

A NEW APPROACH

Insight research series
Report One

THE BIG PICTURE: PUBLIC EXPENDITURE ON ARTISTIC, CULTURAL AND CREATIVE ACTIVITY IN AUSTRALIA

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The opinions in this report do not necessarily represent the views of ANA's funding partners, or the individual members involved in the governance or advisory committees.

About A New Approach

A New Approach (ANA) is an independent think tank championing effective investment and return in Australian arts and culture. We aim to foster a more robust discussion about cultural policies, underpinned by good data, informed by shared understandings, and through a non-partisan and independent approach. ANA was established in 2018 with a \$1.65 million commitment by The Myer Foundation, the Tim Fairfax Family Foundation and the Keir Foundation. The Australian Academy of the Humanities is the lead delivery partner for this initiative.

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A NEW
APPROACH



EXECUTIVE SUMMARY

Cultural and creative activities generate a range of cultural, economic, social and personal benefits for the people of Australia

How and why do individuals, communities, businesses, philanthropists and governments invest in arts and culture? What benefits does this generate? What do we need to do to ensure this investment is relevant and effective into the future?

Over the next 12 months, ANA will release a series of reports focused on:

- * investment
- * benefits
- * ensuring Australia's creative and cultural future.

This is our first report, *The Big Picture: public expenditure on artistic, cultural and creative activity in Australia*. The report's purpose is to establish a baseline understanding of the quantum and trends in expenditure on culture by all levels of government over the last decade. It identifies some basic international comparisons and, by synthesising available data, enables meaningful comparisons to be made now and into the future between different years, different levels of government and different areas of expenditure. One of our hopes is that people will realise the value in capturing, analysing and disseminating relevant data to ensure an even clearer picture of the funding environment and return on investment in all its forms.

ANA is committed to identifying how our policy, regulatory and investment settings can ensure effective and relevant expenditure on culture, make cultural opportunities available to all Australians, and unlock further investment to keep strengthening Australia's cultural and creative activity. Achieving this will require commitment and courage from all parts of this ecosystem—from philanthropists, businesses, non-government organisations, individuals and creators—as well as from governments.

Most of us participate in some form of creative and cultural activities: 82.4 per cent of Australians attended cultural venues and events in 2017–18, with a particularly high rate of direct participation in cultural activities (95.6 per cent) from young people aged five to 14 years. In 2009–10 Australian households spent \$19.87 billion, or 4.0 per cent of their total expenditure, on cultural goods and services.

Cultural and creative activities generate a range of cultural, economic, social and personal benefits for the people of Australia.

- * It is well-established that engaging in cultural and creative activities helps us develop a sense of belonging, forges social cohesion, stimulates curiosity and the ability to engage with different perspectives, and can have a range of beneficial effects on health, wellbeing and education outcomes.
- * Australia's creative and cultural activity is a significant component of our national economy, contributing more than \$111.7 billion, or a 6.4 per cent share of Australia's Gross Domestic Product (GDP), in 2016–17. More than half a million Australians work in the creative economy, which employed 593,830 people in 2016, representing about 5.5 per cent of the national workforce.

Recognising these benefits, Australia's federal, state, territory and local governments all commit funds to artistic, cultural and creative activity. In 2017–18 the three levels of government allocated a combined \$6.86 billion to the cultural life of our nation. While this expenditure is only part of the overall financial investment in creative and cultural production, it plays an important role in enabling both access and experimentation, as well as caring for our shared cultural assets.

This first Insight Report provides an overview of trends in federal, state, territory and local government public expenditure on artistic, cultural and creative activity in Australia between 2007 and 2018. The work relies on the authoritative, publicly available dataset *Cultural Funding by Government* produced by the Australian Bureau of Statistics (ABS) and the Meeting of Cultural Ministers Officials (Statistics Working Group) (MCMO-SWG). This dataset provides the most complete view available of public expenditure on culture in Australia, capturing expenditure on culture across different departments, government entities and funding programs. It includes support for organisations of all scales, including our best-known cultural institutions—such as the Australian War Memorial, the Australian Broadcasting Corporation (ABC) and Bangarra Dance Theatre—as well as support for the nation-wide ecosystem of creative organisations and individuals in remote, regional and metropolitan Australia, and for programs designed to increase access opportunities for specific audiences and programs focused on Australia’s international cultural diplomacy efforts.

Over the last decade there have been significant shifts in the magnitude and source of this public expenditure. Such big changes over short periods of time have been unsettling to a sector that relies on long-term development of skills and products for its delivery and ambition for excellence. It has also unsettled other funders, especially philanthropists, who often provide reciprocal and compensatory funding. ANA identified an important need to achieve a clinical understanding of these emerging trends in public expenditure on arts and culture in Australia.

The research highlights that without strategic and coordinated effort across all levels of government, Australia risks deterioration in its cultural fabric and a loss of the benefits it provides.

In considering pathways for governments to ensure that policy, regulatory and investment settings lead to more effective cultural funding expenditure, the findings of this first Insight Report suggest several opportunities.

Findings

- * Australian public expenditure on arts and culture reached its highest point in 2017–18, while fluctuating during the previous decade (using adjusted figures).
- * Cultural expenditure is not matching population growth. Per capita public expenditure on culture has dropped by 4.9 per cent over the decade 2007–08 to 2017–18, and expenditure as a percentage of GDP remains below the Organisation for Economic Co-Operation and Development (OECD) average.
- * From the ABS and MCMO-SWG dataset, local and state and territory government per capita expenditure on culture has increased, while federal expenditure has decreased. Local government per capita expenditure has increased by 11.0 per cent, while state and territory government expenditure has increased by 3.9 per cent. The federal government is committing 18.9 per cent less expenditure per capita to culture compared with a decade ago.
- * Responsibility for cultural expenditure is split more evenly between the levels of government than it was a decade ago. As a proportion of the total, the federal government now contributes 39.0 per cent, down from 45.7 per cent, while state and territory governments contribute 34.8 per cent, up from 31.9 per cent, and local governments contribute 26.2 per cent, up from 22.4 per cent.
- * Capital expenditure is typically a minor part of the total cultural budget, significantly outweighed by expenditure on recurrent activities. However, it is increasing as a proportion of the total. Between 2007–08 and 2017–18 capital expenditure per capita increased by 47.6 per cent, while recurrent expenditure per capita decreased by 11.7 per cent.
- * Federal, state and territory government expenditure on culture is split fairly evenly between three overarching categories: Film, Radio and Television (32.5 per cent); Museums, Art Museums, Archives, Libraries and Cultural Heritage (37.7 per cent); and Arts (29.7 per cent).

Opportunities

- * Build stronger and more strategic leadership and collaboration between the federal, state and territory and local governments, as well as intra-government collaboration (between different departments who manage cultural expenditure). This should include clear recognition of the increasingly significant contribution of local governments to cultural funding and better public acknowledgement of the respective responsibilities for arts and culture at different levels of government.
- * As an immediate priority—noting that the uplift in 2017–18 has returned per capita expenditure to just below the longer-term average—identify steps to maintain this commitment to the long-term per capita average of the last decade, as a minimum.
- * For the longer-term, consider designing and implementing of mechanisms that will deliver remedial measures and positive incentives to boost cultural expenditure as a percentage of GDP to the OECD average within the next decade.
- * Provide clearer policy direction to ensure the expected public value outcomes of cultural expenditure are better communicated.
- * Ensure current and accurate data about cultural spending by government continues to be available, to inform cultural expenditure by all levels of government, as well as private, philanthropic and corporate funders of arts and culture.
- * Given that significant public capital expenditure on cultural assets may also come through funding programs without a specific cultural focus, identify opportunities to ensure investment decisions are made using relevant cultural expertise and in a coherent, strategic manner, and that these opportunities are made more visible across the creative and cultural sector.



All of us, whether we recognise it or not, have creative and cultural activities in our everyday lives.

For some this might mean listening to music during a workout, laughing out loud at a film, learning a new drawing technique, telling stories around a campfire or watching their child dance in the end of year concert. For others it means reading a book, going to a comedy show with friends, or performing in their town's theatre group. Perhaps it is a trip to the city to see a big exhibition or a trip to the country to attend a music festival. It could be working in a museum, learning a new language or watching a new Australian drama on television. Maybe it is playing a game on a smartphone or singing along with the radio on a long drive. It might involve being enrolled in a course, learning from a mentor, or teaching a new generation how to keep our cultural life evolving. For some people, the focus of their career is creating.

Creative and cultural activities can be a central part of a good life for all Australians.

As a nation we strive to create a society that is prosperous, fair and inclusive for people no matter where they live, and that honours the many stories of this country—both ancient and recent. As a modern society we cannot ensure this future without purposeful and confident investment in our cultural and creative life.

Governments have always played an important role in setting an environment of investment confidence through policy and regulatory settings and by leading public acknowledgement of the important role of creativity and culture in the lives of Australians.

Along with philanthropists, businesses and others, governments have played a leading role in funding Australian arts and culture for the social, cultural, economic and personal benefits they provide.¹ Public funding supports opportunities for people across Australia to be part of the cultural life of our nation, assists people from all walks of life to make and access cultural experiences, and ensures our cultural life reflects, and is relevant to, our contemporary demographics. It enables Australian cultural institutions to protect and share our important cultural heritage. It helps ensure we hear a broad range of perspectives, and promotes a sense of belonging, cooperation, collaboration, safety and trust—elements that form the basis of any liberal democracy. It also assists Australia's cultural diplomacy efforts around the world.

Importantly, public funding can invest in Australian creators to keep energising our culture. This financial commitment is critical in enabling a broader ecosystem of creative risk-taking, which is vital for ongoing innovation and relevance.

Creative and cultural activities can be a central part of a good life for all Australians

Australia's federal, state and territory, and local governments commit funds to provide opportunities for people to access, experience and keep creating Australia's heritage and culture

Australia's federal, state and territory, and local governments together currently commit more than \$6.86 billion of public funds to arts and culture each year, which is approximately 1.0 per cent of the combined total expenditure made across all levels of government.² This provides opportunities for people to access, experience and keep creating Australia's heritage and culture. This expenditure also facilitates further investment in cultural and creative activity more broadly, activity which the Australian Department of Communications and the Arts found contributed more than \$111.7 billion to our economy in 2016–17.³

To ensure the continuing relevance of public expenditure on arts and culture—and to meet future expectations—we need to understand the answers to the following questions:

- * How is public expenditure for cultural activities guided by public value?
- * Are the current arrangements for fostering a rich cultural and creative life in Australia effective and informed by a clear understanding of the possible benefits?
- * Do our policy, regulatory and investment settings best serve the Australian public now and into the future?
- * Will our current cultural, innovation and industry policies and regulations enable our cultural sector to thrive in the 21st century?
- * Is public expenditure on Australian arts and culture growing, shrinking, or remaining the same?
- * How does the private investment of finance, time, creativity and attention—by philanthropists, businesses, non-government organisations and, crucially, individuals—form part of the broader commitment to creativity and culture in Australia?

These are big and complex questions, and ANA's Insight research series aims to uncover fresh evidence and develop new insights to enhance informed discussion of these topics.

The big picture on public expenditure

This first Insight Report from ANA provides an overview of trends in federal, state and territory, and local government public expenditure on arts and culture in Australia between 2007 and 2018.⁴ It identifies key trends within the data and begins our work to assist government, the arts sector and all who are interested in having a better understanding of the way arts funding and policy functions.

This report highlights opportunities for governments to develop the policy, regulatory and investment settings that could lead to more effective public and private expenditure on arts and culture. To understand these trends, the report concentrates primarily on the big picture, rather than changes within individual agencies or artforms.

While this report looks at the big picture, we know this is not the whole picture. Private investment of money, time, creativity and attention—by philanthropists, businesses, non-government organisations and, crucially, individuals—forms a substantial part of support for arts and culture in Australia. In 2009–10 Australian households spent \$19.87 billion—or 4.0 per cent of their total expenditure—on cultural goods and services.⁵ Future Insight Reports will further explore this broader investment and its returns for the country.

This report relies on the authoritative, publicly available dataset *Cultural Funding by Government* produced by the Australian Bureau of Statistics (ABS) on behalf of the Meeting of Cultural Ministers Officials (Statistics Working Group) [MCMO-SWG].⁶ This dataset provides the most comprehensive view available of public expenditure on culture across all departments, from all levels of government (federal, state and territory, and local and their agencies), including of both recurrent and capital expenditure.⁷ No data is available for 2013–14 and 2014–15, as the ABS did not produce the data series during these years.⁸ As a result, these years appear as gaps in the charts that follow. The figures throughout the research findings have been adjusted to June 2018 using the Wage Price Index (WPI).⁹ Further notes on the data categories, limitations and gaps, are included at the end of this report.

The *Cultural Funding by Government* series includes support for organisations at all scales, including for our best-known cultural institutions—such as the Australian War Memorial, the Australian Broadcasting Corporation (ABC), and Bangarra Dance Theatre—as well as support for the nation-wide ecosystem of creative organisations and individuals in remote, regional and metropolitan Australia and for programs designed to increase access opportunities for different audiences. It includes expenditure on broadly available services such as libraries, as well as the funding programs that invest in the development and distribution of new creative work (including those administered by Screen Australia, The Australia Council for the Arts, and the various state and territory agencies).

What we mean by culture

ANA acknowledges the cultures of Indigenous peoples in Australia and their continuing cultural and creative practices in this land. We recognise that Australia's culture has been uniquely shaped by Indigenous peoples, by centuries of migration from many other places, and by generations of people born in this place.

We take a broad view of culture, which draws together two main meanings.

The first meaning refers to the arts and culture as the set of institutions, industries and actions by individuals, which combine to produce and distribute a wide range of texts, performances, exhibitions, experiences and events. Some of these activities are purely commercial while some are subsidised by governments, some are community-sourced, others are privately funded, others are supported via patronage, and many are a combination of these. The activities include, but are not limited to, galleries, libraries, archives and museums, music, screen, radio, video gaming and digital arts, performance, literature, visual art, community-engaged practice, hybrid and experimental forms, language, festivals, craft, heritage, design, and live art.

The second meaning refers to the beliefs, values, ways of living and everyday forms of creativity that we either share as Australians or share with other members of our particular social groups or communities.

In recognising these two notions of culture, our purpose is to acknowledge the interactions between them are crucial to understanding the issues at stake in assessing the public value of expenditure on culture. How do these relate to and interact with our ways of living and everyday forms of creativity? How far do they promote our common interests and values as Australians? How do they also serve the interests and values of different demographic groups? And do they do so fairly?

We note also that arts and culture sit within the broader category of cultural and creative activity. No global, agreed-upon definition exists for this category of activity and it is a topic of contest and change over time.¹⁰ The majority of this report focuses on a single dataset, which removes some of these challenges. At certain points, however, the report refers to a variety of sources that use differing definitions and therefore include or exclude different things from their underlying datasets. Through referencing and clarifications where important, we have endeavoured to make these distinctions as transparent as possible.

THE FINDINGS

Finding 1:

Australian public expenditure on arts and culture reached its highest point in 2017–18, while fluctuating during the previous decade (using adjusted figures). Cultural expenditure is not matching population growth. Per capita public expenditure on culture has dropped by 4.9 per cent over the decade 2007–08 to 2017–18, and expenditure as a percentage of GDP remains below the OECD average.

Finding 2:

From the ABS and MCMO-SWG dataset, local governments and state and territory governments have increased their per capita expenditure on culture. Local governments have increased per capita expenditure by 11.0 per cent while state and territory governments have increased per capita expenditure by 3.9 per cent. The federal government is committing 18.9 per cent less expenditure per capita to culture than it did a decade ago.

Finding 3:

Responsibility for cultural expenditure is split more evenly between the levels of government than it was a decade ago. As a proportion of the total, the federal government now contributes 39.0 per cent, down from 45.7 per cent, state and territory governments contribute 34.8 per cent, up from 31.9 per cent, and local governments contribute 26.2 per cent, up from 22.4 per cent.

Finding 4:

Capital expenditure is typically a minor part of the total cultural budget, significantly outweighed by expenditure on recurrent activities. However, it is increasing as a proportion of the total. Between 2007–08 and 2017–18 capital expenditure per capita increased by 47.6 per cent, while recurrent expenditure per capita decreased by 11.7 per cent.

Finding 5:

Federal, state and territory government expenditure on culture is split fairly evenly between three overarching categories: Film, Radio and Television (32.5 per cent); Museums, Art Museums, Archives, Libraries and Cultural Heritage (37.7 per cent); and Arts (29.7 per cent).

Finding

1

Australian public expenditure on arts and culture reached its highest point in 2017–18, while fluctuating during the previous decade (using adjusted figures). Cultural expenditure is not matching population growth. Per capita public expenditure on culture has dropped by 4.9 per cent over the decade 2007–08 to 2017–18, and expenditure as a percentage of GDP remains below the OECD average.

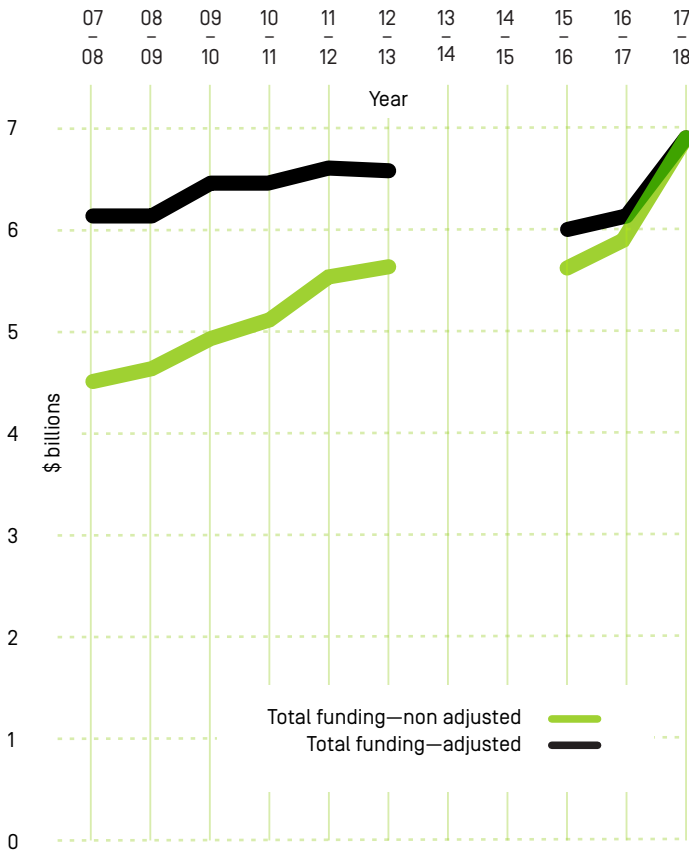
Is overall public expenditure on arts and culture growing, shrinking or remaining the same? We wanted to understand what is happening at a macro level to help Australia move towards a better informed and more strategic conversation about investment and benefits.

Using adjusted figures (June 2018 WPI) we found the overall quantum of public expenditure on arts and culture from federal, state and territory, and local governments was relatively stable over the period 2007–08 to 2012–13. This was followed by a period of instability, with a significant drop in 2015–16, followed by increases in 2016–17 and 2017–18.

The largest spend on culture over the 11 years occurred in 2017–18, using adjusted figures. The total expenditure varies between \$6.11 billion and \$6.86 billion over the 11-year period (a difference of 11.0 per cent). The lowest figure occurred in 2015–16, and the highest in 2017–18, highlighting the volatility of the most recent years.

While the increase between 2015–16 and 2017–18 is significant, it is important to consider how this, and the preceding period of relatively constant total expenditure, intersects with Australia’s significant population growth during the same period.

Total combined cultural funding by all levels of government (adjusted to June 2018 WPI and non-adjusted) 2007–08 to 2017–18



Expenditure plateaued as population grows

In the period 2007–08 to 2017–18, Australia’s population increased by 16.9 per cent, from 21.4 million to almost 25 million people.¹¹

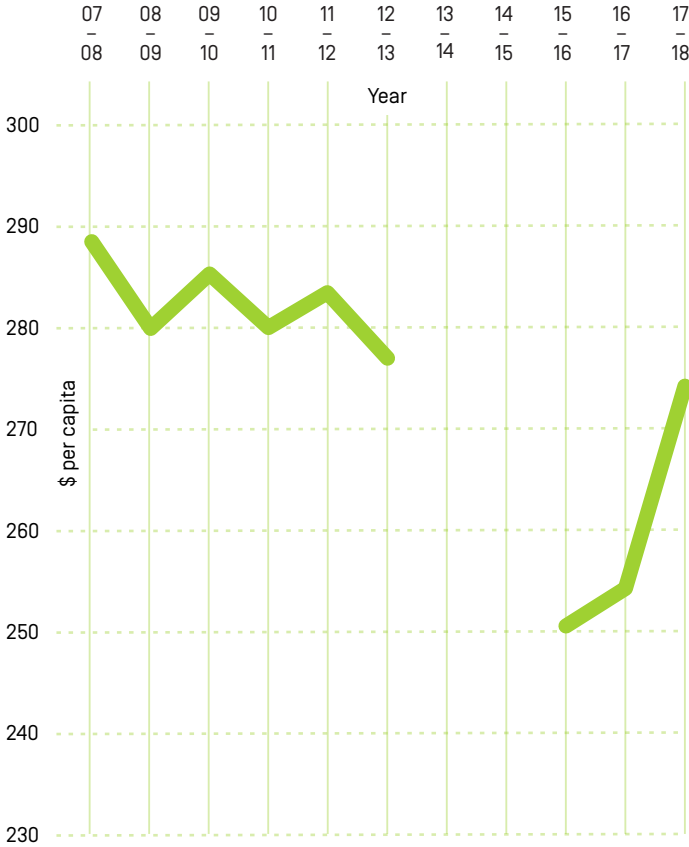
As Australia’s population grew, total public expenditure on culture plateaued, declined and then had a notable uplift in 2017–18.

The combined effect of this is clear in the figures for 2015–16 when per capita expenditure across all areas of cultural funding dropped to its lowest point in the last 11 years.¹² Between 2007–08 and 2015–16 there was an 11.6 per cent decrease in per capita public expenditure on culture. The increase in 2017–18 is noteworthy and shows per capita expenditure is coming back into the range of the period 2007–08 to 2012–13.

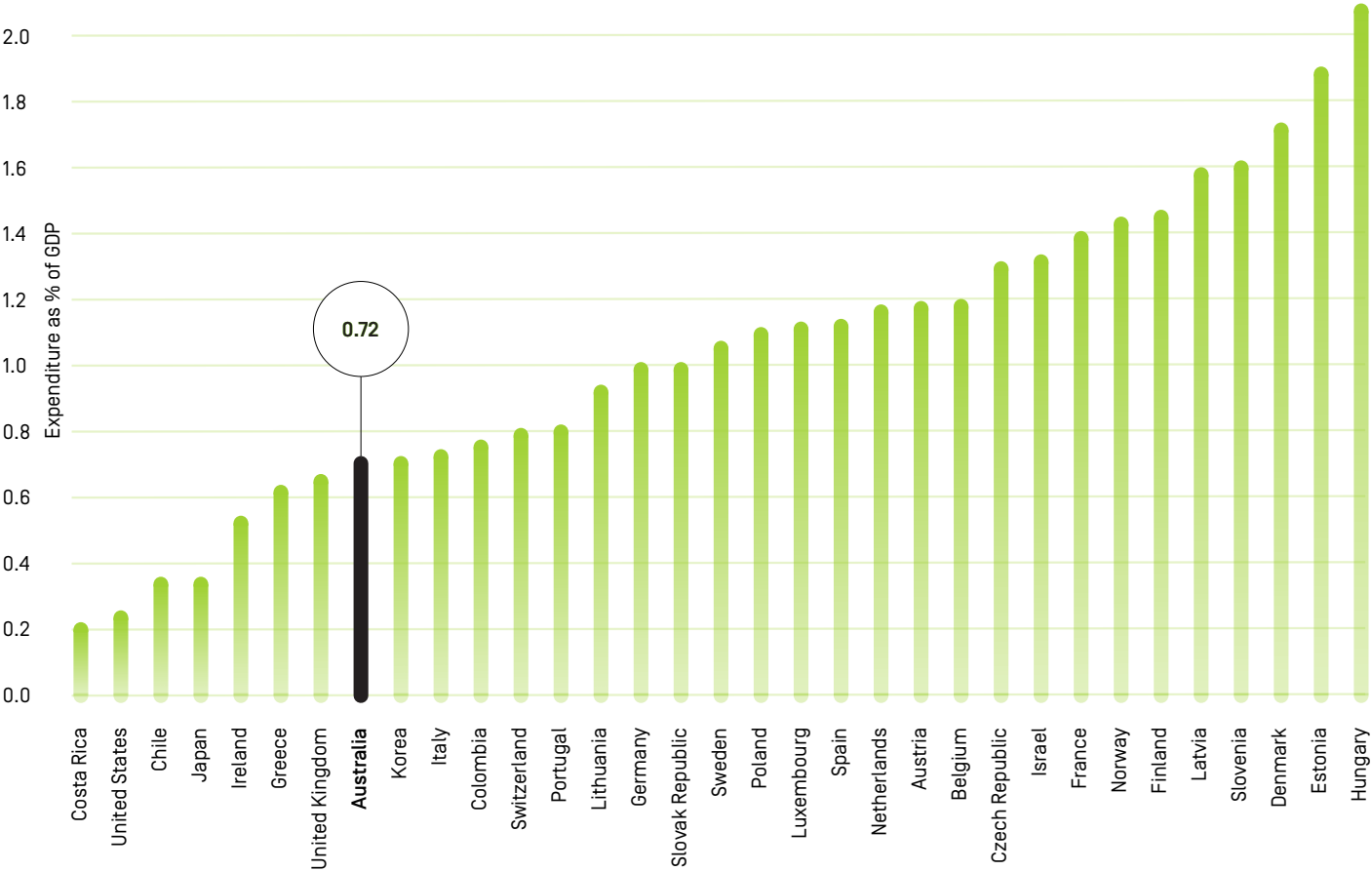
The chart shows the decline in per capita expenditure across the decade. While per capita expenditure fell by just 1.1 per cent between 2007–08 and 2011–12, it fell by 13.0 per cent between 2007–08 and 2016–17. The uplift in expenditure in 2017–18 has partially redressed this, but the 2017–18 per capita figure is still 4.9 per cent lower than the per capita figure a decade earlier in 2007–08.

The average per capita adjusted expenditure over the 11 years for all three levels of government combined was \$275.71. At the lowest point in the decade (2015–16) the per capita expenditure of \$253.14, a decrease of 8.3 per cent from the average. The most recent figure of \$274.60 in 2017–18 is 0.4 per cent below the average.

Cultural funding per capita [adjusted to June 2018 WPI]
for all levels of government combined



Expenditure on recreation, culture and religion as a percentage of GDP by OECD members for which data is available, 2015 Source: OECD National Accounts Statistics: National Accounts at a Glance



Is this pattern evident in other measures?

To help cross-check these trends, we considered whether this pattern appeared in any other measures.

The OECD reports on the expenditure of its members (including Australia) as a percentage share of GDP.¹³ This dataset includes a subsection that combines culture, recreation and religion into one category. Our analysis found:

- * In the 21st century, OECD member states have, on average, reported expenditure on culture, recreation and religion at 1.11 per cent of their GDP, exceeding the Australian figure of 0.77 per cent.
- * In the most recent dataset available at the time of writing (for 2014 to 2017), the average public expenditure on culture, recreation and religion as a percentage of GDP for all OECD member states dropped slightly to 1.09 per cent. Australia's reported expenditure also dropped, more significantly, to 0.72 per cent (the OECD average drop is 0.02 per cent, while Australia's average drop is 0.05 per cent).¹⁴
- * In the most recent year for which comparative data was available, Australia ranked 26th out of 33 member countries.

To better understand how these changes in cultural expenditure per capita have happened we need to look at the different levels of government (Finding 2).

Finding

2

From the ABS and MCMO-SWG dataset, local governments and state and territory governments have increased their per capita expenditure on culture. Local governments have increased per capita expenditure by 11.0 per cent while state and territory governments have increased per capita expenditure by 3.9 per cent. The federal government is committing 18.9 per cent less expenditure per capita to culture than it did a decade ago.

To better understand the overall decline in per capita expenditure, we examined the contributions made by federal, state and territory, and local governments to overall cultural spending, seeking to identify trends and compare the different levels of government.¹⁵

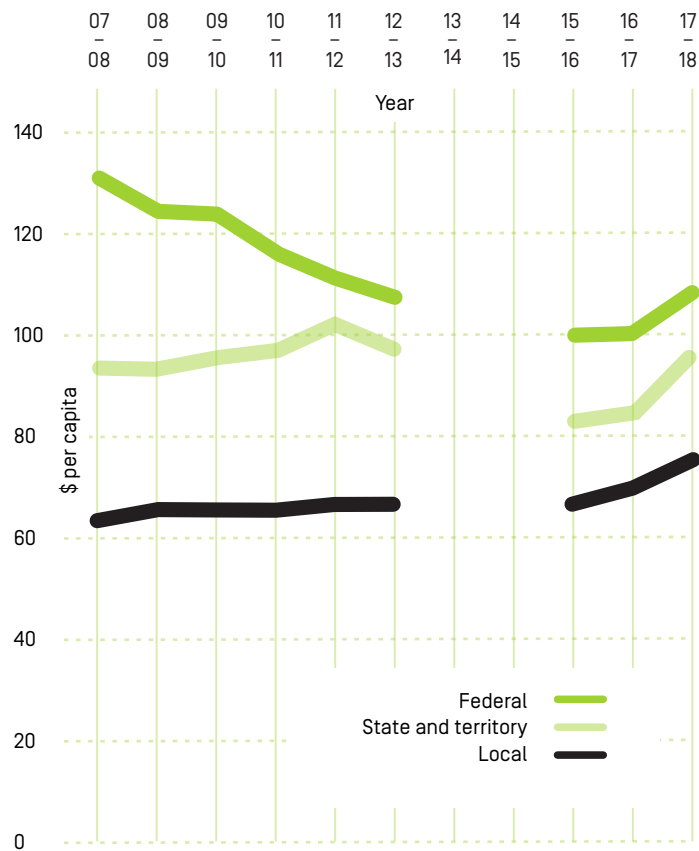
Each level of government directs expenditure in the context of its own policies, population, and priorities.¹⁶ We wanted to see the big picture on whether public expenditure is growing, shrinking or staying the same at each level of government.

Using figures adjusted to June 2018 WPI, we found the following changes in per capita expenditure by the three levels of government between the 2007–08 and 2017–18.

Change in per capita expenditure by all levels of government, 2007–08 and 2017–18

	07–08	17–18	Change
Federal government	\$131.93	\$107.02	↓ 18.9%
State and territory government	\$92.03	\$95.65	↑ 3.9%
Local government	\$64.78	\$71.93	↑ 11.0%
Total	\$288.75	\$274.60	↓ 4.9%

Cultural funding per capita by different levels
of government (adjusted to June 2018 WPI),
2007–08 to 2017–18



Understanding the detail of these changes

Since 2007–08, federal expenditure per capita in adjusted terms has generally been declining, but with a notable upswing in 2017–18.

State and territory expenditure per capita rose slightly between 2007–08 and 2011–12, declined from 2011–12 to 2015–16, and has since been increasing.

Expenditure per capita by local governments has steadily increased most years since 2007–08.

The 4.9 per cent per capita drop in cultural funding described in Finding 1 appears to come from declining federal and state and territory government expenditure intersecting with population growth. While the increased commitment by local governments initially countered the reduction in federal and state and territory per capita expenditure, continuing population growth has resulted in overall decline becoming apparent. However, increased per capita expenditure by both federal and state and territory governments in 2017–18 has begun to address the decline.

It is important to note that different local governments have significantly varied capacities to invest and may have different cultural expenditure priorities to federal and state and territory governments. The rise in local government funding cannot be simply considered as direct compensation for the decline at other levels of government. However, 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.

Finding

3

Responsibility for cultural expenditure is split more evenly between the levels of government than it was a decade ago. As a proportion of the total, the federal government now contributes 39.0 per cent, down from 45.7 per cent; state and territory governments contribute 34.8 per cent, up from 31.9 per cent and local governments contribute 26.2 per cent, up from 22.4 per cent.

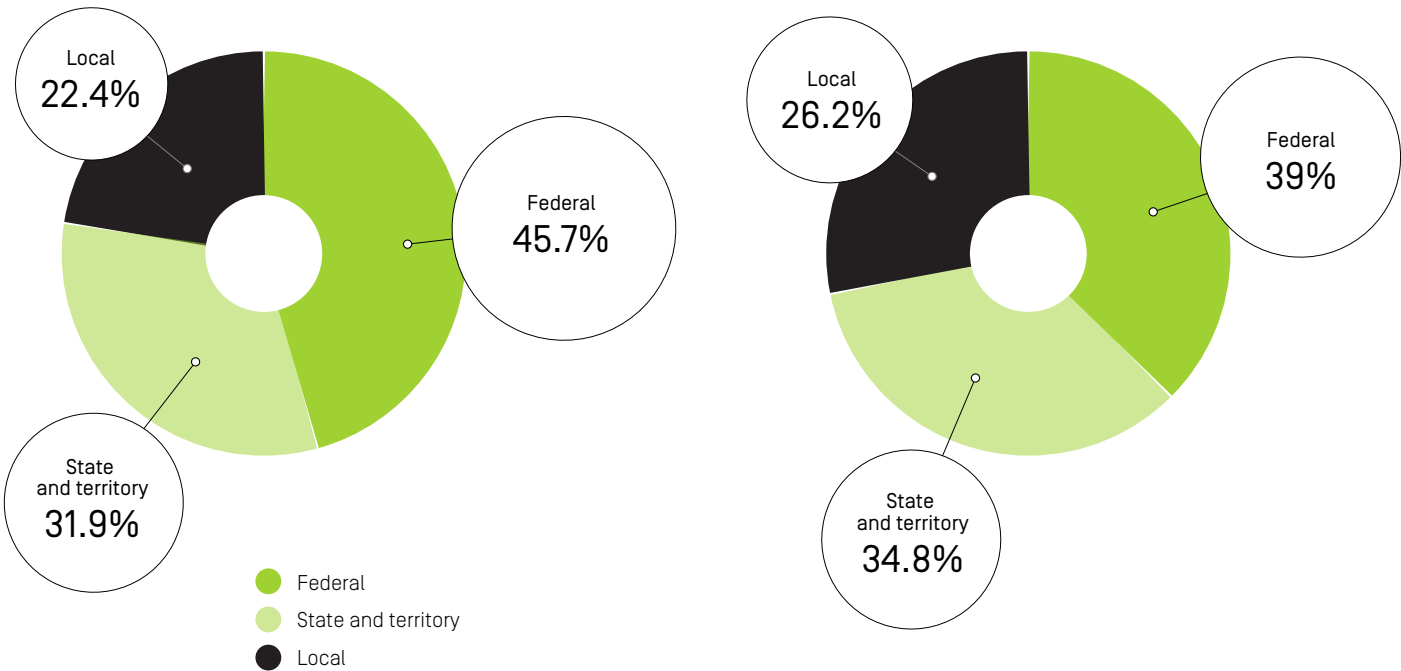
In 2007–08 federal expenditure made up almost half of government cultural funding, at 45.7 per cent. State and territory governments contributed 31.9 per cent and local governments contributed 22.4 per cent.

By 2017–18 this had changed to a far more even split between the three levels of government. Local governments and state and territory governments had increased their share of contribution to the total, while the federal government’s share was proportionally smaller.

In the past decade, federal government funding has declined as a proportion of total cultural expenditure, from 45.7 per cent to 39.0 per cent. At the same time, funding from state and territory governments has proportionally increased from 31.9 per cent to 34.8 per cent, and funding from local governments has risen from 22.4 per cent to 26.2 per cent.

Left: Proportion of cultural funding by different levels of government, 2007–08

Right: Proportion of cultural funding by different levels of government, 2017–18

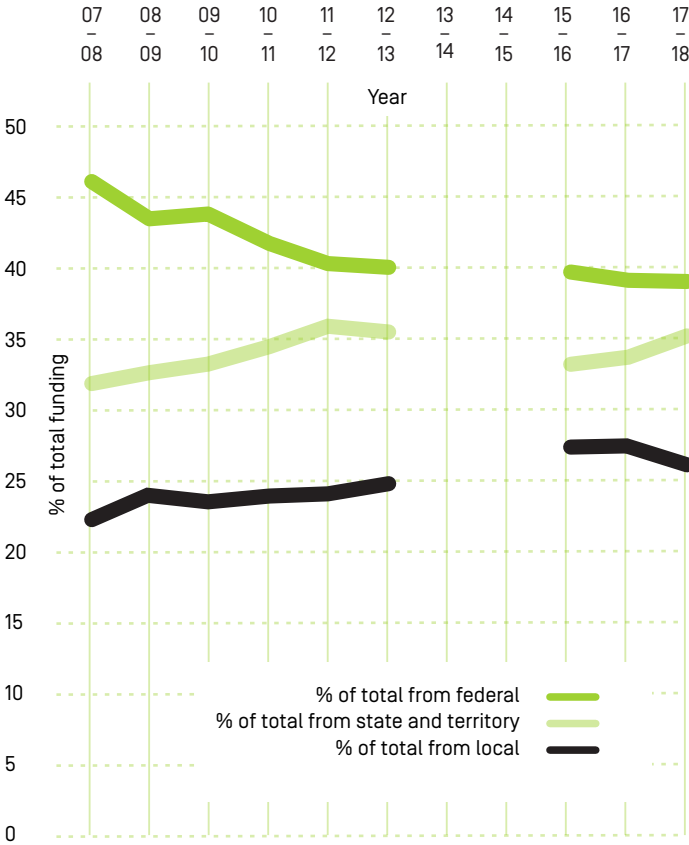


Proportion of total cultural funding, different levels of government, 2007-08 to 2017-18

The shift in percentages can be seen across the period, as shown in the chart opposite.

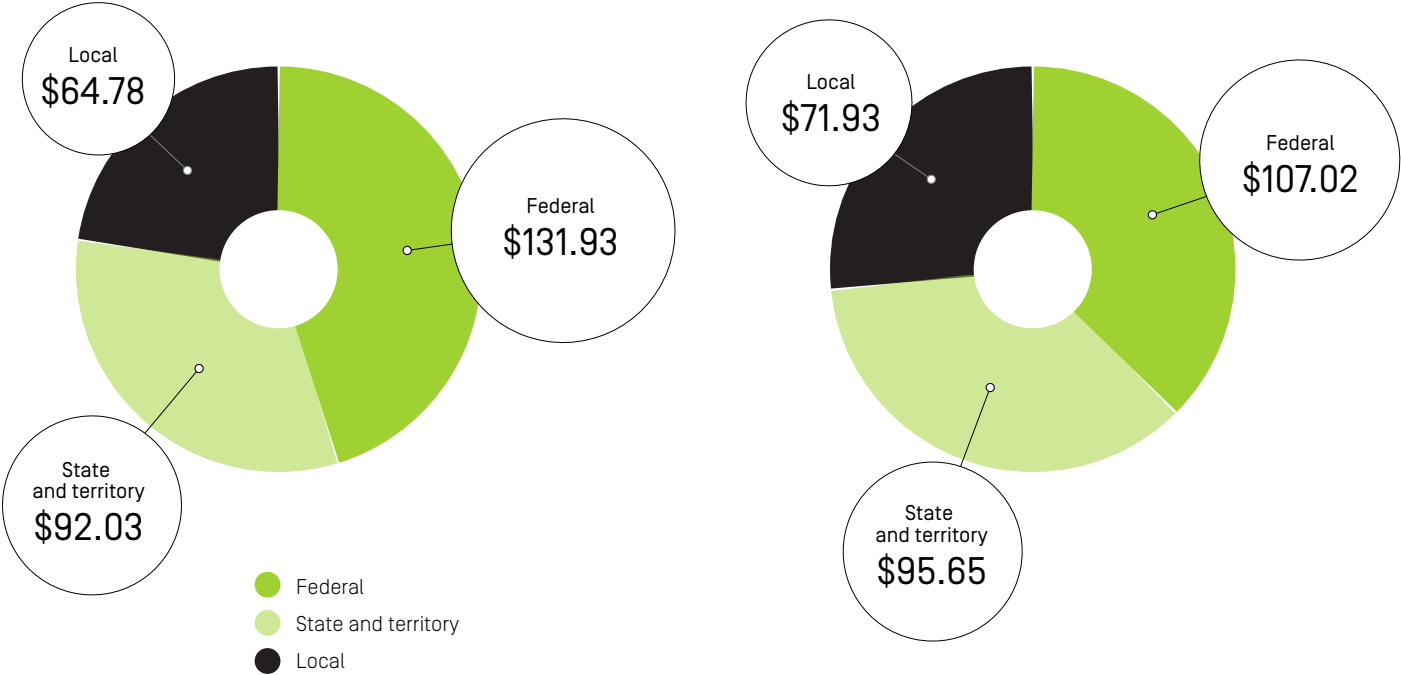
Responsibility is shifting

This significant shift in the dynamic between federal, state and territory and local governments has come about largely as a result of the federal government decreasing its per capita expenditure. This is evident when we compare the per capita expenditure by level of government in 2007-08 and 2017-18 as shown in the charts on the following page.



Left: Per capita expenditure by level of government,
2007-08 [adjusted to June 2018 WPI]

Right: Per capita expenditure by level of government,
2017-18 [adjusted to June 2018 WPI]



Finding

4

Capital expenditure is typically a minor part of the total cultural budget, significantly outweighed by expenditure on recurrent activities. However, it is increasing as a proportion of the total. Between 2007–08 and 2017–18 capital expenditure per capita increased by 47.6 per cent, while recurrent expenditure per capita decreased by 11.7 per cent.

The *Cultural Funding by Government* dataset splits the expenditure into recurrent and capital expenditure using the following definitions:

- * **Recurrent:** Expenditure of government funds on programs, specialist areas and special projects including operational costs, wages and salaries, goods and services, current grants and transfer payments, specific purpose grants and subsidies. Includes non-capital grants or payments to individuals, groups, organisations or other entities.
- * **Capital:** Expenditure of government funds on the creation of fixed assets (e.g. buildings, additions, renovations or restorations), land, building and intangible assets including expenditure on second-hand fixed assets, land acquisitions, and capital grants for capital works on projects. Includes capital grants or payments to individuals, groups, organisations or other entities. Excludes loans.¹⁷

We found that within this dataset, capital expenditure is a minor part of the total cultural expenditure, significantly outweighed by expenditure on recurrent activities. Over the period 2007–08 to 2017–8, recurrent activities account for between 82.2 per cent and 88.5 per cent of total cultural expenditure. In contrast, capital expenditure accounted for between 11.5 per cent and 17.8 per cent of the total cultural expenditure.

Across the same period, recurrent expenditure on average comprised 86.5 per cent of the total expenditure, while capital expenditure on average comprised 13.6 per cent of the total expenditure.



Recurrent expenditure as a percentage of total expenditure, all levels of government, 2007–08 to 2017–18



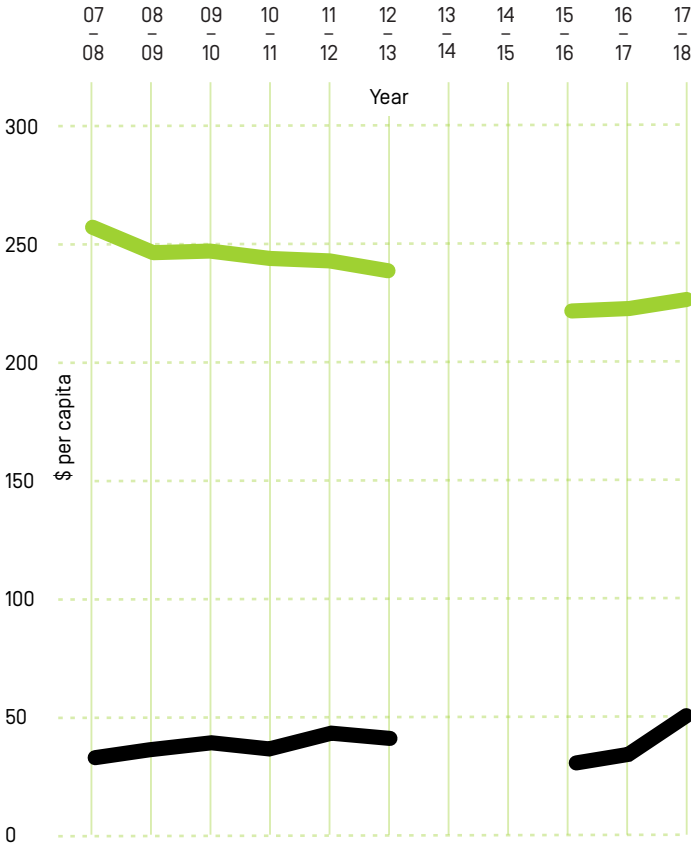
Per capita expenditure: recurrent declines while capital rises

Across the entire decade, total recurrent expenditure per capita has been falling. The slight increase in 2017–18 is the only year where recurrent expenditure per capita was not less than the year before. Between 2007–08 and 2017–18 recurrent expenditure per capita fell by 11.7 per cent.

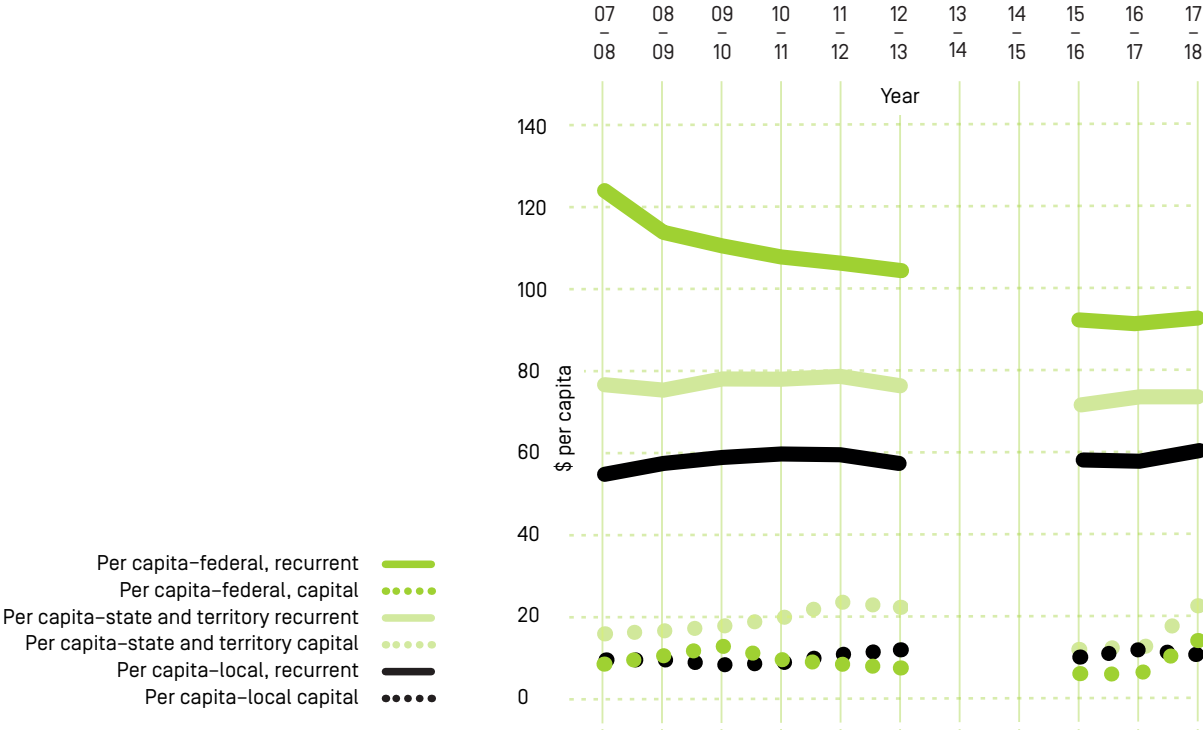
In contrast, capital expenditure per capita rose steadily from 2007–08 to 2012–13, then dropped sharply in 2015–16, before rising slightly in 2016–17 and rising significantly in 2017–18. Between 2007–08 and 2017–18 capital expenditure per capita increased by 47.6 per cent.

Total per capita–recurrent (adjusted) 
Total per capita–capital (adjusted) 

Total per capita recurrent and capital expenditure, all levels of government, 2007–08 to 2017–18 (adjusted to June 2018)



Total per capita recurrent and capital expenditure,
all levels of government, 2007-08 to 2017-18 (adjusted
to June 2018)



This chart shows each level of government's per capita capital and recurrent expenditure over time.

This suggests the increase in per capita expenditure in 2017-18, which brings it back into line with the average over the 11-year period, is driven primarily by an increased commitment to capital expenditure from both federal and state and territory governments. New data from future years will reveal whether the 2017-18 increase is an anomaly or will be sustained longer-term.

How do the levels of government allocate their budgets between capital and recurrent expenditure?

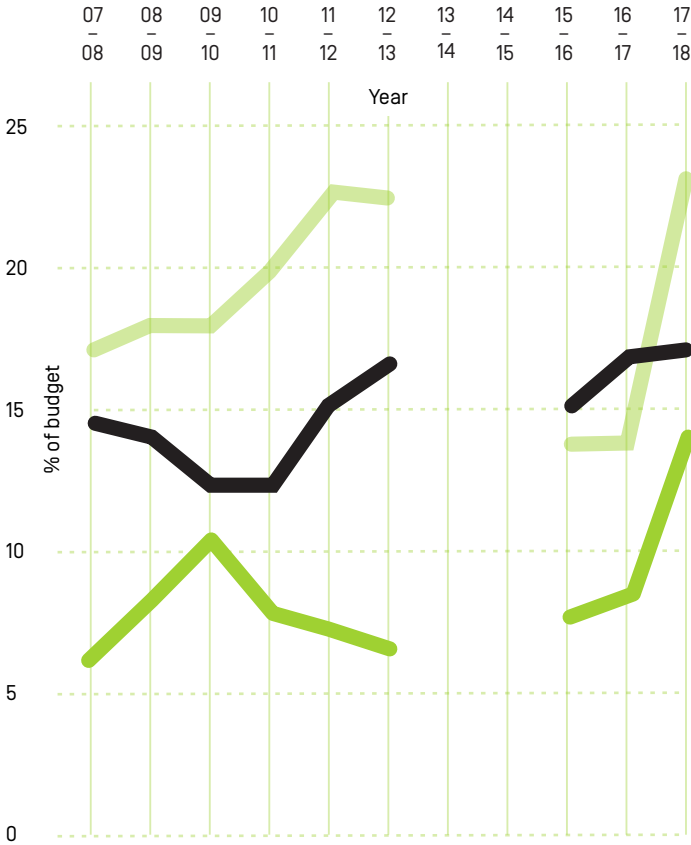
While all levels of government commit substantially more of their cultural budget to recurrent activities than to capital items, they each have a different balance between capital and recurrent expenditure:

- * The federal government has generally spent most of its cultural budget on recurrent activities—only twice since 2007 has it directed more than 10 per cent of its total cultural expenditure to capital expenditure (in 2009–10, with 10.2 per cent, and in 2017–18 with 13.7 per cent).
- * State and territory governments have most often had the biggest focus on capital expenditure, spending between 15.0 per cent and 23.1 per cent of their cultural budget on these items.
- * Local governments have spent between 12.4 per cent and 16.9 per cent of their cultural budget on capital expenditure.

These trends are shown in the chart opposite.

Federal
State and territory
Local

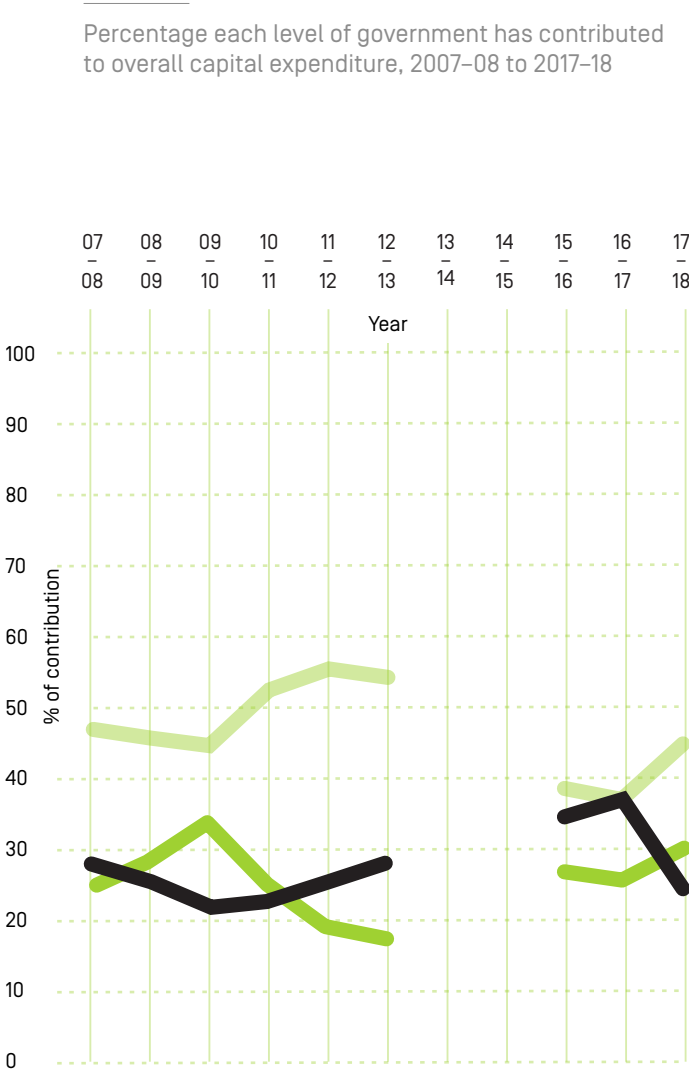
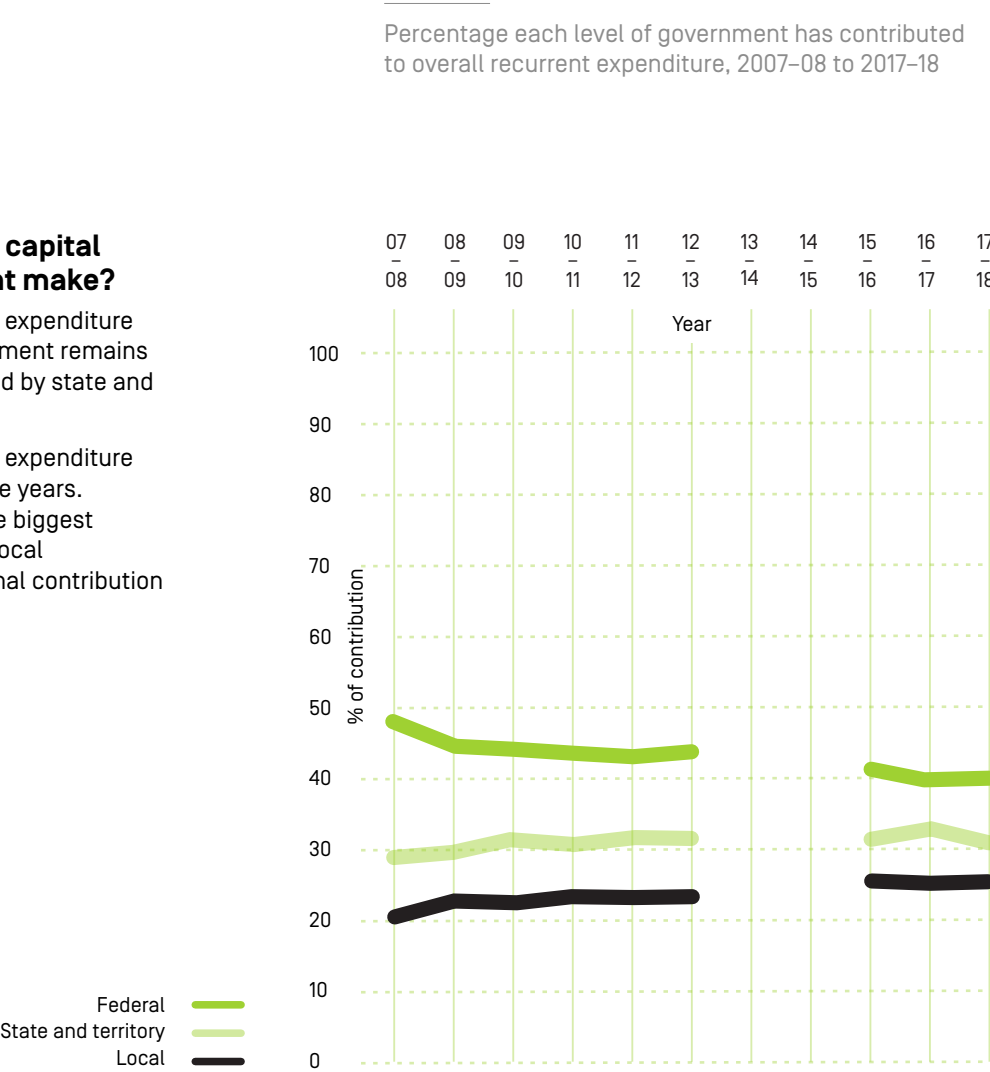
Percentage of own budget that each level of government allocates to capital expenditure



What contribution to overall recurrent and capital expenditure does each level of government make?

When looking at the split between governments' total expenditure on recurrent activities, we can see the federal government remains the biggest contributor to recurrent activities, followed by state and territory governments, and then local governments.

When looking at the split between governments' total expenditure on capital items, we can see more variation across the years. State and territory governments are proportionally the biggest contributors to capital expenditure, with federal and local governments generally making the smaller proportional contribution to overall capital expenditure.¹⁸



Finding

5

Federal, state and territory government expenditure on culture is split fairly evenly between three overarching categories: Film, Radio and Television (32.5 per cent); Museums, Art Museums, Archives, Libraries and Cultural Heritage (37.7 per cent); and Arts (29.7 per cent).

The *Cultural Funding by Government* dataset includes some breakdown of spending by different cultural forms. We wanted to understand at a macro level where the money went and if there were any significant changes. This is important in understanding and discussing cultural spending. This breakdown covers only expenditure by the federal and state and territory governments and does not include local government.

We have grouped expenditure into three overarching categories:

Film, Radio and Television

Radio and television services; Film and video production and distribution.

Museums, Archives, Libraries and Heritage

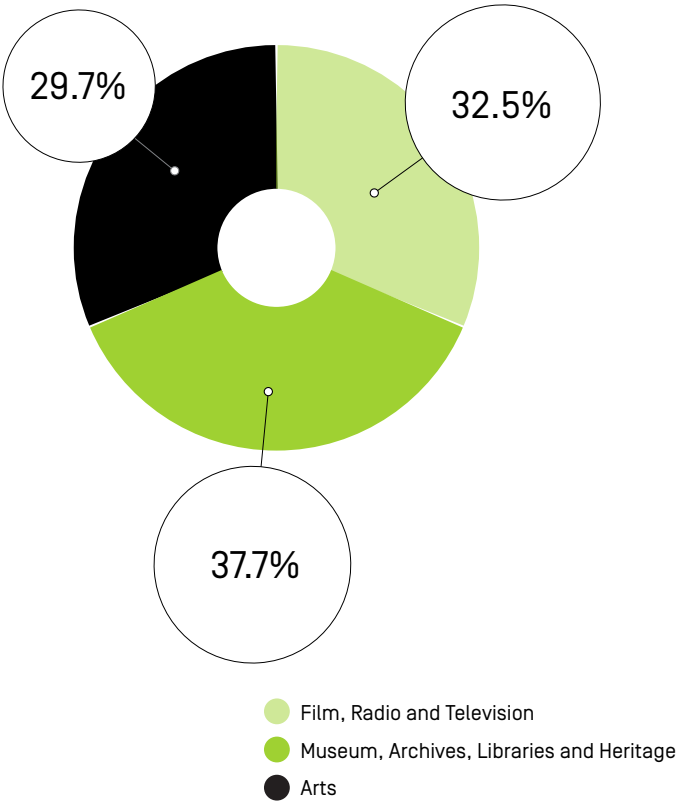
Art museums; Other museums and cultural heritage; Libraries; Archives.

Arts

Literature and writing; Music; Theatre; Dance; Music theatre and opera; Circus and physical theatre; Comedy; Other performing arts; Performing arts venues; Cross-art form; Visual arts and crafts; Design; Interactive arts content; Arts education; Community arts and cultural development; Multi-arts festivals; Arts administration; Other arts.

We found that cultural funding from federal, state and territory governments is currently split fairly evenly between these three overarching categories.

Percentage allocation to: Film, Radio and Television; Museums, Archives, Libraries and Heritage; and Arts (by federal, state and territory governments only), 2017–18

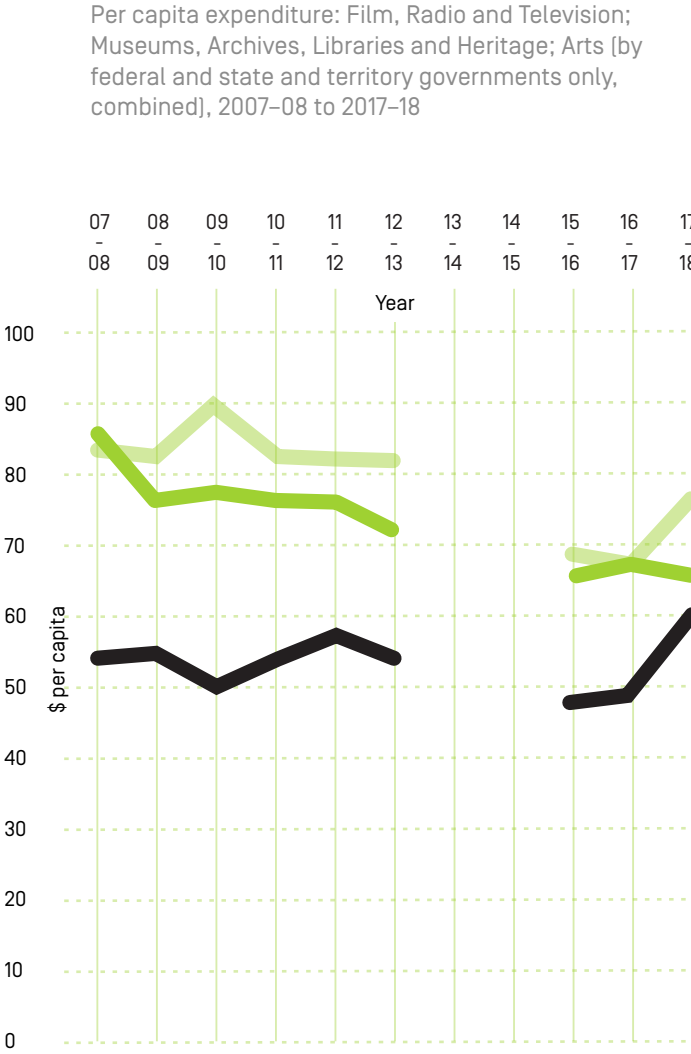
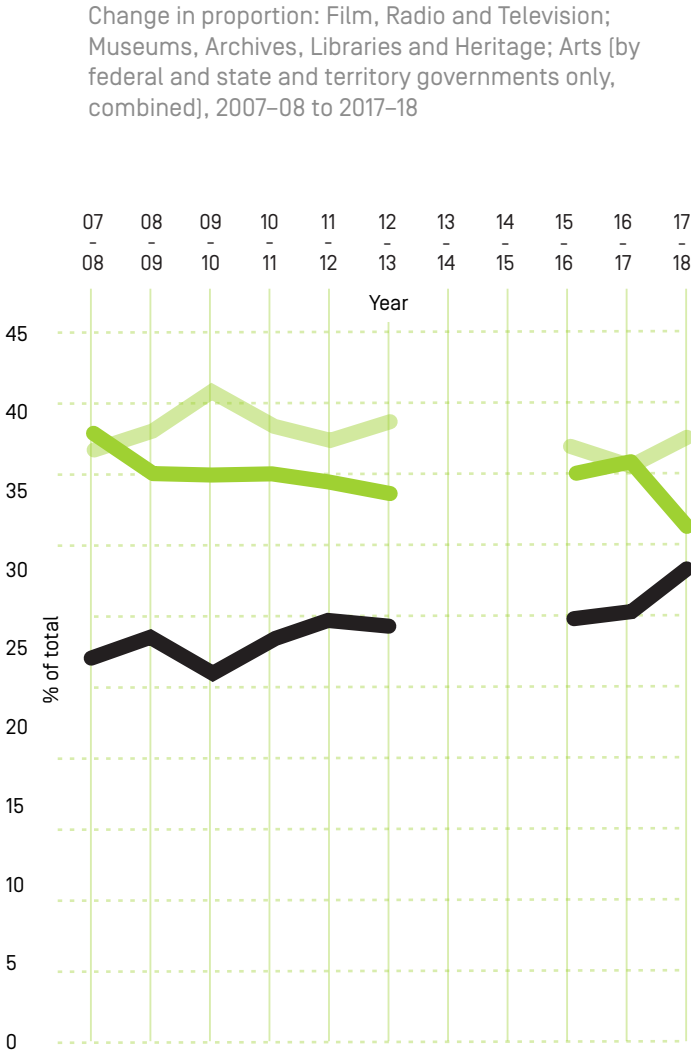


This fairly even relationship between the three categories has been relatively stable over the last decade, although there was a notable change in 2017–18, with a decrease in the proportion allocated to Film, Radio and Television (32.5 per cent, its lowest point) and a rise in the proportion allocated to both Arts (29.7 per cent, its highest point) and Museums, Archives, Libraries and Heritage (37.7 per cent).

What caused the 2017–18 change in the proportion allocated to each category?

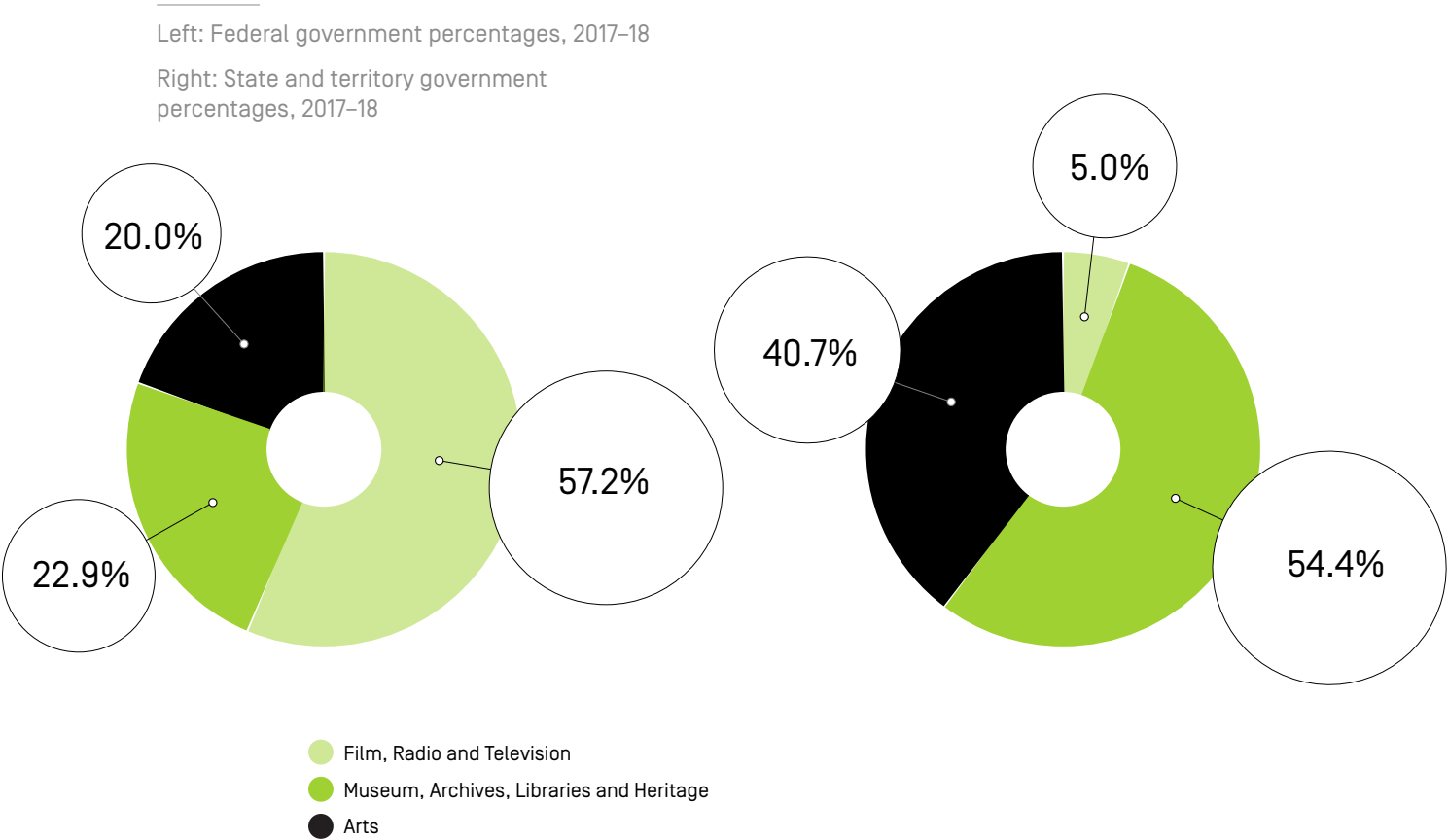
If we look at the per capita expenditure across each of these categories, we can see the change in proportion in 2017–18 comes from a combination of a significant increase in per capita expenditure on Arts plus Museums, Archives, Libraries and Heritage, and a smaller decrease in the per capita expenditure on Film, Radio and Television.

Film, Radio and Television
Museum, Archives, Libraries and Heritage
Arts



Federal and state and territory governments focus on different things

If we split expenditure on these categories into federal and state and territory governments, clear differences emerge. With its responsibilities for national broadcasting, the federal government has a substantial focus on Film, Radio and Television. In contrast, the states and territories have a far more significant focus on both Arts, and Museums, Archives, Libraries and Heritage.



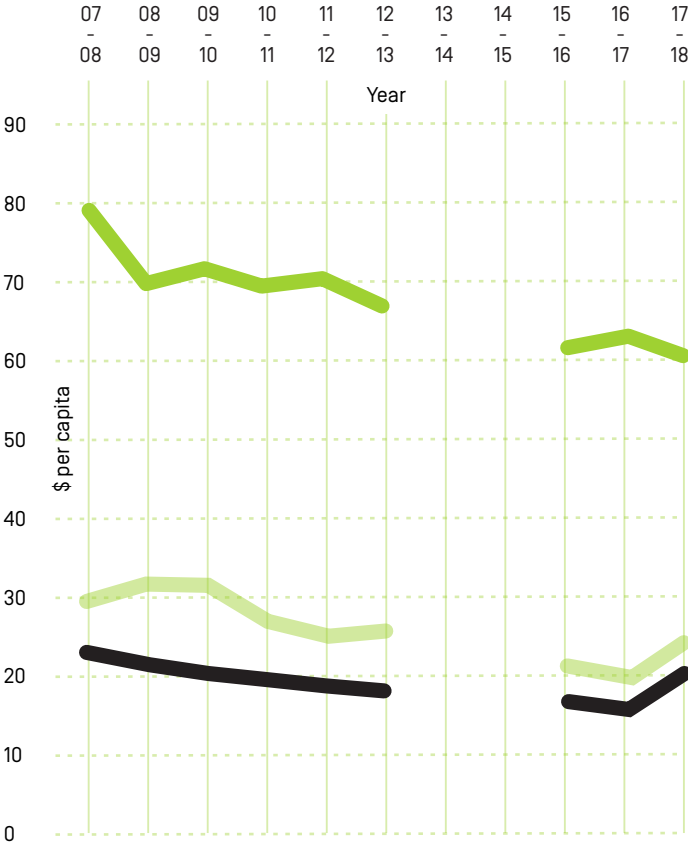
Understanding these changes across categories over time for different levels of government

Federal government per capita expenditure has declined across all three categories during the period. This change is most noticeable in the per capita expenditure in the Film, Radio and Television category (from \$79.46 in 2007–08 to \$61.19 in 2017–18). There are comparatively minor declines in the categories of Museums, Archives, Libraries and Heritage (\$29.69 to \$24.46) and Arts (\$22.79 to 21.38).

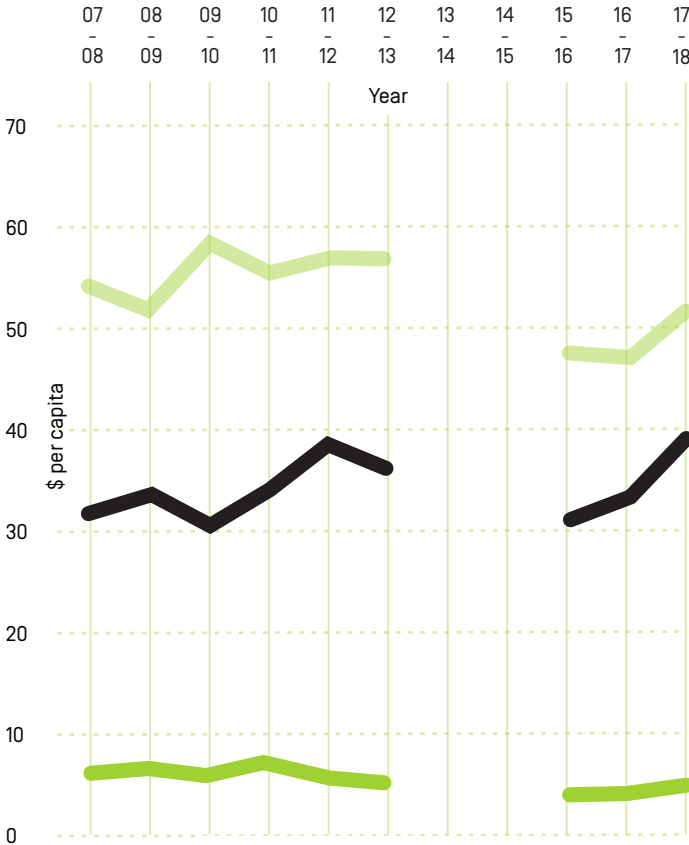
The per capita expenditure by state and territory governments shows more variation in expenditure in two categories: Arts; and Museums, Archives, Libraries and Heritage. There is some minor variation in the Film, Radio and Television category.

Across the period per capita expenditure on Arts has increased (from \$31.61 to \$38.90) while there has been a slight decline in per capita expenditure on Film, Radio and Television (\$6.27 to \$4.77) and Museums, Archives, Libraries and Heritage (\$54.15 to \$51.99).

Film, Radio and Television
Museum, Archives, Libraries and Heritage
Arts



State and territory government per capita spend on different categories, 2007–08 to 2017–18 (adjusted to June 2018)





We enjoy a range of cultural, economic, social and personal benefits from making and participating in creative and cultural activity at all stages of life

Why cultural and creative activity matters

We know cultural and creative activity creates considerable value for us, as individuals and as a society. We enjoy a range of cultural, economic, social and personal benefits from making and participating in creative and cultural activity at all stages of life.

The **cultural benefits** of a strong creative and cultural life include sharing our unique cultures and values, supporting existing and new forms of cultural expression, experiencing diverse voices and perspectives, and developing and maintaining heritage. There are also benefits in the opportunity to express dissent, spark questions and articulate difference. Many of us value having opportunities to make and access cultural experiences that explore our place in the world. This includes sharing stories about different experiences of life in Australia, as well as other parts of the globe.

The **economic benefits** of our cultural and creative industries more broadly are an area of significant interest. In 2016–17 the economic contribution to Australia's GDP from cultural and creative activity was \$111.7 billion, or 6.4 per cent of GDP.¹⁹ The Gross Value Added from cultural and creative activity was \$85.7 billion.²⁰ More than half a million Australians work in the creative economy—in 2016, a total of 593,830 people were employed in the creative economy, representing about 5.5 per cent of the national workforce.²¹ Employees who hold qualifications in creative fields also make a vital contribution toward the goals of Australia's innovation agenda.²² Creative skills remain critical for future employment growth, with around one in seven workers in the fastest-growing industries holding creative qualifications.²³

The **social benefits** of engaging in creative and cultural activities can include: deepening our shared sense of what it means to be part of our communities and Australian society more broadly; fostering belonging; strengthening social cohesion and intercultural understanding; encouraging civic participation; and driving creative innovation, openness and entrepreneurialism across different areas of life.²⁴ In an increasingly globalised world, we also benefit as a nation from the soft power benefits of cultural diplomacy efforts. According to the ABS, for example, 82.4 per cent of Australians aged 15 years and over attend cultural venues and events²⁵ and almost one-third of all Australians play music, sing, dance, write, sculpt, paint or take photos.²⁶ This type of active participation is particularly high among people aged five to 14 years, with the ABS reporting that 95.6 per cent of people in this age group participated in at least one cultural activity outside of school hours.²⁷

The **personal benefits** include an enhanced sense of self and belonging, improved educational outcomes, and improved health and wellbeing, as well as opportunities for learning, pleasure, joy and reflection. Culture can contribute to developing identity, as well as strengthening understanding and insight to different perspectives and experiences.²⁸

The next in our series of Insight Reports will explore these benefits in greater detail.

Opportunities for policy change

In considering pathways to ensure that policy, regulatory and investment settings lead to more effective cultural funding expenditure, the data and findings of this first Insight Report suggest the following opportunities.

Opportunity 1

Build stronger and more strategic leadership and collaboration between the federal, state and territory and local governments, as well as intra-government collaboration (between different departments who manage cultural expenditure). This should include clear recognition of the increasingly significant contribution of local governments to cultural funding and better public acknowledgement of the respective responsibilities for arts and culture at different levels of government.

Opportunity 2

As an immediate priority—noting that the uplift in 2017–18 has returned per capita expenditure to just below the longer-term average—identify steps to maintain this commitment to the long-term per capita average of the last decade, as a minimum.

Opportunity 3

For the longer-term, consider the designing and implementing of mechanisms that will deliver remedial measures and positive incentives to boost cultural expenditure as a percentage of GDP to the OECD average within the next decade.

Opportunity 4

Provide clearer policy direction to ensure the expected public value outcomes of cultural expenditure are better communicated.

Opportunity 5

Ensure current and accurate data about cultural spending by government continues to be available to inform cultural expenditure by all levels of government, as well as private, philanthropic and corporate funders of arts and culture.

Opportunity 6

Given that significant public capital expenditure on cultural assets may also come through funding programs without a specific cultural focus, identify opportunities to ensure investment decisions are made using relevant cultural expertise and in a coherent, strategic manner, and that these opportunities are made more visible across the creative and cultural sector.

DATA, LIMITATIONS, GAPS AND REFERENCES

Data, limitations and gaps

The key datasets used in this report are:

- * ABS 4183.0 *Cultural Funding by Government* for arts and cultural expenditure data up to 2012–13
- * *Cultural Funding by Government* (for 2015–16, 2016–17 and 2017–18 data), prepared by the ABS on behalf of the MCMO-SWG
- * ABS 6345.0 Wage Price Index, using the hourly rates of pay reported in the public and private arts and recreation services category (June quarter of each year)
- * ABS 3101.0 Australian Demographic Statistics for population (June quarter of each year)
- * The *Cultural Funding by Government* dataset includes expenditure in the following categories:
Art museums; Other museums and cultural heritage; Libraries; Archives; Literature and writing; Music; Theatre; Dance; Music theatre and opera; Circus and physical theatre; Comedy; Other performing arts; Performing arts venues; Cross-art form; Visual arts and crafts; Design; Radio and television services; Film and video production and distribution; Interactive arts content; Arts education; Community arts and cultural development; Multi-arts festivals; Arts administration; Other arts.

The category 'Other museums and cultural heritage' covers the acquisition, collection management, conservation and exhibition of heritage objects. This category includes Indigenous cultural heritage and keeping places, historic houses, historic museums, war memorials and National Trust organisations. All figures given in the report are in Australian dollars.

We note the following limitations and gaps in the data:

- * While the *Cultural Funding by Government* series is considered the most complete dataset available, it does not cover all government expenditure on culture. Some specific programs may not be captured (for example, the Australian Screen Production Incentive is not included). Additionally, expenditure on infrastructure that has a significant cultural component (for example, regional museums) may be identified as expenditure on tourism rather than culture.
- * For some of the years considered in this Insight Report, the *Cultural Funding by Government* series included environmental heritage. We excluded this from the federal and state and territory government figures but it was not possible to exclude this category from the local government figures. Because of this, some figures in this report (in particular per capita figures) will differ from those published in the *Cultural Funding by Government* series.

- * There was some difficulty comparing data owing to category changes and inconsistencies.
- * Some releases include corrections to data from the previous years. We used the updated figures.
- * No data is available for 2013–14 and 2014–15. No data was collected for this series by either ABS or MCMO-SWG during these years.
- * The ABS advised that while the survey instrument asks for GST exclusive figures, it cannot guarantee that the data returned is GST exclusive.
- * Government expenditure is indexed using a variety of Wage Cost Indexes (WCI) rather than the Wage Price Index (WPI). The WCI used vary across different departments, different programs and different levels of government, and the details are not released in a collected format. Within this report, we have used the ABS's published WPI series ABS 6345.0, as a proxy for WCI. We note this methodology may create slight variations in the figures across different programs and levels of government.

References

1. These benefits will be the focus of ANA's second Insight Report.
2. Estimate based on cultural spending by all levels of government in 2017–18 *Cultural Funding by Government* and ABS release 5512.0—Government Finance Statistics, Australia, 2017–18 [released 29 April 2019].
3. Australian Government Department of Communications and the Arts, Bureau of Communications and Arts Research [BCAR] *Cultural and creative activity in Australia* 2008–09 to 2017–18. Working paper, October 2018, p. 4. This paper considers economic contribution of activity across the domains of museums; environment heritage; libraries and archives; literature and print media; performing art; design; broadcasting, electronic or digital media, and film; music composition and publishing; visual arts and crafts; fashion; other culture goods manufacturing and sales; supporting activities.
4. This time range covers a period for which comparable data is available within ABS 4183.0 *Cultural Funding by Government*. There was a significant change in methodology in 2007–08. As part of the release for that year, the ABS advised that the data from 2007–08 onwards is not comparable with data from the previous years. See ABS *Cultural Funding Australia Three Tiers of Government 2007–08*, note 13, p. 43.
5. ABS 4172.0 *Arts and Culture in Australia: A Statistical Overview* [Population and People—Household expenditure, based on ABS 6530.0 House Expenditure Survey 2009–10] 2014.

6 This series has had several iterations, starting with *Cultural Funding, Australia* in 1994–95. Before 2015–16, the survey was collected by the ABS under the *Census and Statistics Act 1905*. From 2015–16 onwards, the series has been produced by the ABS as a consultancy on behalf of the Meeting of Cultural Ministers Officials [Statistics Working Group]. This change of collecting arrangements has removed the authority to conduct statistical collections and direct agencies to provide statistical information. The Australian Department of Communications and the Arts has advised that, where necessary, supplementary information on cultural expenditure has been sourced from published sources to produce the 2015–16 and 2017–18 releases. As previously noted, a significant change in methodology occurred in 2007–08 year and, as part of that release, the ABS advised that the data from 2007–08 onwards is not comparable with data from the previous years. This series has had several different name variations over the period. We have used the current nomenclature to describe the series as a whole.

7. It is important to note that while *Cultural Funding by Government* series is considered the most complete dataset available, it does not cover all government expenditure on culture. Some specific programs may not be captured. For example, the Australian Screen Production Incentive is not included [estimated expenditure in this program was \$452 million in 2017–18, Australian Taxation Office Portfolio Budget Statements 2018–2019, p. 181]. Additionally, expenditure on infrastructure that has a significant cultural component (for example, regional museums) may be identified as expenditure on tourism rather than culture.

8. This change occurred due to ABS reductions in 2014. For a detailed explanation of these circumstances, see Judy Morton *Meeting of the Cultural Ministers—the Statistical Advisory Group and the Statistics Working Group—a history* [Department of Communications and the Arts] 2017, p. 14. Available at <https://www.arts.gov.au/documents/meeting-cultural-ministers-statistical-advisory-group-and-statistics-working-group-history>.

9. Adjusted with ABS 6345.0 Wage Price Index (WPI), using the hourly rates of pay reported in the public and private arts and recreation services category. The WPI was used as the implicit price deflator because the majority of this expenditure is directed to recurrent expenditure, of which wages are a significant portion. Government expenditure is indexed using a variety of Wage Cost Indexes (WCI) rather than the WPI. The WCI used vary across different departments, different programs and different levels of government and the details are not released in a collected format. Within this report we have used the ABS's published WPI series as a proxy for WCI. We note this methodology may create slight variations in the figures across different programs and levels of government.

10. The dataset that is the focus of this report likely most closely aligns with the definition used in *The 2009 UNESCO Framework for Cultural Statistics*, which draws on the UNESCO definition of culture as ‘the set of distinctive spiritual, material, intellectual and emotional features of society or a social group, that encompasses, not only art and literature, but lifestyles, ways of living together, value systems, traditions and beliefs’ [p. 9] and uses this to set a framework for the collection of cultural statistics based on the following domains in its definition: Cultural and Natural Heritage; Performance and Celebration; Visual Arts and Crafts; Books and Press; Audio-visual and Interactive Media; Design and Creative Services and Intangible Cultural Heritage [p. 23]. The *Framework for Cultural Statistics* notes that ‘Creative industries usually cover broader scope than traditional artistic domains with the inclusion, for example, of all ICT industries or research and development. The framework addresses this issue by allowing the inclusion of some specific creative industries [design and advertising] as a separate domain’. [p. 19]. With specific reference to Australia, in developing the Cultural and Creativity Activity Satellite Accounts, on which several of the BCAR studies referred to in this report are based, the ABS drew on the following definition: ‘Cultural and creative activity satellite accounts for Australia would encompass productive activities broadly defined as: “cultural” in that they communicate symbolic meaning [e.g. beliefs, values, traditions], require human creativity as an input, and potentially contain intellectual property; or are “creative” in that human creativity is a significant and identifiable input.’ [ABS (2014), Discussion Paper: Cultural and Creative Activity Satellite Accounts, Australia, 2013, p. 8]

11. Based on ABS 3101.0 Australian Demographic Statistics for population [June quarter].

12. Per capita expenditure is the amount spent by all levels of government per person.

13. OECD General Government Spending (<https://data.oecd.org/gga/general-government-spending.htm>) based on OECD (2019), ‘National Accounts at a Glance’, OECD National Accounts Statistics (database), <https://doi.org/10.1787/data-00369-en>.

14. In this recent dataset there are only two years of data from Australia, whereas most countries have provided three or four years.

15. The Australian Capital Territory (ACT) does not have a local government structure as the ACT Government fills both a state and local government role. The expenditure for this jurisdiction is all allocated to the state and territory category.

16. It is important to note that the trends described here are for levels of governments overall, not individual governments. This report does not look at variations between individual state and territory jurisdictions, but instead between the different levels of government. Different state and territory governments may have different trends within their expenditure on culture, as will individual local governments. There are significant variations in the per capita expenditure made by different state and territory governments and by local governments in different parts of Australia, reflecting the different arrangements in different jurisdictions between different levels of government. See *Cultural Funding by Government 2016–17* tables 6 and 15 [p. 8 and p. 17] for recent examples.

17. *Cultural Funding by Government 2016–17*, p. 6.

18. As stated in the *Data, Limitations and Gaps* section of this Insight Report, it is important to note that while the *Cultural Funding by Government* series is considered the most complete dataset available, it does not cover all government expenditure on culture. Capital expenditure on infrastructure that has a significant cultural component (for example, regional museums) may be identified as expenditure on tourism rather than culture and therefore may not necessarily be reflected in these figures.

19. Australian Government Department of Communications and the Arts, BCAR *Cultural and creative activity in Australia 2008–09 to 2017–18*. Working paper, October 2018, p. 4.

20. Australian Government Department of Communications and the Arts, BCAR *Cultural and creative activity in Australia 2008–09 to 2017–18* Working paper, October 2018, p. 9.

21. Stuart Cunningham and Marion McCutcheon, Digital Media Research Centre, Queensland University of Technology (QUT) *The Creative Economy in Australia Factsheet*. This factsheet is an output of an Australian Research Council Linkage project [LP160101724] led by QUT with University of Newcastle, Arts Queensland, Create NSW, Creative Victoria, Arts South Australia and the Western Australia Department of Culture and the Arts.

22. Stuart Cunningham, Max Theilacker, Peter Gahan, Victor Callan, and Al Rainnie, *Skills and capabilities for Australian enterprise innovation*. Melbourne: Australian Council of Learned Academies, 2016.

23. Australian Government Department of Communications and the Arts, *Creative skills for the future economy*, Working paper, 2019, p. 1.
24. Greg Clark et al., Culture, Value and Place 2018, A report for the New South Wales Department of Planning and Environment, pp. 21–22; Ruth Rentschler and Kerrie Bridson [Deakin University] and Jody Evans [Melbourne Business School], *Civic Pride and Community Identity, The Impact of the Arts in Regional Australia, 2015*, Regional Arts Australia; and *Connecting Australians: Results of the National Arts Participation Survey*, Australia Council for the Arts, 2017.
25. ABS publication 4114.0—*Attendance at Selected Cultural Venues and Events, Australia, 2017–18*, 2019.
26. ABS publication 4921.0—*Participation in Selected Cultural Activities, Australia, 2017–18*, 2019.
27. From Key Findings, ABS publication 4921.0—*Participation in Selected Cultural Activities, Australia, 2017–18*, 2019.
28. Geoffrey Crossick and Patrycja Kaszynska, *Understanding the value of arts and culture*. United Kingdom: Arts and Humanities Research Council Cultural Value Project, Arts and Humanities Research Council, 2016.

