of Victoria (PGAV)
- 240 Brisbane Visual Arts Advocacy
- 241 West Australian Ballet
- 242 Wavelength
- 243 Australian Craft and Design Centres
- 244 The Boite (Vic) Inc
- 245 Australian Festivals Association Inc.
- 246 artisan
- 247 Associate Professor Paul Rae

- 248 Professor Rachel Fensham
- 249 Arts Margaret River
- 250 Cygnet Folk Festival
- 251 Opera Queensland
- 252 Melbourne Jazz Co-operative
- 253 Queensland Conservatorium Research Centre, Griffith University
- 254 Ms Irene Lemon
- 255 All Access Crewing Pty Ltd
- 256 National Association for the Visual Arts Ltd
- 257 Australian Academy of the Humanities
- 258 Ms Cathy Hunt
- 259 *Name Withheld*
- 260 Ms Ann James
- 261 Mr Tom Gutteridge
- 262 Ms Fiona Press
- 263 The Usefulness of Art
- 264 Australian Institute of Urban Studies - South Australia
- 265 Caroline Baum
- 266 City of Yarra, Victoria
- 267 Chunky Move
- 268 Art Association of Australia & New Zealand
- 269 Gabrielle de Vietri
- 270 Performing Arts Connections
- 271 Warlayirti Artists
- 272 Musica Viva Australia
- 273 Magabala Books
- 274 Burnie Arts Council
- 275 University Art Museums Australia
- 276 aesthetic alliance

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- 277 Writers SA
- 278 Asialink Arts
- 279 Culture Counts
- 280 Theatre Kimberley
- 281 Diversity Arts Australia
- 282 Barbara Doran
- 283 Jessica White
- 284 Alex Masso
- 285 Festivals Adelaide
- 286 Creative Economy
- 287 Festive Factory
- 288 Maari Ma Health Aboriginal Corporation
- 289 Ted Baillieu
- 290 Australian Young Adult Literature Alliance (LoveOzYA)
- 291 Jane Brownrigg
- 292 Carrillo Gantner
- 293 Department of Infrastructure, Transport, Regional Development and Communications
- 294 Municipal Association of Victoria
- 295 Bell Shakespeare
- 296 City of Perth
- 297 National Museum of Australia
- 298 Australian Live Music Business Council (ALMBC)
- 299 TAFE NSW
- 300 Dr Alison Richards
- 301 Associate Professor Scott Brook
- 302 Australian Youth Orchestra
- 303 Prying Eye Productions
- 304 SBS

- 305 Home of the Arts Gold Coast
- 306 Ausdance National
- 307 Charles Perkins Centre
- 308 Creative Victoria
- 309 First Nations Performing Arts Sector
- 310 Society of Children's Book Writers and Illustrators Australia East and New Zealand
- 311 City of Sydney
- 312 The Text Publishing Company
- 313 Cultural Attractions of Australia
- 314 Australian Brandenburg Orchestra
- 315 Australian Society of Authors
 - 315.1 Supplementary to submission 315
- 316 Screen Producers Australia
- 317 Community Broadcasting Association of Australia
- 318 Independent Cinemas Australia
 - 318.1 Supplementary to submission 318
- 319 Live Music Office
- 320 APRA AMCOS
- 321 Live Performance Australia
- 322 Australian Broadcasting Corporation
- 323 Mr Lyndon Anlezark
- 324 City of Newcastle
- 325 Christian Media and Arts Australia
- 326 Regional Australia Institute
- 327 Alberts
- 328 Council of Australasian Museum Directors
- 329 *Confidential*
- 330 Roundtable of Vocal, Instrumental and Music Education Organisations

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- 331 City of Greater Bendigo
- 332 Story Factory
- 333 Australia Council for the Arts
- 334 Aboriginal Art Association of Australia
- 335 National Trust of Australia
- 336 Camden Council
- 337 Australasian Music Publishers' Association Limited (AMPAL)
- 338 Professor David Throsby, Dr Jan Zwar and Dr Paul Crosby
- 339 City of Casey on behalf of Victorian Growth Area LGAs
- 340 *Confidential*
- 341 Australian Copyright Council
- 342 Mr Andrew Barnum
- 343 National Archives of Australia
- 344 Terry Flew and Katherine Kirkwood
- 345 Northern Territory Department of Territory Families, Housing and Communities
- 346 Create NSW
- 347 Dr Michael Brand, Council of Australian Art Museum Directors
- 349 The Australian Society of Authors and The Australian Library and Information Association
- 350 Palace Cinemas
- 351 Northern Territory Government
- 352 Western Australian Government

B. Exhibits

- 1 *Burnout in Arts Workers*, Abe Watson, (Sub 52)
- 2 *Australia's Cultural And Creative Economy*, Kate Fielding, (Sub 131)
- 3 *A New Approach: 'Insight Report 5' Working Paper*, Kate Fielding, (Sub 131)
- 4 *The arts and creative industries in health promotion: an Evidence check rapid review brokered by the Sax institute for The Victorian Health Promotion Foundation*, Dr Christina Davies
- 5 *Arts, public health and the National Arts and Health Framework: a lexicon for health professionals*, Dr Christina Davies
- 6 *The art of being mentally healthy: a study to quantify the relationship between recreational arts engagement and mental well-being in the general population*, Dr Christina Davies
- 7 *Submission: A Music Nation - Priorities for Australia's Music Industry*, APRA AMCOS, (Sub 320)
- 8 *Submission to Joint Standing Committee on Trade & Investment Growth inquiry into Supporting Australia's Exports and Attracting Investment*, September 2019, APRA AMCOS, (Sub 320)
- 9 *Submission from APRA AMCOS and Australian Guild of Screen Composers: Supporting Australian Stories on our screens: Options paper*, July 2020, APRA AMCOS, (Sub 320)
- 10 *Submission to Select Committee on Covid-19*, June 2020, APRA AMCOS, (Sub 320)
- 11 *Submission from APRA AMCOS and Aboriginal and Torres Strait Islander Music Officer to the House Standing Committee on Indigenous Affairs inquiry into*

- Pathways and Participation Opportunities for Indigenous Australians in Employment and Business*, APRA AMCOS, (Sub 320)
- 12 *Born Global: Australian Music Exports*, Australian Council for the Arts, APRA AMCOS, (Sub 320)
 - 13 *Is Music the Key to Success*, Kim Williams, (Sub 118)
 - 14 *The Balnaves Foundation: FY 2020 Annual Report*, The Balnaves Foundation, (Sub 133)
 - 15 *Renew Australia: Collection of documents*, Renew Australia, (Sub 136)
 - 16 *Submission to Select Committee on COVID-19 to inquire into the Australian Government's response to the COVID-19 pandemic*, Media Entertainment and Arts Alliance, (Sub 140)
 - 17 *Insight Report - Accelerator: How arts and culture can connect people in public spaces during Covid-19 and beyond*, City People Pty. Ltd, (Sub 57)
 - 18 *Kooljaman Statement*, 13 November, Kimberley Aboriginal Law and Cultural Centre
 - 19 *2019/20 Drama Report*, Screen Australia
 - 20 *The Whitlam Legacy A series of occasional papers published by the Whitlam Institute*, Volume 7, November 2019, Kim Williams, (Sub 118)
 - 21 *Documentary Australia Foundation Pty Ltd Management Accounts as at 30 June*, Documentary Australia Foundation, (Sub 228)
 - 22 *Documentary Evidence Film Measurement Framework*, Documentary Australia Foundation, (Sub 228)
 - 23 *Raise your voice: young people in the arts – Jo Higgins, Emily Lienert, Maleeka Gazula, Steph Sekulovska*. October 2020, Museum of Contemporary Art, (Sub 87)
 - 24 *Survey Results: Australian Jazz & COVID-19'*, The Usefulness of Art, (Sub 263)
 - 25 *A Research Agenda for Creative Industries*, Professor Terry Flew and Distinguished Professor Stuart Cunningham, (Sub 95)
 - 26 *The impact of COVID-19 on cultural tourism: art, culture and communication in four regional sites of Queensland, Australia's*, Professor Terry Flew and Katherine Kirkwood, (Sub 344)
 - 27 *What Matters? Talking Value in Australian Culture* by Julian Meyrick, Robert Phiddian and Tully Barnett, Monash University Publishing

- 28 *Born Global: Australian music exports: ARC Linkage Project – The economic and cultural value of Australian music exports, July 2019, APRA AMCOS, (Sub 320)*
- 29 *Creative Economy Capability Statement 2020' and Helene's resume, Helene George*
- 30 *Alberts and The Tony Foundation, Music Education: A sound investment*
- 31 *Book Authors and their Changing Circumstances: Survey Method and Results, Professor David Throsby*
- 32 *Australian Book Publishers in the Global Industry: Survey Method and Results, Professor David Throsby*
- 33 *Australian Book Readers: Survey Method and Results, Professor David Throsby*
- 34 *Changes to the Australian content and children's television standards Consultation paper, Australian Communications and Media Authority, Department of Infrastructure, Transport, Regional Development and Communications*
- 35 *Broadcasting Services (Australian Content and Children's Television) Standards 2020, Department of Infrastructure, Transport, Regional Development and Communications*
- 36 *Media Reform Green Paper: Modernising television regulation in Australia, Department of Infrastructure, Transport, Regional Development and Communications*
- 37 *Two submissions to the National Health and Medical Research Council's Public Consultation into Research Priority Areas in Aboriginal and Torres Strait Islander Health, Kimberley Aboriginal Law and Cultural Centre*
- 38 *Formal Letter for Exemption: ScandiFilm Festival, Palace Cinemas, (Sub 350)*
- 39 *Supporting Documents for the 2012 ScandiFilm Festival Classification Exemption One, Palace Cinemas, (Sub 350)*
- 40 *Social Engagement Programs Survey: February 2021, Regional and Public Galleries New South Wales*
- 41 *Report of the Contemporary Visual Art and Craft Inquiry, 2002, Aesthetic Alliance*
- 42 *Culture: the core of cultural and creative industries, Creative Economy*
- 43 *Research summary: Working in the Australian Entertainment Industry: A research project by Entertainment Assist in association with College of Arts, Victoria University, October 2016, Entertainment Assist*

- 44 *Final report: Working in the Australian Entertainment Industry: A research project by Entertainment Assist in association with College of Arts, Victoria University, October 2016, Entertainment Assist*
- 45 *Why do we need a Digital Lending Right?, Australian Libraries and Information Association*
- 46 *Unapologetically Myself: regional tour, 2019, Somebody's Daughter Theatre Company*
- 47 *2019 Evaluation Report for Strategic Partnerships Program - Nobody's Fool Theatre, Somebody's Daughter Theatre Company*
- 48 *Crime Prevention Final Evaluation Report - HighWater Theatre partnership between Somebody's Daughter Theatre Company, Gateway Health and The Victorian Department of Education and Early Childhood Development , Somebody's Daughter Theatre Company*
- 49 *Breaking the Cycle: Somebody's Daughter Theatre Company, Final Report on the National Suicide Prevention Strategy, Somebody's Daughter Theatre Company*
- 50 *Every Child Every Chance Final Report - Vic Department of Education & Early Childhood Development in partnership with Somebody's Daughter Theatre Company & Gateway Community Health, Somebody's Daughter Theatre Company*

C. Public hearings and witnesses

Friday, 13 November 2020

Parliament House via teleconference

Canberra

Aboriginal Art Association of Australia

- Ms Kate Constantine
- Mr Geoff Henderson, President
- Mr Ian Weston, Interim Executive Officer

A New Approach

- Ms Kate Fielding, Program Director
- Mr Rupert Myer, Chair, Reference Group

Australasian Performing Right Association and Australasian Mechanical Copyright Owners Society (APRA AMCOS)

- Ms Jenny MORRIS MNZM OAM, Chair, Australasian Performing Right Association
- Mr Dean Ormston, Chief Executive Officer
- Ms Sophie Payten, Ambassador

Australian Phonographic Performance Company of Australia Ltd and Australian Recording Industry Australia

- Mr Dan Rosen, Chief Executive Officer, Australian Phonographic Performance Company of Australia Ltd and Australian Recording Industry Australia

Australian Youth Orchestra

- Mr Colin Cornish, Chief Executive Officer

Kimberley Aboriginal Law and Culture Centre

- Mr Stephen Kinnane, Researcher and Writer
- Mr Wesley Morris, Coordinator

Macquarie University

- Professor David Throsby, Professor of Economics

Miriki Performing Arts, Nintiringanyi Cultural Training Centre

- Ms Pauline Lampton, Artistic Director

National Aboriginal and Torres Strait Islander Music Office

- Ms Leah Flanagan, Manager

National Association for the Visual Arts

- Ms Penelope Benton, Acting Chief Executive Officer

Opera Queensland

- Mr Patrick Nolan, Artistic Director and Chief Executive Officer
- Ms Sandra Willis, Executive Director

Private capacity

- Ms Helen Garner
- Mr Christos Tsiolkas
- Dr Charlotte Wood

Regional Arts Australia

- Ms Ros Abercrombie, Executive Director

Sydney Dance Company

- Ms Anne Dunn, Executive Director

Sydney Review of Books

- Dr Catriona Menzies-Pike, Editor

The Value of Culture Research Project, Laboratory Adelaide

- Professor Julian Meyrick, Chief Investigator

Warlayirti Artists

- Ms Poppy Lever, Manager

Friday, 4 December 2020

Parliament House via videoconference

Canberra

Adelaide Fringe Festival

- Ms Jo O'Callaghan, Head of Program Operations and Business Development

AusFilm

- Dr Nick Herd, Head, Policy and Research
- Ms Katie Marks, Chief Executive Officer

Australian Children's Television Foundation

- Ms Jenny Buckland, Chief Executive Officer

Australia Council for the Arts

- Mr Adrian Collette, AM, Chief Executive Officer
- Dr Wendy Were, Executive Director, Advocacy and Development

Australian Live Music Business Council

- Mr Craig Spann, Executive General Manager, Australian Live Music Business Council
- Mr Stephen Wade, Chair, Australian Live Music Business Council

BlakDance, First Nations Performing Arts Sector

- Ms Merindah Donnelly, Executive Producer

Creative Partnerships Australia

- Ms Fiona Menzies, Chief Executive Officer

Department of Infrastructure, Transport, Regional Development and Communications

- Dr Stephen Arnott, First Assistant Secretary, Office for the Arts
- Ms Leonie Holloway, Chief Economist, Bureau of Communications, Arts and Regional Research
- Ms Caroline Fulton, Assistant Secretary, Creative Industries Branch, Office for the Arts

Moogahlin Performing Arts, First Nations Performing Arts

- Ms Alison Murphy-Oates, Managing Director
- Ms Lily Shearer, Co-founder, Co-Artistic Director

Melbourne Fringe

- Mr Simon Abrahams, Creative Director and Chief Executive Officer

Musica Viva Australia

- Ms Anne Frankenberg, Deputy Chief Executive Officer
- Mr Hywel Sims, Chief Executive Officer

Perth Festival

- Mr Nathan Bennett, Executive Director

Screen Australia

- Mr Graeme Mason, Chief Executive Officer

Sydney Fringe Festival

- Ms Kerri Glasscock, Chief Executive Officer and Festival Director

Support Act

- Mr Clive Miller, Chief Executive Officer

The Pack Australia

- Ms Melanie Bainbridge, Co-founder and Chief Impact Officer

Friday, 5 February 2021

Parliament House via videoconference

Canberra

Cobargo Folk Festival,

- Ms Zena Armstrong, Director
- Ms Kharen Harper, Artistic Director

Department of Infrastructure, Transport, Regional Development and Communications

- Mr James Penprase, Assistant Secretary, Broadcasters and Content COVID Response Taskforce
- Ms Pauline Sullivan, First Assistant Secretary, Content Division

Department of the Treasury

- Mrs Philippa Brown, First Assistant Secretary, Labour Market Policy Division
- Mrs Belinda Robertson, Assistant Secretary, Labour Market Policy Division

Hipster Whale

- Ms Clara Reeves, Chief Executive Officer

Interactive Games and Entertainment Association (IGEA),

- Mr Ben Au, Director of Policy and Government Affairs
- Mr Ron Curry, Chief Executive Officer
- Ms Clara Reeves, Board Director

Koch Media Australia

- Mr Roger Clarke, Chair, and Managing Director, Koch Media Australia

Regional and Public Galleries New South Wales

- Mr Brett Adlington, Vice President

Somebody's Daughter Theatre Company Inc.

- Ms Maud Clark, Chief Executive Officer/Artistic Director, Somebody's Daughter Theatre Company Inc.
- Ms Kharen Harper, Artistic Director

Yuin Folk Club

- Ms Kharen Harper, Artistic Director

Friday, 19 February 2021

Parliament House via videoconference

Canberra

A New Approach

- Ms Kate Fielding, Chief Executive Officer
- Mr Rupert Myer, Chair, Reference Group

Actors and Entertainers Benevolent Fund of Queensland

- Mr Michael Balk, Vice-President

Australian Digital Alliance and Australian Libraries Copyright Committee

- Mr Ben Rice, Executive Officer, Australian Digital Alliance; Policy Adviser, Copyright Law, Australian Libraries Copyright Committee

Australian Library and Information Association

- Ms Patricia Hepworth, Director of Policy and Education
- Ms Sue McKerracher, Chief Executive Officer

Australian Society of Authors

- Ms Olivia Lanchester, Chief Executive Officer

Creative Economy

- Ms Helene George, Chief Executive Officer, and Strategic Adviser

Entertainment Assist

- Mrs Julia Edwards, General Manager

Home of the Arts

- Mr Mik Auckland, Director, Programming and Presenter Services
- Mrs Crien Gehrke, Chief Executive Officer

Independent Cinemas Australia

- Mr Kieren Dell, Vice President
- Ms Adrienne Pecotic, Chief Executive Officer
- Mr Scott Seddon, President

Live Music Office

- Mr John Wardle, Consultant

Live Performance Australia

- Ms Evelyn Richardson, Chief Executive

Media Entertainment and Arts Alliance

- Mr Michael Balk, Board Member
- Mr Matthew Chesher, Director, Legal and Policy
- Mrs Michelle Rae, Equity Director

Private capacity

- Mr Tim Hansen
- Dr Nick Earls

Roadshow Films

- Mr Joel Pearlman, Chief Executive Officer

Screen Producers Australia

- Ms Holly Brimble, Director of Policy
- Mr Matthew Deaner, Chief Executive Officer

TAFE NSW

- Mr Andrew Totman, Industry Lead, Art and Culture

D. Survey summary

Background

The Committee undertook a survey as the first stage of its inquiry into Australia's arts and creative industries. The survey launched on 27 August 2020 and consisted of 20 questions.

The survey was also promoted via Facebook and Twitter.

The Survey closed on 22 October 2020 and received 4,871 responses, half of which were received in the first two weeks.

Question 1: What is your age?

Almost three-quarters of all respondents (74%) were aged 35 years or older. The breakdown by age is as follows:

- Under 18 years – 0.29 %
- 18 to 24 years – 5.84 %
- 25 to 34 years – 19.92 %
- 35 to 44 years – 24.49 %
- 45 to 54 years – 25.07 %
- Over 55 years – 24.39 %

Question 2: What State or Territory are you from?

While all States and Territories were represented, two-thirds of all respondents (67.7%) were from NSW or Victoria. The breakdown by state/territory is as follows:

- Victoria – 36.85 %

- NSW – 30.86 %
- Queensland – 12.62 %
- Western Australia – 7.02 %
- South Australia – 6.16 %
- ACT – 3.38 %
- Tasmania – 2.53 %
- Northern Territory – 0.58 %

Question 3: What best describes the area you live in?

Almost three-quarters of all respondents (74.03%) live in a metropolitan area. The breakdown by location is as follows:

- Metropolitan area – 74.03 %
- Regional or rural area – 24.47 %
- Remote area – 0.64 %
- Other (please specify) – 0.87 %

Responses for the 'Other' category could largely be incorporated into either the metropolitan (16 responses) or regional/rural (13 responses) or a combination of both (9 responses). The four remaining responses specified an international location.

Question 4: Do you identify as Aboriginal or as a Torres Strait Islander

- Yes – 1.36 %
- No – 96.86 %
- Prefer not to say – 1.78 %

Question 5: How would you describe your gender?

- Female – 62.89 %
- Male – 33.42 %
- Prefer not to say – 2.12 %
- I prefer to describe myself as... (please provide your preferred gender identity) - 1.57 %

Question 6: How would you define your work within the arts community?

- Paid by an employer – 35.75 %
- Self-employed – 41.04 %
- Volunteer – 9.26 %
- Other (please specify) – 13.95%

Respondents who selected 'Other' largely cited a combination of work styles, including freelancer, employer and employee (often simultaneously).

Question 7: Are you currently paid to work in the arts sector?

- Yes – 56.91 %
- No – 43.09 %

Respondents who answered 'No' to this question skipped Questions 8, 9 and 10.

Question 8: How long have you been paid to work in the arts sector?

This question was responded to by those who answered 'Yes' to question 7 - 2,739 participants.

- Less than one year – 3.21 %
- 1 to 5 years – 19.17 %
- 6 to 10 years – 17.01 %
- 11 years or longer – 60.61 %

Question 9: In the past two years have you been paid to work in the arts sector?

This question was responded to by those who answered 'Yes' to question 7 - 2,736 participants.

- Yes – 98.5 %
- No – 1.5 %

Question 10: How long have you been involved with the arts community?

This question was responded to by those who answered 'Yes' to question 7 - 2,735 participants.

- Less than one year – 0.77 %
- 1 to 5 years – 8.26 %
- 6 to 10 years – 12.36 %
- 11 years or longer – 78.61 %

Question 11: Do you undertake paid work outside of the arts sector?

This question was responded to by 3,768 participants.

- Yes – 49.23 %
- No – 50.77 %

Question 12: If yes [to Question 11], what sector?

This question was responded to by 2,477 participants.

- Education – 23.87 %
- Not applicable – 21.13 %
- Private sector – 16.14 %
- Multiple – 10.91 %
- Other (please specify) – 10.58 %
- Government services – 9.56 %
- Service industry – 7.81 %

More participants responded to this question than to 'Yes' to question 11 (622 responses). These could largely be accounted for in the number of 'Not applicable' responses (517) and those whose response to 'Other (please specify)' indicated unpaid work in the sector.

Question 13: How many paid jobs do you have?

This question was responded to by 3,392 participants.

- 1 – 58.96 %

- 2 – 22.7 %
- 3 – 8.76 %
- 4 – 2.48 %
- 5+ – 7.10 %

Question 14: What area of the arts community are you most engaged with?

This question was responded to by 3,775 participants. Participants could select more than one area.

- Music – 1,362 responses
- Theatre – 1,309 responses
- Live events – 1,089 responses
- Visual arts – 1,041 responses
- Please tell us about any other areas of the arts community you are engaged with – 598 responses
- Literature – 584 responses
- Film and/or television – 575 responses
- Cultural institutions – 562 responses
- Dance – 543 responses
- Comedy – 299 responses
- Circus – 205 responses
- Video games – 90 responses

Of the 598 free text responses in ‘other areas’, the following words featured prominently:

- Community – featured 83 time, eg ‘community arts’, ‘community cultural development’, and ‘community engagement’.
- Festival(s) – 69 times.
- Teach(ing), educate & education – 59 times.
- Cultural(ly) and culture(s) – 50 times, eg ‘cultural events’ and ‘culturally diverse arts’
- Opera – 28 times.
- Youth, young and child(ren) – 28 times.

Question 15: How many jobs have you had over the past 12 months?

This question was responded to by 3,555 participants.

- 1 – 43.99 %
- 2 – 21.58 %
- 3 – 10.69 %
- 4 – 5.15 %
- 5+ - 18.59 %

Question 16: What impact has COVID-19 had on your work or engagement with the arts community?

This question was responded to by 3,557 participants.

Understandably, responses focus on the disruption to the arts caused by COVID-19. Featuring heavily were the words 'lost' (used 386 times), 'reduced' (266), 'loss' (215), 'stopped' (167) and 'closed' (165).

The impact on the arts workforce was also a focus. 'Work' was mentioned 1835 times, 'income' 503 times, 'job' 352 times and 'paid' 189 times. 'JobKeeper' was mentioned 153 times.

Another common theme was a call for help, as shown by the use of 'support' (used 227 times), 'funding' (165) and 'Government' (162).

A sample of responses:

- I have lost what was full time work as a stage manager and had to take a much lower paying full time role outside the industry. I have had the opportunity to work casually a few hours a week on some creative developments but nowhere near my previous capacity or wage.
- The government did not see fit to recognise my freelance status as worthy of Jobkeeper. I have lived on savings while only having 7 days' work in 7 months. I have spent my socially distanced, COVID-induced unemployment time engaging with my arts community to better understand my peers in other art forms and [their] issues, likewise my own (performing arts) and advocating to government for sustained, consistent and properly targeted industry support, funding for the arts, for an overseas arts policy in live performance, adequate funding for public broadcasters, and for a reversal of the recent deviating announcement in regard to the weakening of Australian screen content quotas.
- My view is there is no future in the Arts in Australia unless the government step up to the plate and support the industry.

- I primarily perform in small venues independently or part of festivals such as Fringe, Midsummer, MICF. Those festivals have been cancelled and venues are closed. I have done some online performances via zoom but engagement and ability to charge for tickets is a lot lower than live performance
- I lost all work (7 productions) between March and September. This includes 2 shows overseas. Several of these will now never happen.
- Enormous. Almost everyone I know who works in the arts has lost part or all of their work. The scale of the mental health and financial impact is enormous. For dancers and dance teachers, the sudden decrease in physical activity has caused physical health problems as well.
- I am a Visual Art teacher in QLD. I have been lucky to be relatively untouched in my day to day work.
- It's been seven months since the last time my choir has performed live. Some chorus-specific events have moved online, but it isn't the same. The social dynamic, the feeling of being amongst my colleagues isn't there in the same way as it was pre-pandemic and it is heartbreaking that we, among others in the arts industry whom are doing worse than us volunteers, have suffered this devastating blow to what is part of our livelihoods.
- A great impact on Education teaching Visual Arts delivery of programs as most courses are Studio based and Gallery and Museum closures and not being able to view or see work. It's the bread and butter for most Artist[s] not to mention the mental well being for the community. "Art saves Lives" it gives back to community and enriched our culture on many levels, it creates inspiration, builds tourism and feeds the economy.

Question 17: How do you think Australia benefits from the arts?

This question was responded to by 3,764 participants.

- Other (please specify) – 42.59 %
- Building strong communities through removal of cultural, social and economic barriers – 28.11%
- Enhanced creativity and innovation – 21.65 %
- Promotes cultural appreciation – 4.89 %
- Function as an educational tool – 2.76 %

An error in the setup of this question did not allow for multiple selections.

'All of the above' or similar accounted for 1269 responses (33.71% of all responses). These were received in the 'Other (please specify)' category.

A sample of responses:

- We would be a dumber more brutish country without the Arts. The Arts inform and enrich our ways of thinking about life, other people and what we do in the world. Thereby all boats are lifted on a tide of cultural enlightenment. We end up doing everything better (ie jobs, the economy, services etc.)
- All of the above, PLUS: the A in 'STEAM' is there for a reason. The ability to think creatively is fundamental to innovation. Imagination and vision are the building blocks of social progress.
- The arts are used and appreciated by every human. We need them. Music heals, dance inspires. Where there is no arts there is nothing. A world or county that does not support art is sad and grey. There is a huge amount of people depressed at the moment because they are doing nothing with their time as the arts has been stripped away.
- There is a huge economic benefit to the arts and I don't think that is recognised. It is a thriving and legitimate business. It also enhances creativity and innovation and builds strong communities and promotes cultural appreciation.
- Benefits are intergenerational and not a one-liner. It opens up discussion, debate and understanding. It educates, builds empathy, brings communities together, engages people of different age groups to come together and experience positivity, beauty or a whole host of emotions. It enables people to feel welcome, encouraged and positive about where they live. Public art (in schools for example) can make people feel valued, instil pride and reciprocity for being respected- you give them a beautiful environment and impression place and they will rise to meet that in response.

Question 18: Do you have suggestions to strengthen Australia's creative and cultural industries?

This question was responded to by 3,161 participants.

A major theme in responses to this question was support. The words 'funding' (used 1,539 times), 'support' (1,143) and 'Government' (790) featured heavily in responses.

A sample of responses:

- We need funding to make events accessible - Auslan, captions etc. - for all artists, it shouldn't just be up to disabled people and orgs to do this. Access should be done by everyone. Keep accessible events post COVID Keep easy and quick grants application processes
- Fund more artists and programs beyond competitive grants. Pay artists and arts orgs for making/facilitating work. Protect the viability of organisations that engage the community and assist all to share creativity
- You need to teach music in primary schools, engender and foster a sense of appreciation for music, for the arts, for theatre, for wonder- a society cannot exist on sports alone.
- The Arts needs to be truly valued for all it offers Australia - creative expression, the skills it develops, the impact it has on health and well being, the way it connects diverse people, the way it engages people, and for its economic and employment contributions. A lot more effort and investment could be made to support people working within the arts and arts organisations who facilitate arts opportunities. We need to reduce, and ideally, drastically reduce job insecurity and burn-out in the sector. Instead, Australia should ensure reliable and ongoing funding to arts organisations so they can continue to inspire and support connected, vibrant and prosperous communities in the medium and long term.
- More equitable funding into the arts, more purchasing of work by Australian artists by state and federal cultural institutions, quotas on Australian content on media platforms (including visual arts content), more commissioning of live arts.
- Firstly, we need to be recognised by government as a workforce and industry with the respect we deserve. The arts are more than just a "glorified hobby". We are a major industry bringing billions of dollars to the economy each year. Secondly, we need more financial assistance. The live entertainment sector particularly will be if not the last sector that will be able to open up again, and these workers need the assistance deemed necessary to continue caring for their families and their livelihoods while they are unable to work. Thirdly, we need to diversify the people who run the sector on all layers, so that our story-telling in this country can be an actual representation of who we are as a nation.
- Provide more long term support for artists- Emulate models like Germany or Finland, and pay a living wage for what is largely done for free. Provide pathways for training and early career artists - have

Centrelink recognise arts work in all levels and forms. Art is work.
Acknowledge that.

Question 19: How have you, or your business, changed because of COVID-19?

This question was responded to by 3,193 participants.

Similar to question 16, many responses detail a loss of work, mental health and income. Others have attempted to adapt to restrictions with varying levels of success.

A sample of responses:

- Adapted my practice online; accepted more online publishing commissions; accepted commissions which engage creatively with the subject of the pandemic. Focalised/streamlined my projects.
- Government pay subsidies has helped immensely. Has been harder to network and engage in the industry.
- We have all changed because of COVID-19. Art is an invitation to learn. Art makes us human.
- All of our overseas tours have been cancelled due to the very strict border closure rules of the Australian government. These are some of the strictest in the world and the extra costs associated with this are making it impossible to tour work nationally and internationally. Also our new Works have been cancelled due to the fact dancers cannot rehearse and theatres have closed. Most of our work has dried up and it's very hard to plan for the future as it is very unknown, especially in Melbourne.
- We have had to go into hibernation given the lockdowns and lack of audience confidence.
- Isolation de-skills you, especially if you are a writer and an introvert already. I have lost social confidence, and feel that as an independent artist I have even less status than I had before, and really worry about making any sort of living in the months ahead. With the lack of arts bailouts, I grieve the damage being done to my sector, and the squandering of a generation of hard work by theatre artists. This is the latest in a long line of arts-bashing, and I must admit I'd tired, semi-defeated, thinking about leaving the profession altogether. Feeling a bit stunned and paralysed.

- My business had an annual turnover of \$4 million and since COVID our turnover is down 96% and we don't know if we will survive
- Much larger emphasis to online although we need to keep these capacities people are keen to reconnect in real life.
- We have had to adapt all work for artists and creative organisations to recognise the huge stress on the community. We have changed the way we work, administer, contract manage and support the arts and artists.
- I'm living now in poverty more than ever before

Question 20: Are there any other comments you would like to share with the Committee on your experience in the arts community?

This question was responded to by 2,284 participants.

A sample of responses:

- I have been a professional writer since I was seventeen, but only after the publication of eight novels have I been able to earn enough to live as an author. My future capacity to continue to live and work full time as a writer is entirely reliant on my future books having commercial success. None of this can be taken for granted. Grants are hard to obtain, taxable, and not able to provide a writer with more than a year at most. Usually just a few months. We desperately need more help to allow Australian writers to deeply immerse themselves in the long, hard craft of writing so that this country can birth writers of international significance. At the moment, Australia has won one Nobel Prize for Literature – Patrick White in 1973.
- The arts have a significant role to play in the imagining of a COVID-normal future. It is our sector that will lead this countries COVID recovery - building, narrating and capturing the stories of our time and the culture of our future
- It's still extremely difficult to be a young performer in Australia, particularly if you don't fit into one of a few different archetypes/stereotypes. We need more places that performers can play - more than busking, places with a proper audience. Incentivising cafes or restaurants to have live musicians each week, for instance.
- Funding is difficult to access for early career artists. There should be a register of practicing artists. Art sometimes falls between hobby and profession, and is difficult to classify in terms of tax and business.

- Arts and culture are important for the social and economic health of communities. Especially in regional or remote areas. Telling local and Australian stories or promoting such aspects of our society enrich us and also can promote tolerance and at times mental well being in communities.
- The arts connects me to my community, it has helped me with my mental health.
- There needs to be more Indigenous representation and story telling. The industry is white dominated and we have to do more
- There are very few grants available for self employed creatives and the competition for the few grants available are fierce. Art, music, literature and performing arts are important in the everyday life. Can you go a week without interacting with the world without the creative & cultural sectors. Odds are you can't.
- I grew up in a remote community in Western Australia and now live in a regional community. Being able to participate in the arts and tell our own experiences honours us as people with unique experiences and stories to tell. Otherwise we're just people who watch Netflix and consume other cultures.
- The Arts are an essential part of a thriving creative society. They play a significant role in fostering social cohesion, community connection, innovation, improve mental health, employ thousands of people and generate massive economic benefits. The Arts and Creative industries deserve the support and respect of the Government of Australia.
- I feel so devalued. I have been training at tertiary level since I was 16. I have won scholarships, represented my country overseas in global competitions, worked for NFP organisations and run my own commercial company. I am now a 32 year old woman, I have two degrees and am apparently unemployable. Does my contribution to Australia's economy have no worth now?

E. Commonwealth Government funding in response to COVID-19

Table E.1 Arts sector funding announced in response to COVID-19

Date	Amount	Funding details
9 April 2020	\$27 million	<p>Targeted Support for Indigenous Arts, Regional Arts and Support Act:</p> <ul style="list-style-type: none"> ▪ \$10 million for regional artists and organisations to develop new work and delivery models; ▪ \$10 million for Support Act; and ▪ \$7 million under the Indigenous Visual Arts Industry Support.¹
15 April 2020	\$41 million	<p>Tax and short-term red tape relief:</p> <ul style="list-style-type: none"> ▪ \$41 million in spectrum tax rebates for television and radio broadcasters; and ▪ suspension of television content obligations for Australian drama, children's and documentary.²

¹ The Hon. Paul Fletcher MP, Minister for Communications, Cyber Security and the Arts and Hon. Michael McCormack MP, 'Targeted Support for Indigenous Arts, Regional Arts and respected charity Support Act', *Joint Media Release*, 9 April 2020.

² The Hon. Paul Fletcher MP, Minister for Communications, Cyber Security and the Arts, 'Immediate COVID-19 relief for Australian media as harmonisation reform process also kicks off', *Media Release*, 15 April 2020.

25 June 2020	\$250 million	<p>\$250 million JobMaker plan to restart Australia's creative economy:</p> <ul style="list-style-type: none"> ▪ \$90 million in concessional loans to creative economy businesses; ▪ \$75 million in grant funding through Restart Investment to Sustain and Expand Fund; ▪ \$50 million towards the Temporary Interruption Fund; and ▪ \$35 million for significant Commonwealth funded arts and culture organisations.³
17 July 2020	\$400 million	<p>Location Incentive:</p> <ul style="list-style-type: none"> ▪ a merit-assessed grant of up to 13.5 per cent of a film and television production's qualifying Australian production expenditure.⁴
29 June 2020	\$50 million	<p>Public Interest News Gathering:</p> <ul style="list-style-type: none"> ▪ \$13.4 million allocated through new money, with the residual repurposed from unallocated funds from the Government's Regional and Small Publishers Jobs and Innovation Package; and ▪ funding delivered to regional publishers and broadcasters.⁵
5 August 2020	\$5 million	<p>Regional and Small Publishers Innovation Fund:</p> <ul style="list-style-type: none"> ▪ the 2020 round of the Innovation Fund, which began in 2018, was expedited and

³ The Hon. Paul Fletcher MP, Minister for Communications, Cyber Security and the Arts, '\$250 million JobMaker plan to restart Australia's creative economy', *Media Release*, 25 June 2020.

⁴ Screen Australia, 'Location and PDV Offsets', <https://www.screenaustralia.gov.au/funding-and-support/producer-offset/location-and-pdv-offsets>, accessed 3 March 2020.

⁵ Department of Infrastructure, Transport, Regional Development and Communications, 'Relief for Australian media during COVID-19', <https://www.communications.gov.au/what-we-do/television/relief-australian-media-during-covid-19>, accessed 5 March 2021.

		supports 43 recipients. ⁶
11 August 2020	\$20 million	Live Music Australia grant program: <ul style="list-style-type: none"> ▪ \$5 million in funding over four years divided over two rounds per year, each round worth \$2.5 million; ▪ 2020-21 funding focuses on supporting live music venues to reopen; and ▪ the program is part of the Government's \$30.9 million Australian Music Industry Package announced in March 2019.⁷
26 August 2020	\$49 million	Funding for Indigenous Visual Arts Industry Support program: <ul style="list-style-type: none"> ▪ \$49 million to support Indigenous visual art organisations including hubs, fairs and centres
02 September 2020		Indigenous Visual Art Action Plan
08 September 2020	\$1 million	Funding for touring Australian and international exhibitions to 32 venues across regional Australia: <ul style="list-style-type: none"> ▪ \$179,430 for the National Film and Sound Archive; ▪ \$153,399 for the National Gallery of Australia; and ▪ \$134,272 for the National Portrait Gallery of Australia⁸
18 September 2020	\$5 million	Funding to the Australian Associated Press Limited Newswire (AAP):

⁶ Australian Communications and Media Authority, 'Regional and Small Publishers Innovation Fund', 11 January 2021, <https://www.acma.gov.au/regional-and-small-publishers-innovation-fund>, accessed 5 March 2021; The Hon. Paul Fletcher MP, Minister for Communications, Cyber Security and the Arts, 'Funding to help Australian venues bring back the music', *Media Release*, 5 August 2020.

⁷ The Hon. Paul Fletcher MP, Minister for Communications, Cyber Security and the Arts, 'Funding to help Australian venues bring back the music', *Media Release*, 11 August 2020.

⁸ The Hon. Paul Fletcher MP, Minister for Communications, Cyber Security and the Arts, 'National collecting institutions to tour exhibitions to regional Australia', *Media Release*, 8 September 2020.

		<ul style="list-style-type: none"> ▪ This funding focuses on supporting over 250 regional news mastheads ▪ These are extra funds granted under the Public Interest News Gathering (PING) program, which consists of \$50 million funding ▪ This results in PING being a total of \$55 million⁹
26 September 2020	\$19.5 million	<p>Funding for three scripted television series produced by NBCUniversal's Universal Studio Group:</p> <ul style="list-style-type: none"> ▪ This funding aims to produce three scripted television series in Australia ▪ This funding is a part of the Australian Screen Production Incentive Location Offset, initially announced in May 2018 with \$140 million, and a further \$400 million announced at a later date.¹⁰
26 September 2020	\$22.9 million	<p>Funding for eight cultural institutions in 2020-21, including:</p> <ul style="list-style-type: none"> ▪ \$2.3 million for the Australian Film Television and Radio School; ▪ \$2 million for the Australian National Maritime Museum; ▪ \$2.5 million for the National Film and Sound Archive; ▪ \$4.5 million for the National Gallery of Australia; ▪ \$5.4 million for the National Library of Australia; ▪ \$3.9 million for the National Museum of Australia; ▪ \$1.2 million for the National Portrait

⁹ The Hon. Paul Fletcher MP, Minister for Communications, Cyber Security and the Arts, '\$5 million support for AAP Newswire', *Media Release*, 18 September 2020.

¹⁰ The Hon. Paul Fletcher MP, Minister for Communications, Cyber Security and the Arts, 'Morrison Government's Location Incentive brings Young Rock, Joe Exotic and Irreverent down under', *Media Release*, 26 September 2020.

		Gallery of Australia; and
		▪ \$1.1 million for Screen Australia. ¹¹
30 September 2020	\$53 million	▪ \$53 million in supporting Australian screen content: ▪ \$30 million to Screen Australia over two years ▪ \$3 million over three years to cultivate Australian screenwriting and script development ▪ \$20 million to the Australian Children's Television Foundation over two years ¹²
20 November 2020	\$60 million	▪ \$60 million in grants to be provided under the Restart Investment to Sustain and Expand (RISE) Fund: ▪ Grants between \$50,000 and \$2 million to be allocated to 115 projects ¹³
04 December 2020	\$90 million	▪ \$90 million in loans, guaranteed by the Australian Commonwealth Government for arts and entertainment organisations. ¹⁴

¹¹ The Hon. Paul Fletcher MP, Minister for Communications, Cyber Security and the Arts, 'Investing in Australia's national cultural institutions', *Media Release*, 26 September 2020.

¹² The Hon. Paul Fletcher MP, Minister for Communications, Cyber Security and the Arts, 'New funding in Budget to deliver Australian screen content', *Media Release*, 30 September 2020.

¹³ The Hon. Paul Fletcher MP, Minister for Communications, Cyber Security and the Arts, '\$60 million in RISE grants to restart arts and entertainment activity around Australia', *Media Release*, 20 November 2020.

¹⁴ The Hon. Paul Fletcher MP, Minister for Communications, Cyber Security and the Arts, 'Australia's first arts and entertainment loan scheme open', *Media Release*, 4 December 2020.

F. Labor members - additional comments

We commend this report for rightly acknowledging the importance of the creative sector, and the disastrous impact of the COVID-19 pandemic on the sector. While we agree with the many bipartisan recommendations, these additional comments provide scope for even more that can be done to help this vital sector.

The pandemic has had a devastating and transformative impact on the Australian creative sector. Many individuals and organisations have been forced to leave the sector or to close for good.

The Morrison Government waited too long to pledge targeted assistance for the sector, and delivery of these funds took even longer.

It is also important to remember the arts sector was in a vulnerable state well before COVID hit, thanks to years of neglect and funding cuts inflicted by Coalition governments.

Therefore, we submit these additional recommendations to help Australia's creative industries.

ADDITIONAL COMMENTS:

1. Representation for future wage subsidy programs

A restored 'Department of the Arts' should be represented in all discussions around future wage subsidy, job creation and protection programs whether prompted by the current COVID-19 pandemic or any other circumstances that require such programs.

The Committee heard evidence that the toll of the public health emergency on the overall arts labour market was significant, with employment falling by 872,000 people between March and May 2020. ‘Arts and recreation’ was the second hardest hit sector by jobs lost, and employees average work hours decreased by 21 per cent between the March and June quarters of 2020 (compared with the all industry average of five per cent).

The nature of those who work and derive income in this industry – from artists and actors to musicians and technicians, meant that JobKeeper failed to cover many of these people who often work in the gig economy, on short-term or casual contracts and who work from project to project.

Submissions made to the Committee suggest that for one representative body, roughly half its’ members in the entertainment sector were unable to access JobKeeper.

The restored ‘Department of the Arts’ should make representations to other Departments to provide adequate coverage for people working in the creative and artistic industries.

It is vital that any future economic and worker support programs and packages provide coverage for these workers.

2. Insurance Scheme for events sector

The pandemic has been devastating for the arts and events sectors. The unpredictability of the pandemic has meant that Australian businesses have been left on their own when events have been cancelled at short notice due to outbreaks.

This has had a profound impact on jobs and confidence. Without an insurance program underwritten by government, the industry will continue to be vulnerable and we will see even more jobs lost and Australian talent left abandoned. The risk of putting on big live events is just too great.

The Committee heard evidence from Ms Gwendolyn Konx. Ms Knox stated that, “I personally have had all my bookings cancelled indefinitely. At 63 years of age and living remotely of indigenous descent, my chances of re-entry to the sector could be very challenging.”¹

Forecasts of lost revenue provided to the Committee, suggested that some organisations expected to lose \$70 million in revenue this financial year.

¹ Ms Gwendolyn Knox, *Submission 21*, p. 1.

As commercial insurance is no longer available for COVID-19 for events, the Morrison Government must immediately establish a live event insurance program – similar to the Temporary Interruption Fund which applies to the film industry.

3. Fully funding the ABC

The ABC is one of Australia's most beloved and trusted public institutions. It is not only a vital source of reliable and independent information and news during times of crisis – as best illustrated during the pandemic and the bushfire crisis of Summer 2019/20 – it is also an organisation that invests in Australian creative content and production.

Continual cuts and indexation of the ABC's funding and pursuits of efficiency in expenditure has led to job losses, the closure of regional and local news bureaus and broadcasting, and an erosion of the ABC's ability to invest in Australian content.

The Committee heard that the ABC is a key commissioner of Australian scripted content spending \$489 million in the last five years, and prioritising the promotion of indigenous works.

A number of inquiry participants pointed to the success story of children's television show Bluey. Bluey was co-commissioned by the ABC and receives international attention.

In a time where misinformation is rampant and extremism is rising, the ABC is vital to provide the public with objective and independent news and information. And in a time when the pandemic has caused so much disruption to our arts and creative sectors, the ABC's investment in Australian entertainment and content is more vital than ever.

We call on the Government to provide stable and adequate funding to the ABC and ensure ongoing support for this vital institution.

4. Remove the efficiency dividend from the National Collecting Institutions

The National Institutions have been subject to efficiency dividends for decades, and there is barely any fat left to cut. Job cuts and reductions in services have been the result.

These institutions are meant to showcase our national stories, and they are major employers for Canberra as well as tourist attractions. Continued cuts through efficiency dividends are not sustainable and we call on the government to reconsider this longstanding policy.

5. Properly fund the Australia Council

The Australia Council was subject to major funding cuts and disruption under former Arts Minister George Brandis, and it has yet to recover - annual funding is below where it was when Labor left office. As an arms-length funding body which operates on the basis of peer review, the Australia Council is the backbone of our national arts ecosystem. The federal government must acknowledge this and deliver the Australia Council the funding it needs to play this important role.

6. Properly support and help grow Australia's Gaming Sector

Labor Members note the Government's neglect of the Australian video games Industry, which has stymied the growth of what should already be a powerhouse of Australia's creative economy.

We condemn the Government for slashing the Australian Interactive Games Fund - a key Labor initiative to deal with the effects of the Global Financial Crisis (GFC) and the concurrent major restructuring of the global games industry, due to the move to mobile platforms - a cut that contributed to the stunting of the Australian games industry, and undermined Australia's success as a digital economy.

After cutting the Interactive Games Fund in 2014, the Liberal National Government stubbornly refused to act on the recommendations of the April 2016 Report of the Senate Environment and Communications References Committee, "Game on"², which included a funding scheme as well as the introduction of a refundable tax offset.

For years, this short-sighted Liberal National Government has rejected and ignored industry and Labor's repeated calls to support one of the largest and fastest growing entertainment and media industries in the world.

After seven years of wasted time and intransigence from this Government, Australia's vibrant but small video games industry has been outpaced by Finland, the UK, Canada and New Zealand, and others, where government support has been well delivered. Not only has Australia missed out on thousands of highly skilled and high paying jobs and investment, but Australian talent has also leaked to environments more supportive for games developers overseas.

Labor Members are pleased the 2021 Budget finally announced support in the form of a 30 per cent tax offset for local and international businesses that develop digital games in Australia, and that the game of catch up can finally begin.

² Senate Standing Committees on Environment and Communications, *Game on: more than playing around. The future of Australia's video game development industry*, April 2016.

We note however that a significant number of the Australian-owned businesses which are currently of sufficient size to access the tax offset received support from the first \$20 million that was disbursed from the Australian Interactive Games Fund, before it was abolished. It is arguable that, if the slashing of \$20 million from that fund had not occurred, the games industry could have up to twice the number of companies it has today able to access the proposed tax offset, and many more if such fund had been extended.

While Australia's games industry is resilient, it is caught in an underdevelopment trap in part because of a long-term lack of public policy and understanding of its role in high end digital skills development and therefore its place in the digital economy, as well as global export focus.

Australia can boast a world class indie game development sector but we lack a government who is focused on helping them grow and export their businesses.

The Liberal National Government has mismanaged support for this sector and Australia is missing out on the significant economic and cultural dividends as a result.

Ms Emma McBride MP

Member for Dobell

Deputy Chair

Mr Patrick Gorman MP

Member for Perth

Member

Mr Josh Burns MP

Member for Macnamara

Member