

A person is standing on a vast, flat, white landscape, possibly a salt flat or a beach, under a clear blue sky. The person is silhouetted against the bright background. The title text is overlaid on the image.

STRATEGIC DIRECTIONS

2016-2031

ARTS LEADERSHIP GROUP



CONTENTS

PREAMBLE	3	EDUCATION AND TRAINING	22
INTRODUCTION	4	TECHNOLOGY	24
OUR VISION	5	CLIMATE CHANGE	25
WE'LL KNOW WE HAVE ACHIEVED THIS WHEN	6	EVALUATING THE VALUE OF ARTS AND CULTURE	26
IN 2031 WE WILL SEE	7	ACCESS TO FINANCE	27
THE ARTS, CULTURE AND CREATIVE INDUSTRIES SECTORS	9	BARRIERS TO SUCCESS	28
WESTERN AUSTRALIAN ARTS, CULTURAL AND CREATIVE INDUSTRIES IN 2016	10	IMPLEMENTATION OF STRATEGIC DIRECTIONS 2016-2031	30
STATE'S FUTURE CONTEXT	12	BY 2021 WE WILL HAVE	31
POPULATION GROWTH	14	BY 2026 WE WILL HAVE	34
REGIONAL AND OUTER METROPOLITAN WA	15	APPENDIX A - CONSULTATION SUBMISSIONS	35
PERTH METROPOLITAN AREA	16	APPENDIX B - THE CONTRIBUTION OF ARTS, CULTURAL AND CREATIVE	
ABORIGINAL ARTS AND CULTURES	17	INDUSTRIES IN WESTERN AUSTRALIA	39
CHILDREN AND YOUTH	19	REFERENCES	43
ECONOMIC DIVERSIFICATION	20		



PREAMBLE

The Arts Leadership Group (ALG) was formed to provide a long-term strategic direction for the arts and cultural sector in Western Australia.

In May 2015, the ALG released a discussion paper seeking feedback from the community on the future challenges and opportunities of building and sustaining a vibrant art, cultural and creative sector in Western Australia to help inform a strategic direction for government, the sector and the community for the next 15 years.

More than 100 submissions to the discussion paper were received from across the sector. These comments were aligned with the latest trend forecasts and the 'State Planning Strategy 2050'.

The Group then also introduced new themes identified in the initial consultation and a vision presented for the State with five year targets of what government, the sector and the community will need to achieve together in order to deliver that vision by 2031.

This second paper garnered a further 60 responses with ideas of how the goals may be delivered.

This document presents an update of the previous document incorporating information from all of the submissions received. This is the first time that a unified vision for arts and culture in WA has been presented.

In order to deliver this vision, government will be required to develop new policy responses in partnership with the sector; research will need to be more open, deeply analytical and borne of a data culture across the sector; all of us will need to respond quickly and better to sector driven initiatives and committed to implementing the government of the day's priorities and commitments in partnership.

Do this and we will achieve much in the 15 years to come.



INTRODUCTION

Western Australia is rightly proud of the many ways in which our arts, cultural and creative industries sector (the sector) enrich our lives and enhance our shared experience. The sector's activities directly encourage participation in our community life, improve our economy and add to a sense of place and belonging for people living throughout Western Australia.

In the last decade we have seen how a thriving cultural sector in Western Australia can bolster our aspirations and our international relationships and reputation. The sector ecology in Western Australia has become a richer mix of creative expression encompassing the full extent of the arts and our shared culture but also design, film, heritage and new digital experiences, including games and streamed content across a wide variety of platforms.

Our aim must be to encourage and harness these growing inter-connections, enabling our creative people to work across art forms, cultural disciplines and new distribution channels to excite, engage and educate our citizens and visitors.

As a State, we have a responsibility to nurture a vibrant and sustainable sector that works towards creating one of the great places in the world to live, work and play.

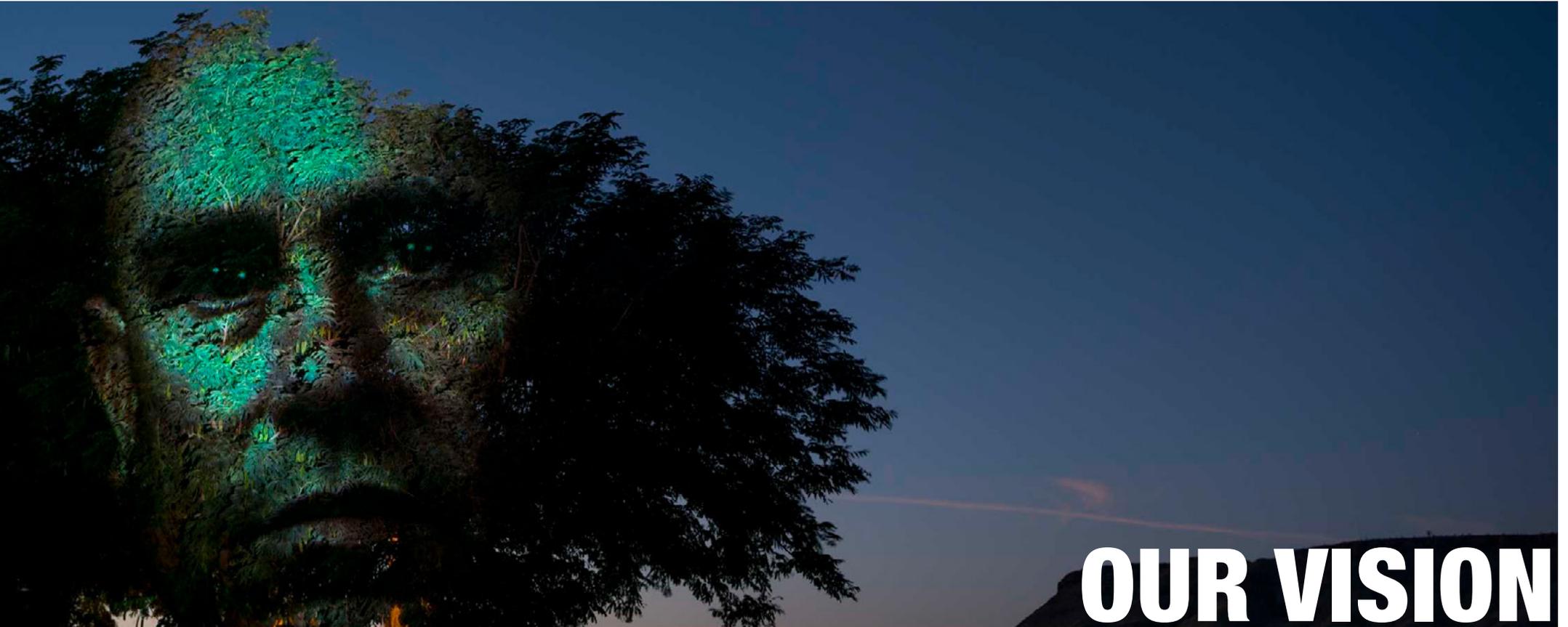
This document presents a shared context and road map for the future that will ensure the continued transformation of our cultural lives through a unified ambition for government, sector, community and private enterprise. We will do this with our many local, national and international partners, identifying new

opportunities for creative growth and expression.

This document is a result of what we see as the strengths we need to build on and the challenges we need to address to achieve our ambitions.

The consultation process has confirmed the need for ambition, progressive social values and direction about how we can best achieve our aims by working in close partnership with key stakeholders across the State and articulating a carefully considered set of goals that will maximise the chances of success.

With those ends in mind, we present a vision of the future for the arts, cultural and creative industries in Western Australia.



OUR VISION

For Western Australia to be the best place it can be to live, work and play thanks to the contribution of its arts, culture and creative industries.

WE'LL KNOW WE HAVE ACHIEVED THIS WHEN



Perth is regarded as the most liveable city in Australia and WA the most liveable State thanks largely to its cultural lifestyle.



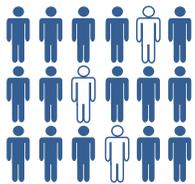
Employment in the WA culture and arts sector is at least 8 per cent of the State's total employment.



The Gross Value Added of the sector is at least 7 per cent of the State's output.



More than 90 per cent of Western Australians have attended at least one live cultural activity a year.



Popular and public policy support for the sector is clearly demonstrated.



A progressive legislative and regulatory reform agenda has been implemented that promotes sector growth.



Connectivity through big data, and data-driven evidence based decision-making is central to sector growth.



The strength of Aboriginal culture is celebrated by all Western Australians through the maintenance, practice and visibility of Aboriginal language, arts and culture.



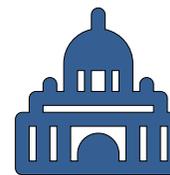
The sector has produced a net gain of creative talent to the State while retaining the best talent to export our stories.



The sector is able to measure and affect our environmental footprint as a sector.



The quality of the experiences produced in WA is consistently of a national/international standard.



Western Australia's unique cultural and natural history assets are preserved, valued and recognised nationally and internationally.



All Western Australians have access to creative learning and participation opportunities throughout their lives.



IN 2031 WE WILL SEE

- ◉ **A growing sector, creating new jobs and new opportunities for WA's creative people.**
- ◉ **A capital city and regional centres as year-round vibrant, safe, tourism hotspots with culturally inclusive suburbs and places to experience and learn about the best arts and cultural activities the State can offer.**
- ◉ **Universal and equitable access to high quality arts and cultural experiences for Western Australians wherever they live in the State.**
- ◉ **A strong Aboriginal culture manifested through its heritage, language, cultural practices and connection to country.**
- ◉ **All Western Australians are proud of and connected with Aboriginal culture within Western Australia.**
- ◉ **Western Australia having the most environmentally sustainable sector in Australia.**
- ◉ **Western Australia's artists, curators and creative talent with the choice to represent the State throughout the world and/or be successful in WA.**
- ◉ **World-class cultural infrastructure servicing world-class organisations.**
- ◉ **Government as flexible, responsive and creative in the support it offers to the sector.**
- ◉ **Universal access to arts and culture supported by government, the corporate sector and families and individuals who value the contribution of arts to society.**

IN 2031 WE WILL SEE

- ⦿ **The State's cultural institutions leading their sectors and driving the growth in access to museums, libraries and galleries across WA.**
- ⦿ **A seamless partnership between State government, local government, the sector and the education system in support of developing creative talent and the latent creativity in all Western Australians at all stages in their lives.**
- ⦿ **People of all backgrounds, ethnicities, ages and abilities engaging in art without fear of exclusion, and creating their own experiences at home, work, school or in public.**
- ⦿ **Western Australian culture digitally connected to and experienced by the rest of the world.**
- ⦿ **WA's cultural heritage fully accessible and actively contributing to our cultural future.**
- ⦿ **WA's public realm shaped by our creative talent.**
- ⦿ **WA's international trade successes supported through our cultural ties to the rest of the world.**
- ⦿ **The private and subsidised sectors creating a collegiate approach to technological innovation, content creation and digital access for cultural producers and audiences.**
- ⦿ **Artists, scientists and engineers working in interdisciplinary teams to push the boundaries of each other's work.**

THE ARTS, CULTURE AND CREATIVE INDUSTRIES SECTORS





WESTERN AUSTRALIAN ARTS, CULTURAL AND CREATIVE INDUSTRIES IN 2016

The arts, culture and creative industries (the sector), is diverse, complex and one of Western Australia's great success stories¹.

The sector in Western Australia employs more than 42,000 people², pays \$1.92 billion in wages³ and is growing at a rate faster than the sector in the rest of Australia⁴. Some 87.8 per cent of the State's population attend arts and cultural events annually⁵, including 92 per cent of young people⁶.

About 22 per cent of the population are involved in either a paid or unpaid capacity⁷.

About 29 per cent of the State's Aboriginal population participate in at least one creative arts activity per annum⁸.

The State has produced world-class artists including Academy Award winners Shaun Tan and the late Heath Ledger, fashion designer Aurelio Costarella, writer Tim Winton, international graffiti sensation Ian Strange, comedian, actor,

composer, songwriter, pianist, musical director Tim Minchin, rock band Tame Impala, and artists Sandra Hill and Lena Nyadbi whose work is amongst the most significant in the world and displayed from Paris to Singapore.

The sector operates in a dynamic but delicate ecology of interrelationships that require both co-operation and competition to be successful. Our individual artists, grass roots community arts groups, and small to medium not-for-profit organisations are as integral to the success of the system as are our large commercial entities. Resourcing and expertise from all levels of government needs to be well placed.

State government investment in the arts has been growing since 2009-10. State government funding to the small to medium arts sector is the highest in the nation and per person funding in WA is the fourth highest of the States and Territories⁹. Western Australians recorded the third highest attendance at cultural events in Australia¹⁰, with the highest growth nationally.

The establishment of the Fringe World Festival, already the third largest in the world, and the continued success of the Perth International Arts Festival, having both recorded their highest attendances in 2015, provided the impetus to Perth's cultural growth and vitality¹¹.

Fremantle was named as a must see destination for 2016 by one of the world's most respected international travel publishers, Lonely Planet citing Fremantle as a 'cosy home for performers, professionals, artists and more than a few eccentrics [with] fantastic museums, edgy galleries, pubs thrumming with live music and a thriving coffee culture'¹² while the State Government's \$24million investment in Creative regions will be the catalyst for high quality and grassroots arts across the State.

From 2006-2011, libraries, museums and galleries, performing arts, dance, jewellery, fashion and design all experienced high average annual growth and higher than average concentration of employees compared with the rest of Australia, suggesting they are strong, adaptive sub-sectors that are fuelling employment growth.

Major capital developments from the New Museum to the redevelopment work of the Metropolitan Redevelopment Authority at Elizabeth Quay, Scarborough Beach, Yagan Square and City Link, and a raft of regional cultural infrastructure projects point to greater vibrancy and better access to art and culture for Western Australians and visitors to the State.

These developments are positively addressing latent risks to the State's development identified in The Economist Intelligence Unit (EIU) Global Liveability Ranking and Report 2014. The report rated Perth as the world's ninth most liveable city in 2014, down from eighth in 2011, noting that Perth performs consistently poorly for 'cultural infrastructure and vitality' within the index¹³.

While accepting the limitations of the EIU approach, which as part of its index score for culture includes combined aggregations for climate and sport for example, the collaboration between the Committee for Perth and The University of Western Australia through their FACTBase project and DCA's Culture Counts™ system, offers scope to benchmark our ambition in this area.

With its geographic position and the most diverse population in Australia, Western Australia is perfectly positioned to engage with its Asian neighbours and trade partners. Government and the sector is facilitating cultural exchange, driving exports, diversifying the economy and attracting tourism. The sector contributes to a range of government policy initiatives from invigorating the regions to improving the State's competitiveness and addressing Aboriginal disadvantage.

Business leaders have consistently argued that access to high quality arts and culture are essential for attracting global talent and encouraging companies to relocate. Maintaining confidence in the

State's economy through continual economic activity at a local level is a major asset of the sector making clear that growing the sector is essential for the future of the State.

But what is really at the heart of Western Australia and what will define our success is our unique cultural identity, driven and reflected by our artists and curators.

Our identity is the sum of our unique individual and shared histories, landscapes, peoples, small population across vast distances, our languages and geography. It is through the preservation, exploration and evolution of our identity that we will form the Western Australia we want.

As we have seen, our uniqueness has already been manifested in the success of all parts of our sector across the world, as we have used the best of being Western Australian to innovate and overcome our seeming isolation. As our geographic isolation reduces with every new technological innovation, so too will our opportunity to communicate this identity to the world.

Our role as a sector is to place the artist and the creative person in all of us at the centre of our vision.

We need to create the environment from world class arts based education to support for originality in our work to affordable, fit for purpose infrastructure, to enable the universal access in artistic and creative endeavour that will deliver our ambitions.



STATE'S FUTURE CONTEXT

From a small, sparsely populated State with an agricultural-based economy, Western Australia has grown into the powerhouse of the Australian economy, contributing disproportionately to the nation's gross domestic product (GDP).

Despite periodic fluctuations, all indicators suggest that Western Australia is on the cusp of sustained growth. It is a period of great promise and opportunity for all Western Australians¹⁴.

There are a range of factors that provide a context for, and directly influence, Western Australia's future development.

The 'State Planning Strategy 2050' (SPS 2050) discusses seven areas that will influence the lives of Western Australians over the next few decades.

These drivers will also influence how the sector will develop and will need to be considered in all future planning.

Summary of SPS 2050 key drivers for Western Australia's future

	2013-2014	2050 Projections
Population (WA)	2.5 million ¹⁵	3.6-5.4 million (SPS 2050)
Workforce	1.2 million (SPS 2050)	1.5-2.2 million (SPS 2050)
Global economy (Key drivers for WA growth)	India, China and Asia Pacific Region. Increasing emphasis on Indian Ocean Rim countries.	India, China and Asia Pacific Region.
Economic diversification	Heavily reliant on extractive industries (SPS 2050). Strengths in the sector that can be capitalised upon ¹⁶ .	More diversified economy linking WA strengths to quality of life (SPS 2050).
Urbanisation and regional expansion	WA urbanisation fuelled by access to employment, education, health and allied services, entertainment and community activities. Pilbara Cities and SuperTowns initiatives for regional expansion (SPS 2050).	Global: 70 per cent in cities (UN). Contested futures: Perth at 3.5 million (CfP; Dep.t of Planning) or 4 major interconnected cities (Weller and Bolleter, 2013) or Perth and Pilbara Cities (SPS 2050).
Technology	China and India committing 30-40 per cent GDP to innovative technologies 2010-2050 (SPS 2050). National Broadband Network rollout in progress.	Information and Communication Technology and high-speed broadband will generate around \$1 trillion in revenue for Australia. Some industries will disappear if not reinvented (Ruthven for IBM).
Climate change	Observable changes in temperatures and rainfall patterns (SPS 2050).	Rising sea levels and more frequent and intense natural disasters (SPS 2050).

Sources: ABS, State Planning Strategy document, DCA 2013 Creative Industries Statistical Analysis, United Nations, IBM Snapshot of Australia's Digital Future, Committee for Perth (CfP), WA Department of Planning, WA State Government International Relations Policy.



POPULATION GROWTH

The 2011 Australian Census showed that Western Australia is one of the most culturally diverse and fastest growing of all the states and territories in Australia, and is expected to grow to between 3.7-4.3 million in 2031.

The combined effects of a rapidly growing ageing, diverse and decentralised population, a shift in the way culture is created and presented, and the demands for high quality product with equitable access throughout the State, present major challenges for the provision of fit-for-purpose, adaptable cultural infrastructure within a regulatory and legislative environment that promotes growth.

Cultural infrastructure is not just about buildings, it also includes the technology and people necessary for the creation and the delivery of arts and cultural experiences¹⁷.

It is important that content and resources are considered in the planning of physical infrastructure and that the benefits of such a culturally diverse population are harnessed.

There is an opportunity here for government and the sector to work innovatively with the private sector to explore where infrastructure can be privately developed on government and privately owned land. Decisions will need to be reached on the partnerships required to deliver this infrastructure, its form and priorities, if the ambitions for the sector are to be realised.

Population growth will also have an effect on the provision of government services in health, education, law and order, and other social services.

According to the ABS, in 2011-12 total investment in the arts by other government agencies excluding the DCA nearly matched that provided by the DCA¹⁸.

This suggests a move by other government agencies to look to the arts as a potential instrument in improving service delivery and outcomes in other areas of social policy.

If the State is to accommodate a large population

increase and the inevitable pressure on services that this will entail, then the sector will be essential in challenging the current norms of social service delivery.

In the area of health, for example, Western Australia is signatory to the National Arts and Health Framework and has begun Australia's first survey in public and private health care settings of arts interventions in support of health outcomes.

For the first time the State will be able to benchmark activity and eventually demonstrate the effectiveness and cost of the arts in health care settings that it is hoped will lead to savings in the health budget particularly as the population ages.

This ageing population offers a tremendous opportunity for the sector. More than 20 per cent of WA's population will be aged more than 60 by 2021.

This mobile population with time and income at its disposal will be an enormous asset in achieving the ambitions of the State.



REGIONAL AND OUTER METROPOLITAN WA

At the end of June 2013, there was an estimated 664,300 (26.5 per cent) of Western Australians living outside the Perth metropolitan area¹⁹.

According to the ABS, the projected population for all regional development areas will rise from 0.57 million in 2016 to between 0.71-0.75 million in 2031. This represents a population growth of between 24 and 30 per cent²⁰. Although substantial, this growth is less than the projected growth for the whole of Western Australia of between 32-54 per cent, to between 3.7-4.3 million. The projected growth for Perth over this period is from 2.2 million to between 3.0-3.5 million, or between 36-59 per cent.

The 'Living in the Regions 2013' report indicated that 27 per cent of the regional population had moved from Perth or another capital city. At 31 per cent, this is almost equivalent to the number of people currently living in the region where they were born²¹. Further, of current metropolitan residents, almost a third of those were seriously considering a move

to the regions. For those who had moved to the regions, key reasons why they stayed were lifestyle and the quality of social life. With this move comes the expectation of comparable cultural infrastructure, amenity and access to it.

Addressing the decentralisation of population and services to regional Western Australia is likely to be supported by regional centres attracting skilled and talented people in the sector, providing employment in their own right and increasing demand for cultural and creative activity.

The growth in outer metropolitan areas brings a different dynamic. Home to the most culturally diverse populations in the State, the outer metropolitan areas will demand cultural experiences that are authentic, multicultural and relevant, and supported by suitable infrastructure. In these areas, the expertise and support of local government working in tandem with the State will be essential to harness local engagement.

The demand from the regions and outer metropolitan

areas is good for the State in a number of ways. The contribution of the sector to social development, urban design and liveability is well evidenced. As importantly, the sector brings with it job creation and economic diversification opportunities.

This suggests that regional and outer metropolitan arts policies targeted at improving infrastructure, local content and job creation in the sector, albeit with different emphases, will help act to both attract and retain people. One of the most difficult challenges up to 2031 will be how to achieve a critical mass of quality activity and supporting infrastructure across the State.

Regardless of whether the State's strategy is to further urbanise or develop regional centres, the sector will be central to ensuring that the growing population is cohesive and actively engaged in Western Australian life.

This is likely to require an accord between State and Local Government to continue actively planning for the infrastructure and the content required to service the ambitions of the communities.



Most of Western Australia's population growth is projected to occur in Perth where the population is projected to rise from 2.2 million in 2016 to between 3.0-3.5 million in 2031²².

To be a city of choice in this increasingly competitive global environment, Perth will have to demonstrate its vibrancy, with lots of recreation and entertainment opportunities including a strong arts and cultural sector²³.

Companies are increasingly assessing and comparing the attractiveness of cities, rather than countries, as places to live, set up headquarters and do business before making decisions about where to locate their offices.

Perth rates poorly for 'cultural infrastructure and vitality' in international liveability surveys and this represents a major challenge for our future growth and global competitiveness.

It also presents a more immediate challenge. In addition to the challenge of attracting global talent,

Perth faces the task of retaining its local creative talent and encouraging international exchange.

As noted in research by FORM, Perth is losing its 'young and talented' to other cities with a net loss of more than three per cent between 2001 and 2006²⁴.

This is despite excellent economic growth over that period. Out of Perth's young talent who left Perth between 2001 and 2006, 71 per cent chose to relocate to Melbourne and Sydney, suggesting the dramatic appeal of those cities as 'talent magnets'.

New South Wales has a formal policy to have 'Sydney successfully positioned as a global creative centre and gateway'²⁵, while Victoria has established Creative Victoria with an investment of an additional \$202 million announced in 2015 for its sector over the next four years²⁶.

If we are to compete for the best then we need to ensure that we plan to attract and retain them, which is where WA's multiculturalism is an obvious asset.

Culture comprises a number of layers including outer expression, such as art, clothing, food, artefacts, as well as inner beliefs, values, core allegiances and identity. There are opportunities for growth to explore the deeper meaning of what it is to be Western Australian in our multicultural future, and how this can be communicated and shared.

Working in harmony with the richness of the State's Aboriginal cultures, WA has an enormous advantage to be the best it can be.

The role of our State and community collections in reflecting our identity, culture and environment will become increasingly important for full citizen engagement to contribute to social cohesion, authentic Western Australian branding and meaningful storytelling around a shared identity.

How we include our most creative people into our civic decisions will be one of the most important challenges in reaching 2031.



ABORIGINAL ARTS AND CULTURES

Western Australian Aboriginal people are part of the oldest continuous culture on Earth.

Aboriginal culture is manifested through heritage, languages, cultural practices and connection to country to inform who we are as Western Australians, and contribute fundamentally to a Western Australian identity.

Aboriginal arts and culture is unique, widely acknowledged and experienced internationally as a distinguishing feature of Australia.

Western Australian Aboriginal artists are exhibited in major galleries internationally and in Australia, and FORM's 'Ngurra Kuju Walyja - One Country One People - the Canning Stock Route Project' was the most visited exhibition in the history of the National Museum of Australia, which acquired all 140 works produced through the project.

The State's Aboriginal Art Centres produce more than 40 per cent of Australia's Aboriginal Art; have 31 per cent (or 4,000) of Australia's Aboriginal artists working through them.

Thirty per cent of Australia's total Aboriginal Art Centres are located in Western Australia at the best subsidy to sale ratio in the nation.

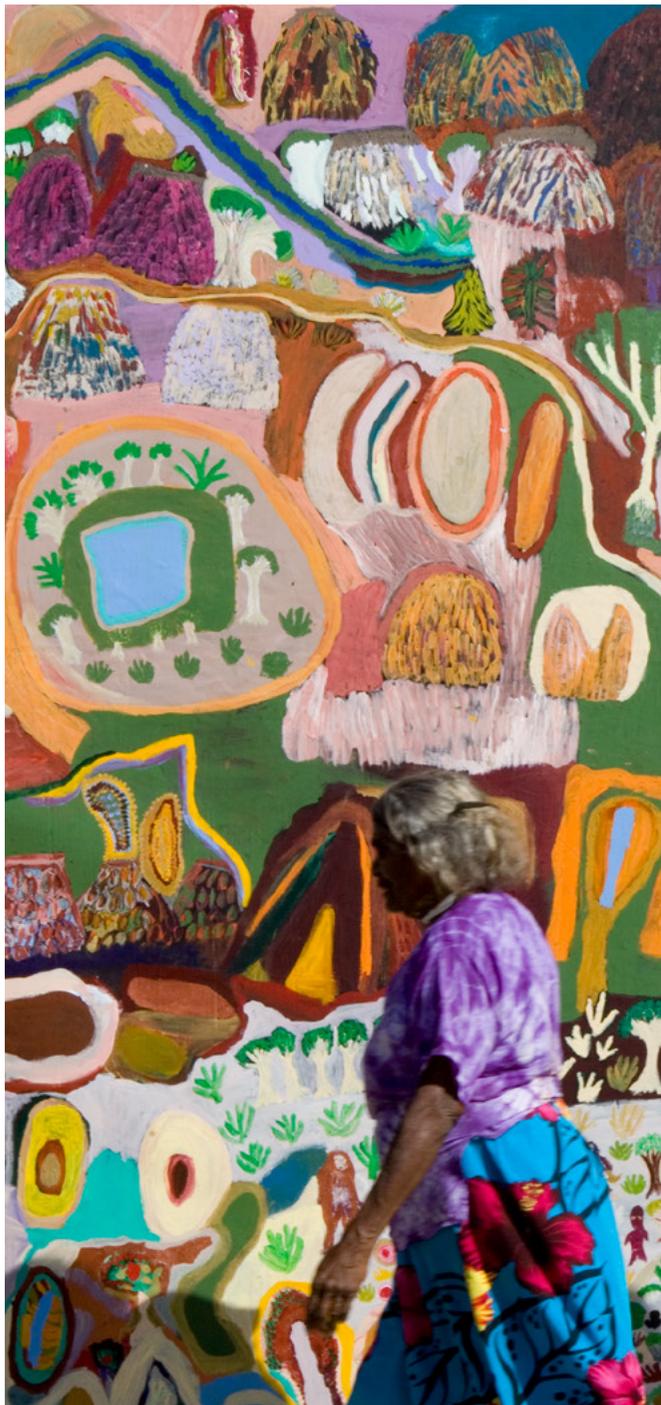
In 2009-10, 21 Western Australian Aboriginal owned and managed art centres generated an estimated \$14 million in sales to national and international markets²⁷.

This success extends well beyond Art Centres. Magabala Books from its base in Broome is Australia's oldest independent Indigenous publishing house; Yirra Yaakin is a multi-award-winning, world-class Aboriginal theatre company; we have the great

Aboriginal writers Sally Morgan and David Milroy, Dr Richard Walley OAM is one of Australia's leading Aboriginal performers, musicians and writers; and films including 'Bran Nue Dae', 'Mad Bastards' and 'Putuparri and the Rainmakers' all draw their success from WA Aboriginal stories and talent.

Yet despite this success, the '2015 Western Australia Closing the Gap Report' indicates limited progress across the seven Building Blocks designed by the Coalition of Australian Governments to alleviate Aboriginal disadvantage in spite of significant financial investments by both State and Commonwealth Governments²⁸.

Aboriginal cultures are central to achieving the ambitions of both 'Strategic Directions' and 'Closing the Gap'. Their sustainability is one of the greatest policy challenges to 2031.

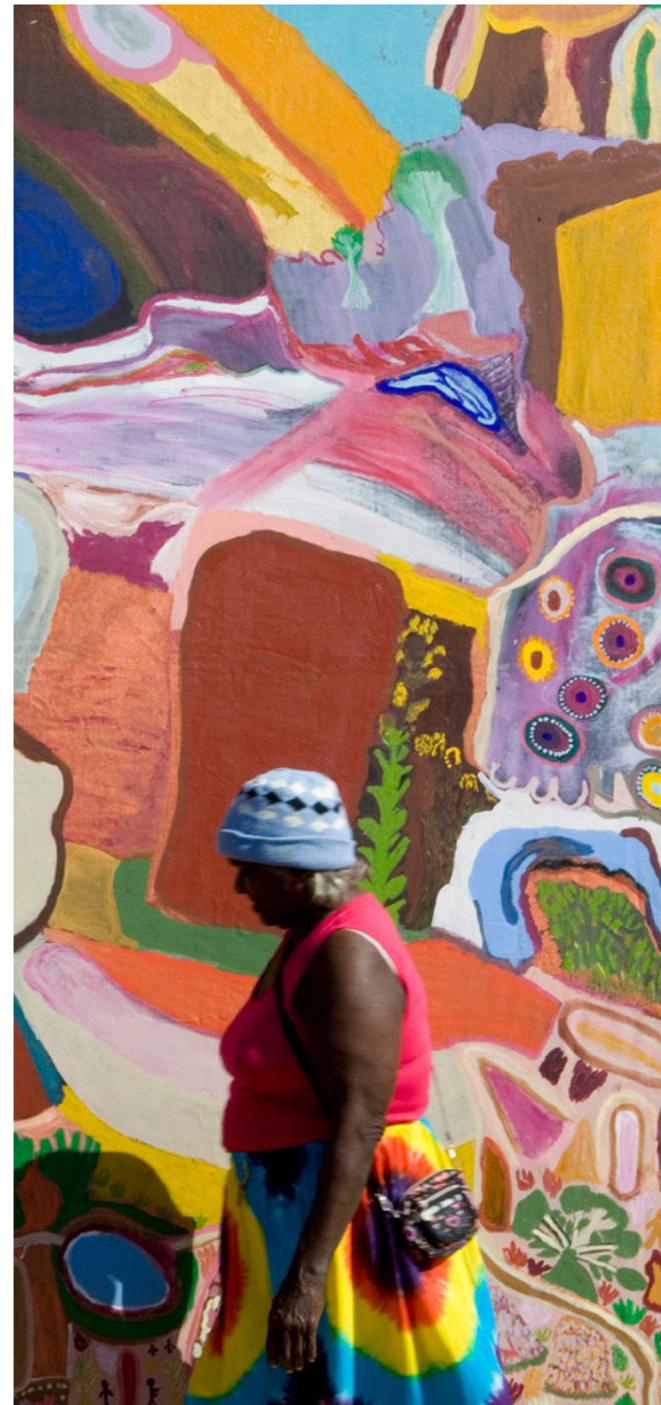


First and foremost, there is a clear need for Aboriginal culture to be maintained for the wellbeing of Aboriginal people.

From a position of cultural strength, there will be even greater success for more Aboriginal artists, performers, musicians, writer and filmmakers and new opportunities for the broader community to engage with Aboriginal culture.

There are challenges which will require a cross government approach: resourcing traditional cultural practice, sustaining remote Aboriginal Art Centres, providing access to culture in schools, and supporting emerging artists to name but a few.

Using culturally based interventions rooted in maintaining Aboriginal culture to improve the economic, social and cultural well-being of Aboriginal people, improving the effectiveness of government service delivery and investing in current Aboriginal cultural expression and activities that engage the broader WA public, is likely to be transformative for all.



Amy French and Miriam Atkins in front of Amy French and Lily Long's *Karlamilyi* (detail).
We don't need a map: a Martu experience of the Western Desert. Fremantle Arts Centre. Photo by Bo Wong.



CHILDREN AND YOUTH

Australia's 4.6 million Generation Z's (born between the years 1995 and 2009) are truly the 21st Century generation, with the whole of their formative years lived in this century. Within a decade they will comprise 12 per cent of the workforce and will be the first fully global generation, shaped by the 21st century, connected through digital devices, engaged through social media and expecting popular culture through iconic technology²⁹.

By 2031 the proportion of children and young people aged 0-24 in Western Australia will be between 31.7 – 34.4 per cent of the population³⁰. For them, digital engagement will be the norm and not an optional extra to their arts and cultural life. As such, the impact of this age group on policy development over the next five to ten years is significant.

While technology is a major way of accessing and creating culture, it is not exclusively so. A series of recent consultations and research undertaken by Western Australia's Commissioner for Children

and Young People (CCYP) has shown that our children and youth (between ages of 12 and 24 for Commissioner's purposes) not only want, but need, access to ongoing arts and cultural opportunities *in their community* for their emotional and creative expression, their mental health and ultimately their transition into adulthood³¹. This poses a policy problem around the extent to which 'live' versus 'virtual' cultural engagement is balanced and prioritised, and how the role of the arts in supporting mental health is understood.

Overlaying this complexity, young Aboriginal people aged between 10-24 years comprise 29.6 per cent of the total regional Aboriginal population with 59 per cent of Western Australian Aboriginal young people living outside of the Perth metropolitan area and 21 per cent living in very remote locations. In consultations for the 2015 'Listen To Us' report³², young Aboriginal people identified their culture and its expression as one of the most important features of their lives.

The necessity of intergenerational learning in this context is vital, with the 'Closing the Gap' report card released in February 2016³³ showing that the life expectancy of Aboriginal and Torres Strait Islanders is still 10 years less than the general population with no signs of improvement. Providing opportunities for intergenerational learning will be essential in the development of these young people.

Further challenges affecting the delivery of the vision include how to actively engage young people in the decisions that will impact them, how to broaden their experience, and how the rest of the sector can capture their propensity to experiment, take creative risks and harness opinions through social media.

Whatever the challenges, the way in which young people are interacting with the world is a fundamental shift in the way culture is created, developed and expressed and we will need their support to help deliver our vision in a way that remains relevant.



ECONOMIC DIVERSIFICATION

The projections and scale of opportunity outlined in the SPS 2050, provide a context to how the sector can contribute to the State's development over the next few decades.

There is clear role for the sector in assisting the State to meet its targets for international trade through facilitating cultural ties and developing the sector's own export potential.

Perth's proximity to Asia provides opportunities for internationalisation while our isolation from the rest of Australia gives us the space and freedom to explore our own interpretation³⁴.

There is uniqueness in WA culture and identity that could be better understood, celebrated and authentically promoted for shared trade, government relations and cross-cultural understanding.

Adopting a policy of cultural exchange and diplomacy will assist in developing bi-lateral trade relations with India, China and others in the Asian region while contributing to easing security-related tensions³⁵.

The sector is already a major employer and will be essential if the State is to meet its targets for economic diversification.

To put this into context, the Gross Value Added (GVA) contribution of the sector

nationally is similar to the GVA contribution of health care and social assistance, and greater than industries such as education and training, retail trade, public administration and safety, agriculture, forestry and fishing³⁶ and average growth exceeds the national average.

Western Australia, however, has a lower percentage of creative employment than the Australian average, suggesting room for development.

Employment in the areas of architecture and design, and software and digital content is growing faster than the Western Australian economy overall and have the potential to stimulate innovation, new economic growth and advanced economy industries for the State³⁷. These areas also have high export potential to Asian nations where high-speed internet access is widespread.

While Western Australia faces unique challenges in driving development from the most isolated capital city in the world, a FACTBase report undertaken by The University of Western Australia for the Committee for Perth found that Perth is one of the most connected digitally through social media³⁸.

This connectivity can be used to build networks that can be drawn on for community engagement, and sharing, creating and conserving arts, culture and creative activity. To do this, new support mechanisms for growing virtual clusters and collaborations need to be prioritised³⁹.



This approach to growth will be essential. In the short term, WA Treasury is predicting the WA economy will grow at below trend over the next four years, as resource sector investment continues to unwind⁴⁰.

As WA begins this economic downturn, investment in the arts, cultural and creative industries sector will be essential to maintain economic activity and confidence and, vitally, continue to develop its export potential.

In an era of urbanisation and globalisation where the global workforce is more mobile than ever before, Perth will be competing with all of the other cities around the world⁴¹ to attract both talent and investment meaning that decisions made now will impact upon the State's development for the next 15 years.





EDUCATION AND TRAINING

One of the cornerstones of delivering on the ambitions of 'Strategic Directions' is an education sector that enables every individual to meet their creative aspirations, and a vocational and higher education sector that marries the needs of arts development with research, employment and marketing opportunities.

Education is the key enabler of a vibrant, high quality culture and arts sector.

There is strong evidence supporting the principle that fostering creativity with the arts at a young age will build the foundations of a resilient population, armed with capacities for critical inquiry, lateral thinking, innovative solutions and powerful communication⁴².

Shared experiences of cultural and creative pursuits have the potential to achieve social outcomes and help form an inclusive Western Australian identity. This process begins at home and continues through our education system so strategies are required to ensure full accessibility to the arts for the community throughout their lives.

Western Australia is recognised for having the longest and one of the most progressive arts and education State government agency partnership in Australia.

The strength of evidence of the impact of education through the arts has led to many recommendations to integrate the arts into other academic disciplines, including by Australia's Professor Robyn Ewing⁴³.

This has led to an international movement of high profile arts integration programs in numerous countries, including Canada, England, Finland, Ireland, Scotland, Singapore, the USA and Wales, where artists are partnering with teachers to contribute to enhanced learning outcomes for young people.

Given the depth of the partnership between the State agencies here and the years of expertise built in the art sector, there is real potential to transform the education system over the next 15 years using arts and creative thinking as the driver of reform. A by-product of this is that we can project a likely increase in the number of children that go on to be artists and cultural workers as they will have greater exposure in their early learning years.

There are, however, some emerging trends that will need to be monitored over the first years of 'Strategic Directions'.

There was a steep decline of 6.8 per cent in VET students in Western Australia between 2013 and 2014⁴⁴ and, although there are no available trend analyses for the creative arts sector, it is a trend that will require monitoring if we are to sustain the number of artists needed to deliver our ambitions.

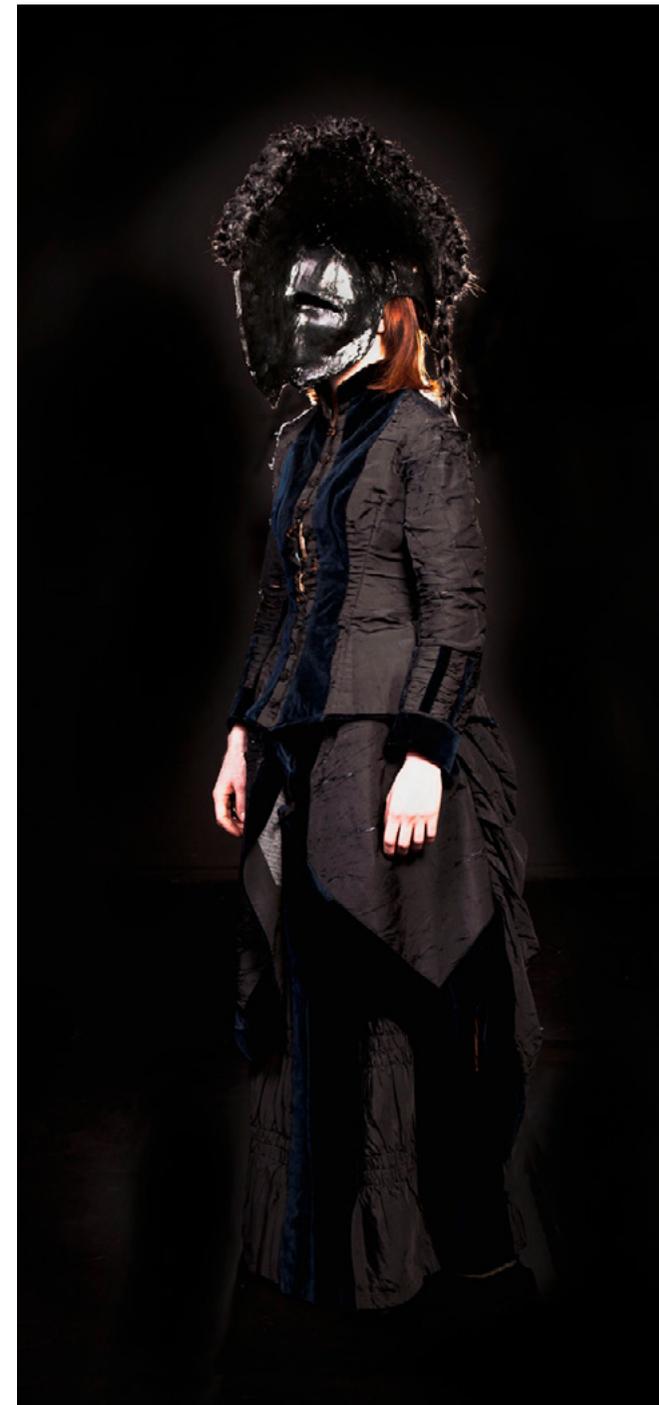
At the Post Graduate level, the education sector provides an important research and development role that has a long and successful history in Western Australia, while also being a major employer.



The Post Graduate sector is vital for research and as hot beds of experimentation and innovation, so we must ensure that we prepare for the future artists we are creating throughout the education system with a broad range of Post Graduate courses across all areas of study.

We have world class courses of study in culture and arts in our universities and training institutions and throughout our school system.

Nurturing these sectors and enabling access to lifelong learning through our sector cannot be understated if all Western Australians are to have universal access to arts and culture and those forms of arts and culture that reflect their cultural identity.





TECHNOLOGY

One of the most exciting opportunities is the potential of technology and how this will affect our lives and the sector.

New methods of communication have changed the way Australians create, access and participate in arts and culture.

Our citizens are increasingly blurring the boundaries between consumption and participation and will benefit from the new global digital economy. Coupled with increasing cultural diversity, this is helping fuel innovation by bringing different insights to traditional practices⁴⁵.

While increasing digitisation is facilitating greater levels of access to cultural and creative product such as music, theatre, Internet Protocol Television, live streaming, film and libraries. Other technological advances such as 3D printing could improve prototyping for fashion, crafts and designed objects in ways as revolutionary for those industries as the iPod was for music industry.

Western Australia needs to position itself for these revolutions. The make-it-yourself trends in arts, culture and creativity have produced a new generation of 'pro-sumers' (producers/consumers). These 'pro-sumers' are representative of

the changing demands of current and future audiences.

The combined social change and technological innovations have the potential to radically alter industry business models and how they are supported. Film, gaming, transmedia and screen-based entertainment are areas of high-potential for Western Australia as more consumers access their culture and entertainment digitally.

Important in this context, is how Western Australians can access their own culture no matter where they live in the State or what their physical abilities are.

Our great State collecting institutions – Western Australian Museum; the State Library of Western Australia; the State Records Office and the Art Gallery of Western Australia, have the potential to harness the State's collective history digitally and present new images, sounds, text, objects, means of engaging with, participating and developing our assets. An important goal will be planning for this future and understanding how to incentivise innovations through technology, which will be an area requiring considerable ongoing work over the next five years.



The potential impact of climate change has yet to be addressed by the sector.

We do not have an understanding of our carbon footprint nor mechanisms to evaluate our impact either through normal programming or in the planning of infrastructure.

The State is, however, fortunate to have a depth of resources available to help the community understand the value of our environment and how it may be protected.

Through the Western Australian Museum and the strength of Aboriginal connection to Country, there is an opportunity to pay especial attention to working collaboratively as a sector and community and lead on environmental protection.

If we are to maintain the pristine environment of our State, the sector will need to use its assets to promote the special bio-diverse nature of Western Australia while understanding how the sector can minimise or reduce its environmental impact.

A photograph showing two people, a man and a woman, looking at a suspended sculpture in a dark room. The sculpture is a small, white, abstract figure with thin, white lines extending from its head to a rectangular frame above it. The man is on the left, and the woman is on the right. The lighting is dramatic, highlighting the sculpture and the people's profiles.

EVALUATING THE VALUE OF ARTS AND CULTURE

The value of culture to society, and how to measure this value, has been the subject of intense debate for many years both in Australia and overseas. Increasingly the sector is expected to demonstrate the value of its work across social, economic and environmental outcomes to audiences, investors and governments, often relying on government to consolidate data and report on key measures of value.

The DCA with its private partners Pracsys Economics and The Intelligence Agency developed the Public Value Measurement Framework⁴⁶ to recognise the value of arts to an individual, the value it produces for the economy and social policy as a by-product, and the value placed on it by the entire community whether they consume the arts or not⁴⁷.

The development of Culture Counts™, a world leading technology platform is being used throughout Australia and internationally, providing the opportunity to demonstrate the full value of the sector in real time.

It is enabling individual artists and arts organisations of all scales and artforms to set their artistic ambitions and test these against other artists and the public, to provide a supportive environment based on data for them to understand the impact of their work.

All the artists and public respondents involved are providing standardised data on the same scale in real time. For the first time, the data collected through Culture Counts™ will allow benchmarking so the sector can track its progress, especially as it relates to the quality of work.

Much discussion on the contribution of the sector is based on the assumption that high quality, challenging, original, authentic work is produced. The impact of cultural transformation will be greater if artistic and creative quality across the sector can be improved.

How this quality is benchmarked internationally, how artistic risk and innovation is encouraged, and how a system best combines a focus on cultural excellence as well as a priority on extending public reach and participation will determine if we can meet our cultural ambition.

If Western Australia is genuinely serious about becoming a leading international cultural centre, we need to develop more rigorous and exacting regimes to measure its progress against national and international benchmarks.



ACCESS TO FINANCE

Earned income, philanthropic and commercial sponsorship, and government funding and investment play an important role in financing the sector.

While these represent the major sources of income for organisations, increasingly alternative financing methods are being considered.

Apart from bank loans, informal financing such as loans from private individuals, crowdfunding and angel investment are also being used along with equity investment in some sub-sectors due to high levels of novelty and risk.

Access to alternative finance options is often difficult for the sector.

Organisations tend to lack tangible assets, depend on intangible assets, operate in high uncertainty of market demand and/or government financing, suffer from a perceived lack of business skills, and operate with low cash margins⁴⁸.

One of the uncomfortable truths for the emerging dynamics of creative and commercial success is that the range of skills and capabilities required for the sector to be resilient and sustainable grow ever larger.

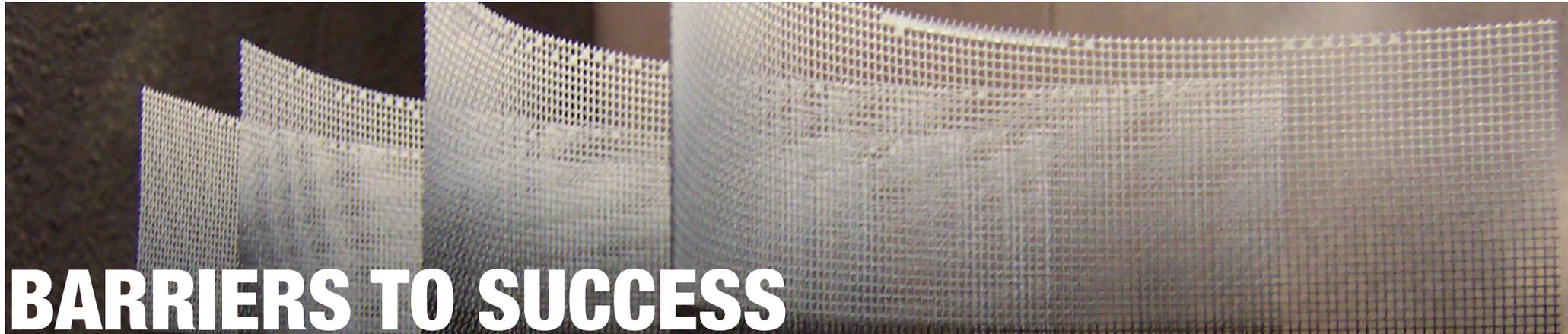
Creative leadership; strong governance; management skills; investment, fundraising and entrepreneurial expertise; digital Research and Development

skills; marketing and social media awareness; audience research and engagement; and the capacity to engage with a burgeoning array of investors and funders are all patchily distributed throughout our sector.

There is a need to build the capacity of the sector to identify and realise the full potential of their assets, to fully understand how to analyse all the data available to them and develop alternative business models to attract outside investment. This will require skills development and training, in addition to attracting new board and management expertise into the sector.

As a sector, we will therefore need to develop concerted programs of capacity building to meet these needs across the whole ecology. Particular points of focus for us will be to nurture a new generation of creative and cultural producers and arts entrepreneurs who can work across this dynamic mixed economy attracting private sector investment and risk sharing from inside and outside of Western Australia into our film, music, fashion and design industries.

There is an opportunity and in the short term maybe a priority, to create a range of investment strategies that focus on bridging the barriers to finance, decreasing the dependency on one particular source of finance⁴⁹.



BARRIERS TO SUCCESS

While there is enormous potential from the start point of 2016, there are barriers to the future success of the sector.

Between 2001-02 and 2015-16, the percentage of total government funding allocated to the Department of Culture of the Arts (DCA) declined from 1.17 per cent to 0.67 per cent with 0.21 per cent now spent on direct cultural production through the DCA⁵⁰.

This is also reflective of the growing proportion of government expenditure since 2009-10 on education, police and capital projects in particular. At a time of relative economic success in WA there hasn't been a proportionate focus on the sector.

As discussed earlier the short term economic forecasts for the state are below projections, which may signal a further tightening of overall government expenditure; however, there is a convincing argument to accelerate expenditure in the sector both in absolute and proportional terms to better leverage returns from it to address the State's short

term issues and prepare for a better economically diversified and socially active state.

An emerging trend in the sector, which seems to be the opposite of a barrier to success, is that in 2011-12, for the first time State government support for the arts from government departments excluding the DCA nearly matched the funding provided by the DCA⁵¹.

While this is a welcome and essential influx of new investment, it poses a risk to the quality of the arts experiences that have led to such strong public support, as investment from other agencies is usually to achieve other policy agendas rather than improve the arts and cultural product itself. Without high quality at the heart of the experience to drive engagement, the sector's future will be unstable at best.

The absence of any increase to the DCA's peer grants programs since 2007-08 has resulted in less expenditure on the production of cultural content.

This has resulted in a sector that is able to subsist year on year, but not adequately meet its potential through driving attendance through better quality.

A policy emphasis on driving quality will be a major step in helping the sector be more sustainable.

Along with this quality, the State needs a critical mass to support year round continuous programming, which would not only provide those working in the sector the opportunity to earn a living wage but would also drive tourism and grassroots community involvement.

This additional activity would require our infrastructure to be well-maintained and fit-for-purpose, our regulatory framework supportive of public arts activity and our major cultural institutions to truly lead their sub-sectors.

The risks to sector growth are compounded with the lack of support of the Federal Government and an over-reliance on the State.



The Australia Council for the Arts distributes just 6.8 per cent of its funding to Western Australia⁵² and funds the fewest small to medium arts organisations of any State⁵³.

At the same time the Australian Government provides just 19 per cent of its art centre funding to Western Australia's Aboriginal art centres, which produce 40 per cent of Australia's Aboriginal art and represent 30 per cent of all Aboriginal art centres in Australia⁵⁴.

A more equitable contribution for WA from the Federal Government will be essential to ensure our growth targets are met.

This under-investment has impacted on employment levels. The creative workforce represents 3.76 per cent of Western Australia's total workforce, compared to 5.29 per cent nationally⁵⁵.

In employment terms, sub-sectors including film,

writing and visual arts have struggled to provide relative growth in employment over a number of years and between 2006-2011, showed lower than average annual growth and lower than average concentration compared with the rest of Australia.

Film in particular had been in relative decline with employment falling (in net terms against the Australian average) by 5.8 per cent per annum between 2006 and 2011⁵⁶. Yet since 2009, there have been 14 films produced in regional Western Australia with a combined production budget of \$89 million and approximately \$42 million spent directly in WA. This suggests that good policy choices and a clear direction can drive growth.

These are not small challenges and there are others.

As our international neighbours commit to innovative technology, there is a unique opportunity for the Western Australian cultural and creative sector to

be placed at the forefront of the State Government's broader commitment to innovation; to take into account and to embrace the changes coming in 3D printing, wearable technology, digital communications or big data.

Our cultural heritage has enormous potential for activation across the State and a greater focus on innovative design in our physical environment will help communicate our identity. Surprisingly, our sector is not contributing adequately to environmental sustainability despite the State's reputation for bio-diversity and this represents a massive area of opportunity for creative input and employment.

Despite these barriers, there is reason for considerable optimism. 'Strategic Directions 2016-2031' represents for the first time a shared vision across the sector, and a strong will has been demonstrated through this process to deliver on these ambitions.



IMPLEMENTATION OF STRATEGIC DIRECTIONS 2016-2031

To deliver a coordinated plan, State Government, Local Government, the education and training sectors and the peak bodies of the sector will need agreement on their respective roles.

Local Government in particular has a significant role to play with 79 per cent of local authorities currently investing in arts and cultural activity at an investment level which is the third highest per capita in Australia⁵⁷.

One of the key planks and priorities for delivering on the ambitions of 'Strategic Directions' will be to increase the current 13 per cent of local authorities that have a cultural plan so that the expertise of grassroots artists and cultural workers can help deliver the goals we have set.

The DCA will establish a process that ensures ongoing dialogue between DCA, other government agencies, local government, the sector and the

public for the purpose of advocating, monitoring and reviewing 'Strategic Directions'.

With different sub-sectors at different stages of development and requiring different investment profiles, there is an opportunity to propose and establish tailored new partnerships for sub-sectors, both within and between, government and the sector.

By creating new structures, there is an opportunity to understand whole-of-government priorities and their relationship to arts and culture.

For the sector, there is an opportunity to identify drivers for, and barriers to, cultural and commercial growth including those caused by government practices.

Part of this work will be to identify what reforms the current legislative and regulatory framework may be needed to support sector growth to ensure that

government plays the right facilitative role in sector development.

In summation, government will be required to develop new policy responses in partnership with the sector; research will need to be more open, deeply analytical and borne of a data culture across the sector; all of us will need to respond quickly and better to sector driven initiatives and committed to implementing the government of the day's priorities and commitments in partnership.

Each five-year stage of 'Strategic Directions' has clear milestones we need to meet which will form the basis of a new co-ordinated approach to delivering our shared vision.



BY 2021 WE WILL HAVE...

- ⦿ **Set achievable benchmarks for our ambitions in partnership with Department of Treasury and the sector.**
- ⦿ **Established a process that ensures ongoing dialogue between the DCA, local government, the sector and the public for the purpose of advocating, monitoring and reviewing 'Strategic Directions'.**
- ⦿ **Demonstrated the economic contribution of the sector to the State economy and developed growth strategies.**
- ⦿ **Implemented a progressive legislative and regulatory reform agenda.**
- ⦿ **Aligned and prioritised cultural infrastructure needs to the changing demographics of the State and the potential of repurposing and integrating heritage assets.**
- ⦿ **Accounted fully for State expenditure on Aboriginal cultural activity and established a whole of government policy and partnerships to invest in Aboriginal cultural maintenance and development.**
- ⦿ **Strengthened the opportunities for Aboriginal people to celebrate and connect Western Australians with Aboriginal culture.**
- ⦿ **Facilitated Regional and Outer metropolitan arts development policies.**
- ⦿ **Developed State Planning Policies for cultural infrastructure and the Arts.**
- ⦿ **Identified and prioritised major cultural hubs and infrastructure for master planning and capital investment.**



BY 2021 WE WILL HAVE...

- ⦿ Better reflected our multicultural population in our artistic and cultural output.
- ⦿ Established new public, private and sector partnerships to drive reform and established new philanthropic foundations for the arts.
- ⦿ Created sub-sector specific strategies to achieve the ambitions of 'Strategic Directions'.
- ⦿ Used new technology for performance measurement and public engagement.
- ⦿ Created a suite of new and exciting arts tourism experiences.
- ⦿ Leveraged Commonwealth funds commensurate with the population size of the State.
- ⦿ Developed a joint strategy to promote Western Australia as the world's most livable state through targeting livability indices relating to lifestyle and culture, and increasing access and participation in the arts.
- ⦿ Identified and invested in appropriate skills training across the sector.
- ⦿ A New Museum for Western Australia.
- ⦿ Improved the preservation of and public access to State archives.



BY 2021 WE WILL HAVE...

- ⦿ **A screen production facility at ABC Studios.**
- ⦿ **A joint vision of library reform by State and Local Government.**
- ⦿ **Created memoranda of understanding for cultural exchange and activity with our major Asian and Indian Ocean trading partners.**
- ⦿ **Sought to form a bi-partisan Parliamentary committee to research arts activities that deliver savings to other portfolios of government.**
- ⦿ **Developed a 'Culture Pass' for main population centres that integrate ticketing, travel and other benefits in a single transaction.**
- ⦿ **Established a joint State and Local Government accord for delivery and management of cultural infrastructure.**
- ⦿ **Investigated the use of vacant buildings and spaces held by government to be used as creative arts spaces.**
- ⦿ **Develop Local Government Cultural Plans to drive best practice and better leverage arts and culture spend across the State.**
- ⦿ **Undertaken a feasibility study to examine the advantages of a back office support centre for small organisations.**
- ⦿ **Establish a committee to oversee planning for the cultural celebrations of the bicentennial of Perth.**



- ⦿ **Aligned our world-class higher education and training capacity to the growth and international recognition of our sector.**
- ⦿ **Created a continual program of high quality, accessible arts festivals and activities throughout the State.**
- ⦿ **Established mechanisms for measuring the environmental impact of the sector.**
- ⦿ **Ensured the sustainability and ongoing development of the State's Aboriginal arts and culture sector.**
- ⦿ **Delivered growth in the currently underdeveloped sub-sectors of visual arts, crafts/design, literature, digital media and theatre.**
- ⦿ **Accelerated employment growth in film, animation, architecture, music, fashion, design, gaming and dance.**
- ⦿ **Embedded arts based creative learning across all schools in the State.**
- ⦿ **Established a cultural planning system between State and Local Government that facilitates participation in and access to arts and culture for all Western Australians.**
- ⦿ **Demonstrated savings and improved service outcomes to government portfolios that utilise the arts to support service delivery.**
- ⦿ **Every public and private hospital will have arts based activities in clinical settings.**
- ⦿ **Created a young people governance program to enable young people to be better represented on the boards of cultural organisations.**
- ⦿ **Demonstrated public policy support for the sector.**

APPENDIX A - CONSULTATION SUBMISSIONS

A	B	C
Shared (Government, Private and NfP Sector)	Private and Not-for-Profit Sectors	DCA and Whole of Government
<p>Prioritise strategies that promote access for Aboriginal communities to traditional cultural practice.</p> <p>Prioritise investment in activities that reflect the full diversity of the cultures represented in WA.</p> <p>Prioritise investment in centres of specialised or complementary cultural activity to develop sustainable critical masses of activity.</p>	<p>Create a young people governance program to enable young people to be better represented on the boards of cultural organisations.</p> <p>Sector peak bodies to establish in-sector mentoring programs targeting young creators post formal education.</p> <p>Sector peak bodies to work with Future Now to develop suitable work placement programs to encourage employment growth.</p> <p>Sector peak bodies and tertiary education institutions to collaborate to ensure vocational course content is relevant to grow the sectors being supported.</p>	<p>Government Ministers recognise and promote the importance of the sector to the cultural, social and economic growth of Western Australia.</p> <p>Establish a bi-partisan Parliamentary Committee to research arts activities that save money of non-arts government agencies.</p> <p>DCA to establish a process that ensures ongoing dialogue between the DCA, sector and public including for the purpose of advocating, monitoring and reviewing 'Strategic Directions'.</p>
<p>Establishment of the Grey-Smith Institute of the Creative Arts.</p> <p>Develop a new ticketing and CRM plan and systems to foster audience development and sustainability.</p>	<p>Establish committee to oversee planning for cultural celebrations of 2029 bicentennial of Perth.</p> <p>Support an international artist exchange program.</p> <p>Establish a regulation roundtable to identify barriers to cultural activity.</p> <p>Establish a major international Aboriginal Visual Arts Festival to showcase one of WA's greatest cultural strengths.</p> <p>Offer consumers a 'culture pass' for main population centres that integrate ticketing, travel and other benefits in a single transaction.</p>	<p>ScreenWest to establish a screen production facility at the ABC Studios.</p> <p>Develop a whole of government approach to the protection and expression of Aboriginal arts and culture.</p> <p>WA government to fully account for its expenditure on Aboriginal cultural maintenance and expression.</p> <p>Consider dual street signage of English and Noongar in Perth.</p>
<p>Survey then establish targets for cultural diversity and representation for people with disabilities on the boards of DCA funded organisations.</p>	<p>Sector peak bodies to develop programs for consideration by government that actively support the long term development needs and growth of their respective sub sectors.</p> <p>Undertake a feasibility study into a back office support centre to provide administrative support to not for profit organisations.</p>	<p>Identify the needs of the public galleries sector in regional WA and provide a case for future investment.</p>

Shared (Government, Private and NfP Sector)	Private and Not-for-Profit Sectors	DCA and Whole of Government
<p>Establish methodologies to account for carbon reporting of cultural activities.</p> <p>Prioritise investment in the small to medium arts sector.</p>	<p>Partner with Volunteering WA to increase volunteer opportunities for arts and cultural activity.</p>	<p>Development of policies for Regional and Outer metropolitan arts.</p> <p>Develop a formal policy for disability arts access, development and participation cognisant of recent legislative changes.</p> <p>DCA to develop an Open Data policy.</p> <p>Establish a State policy to protect, preserve and transfer Aboriginal arts and culture and to increase Western Australian's exposure to Aboriginal Arts.</p>
<p>DCA and sector peak bodies to better leverage existing cultural activities and events through improved coordination and promotion to ensure there is year-round activity of complementary and diverse cultural offers.</p>	<p>Develop a Digital Arts and Creative Industry Roadmap for WA and lead the creative and arts industry to leverage the innovation hub focus emerging in the State.</p> <p>Sector peak industry bodies and DCA to prioritise development programs that utilise new technologies.</p>	<p>Implement WALGA's Vision 2025 and the Framework for Strategic Action for Public Library Services in WA.</p> <p>Create and devolve to local areas in partnership with local government a cultural Festival support program to encourage celebration of local grassroots art and cultural identity.</p> <p>Local Government to promote the use of existing vacant buildings and street art opportunities as creative arts spaces to revitalise city spaces, particularly in regional centres.</p> <p>DCA to support the development of Local Government Cultural Plans to drive best practice and better leverage arts and culture spend in the community throughout the State.</p>
<p>Established an Arts and Cultural Ambassadors program for Western Australia to promote the value of the arts in everyday lives of all Western Australians.</p> <p>Established a mentoring and development program for future cultural leaders for Western Australia.</p> <p>Embedded processes for direct consultation and evaluation with children and young people in arts and cultural organisations and initiatives.</p> <p>Established a creative collaborators initiative, through which young creatives partner with young entrepreneurs to grow their arts business and realise creative ambitions</p>		<p>Create a formal MOU between DCA and the Heritage Council to identify and preserve cultural heritage for the long term.</p>

Shared (Government, Private and NfP Sector)	Private and Not-for-Profit Sectors	DCA and Whole of Government
		<p>Create and institute a long-term plan for all DCA owned/leased capital assets.</p> <p>Invest in urgent upgrades to the buildings – State Library, PICA, Artshouse, Art Gallery.</p> <p>Commit to map the facilities improvement required for regional gallery spaces that meet appropriate security and environment controls required for high quality touring exhibitions.</p> <p>DCA, WALGA and Landcorp to investigate the use of vacant spaces held by Government in the community that can be used by the arts sector particularly for activities that generate visible cultural activity.</p> <p>Major public capital procurement processes to provide a greater degree of weighting in assessment to innovative design.</p> <p>Encourage the growth of low risk arts and cultural venues through simplifying regulatory approvals.</p> <p>Identify and prioritise major cultural hubs and infrastructure for master planning and capital investment.</p>
		<p>DCA, Tourism WA and Department of State Development to better co-ordinate activities that generate export and inward investment activity.</p>
		<p>Supporting community access to art across the State Regional Touring Injection – supporting targeted exhibitions, visual artists and curators and for State Institutions to develop touring exhibitions.</p> <p>DCA to publish and promote a comprehensive assessment of the cultural, social and economic, impact of the sector to established benchmarks agreed by the sector and Treasury.</p> <p>WA collecting institutions to digitise their collections and cultural assets and promote their online availability to allow people, to experience and, where appropriate, use, learn from and monetise cultural resources.</p>

Shared (Government, Private and NfP Sector)	Private and Not-for-Profit Sectors	DCA and Whole of Government
		<p>DCA and DoE establish a new Memorandum of Understanding under a revised Ministerial Taskforce.</p> <p>Encourage formalisation of the STEAM curriculum.</p> <p>DCA and education sector monitor and where necessary incentivise enrolment in sector professional development and academic programs.</p>
		<p>State Government to establish cultural exchange, research and development programs with major trading partners.</p>
		<p>Develop a State Planning Policy for the Arts.</p>
		<p>DCA to work with each sub sector peak body to agree strategies for growth of those sub sectors and reported publicly. Strategies to include agreed benchmarks for sub sector growth.</p> <p>DCA to continue to develop the Public Value Measurement Framework to capture the instrumental and institutional value of culture and the arts, alongside the intrinsic value captured through the Culture Counts system.</p> <p>DCA to continue work with the Meeting of Cultural Ministers – Statistics Working Group (SWG) and the Australian Bureau of Statistics (ABS) to develop sub-national economic impact data based on the Cultural and Creative Activity Satellite Account.</p>

APPENDIX B - THE CONTRIBUTION OF ARTS, CULTURAL AND CREATIVE INDUSTRIES IN WESTERN AUSTRALIA⁵⁸

Economic activity

- ◉ In 2009-10, Western Australians spent \$2,011 million of household expenditure on cultural goods and services that employ 42,447 people and generate \$1.92 billion in wages (ABS 2012).
- ◉ The Cultural and Creative Industries (CCI) inject an estimated \$10.6 billion dollars into the Western Australian economy (DCA 2007).
- ◉ In the past five years, the value of film and television production in the State has been \$188.97 million from a ScreenWest investment of \$23.82 million.
- ◉ For each dollar of State Government investment through ScreenWest, market and partnership funding of \$7.93 has been leveraged.
- ◉ Nationally, cultural and creative activity is estimated to have contributed \$86.8 billion to Gross Domestic Product (GDP) in 2008-09 (ABS 5271.0).
- ◉ Volunteer services to arts and heritage organisations are estimated to have contributed \$756 million to GDP on a satellite accounts basis in 2008-09 (ABS 5271.0).
- ◉ There were an estimated 972,200 people during 2008-09 whose main employment was in a cultural or creative industry or occupation (ABS 5271.0).
- ◉ At the end of June 2009, there were 164,730 entities actively trading as a business or non-profit institution within the CCIs (ABS 5271.0).
- ◉ Nationally, activity in the CCIs contributed an estimated \$65.8 billion (or 5.6 per cent) to Australia's Gross Value Added (GVA) in 2008-09. To put this into context, this contribution was similar to the GVA contribution of health care and social assistance (\$68.0 billion or 5.8 per cent) and greater than industries such as education and training, the retail trade, public administration and safety, and agriculture, forestry and fishing (ABS 5271.0).

Accessibility and participation

- 81 per cent of Western Australians attended an event at least once a year (DCA 2015). This compares with 43.7 per cent of the population who attended sports event (ABS 2009-10).
- Western Australia has the highest rate of attendance of any State at popular music events (36.3 per cent compared to the national average of 30.3 per cent).
- Western Australia has a higher attendance than the Australian average to classical music concerts, popular music concerts, other performing arts and cinema (ABS 2014).
- Compared to the major mainland States, Western Australia has the highest rate of attendance for archives and dance (ABS 2009-10).
- 64 per cent of people in Western Australia with a disability attended at least one cultural venue or event (ABS Survey of Disability, Ageing and Carers 2009).
- Young people (aged 15-17 years) were more likely than older people to attend the cinema (93 per cent), libraries (40 per cent), and popular music concerts (38 per cent), while older people (aged 55 years and over) were nearly twice as likely to attend classical music concerts (13 per cent compared with seven per cent for those aged 15-17 years) (ABS 2012-2014).
- 53 per cent of Australians used the internet to research artists and performances or download music, while 28 per cent used the internet to create or promote their own music, writing or video art, engage with a social network or learn about art (Instinct and Reason 2010).
- Creating art online was the domain of the young, with 41 per cent of all online creators aged 15-24 years (Instinct and Reason 2010).

These statistics reflect that arts, culture and creativity are increasingly being recognised for their power in tackling health, education, behavioural, attitudinal, social and environmental issues; creating novelty and stimulating innovation; and generating a 'buzz' in communities, attracting skilled and talented people (CACWA 2012; Hartley et al. 2013; Lennon and Higgs 2013).

Employment

- ◉ 42,447 Western Australians declared their main employment as the cultural sector in the 2011 Census; an increase of 5.32 per cent from 2006.
- ◉ The creative services segments also experienced strong employment growth, particularly in software and digital content, which increased by 5.3 per cent.
- ◉ At 3.76 per cent of total State employment, Western Australia's creative employment lags behind the national average of 5.29 per cent suggesting there is room for further development. (The above figures exclude the creative services areas of architecture and design, software and digital content, marketing and advertising, which are rarely Government funded, yet contribute to the whole ecology).

Government investment

The figures below give an indication of all levels of Government funding in arts and cultural activities in Western Australia. It is important to note that these statistics are drawn from different sources that each use different definitions of what constitutes an arts, cultural and creative organisation.

- ◉ Government funding for arts and cultural activities in Western Australia remains among the highest levels per person after the territories (ACT, NT), which have traditionally received higher per person funding due to a smaller population base.
- ◉ Western Australia was ranked third highest jurisdiction in per person funding at \$257.10 per person (well above the national average of \$146.5), comprising \$54.80 per person for the arts and \$202.30 per person for heritage (ABS 2012).
- ◉ Western Australia ranks fourth in terms of overall cultural funding by a State Government (ABS 2009-10).
- ◉ Total funding for heritage categories in Western Australia rose 15 per cent or \$61.5 million from 2010-11 to 2011-12, while total arts funding experienced a drop of 3 per cent or \$3.9 million in the same period.
- ◉ Western Australia receives seven per cent of the Commonwealth Arts and Culture funding, despite having 11 per cent of the population (CACWA 2012).

What the public thinks

- ⦿ 95 per cent of Western Australians consider it important for children to access arts and cultural activities as part of their education (Patterson Market Research 2016).
- ⦿ 90 per cent of Australians think arts should be an important part of the education of every Australian (Instinct and Reason 2014).
- ⦿ 90 per cent of the Australian population values Aboriginal culture (Australia Council for the Arts, 'Building Audiences: Aboriginal and Torres Strait Islander Arts'. 2015).
- ⦿ 81 per cent of Western Australians surveyed believe that the government should invest in arts and cultural activities (Patterson Market Research 2016).
- ⦿ 68 per cent of Western Australians consider arts and culture play a valuable role in their lives; 78 per cent consider they play a valuable role in the community (Patterson Market Research 2016).
- ⦿ Western Australians think the arts have had a big and positive impact in five different areas (Instinct and Reason 2014):
 - 67 per cent of those surveyed believe the arts have a big impact on child development.
 - 59 per cent of Western Australians agree that the arts positively impact our ability to think creatively and develop new ideas.
 - 56 per cent of Western Australians agree that the arts contribute to our ability to express ourselves.
 - 54 per cent of respondents think that the arts are helping us deal with stress, anxiety and depression.
 - 50 per cent of Western Australians believe that the arts have a big impact on our sense of wellbeing and happiness.
- ⦿ Regional Western Australians are more likely to perceive a big impact of the arts in bringing visitors to their community (51 per cent compared with 40 per cent of Western Australia as a whole) (Instinct and Reason 2014).
- ⦿ 52 per cent of regional residents, compared with 43 per cent of Western Australia as a whole, believe that the arts have a big impact on community pride and identity (Instinct and Reason 2014).

REFERENCES

- ¹ For all current WA cultural and creative industries sector data and statistics visit the DCA Research Hub: <http://www.dca.wa.gov.au/research-hub/>
- ² ABS, Employment in Culture, 2011 - Western Australia (Cat. 6273.0): <http://www.abs.gov.au/ausstats/abs@.nsf/PrimaryMainFeatures/6273.0?OpenDocument>
- ³ 'Perth Creative Industries – An Analysis' (2006), Telesis Consulting, CCI, SGS Economics, Designer Futures: <http://www.dca.wa.gov.au/research-hub/creative-industries/>
- ⁴ DCA, 'Creative Industries Statistical Analysis for Western Australia', Nov 2013, prepared by CCI ARC Centre of Excellence for Creative Industries and Innovation and SC Lennon and Associates: <http://www.dca.wa.gov.au/research-hub/creative-industries/>
- ⁵ ABS, Attendance at Selected Cultural Venues and Events, 2013-14 (Cat. 4114.0): <http://www.abs.gov.au/ausstats/abs@.nsf/mf/4114.0>
- ⁶ ABS, Children's Participation in Cultural and Leisure Activities, Australia, Apr 2012 (Cat. 4901.0): <http://www.abs.gov.au/ausstats/abs@.nsf/mf/4901.0>
- ⁷ ABS, Arts and Culture in Australia: A Statistical Overview, 2014 (Cat. 4172.0): <http://www.abs.gov.au/ausstats/abs@.nsf/Lookup/4172.0main+features242014>
- ⁸ ABS, National Aboriginal and Torres Strait Islander Social Survey, 2008 (Cat. 4714.0): <http://www.abs.gov.au/AUSSTATS/abs@.nsf/mf/4714.0/>
- ⁹ The Chamber of Arts and Culture Western Australia. 'A Report on Desktop Research Undertaken into Western Australia's Small-to-Medium Arts Sector': <http://www.cacwa.org.au/documents/item/340>
ABS, Cultural Funding by Government, Australia, 2012-13 (Cat. 4183.0): <http://www.abs.gov.au/AUSSTATS/abs@.nsf/allprimarymainfeatures/FAD555C3F67C2C14CA256B3C00751934?opendocument>
- ¹⁰ ABS, Attendance at Selected Cultural Venues and Events, 2013-14 (Cat. 4114.0): <http://www.abs.gov.au/ausstats/abs@.nsf/mf/4114.0>
- ¹¹ CACWA, '2015-16 Pre-Budget Submission to the Government of Western Australia': <http://www.cacwa.org.au/documents/item/242>
- ¹² Lonely Planet, Fremantle <http://www.lonelyplanet.com/australia/western-australia/fremantle>
- ¹³ Global Liveability Ranking and Report August 2014: https://www.eiu.com/public/topical_report.aspx?campaignid=Liveability2014
- ¹⁴ Western Australian Planning Commission. 'Western Australia Tomorrow (2015)': <http://www.planning.wa.gov.au/publications/6194.asp>
- ¹⁵ ABS, Australian Demographic Statistics (Cat. 3101.0): <http://www.abs.gov.au/ausstats/abs@.nsf/mf/3101.0>
- ¹⁶ DCA, 'Creative Industries Statistical Analysis for Western Australia', Nov 2013, prepared by CCI ARC Centre of Excellence for Creative Industries and Innovation and SC Lennon and Associates: <http://www.dca.wa.gov.au/research-hub/creative-industries/>
- ¹⁷ DCA, Cultural Infrastructure Directions: <http://www.dca.wa.gov.au/DevelopingArtsandCulture/cultural-infrastructure/cultural-infrastructure-directions/>

- ¹⁸ ABS, Cultural Funding by Government, Australia, 2012-13 (Cat. 4183.0):
<http://www.abs.gov.au/AUSSTATS/abs@.nsf/allprimarymainfeatures/FAD555C3F67C2C14CA256B3C00751934?opendocument>
- ¹⁹ Department of Workforce Training and Development
<http://www.dtwd.wa.gov.au/workforceplanninganddevelopment/westernaustraliasprofile/population/Documents/D14%200072568%20%20Update%20of%20the%20Population%20Profile%20on%20the%20Department%20s%20Website.pdf>
- ²⁰ ABS, Population Projections, Australia, 2012 (base) to 2101 (Cat. 3222.0): <http://www.abs.gov.au/ausstats/abs@.nsf/mf/3222.0>
- ²¹ Department of Regional Development. 'Living in the Regions 2013':
http://www.drd.wa.gov.au/Publications/Documents/Living_in_the_regions_2013_State_Report.pdf
- ²² ABS, Population Projections, Australia, 2012 (base) to 2101 (Cat. 3222.0):
[http://www.abs.gov.au/ausstats/abs@.nsf/Lookup/3222.0main+features112012%20\(base\)%20to%202101](http://www.abs.gov.au/ausstats/abs@.nsf/Lookup/3222.0main+features112012%20(base)%20to%202101)
- ²³ Committee for Perth, 'Vibrancy and Culture': <http://www.committeeforperth.com.au/advocacyCulturalVibrancy.html>
- ²⁴ FORM, Comparative Capitals, (2008): <http://www.form.net.au/project/creative-cities-research/>
- ²⁵ NSW Creative Industries plan: <http://www.arts.nsw.gov.au/index.php/arts-in-nsw/creative-industries-action-plan/>
- ²⁶ Creative Victoria, 2015-16 Budget: http://creative.vic.gov.au/News/In_Brief/2015/2015-16_Victorian_Budget
- ²⁷ 'The Economy of Place - A Place in the Economy: A value chain study of the Aboriginal and Torres Strait Islander art sector - Summary report', Acker, T, Woodhead, A. 2015. NintiOne Limited. <http://www.crc-rep.com.au/resource/EconomyOfPlace/index.html#2/z>
- ²⁸ 'Progress Against Closing The Gap, Western Australia 2015'. Government of Western Australia, Department of Aboriginal Affairs. P. 11 & 22
<http://www.daa.wa.gov.au/accountable-government/closing-the-gap/>
- ²⁹ Generation Z: <http://generationz.com.au/>
- ³⁰ ABS Population Projections, Australia, 2012 (base) to 2101 (Cat. 3222.0) <http://www.abs.gov.au/ausstats/abs@.nsf/mf/3222.0>
- ³¹ Commissioner for Children and Young People, Western Australia; <http://www.cryp.wa.gov.au/index.aspx>
1. 'Our Children Can't Wait'. Review of the implementation of recommendations of the 2011 Report of the Inquiry into the mental health and well-being of children and young people in WA, 2015
 2. Report of the Inquiry into the mental health and wellbeing of children and young people in Western Australia, 2011
 3. The State of Western Australia's Children and Young People – Edition One 2012 and Two 2014

- ³² Commissioner for Children and Young People, Western Australia. 'Listen to Us' (2015) <http://www.cyp.wa.gov.au/files/Aboriginal%20consultation%202014/Listen%20To%20Us/Listen%20To%20Us%20-%20Final%20-%20Web%20PDF%20-%20August%202015.PDF>
- ³³ 'Closing the Gap: Australia is failing to meet its goals on tackling Indigenous disadvantage': <http://www.abc.net.au/news/2016-02-10/australia-failing-to-close-the-gap-on-indigenous-disadvantage/7153234>
- ³⁴ 'Creative Conversations' Perth Creative Industries – An Analysis' (2006), Telesis Consulting, CCI, SGS Economics, Designer Futures: <http://www.dca.wa.gov.au/research-hub/creative-industries/>
- ³⁵ 'Creative Australia', Australian Government 2013: <http://creativeaustralia.arts.gov.au/>
- ³⁶ ABS, Cultural and Creative Activities Satellite Account 2008-09 (Cat. 5271.0): <http://www.abs.gov.au/AusStats/ABS@.nsf/MF/5271.0>
- ³⁷ DCA, 'Creative Industries Statistical Analysis for Western Australia', Nov 2013, prepared by CCI ARC Centre of Excellence for Creative Industries and Innovation and SC Lennon and Associates: <http://www.dca.wa.gov.au/research-hub/creative-industries/>
- ³⁸ Committee for Perth, FACTBase Special Report – 'Perth as a Globally Connected City', 2013: <https://www.committeeforperth.com.au/assets/documents/factbase-special-reports/ConnectivityReportNovember2013.pdf>
- ³⁹ DCA, 'Creating Value - An Arts and Culture Sector Policy Framework', 2010: <http://www.dca.wa.gov.au/About-US/our-policies/creating-value/>
- ⁴⁰ Chamber of Commerce and Industry of Western Australia, 'Economic Outlook': <http://cciwa.com/state-budget-2015/wa-economic-outlook>
- ⁴¹ CACWA, 'Get Your Arts into Gear', 2012: <http://www.cacwa.org.au/documents/item/84>
- ⁴² Collard, P. 'Unlocking Creativity, Thinker in Residence, Commissioner of Children and Young People, WA', 2011: <http://www.cyp.wa.gov.au/files/Report%20of%20the%202011%20Thinker%20in%20Residence%20-%20Unlocking%20Creativity.pdf>
- ⁴³ Ewing, R. (2010). 'The Arts and Australian Education: Realising Potential'. Camberwell: ACER Press: <http://research.acer.edu.au/aer/11/>
- ⁴⁴ National Centre for Vocational Education Research (NCVER). Government-funded students and courses 2014 <https://www.ncver.edu.au>
- ⁴⁵ 'Creative Australia', Australian Government, 2013: <http://creativeaustralia.arts.gov.au/>
- ⁴⁶ DCA, 'Public Value Measurement Framework: Valuing and Investing in the Arts - Towards a New Approach', 2012: <http://www.dca.wa.gov.au/research-hub/public-value/>
- ⁴⁷ Holden, J. 'Cultural Value and the Crisis of Legitimacy'. London: DEMOS, 2006: <http://www.demos.co.uk/files/Culturalvaluweb.pdf>

- ⁴⁸ European Commission, 'Survey on access to finance for cultural and creative sectors 2013': http://ec.europa.eu/culture/library/studies/access-finance_en.pdf
- ⁴⁹ DCA, 'Economic Sustainability Research Project', 2015 (not published)
- ⁵⁰ Budget Information taken from Total appropriation towards recurrent services, Budget Paper No.2 Ch1- Consolidated Account Expenditure Estimates. Internal appropriation from CA budget papers.
- ⁵¹ ABS, Cultural Funding by Government, Australia, 2012-13 (cat. no. 4183.0):
<http://www.abs.gov.au/AUSSTATS/abs@.nsf/allprimarymainfeatures/FAD555C3F67C2C14CA256B3C00751934?opendocument>
- ⁵² Australia Council for the Arts Annual Report 2013-14: <http://www.australiacouncil.gov.au/workspace/uploads/files/news/annual-report-2013-14.pdf>
- ⁵³ The Chamber of Arts and Culture Western Australia. 'A Report on Desktop Research Undertaken into Western Australia's Small-to-Medium Arts Sector':
<http://www.cacwa.org.au/documents/item/340>
- ⁵⁴ The Economy of Place - A Place in the Economy: A value chain study of the Aboriginal and Torres Strait Islander art sector- Summary report', Acker, T, Woodhead, A. 2015. NintiOne Limited: <http://www.crc-rep.com.au/resource/EconomyOfPlace/index.html#2/z>
- ⁵⁵ DCA, 'Creative Industries Statistical Analysis for Western Australia', Nov 2013, prepared by CCI ARC Centre of Excellence for Creative Industries and Innovation and SC Lennon and Associates: <http://www.dca.wa.gov.au/research-hub/creative-industries/>
- ⁵⁶ Ibid
- ⁵⁷ The Chamber of Arts and Culture Western Australia. 'Arts and Culture in Western Australia Local Government', 2015: <https://www.cacwa.org.au/documents/item/292>
- ⁵⁸ For all current WA cultural and creative industries sector data and statistics visit the DCA Research Hub: <http://www.dca.wa.gov.au/research-hub/>

Arts Leadership Group c/
Department of Culture and the Arts
Gordon Stephenson House
140 William Street
Perth WA 6000

Telephone: +61 8 6552 7300

Toll Free (country WA callers only): 1800 199 090

If you are deaf, or have a hearing or speech impairment, contact us through the National Relay Service (NRS) www.relayservice.com.au and enter 08 6552 7300.

For Speak and Listen users, phone 1300 555 727, then ask for (08) 6552 7300.

TTY users phone 133 677 then ask for 08 6552 7300

Email: artsleadershipgroup@dca.wa.gov.au

Website: www.dca.wa.gov.au/alg/

About the Arts Leadership Group

The Arts Leadership Group is an advisory body and its role is to set a long-term strategic direction for the arts in Western Australia, and set the infrastructure, policy and funding priorities for consideration by successive State Governments.

The Arts Leadership Group includes chief executives and directors general from key State Government departments, industry and arts organisations, including the Departments of Culture and the Arts, and Sport and Recreation, Lotterywest, Tourism WA, State Library of WA, WA Museum, Art Gallery of WA, ScreenWest, Perth Theatre Trust, Western Australian Local Government Association, Chamber of Commerce and Industry of WA, Perth International Arts Festival, Chamber of Arts and Culture WA and the Committee for Perth.

It is chaired by Duncan Ord OAM, Director General of Culture and the Arts.