



THINKING
BIG

Australia 2020 Summit

Creative Australia

April 2008

These background materials aim to tell an evidence-based story about how Australia is faring. They are not intended to be definitive or comprehensive, but were put together to stimulate discussion on the main challenges and opportunities facing the country and the choices to be made in addressing them. They do not represent government policy.

The materials end with a set of questions. We hope that these, along with many other questions, will be the subject of conversation both prior to and during the Summit.

Education in creativity starts from our earliest years, but often falls away as school continues

States set out to encourage creative education...

All states recognise the role of the arts in developing creative students

In Victoria, "the arts" (which includes performing and visual arts) forms one of six core disciplines for students from prep to year ten

In NSW, "creative arts" are one of six learning areas for students from kindergarten to year six

One of the objectives of The Adelaide Declaration on National Goals for Schooling in the Twenty-First Century³ is for students to be "*confident, creative and productive users of new technologies*" when they leave school

...however these aspirations are not always met

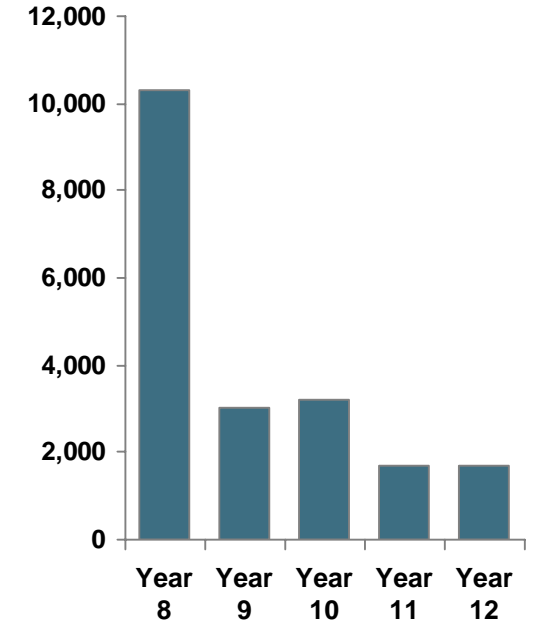
The number of creative subjects undertaken as electives in final year is relatively small (~12% in Victoria)¹

Socio-economic background remains a major influence on children's access to music²

Demand from business for graduates with "core" competency in mathematics and English puts pressure on schools and education systems to reduce timetable allocations of creative endeavours

Example: music falls away during secondary school

Students receiving music education in secondary schools, by year - Qld: 2002

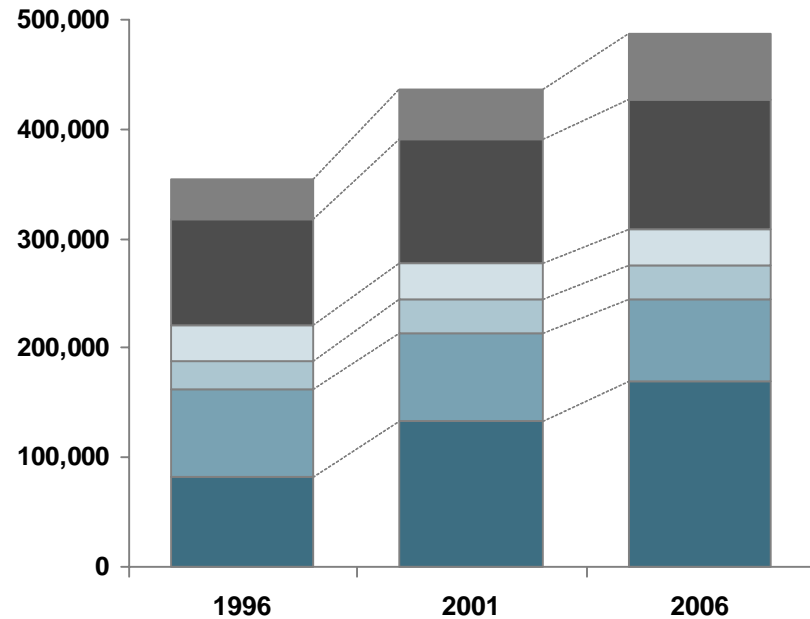


1. Creative subjects include: Art, dance, drama, literature, media, multimedia, music, studio arts, theatre studies and visual communication and design 2. Pascoe et al., *A National Review of School Music Education* (2005) 3. The declaration was signed by state and territory education ministers at the 10th Ministerial Council on Education, Employment, Training and Youth Affairs (1999)
Source: Music Council of Australia, *National Report on Trends in School Music Education Provision in Australia* (2003); Victorian Curriculum Assessment Authority, *Unit three completion* (2007)

Creative industries have significant economic value to Australia

They exhibit high growth...

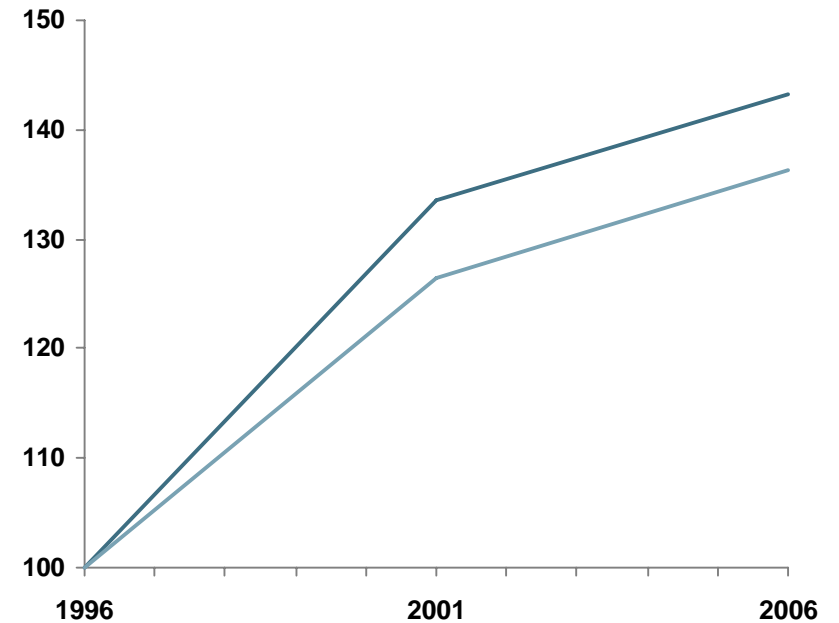
Number of people employed



- Advertising and marketing
- Architecture, design and visual arts
- Film, TV and radio
- Music and performing arts
- Publishing
- Software and digital content

...and large wage increases

Wage indexed (base=100)

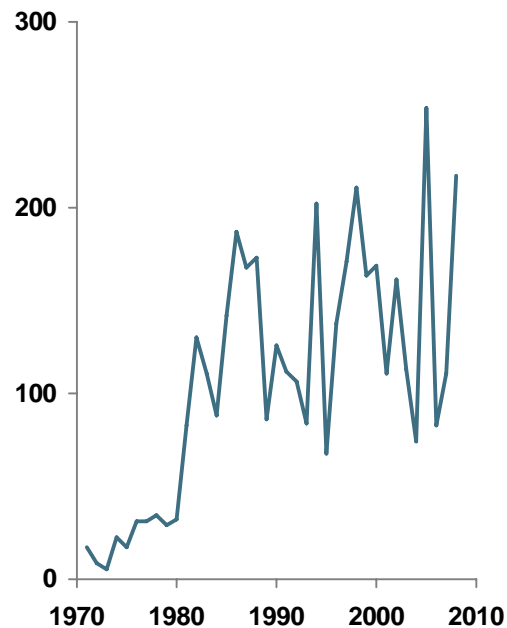


- Creative industries
- Total workforce

While our film industry appears to be growing, domestic successes have recently eluded us

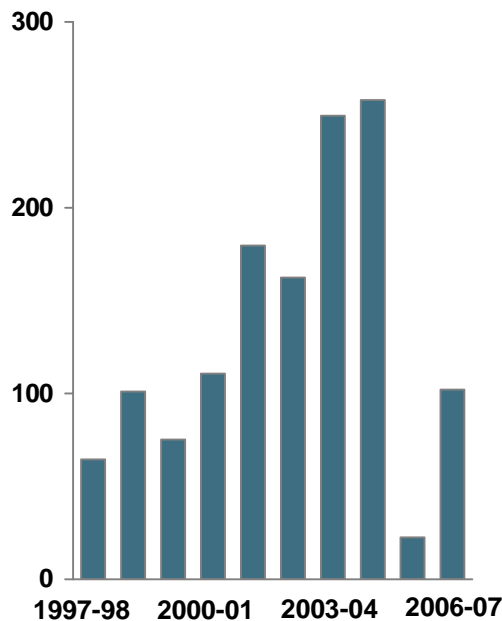
Expenditure on Australian film production is growing...

Total production budget: (A\$m, 2006)



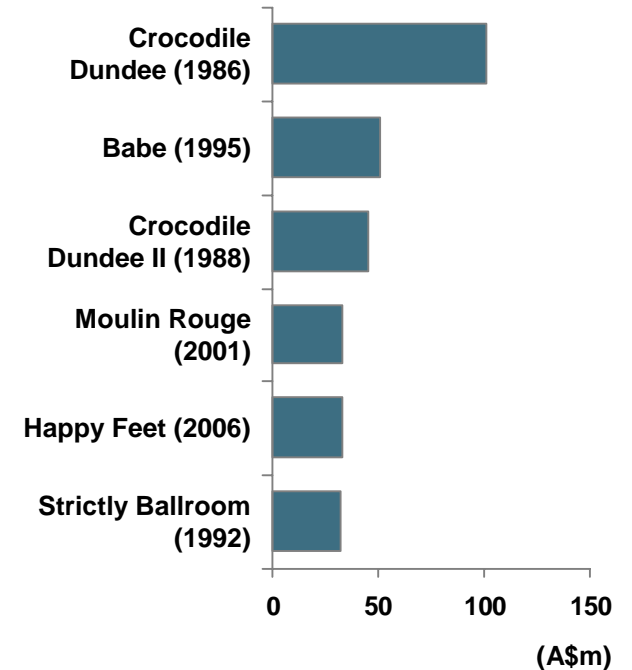
...as is expenditure on foreign films made here...

Foreign film spend in Australia (A\$m)



...but consistent success has not accompanied this growth

Top six Australian feature films by Australian box office revenue (A\$m¹)

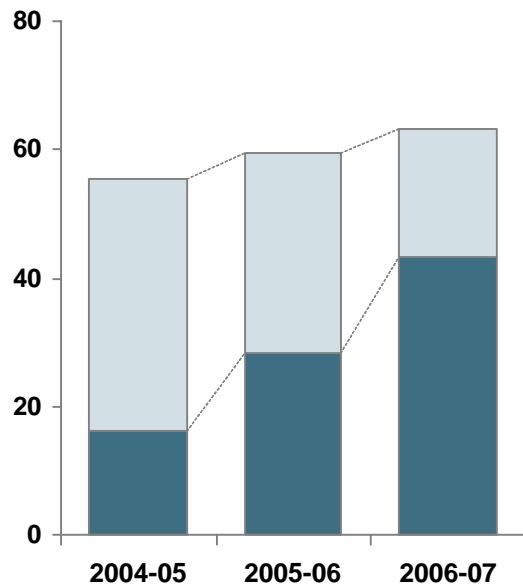


1. In 2006 prices
Source: Australian Film Commission, *Audiovisual Production in Australia* (2007)

Digital technology is changing the industry rapidly and democratising content creation

Rapid uptake of broadband is improving download rates...

Households with internet access (%)



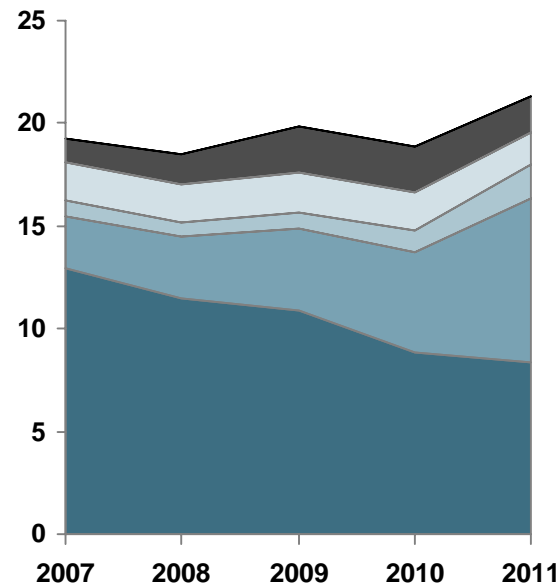
Legend:
■ Broadband
■ Dial-up



For more on Australia's broadband internet capabilities, see *Future Directions for the Australian Economy* (p10)

...increasing access to culture in digital form...

Household expenditure on cultural activities per week (A\$1)



Legend:
■ Literature
■ Broadcasting, electronic media and film
■ Visual arts and crafts
■ Performing arts
■ Music

...and democratising and broadening creation of content

Digital technology has also given rise to new forms of expression

- Computer game development
- Short film production
- Digital animation

The structure of the creative industries is changing

- Previously there were small numbers of producers and a large number of consumers
- Now consumers of content are becoming producers *en masse*

The internet is the new distribution medium for creative content, sites include:

- Flickr (photos)
- YouTube (video)
- Facebook (various)
- MySpace (various)
- SecondLife (various)

1. In 2003-04 prices

Source: ABS, 8146.0, *Household use of information technology* (2007); ABS, 4172.0, *Arts and Culture in Australia: A statistical overview* (2007)

Australians embrace culture through a wide variety of activities, of which the following are just a few examples...

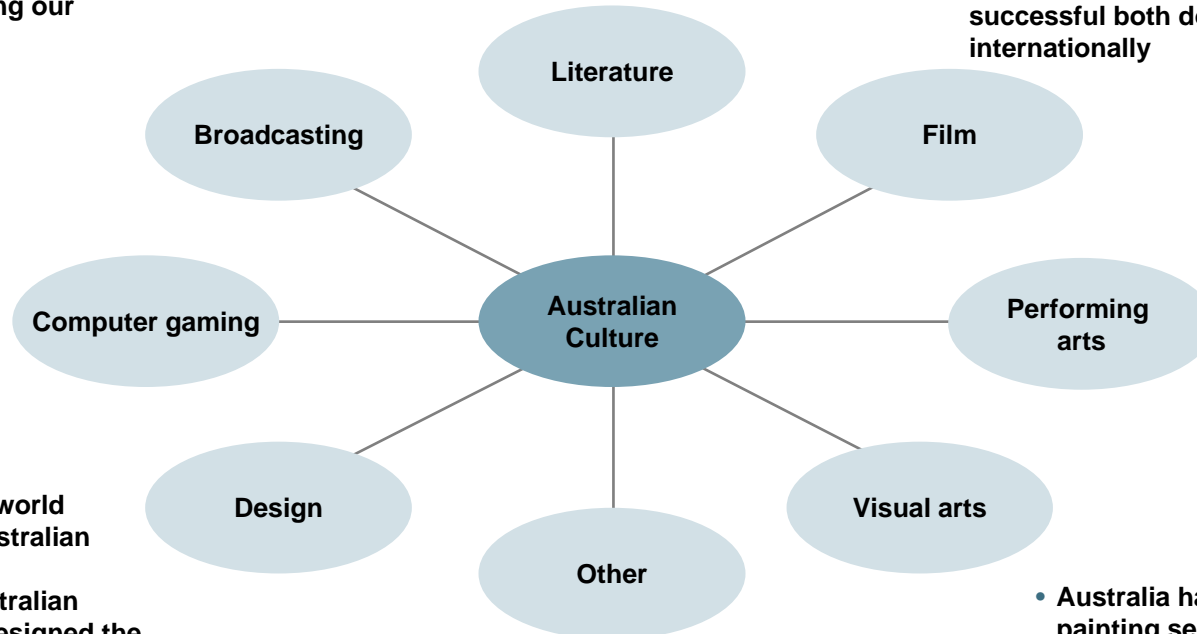
- Australia supplies a broad array of television content for domestic and international consumption
- Australian drama has a history as a breeding ground for future acting talent
- Public broadcasting also plays an important role in defining our national identity

- Writing and literature play important roles in chronicling our history and defining our national psyche
- Australian writers have been acknowledged with prestigious international awards including the Nobel Prize for Literature and the Booker Prize

- Australia produced the world's first feature length film, *The Story of the Kelly Gang* (1906)
- In recent years, Australians have been recipients of numerous international awards from the film industry and are household names all over the world
- Our films are a source of Australian social commentary, many of which have been successful both domestically and internationally

- Australians excel globally at computer game design, a source of huge potential future economic growth and a training ground for the next generation of creative Australians

- Our cities are filled with world famous and uniquely Australian architecture
- PTW, a cutting edge Australian architecture company, designed the widely acclaimed swimming centre for the Beijing Olympics
- Australia has an exceptional international reputation for fashion design



- Opera Australia is the busiest opera company in the world, performing seasons in Sydney and Melbourne as well as touring regional areas
- Australian music, from The Wiggles to Silverchair, is enjoyed all over the world
- Dance is an important part of Indigenous culture in Australia

- Australians value and excel in a variety of other creative activities including crafts, advertising and gastronomy

- Australia has a thriving indigenous painting sector
- Our landscapes and way of life are chronicled through our history of painting
- Painting forms an important introduction to art and culture in our schools
- Urban sculpture is prominent in all of our major cities

...but some Australians experience barriers, both practical and social, to engagement

Impediments to engagement in cultural activity

Practical

Financial constraint

- 85% of the population would feel more positive about the arts if they were more financially accessible

Geographic barriers

- 74% would feel more positive if the arts were more geographically accessible

Social

A perceived sense of exclusion

- 84% of the population believe that the arts should be "more accessible and available to average Australians"

A perceived lack of relevant information and education about the arts

- 35% agree that "the arts are OK, but irrelevant to me"

Perceived social atmosphere precludes some from feeling comfortable engaging in the arts

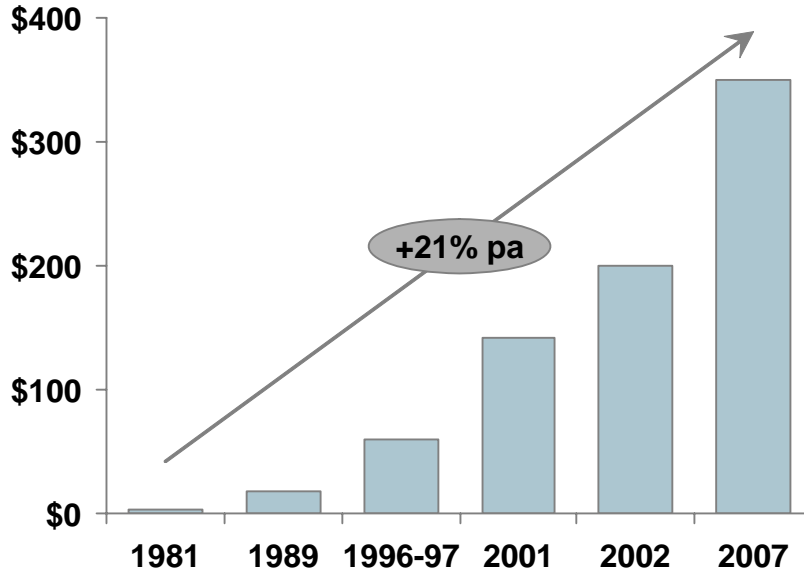
- 51% believe the arts attract people who are "somewhat elitist and pretentious"

There is great scope to promote the value of the arts more broadly and to expand the ability of all Australians to enjoy them

Indigenous art is a particularly important sector

A large and rapidly growing indigenous art and craft industry...

Sales of Indigenous arts and crafts (A\$m)



High-end Indigenous art is highly prized and can be found in the world's most famous art galleries

...with considerable social and cultural benefits

Indigenous creative activity is associated with¹

- Pride
- Self-esteem
- Maintenance of culture
- Transmission of culture
- Intergenerational learning

*"The Indigenous visual arts and crafts sector is absolutely central to cultural sustainability for Indigenous Australia and cultural diversity in the wider Australian community. The sector is a living demonstration of the continual connection to land, family, Dreaming, culture and place that dates back many millennia. Arts practice is a fundamental part of the way of life for Indigenous artists and communities."*²

*75% of people think "Australia has a richer culture because of our Aboriginal heritage"*³

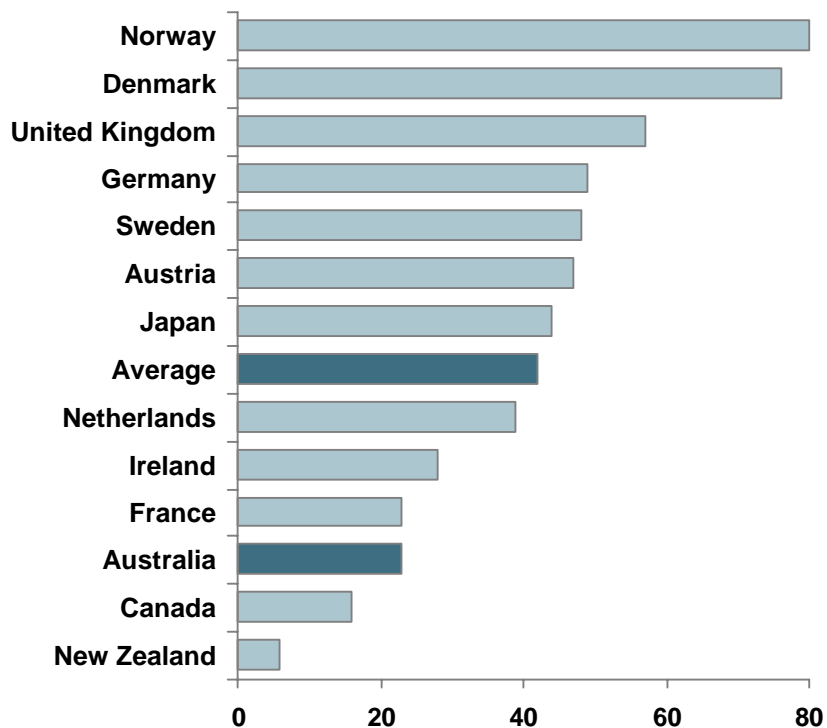
1. Senate Standing Committee on Environment, Communications, Information Technology and the Arts, *Indigenous Art – Securing the Future* (2007) 2. Victorian College of the Arts, *Submission to Indigenous Art – Securing the Future* (2007) 3. Australian Research Group, *Attitudes towards Indigenous people and reconciliation* (2007)

Source: The Senate Standing Committee on Environment, Communications, Information Technology and the Arts, *Indigenous Art – Securing the Future* (2007)

Our public broadcasters - the ABC and SBS - also play important roles

Public broadcasting funding lags international peers

Public broadcasters' funding levels (1999¹, US\$)



ABC and SBS play important social and economic roles

- Our public broadcasters assist in developing, maintaining and transmitting our national identity
- SBS is a valuable provider of international and multi-lingual content, especially for the 16%² of Australians who speak a language other than English at home
- The ABC projects Australia into the Asia-Pacific region and engages with our neighbours through Australia Network and Radio Australia
- As a key supporter of local emerging talent, public broadcasters contribute to future growth of our creative industries
- The ABC is highly active in the developing digital economy, providing internet television and news sites for rural communities, online sales through the "ABC Shop Downloads" service and digital television through ABC1 and ABC2 stations
- 89% of Australians continue to believe the ABC provides a valuable service to the community

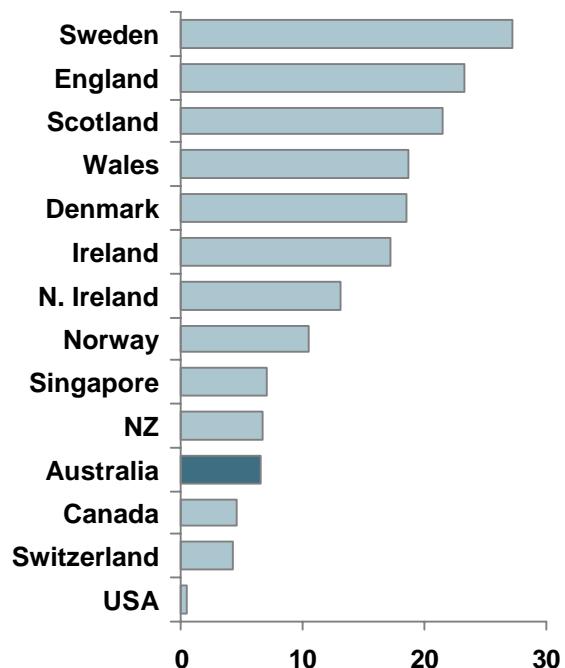
1. Latest data available 2. ABS 2068.0, *Census tables 2006*

Source: OECD, *Communications Outlook 2001*; Australian Broadcasting Corporation, *Annual Report 2007*; ABS 2068.0, *Census tables 2006*

The current role of government in the arts and culture is highly fragmented

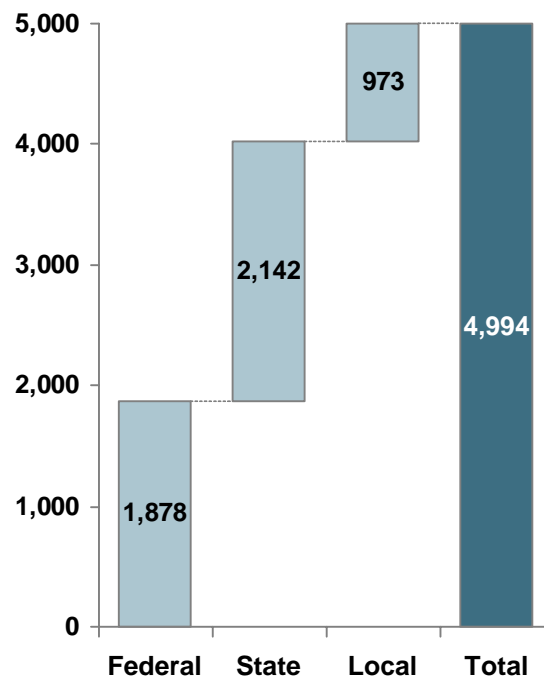
On government funding, we trail Europe but lead the USA where private philanthropy is much more significant

Arts council budget per capita: 2003-04 (A\$)¹



Funding is spread across all levels of government

Government funding: 2005-06 (A\$m)



This model may need a rethink

- Funding and art collections are highly fragmented between states and levels of government. We should begin from a national perspective when we consider the future of the arts and culture in Australia
- Private philanthropy could play a larger role in promoting culture in Australia

1. Figure for Switzerland is from 2005

Source: ABS, 4183.0, *Cultural funding by government (2007)*; Canada Council for the Arts, *Comparisons of Arts Funding in Selected Countries (2005)*

Questions

What role does government have in supporting traditional art forms, and in promoting innovation?

How can the cultural sector better balance the desire for creative output with the intrinsic worth of the artistic process?

How can we foster a population with wide-ranging intellectual and creative curiosity?

What forms of innovation are critical to maximise outcomes for the community and the economy?

What can Australia do to encourage experimentation, innovation and creative thinking in a changing environment?

What skills does Australia need in emerging creative industries (for example, those which draw heavily on digital content)?

What benefits can new communication technology provide for arts and cultural organisations?