National Cultural Policy Submission

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Scott Brook is Associate Professor of Communication in the School of Media and Communication, RMIT University, and a leading researcher on creative labour in Australia. He is currently a Chief Investigator on an Australia Research Council Linkage Project on employability skills in youth arts and media, and was previously a Lead Chief Investigator and Chief Investigator on two ARC Discovery Projects investigating graduate careers in the Cultural and Creative Industries in Australia and the UK. He has been a Research Fellow at the Centre for Creative and Cultural Research, University of Canberra, and a visiting scholar at the Department of Communication, Shanghai Jiaotong University, and Cultural Management program, University of Strasbourg.

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We are making this submission as individuals and independent researchers.

First Nations

A central means by which any national policy can 'recognise, respect and celebrate the centrality of Aboriginal and Torres Strait Islander cultures to the uniqueness of Australian identity' is by supporting and creating opportunities for *First Nations people's access to paid employment and business development in Australia's Creative and Cultural Industries.* Despite very poor levels of access to employment historically, the most recent Census trend data indicate that Indigenous employment across the Cultural and Creative Industries has improved significantly. Our analysis of Australian Census data shows that, between 2011 and 2016:

- Indigenous employment in Creative Services[1] occupations grew by an average annual rate of 59.1 per cent, as compared to an overall rate of growth in employed persons of 23.3 per cent for Indigenous people across the whole economy.

[1] Creative Services are composed of Advertising and Marketing, Architecture and Design, and Software and Digital Content. They are predominantly business to business (B2B) activities. Cultural Production is composed of Film, TV and Radio, Music, Visual and Performing Arts, and Publishing. Cultural Production consists predominantly of business to consumer (B2C) activities. See Stuart Cunningham and Marion McCutcheon, Submission 45, Parliament of Australia, Australia's creative and cultural industries and institutions, https://www.aph.gov.au/Parliamentary_Business/Committees/House/Communications/Arts/Submissions

- Indigenous Cultural Production employment grew by an average annual rate of 11.1 per cent – while total Cultural Production employment in Australia fell.

Indigenous creative and cultural employment, 2011 to 2016

	Employment count, 2016				**Compound average growth, 2011 to 2016**			
	Cultural prod'n industries	**Creative services industries**	**Other industries**	**Total**	**Cultural prod'n industries**	**Creative services industries**	**Other industries**	**Total**
Cultural production occupations	894	23	560	1482	0.4%	9.5%	2.4%	1.9%
Creative services occupations	60	310	686	1057	-3.2%	38.4%	28.5%	29.7%
Other occupations	848	796	177963	179613	26.4%	67.6%	23.3%	23.5%
Total	1802	1136	179206	182147	11.1%	59.1%	23.3%	23.3%

Source: ABS 2011 and 2016, Australia Census of Population and Housing, Tablebuilder, https://tablebuilder.abs.gov.au/

These data are dated, and we will analyse Census 2021 data as soon as it becomes publicly available. Census data likely underestimates the significance of this growth, numbers are limited to primary employment and likely underestimate creative employment as they do not include second jobs and industry moonlighting, as well as employment in Creative Services due to data availability (Creative Services employment can only be analysed in ABS TableBuilder at ANZSIC4 and ANZSCO4 levels, not ANZSCO6).

This suggests Indigenous Creative Services employment, along with that of Indigenous Cultural Production employment, should be a key focus of investigation and understanding in a National Cultural Policy that places such signal importance on both a pre-eminent attention to First Nations and to where real job growth is found in the industry. Creative Services are a driver of business and market development, so it is likely that Indigenous employment in Creative Services has supported Indigenous employment in cultural occupations during a period of decline.[2] There is some level of recognition of Indigenous Creative Services in traditional arts and cultural policy – fashion design perhaps most prominently – and some level of understanding in particularly regional economy development of the nexus between tourism as an 'allied' industry and that of Indigenous business opportunity. However, a 21st century cultural policy would place emphasis on cementing the synergies between the rationale for government involvement in Indigenous cultural production (Recognise, respect and celebrate the centrality of First Nations cultures to the uniqueness of Australian identity) and a holistic understanding of the Indigenous creative workforce. This could be accomplished through greater understanding of Indigenous 'creative ecosystems', that is relationships between the Creative Services and the Cultural Production parts of the creative ecosystem.

Of course, this applies to the whole Australian creative ecosystem as well. This is explored at some length in our research.[3] **We recommend that the National Cultural Policy provides a holistic focus on the cultural and economic empowerment and opportunity provided through the growth of, and synergies between, Indigenous Creative Services and Cultural Production employment.**

[2] First Nations businesses are more likely than non-Indigenous businesses to employ First Nations people. See Boyd Hunter 2015, 'Whose Business Is It to Employ Indigenous Workers?', *The Economic and Labour Relations Review*, 26(4), pp. 631–651.

[3] For a summary, see *'Creative Hotspots' in the regions: Key thematic insights and findings from across Australia*. Https://eprints.qut.edu.au/227753/

First Nations—data and resource needs for policy development

What data/measurement/analysis is needed to support policy development on issue	What resources/sources are the available to do that	What are the data gaps?
First Nations creative and cultural employment – trident analysis of occupations, industries and qualifications	**ABS Census** via TableBuilder ANZSIC4, ANZSCO4, ASCED6, Labour force status, hours worked, income, public sector / private sector employment, business owner/ employee, detailed geography	Information on second/additional jobs
		ABS Cultural Participation Survey Does not include Indigenous status
		ABS LEED / Jobs in Australia Does not include Indigenous status
First Nations volunteering in creative and cultural activities		**ABS Cultural Participation Survey** Does not include Indigenous status
First Nations creative and cultural businesses and their contribution to Indigenous employment and the economy		Comprehensive information on Indigenous creative and cultural businesses. Existing statistics underestimate Indigenous economic activity.[a]

Note: a. Michelle Evans and Cain Polidano, 2022, 'First National Businesses: Progress, Challenges and Opportunities', *Bulletin*, Reserve Bank of Australia, 16 June, <https://www.rba.gov.au/publications/bulletin/2022/jun/first-nations-businesses-progress-challenges-and-opportunities.html>.

A Place for Every Story

There is a broad consensus that new media technologies and online distribution have radically expanded opportunities for diversifying Australian stories, providing culturally diverse creatives with the opportunities to have their stories told, as well as diverse *audiences* to access a broader field of Australian content. A cultural policy that seeks to ensure "all citizens, wherever they live, whatever their background or circumstances, have a right to shape our cultural identity and its expression" should consider emerging cultural talent and innovation outside the traditional purview of arts and cultural policy. Emerging fields of content creation, such as Social Media Entertainment[4] and the Creator Economy, are great 'diversifiers' of Australian culture. They diversify content in terms of 1) production (who tells Australian stories?), 2) content (what kinds of stories do Australians have access to?) and 3) audiences (which audiences in Australia are catered for?). This is due to their unique capacity to connect with local, community-based modes of production, and articulate with industries and platforms of scale. A good example of this would be the success of Vietnamese Australia digital video production in Sydney's western suburbs, such as MC2, who as early adopters of YouTube developed innovative martial arts content for ABC TV, and have opened pathways for young Vietnamese creatives in industry. Key government supported programs for the screen industry, such as SBS Online/Screen Australia's 'Digital Originals' program for web content creators and Screen Australia's 'Skip Ahead' program (partnering with Google) have been catalysts not only of web-based content, but in diversifying the screen industry in terms of culture, gender and sexuality.

We propose that a refreshed National Cultural Policy recognise the potential of digital online media to increase diversity in these three domains (in access to professional development, in content, and audiences) for a wider domain of creative and cultural practice. The COVID lockdowns have shown the power of online media to not only support screen based art forms, but to engage the live performing arts, such as the IsolAid music festival that streamed on

[4] 'Social media entertainment' and the 'creator economy' can be defined simply as any independent creator "making all or part of their living making stuff on the internet, or are working toward that goal". Or as 'commercializing and professionalizing native social media users who generate and circulate original content in close engagement with their communities on the major social media platforms as well as off-line'. See Stuart Cunningham, S. and David Craig, *Social Media Entertainment: The new industry at the intersection of Hollywood and Silicon Valley*, New York: New York University Press (2019) and Stuart Cunningham and David Craig (eds) (2021), *Creator Culture: An Introduction to Social Media Entertainment*, New York University Press. And see footnote 5.

Twitch and TikTok (itself exemplary in terms of cultural diversity). *Our focus is on cultural activity currently supported to a greater extent by digital platforms than by government arts and cultural policy and programs.*

In the United States, recent research shows that more than 16.9 million independent, American creators earned a baseline of $6.8 billion from posting their music, videos, art, crafts and other works online in 2017. Building upon last year's study, the updated ReCreate Coalition report found the number of new creators grew by 2.4 million (16.6%) and total revenues grew by 14.8%. New creators live and work in every state, using platforms like Amazon Publishing, eBay, Etsy, and Instagram to earn income and drive the growth of a multibillion-dollar Creative Economy.[5]

It is difficult to accurately and independently estimate the size and scope of the Australian Social Media Entertainment /creator economy,[6] but that is not critical to this argument as it is the dynamic and blurred relationship between 'professionals', 'pro-ams' and amateurs that is the focus. Skip Ahead, the joint venture between Google and Screen Australia, is an exemplar of what government programs can achieve in identifying 'signalling' cultural talent and innovation outside the traditional purview of cultural policy and facilitate opportunities for career development and greater sustainability.[7]

We recommend that government agencies engaged in supporting Australian art and culture develop and extend social media industry partnership strategies in order to diversify Australian cultural production, content and audiences.

The Centrality of the Artist

A defining feature of most artists' careers is they are driven by a commitment to a creative vocation rather than formal employment or commercial opportunities. Just as an artists' vocation does not commence with employment in the arts, so too does it not cease when they are not employed in the arts. Economic studies show that artists often limit formal employment in order to focus on artistic work (Throsby 1994), and that arts careers are routinely supported by, and developed in relation to, other careers. The Cultural Participation Survey 2017/18 shows that for every person employed in a creative occupation, there are many more working other jobs to support their creative practice. This is a longstanding and globally recognised feature of the arts, a sector motivated by notions of cultural and public value, where social and symbolic rewards are key motivators for artists. *This focus on artistic vocations independent of commercial or labour market value should be recognised as a source of skills development and skills signalling, both of which support artists and sustain viable careers. Furthermore, through arts education, artists encourage all Australians to understand the value of vocational commitments and their value to employability.* The Australia Council interactive dashboard, based on the research for *Making Art Work: an economic study of professional artists in Australia* (Throsby and Petetskaya 2017), provides crucial information for aspiring artists on those industries and occupations to which artists transfer their skills, such as Education, Community and the Media industries.

We recommend that the National Cultural Policy recognise that artists' career trajectories can play a valuable role in the national skills agenda, and commit to resourcing arts bodies to identify allied industry and labour market pathways for artists, including those within the cultural and creative industries, that value creative skills and can support creative careers. We further recommend that a focus on employability skills be embedded in formal arts education.

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[5] ReCreate Coalition, https://www.recreatecoalition.org/media-center/economic-research/

[6] See Boston Consulting Group/Google (2012), 'Culture Boom: How Digital Media are Invigorating Australia; Alphabeta/Google (2016), Bigger picture: The new age of screen content. bit.ly/2yBpEDe; Oxford Economics (2021), A Platform for Australian Opportunity: Assessing-the economic, societal, and cultural impact of YouTube in Australia. https://blog.oxfordeconomics.com/content/assessing-the-economic-social-and-cultural-impact-of-youtube-in-australia.

[7] See Stuart Cunningham, Follow This, InterMEDIA, December/January 2018/19 Vol 46 Issue 4.

Centrality of the Artist—data and resource needs for policy development

What data/measurement/analysis is needed to support policy development on issue	What resources/sources are the available to do that	What are the data gaps?
Creative employment – trident analysis of occupations, industries and qualifications, including the six sub-sectors and allied industries	**ABS Census** via TableBuilder Creative employment – trident analysis of occupations, industries and qualifications, including the six sub-sectors and allied industries	Information on second/additional jobs
Creative employment, including in second/additional jobs	**ABS LEED / Jobs in Australia** Secondary jobs – LEED has the potential to reveal the extent of creative work across the workforce that is concealed by primary employment statistics	
Creative vocations	**ABS Cultural Participation Survey** Captures paid activity beyond primary employment and unpaid participation in activities including games, website and software development, interior and graphic design, traditional visual and performing arts, and writing and media	
Career pathways	**ABS Census Longitudinal Survey** Respondent level data (5% of the Australian population) allows career paths and jobs transitions to be tracked between 2006-11, 2011-16 and (forthcoming) 2011-2021.	
Creative businesses	**ABS BLADE** Counts of types of businesses and employment by ANZSIC4	
Contribution of creative and cultural activity to the Australian economy, segmented by industry, occupation creative qualification.	**Cultural and Creative Activity Satellite Accounts, Australia** ABS 2013, updated by BCARR in 2018	Value of volunteering is out of date, based on the ABS 2010 Voluntary Work, Australia and held constant in the BCAR updates.
		Based on **Census** and **BLADE**, estimate the economic contribution from the CCIs, and disaggregate the economic contribution of creative activity across combinations of ANZSIC, ANZSCO and ASCED categories

Strong Institutions and Reaching the Audience

Because of space limits to this submission, we bring the fourth and fifth pillars, 'Strengthen the capacity of the cultural sector to contribute to national life, community wellbeing and the economy' and 'Ensure Australian creativity thrives here and abroad in the digitally enabled 21st century', together, while referring the Office and the Minister to our more detailed submissions (#45 and #301) to the Inquiry into Australia's creative and cultural industries and institutions.

What we want mostly to stress here, based on our research, is integrating more strongly into a National Cultural Policy the concept of 'allied' or 'complimentary' industries, which recalls then Arts Minister Crean's notion of 'connecting the dots' from the previous Creative Australia policy process. This perspective focuses on business-to-business (B2B) demand as a source of inter-institutional strength in Australia's creative economy. Our recent research into creative hotspots[8] in regional Australia identified tourism, education, health and social enterprise as key 'demanders' of

[8] See footnote 2 and Stuart Cunningham, Marion McCutcheon, Greg Hearn and Mark David Ryan (2021), 'Demand' for culture and 'allied' industries: Policy insights from multi-site creative economy research, *International Journal of Cultural Policy*. https://doi.org/10.1080/10286632.2020.1849168

creative inputs to their businesses, thereby acting as a vital source of sustainability for the sector. However, a holistic mapping of allied industries allied to or complimentary with Australia's creative and cultural industries would, for example, demonstrate the potential benefits of reforms to Australia's current science, research and industry policies in releasing the R&D potential currently sequestered in Australia's creative and cultural industries and institutions and allowing it to flourish.

As others have also argued (for example, the Academy of Humanities' submission #257 to the CCII enquiry), the efficacy of Australia's R&D tax incentive provisions needs to be examined to ensure that opportunities for creative and cultural industries, digital R&D, design for social innovation and future service-oriented industries embracing social enterprises are maximised. This would require reforms to the R&D tax credit, facilitating the inclusion of the underpinning creative and technical expertise of the creative sector. Compared to the cultural sector, the Commonwealth's outlays on science, research and industry support is of a different order altogether and thus, rectifying this relationship could have significant benefits for the creative sector. For example, reforms to criteria for National Science and Research Priorities, Industry Growth Centres, the Australian Research Council's Industrial Transformation Scheme, and the National Priorities Industry Linkage Fund could facilitate significantly better outcomes for the creative sector in its collaborations with science, research and industry and with higher education.

We recommend that the National Cultural Policy recognise that 'audiences' for Australian artistic and creative talent include the numerous allied or complimentary industries that act as 'demanders' of creative inputs to their businesses, thereby developing a deeper, eco-systematic, approach to the demand-side in a cultural policy.

Strong Institions—data and resource needs for policy development

What data/measurement/analysis is needed to support policy development on issue	**What resources/sources are the available to do that**	**What are the data gaps?**
Creative businesses and organisations – financial stability, employment, policy impact	ABS BLADE Financial time series analysis of businesses with relevant ANZSIC4 codes	
Cultural funding from non-cultural sources		Local governments and regional development councils are sourcing significant investments for cultural infrastructure from competitive development fund programs. How to ensure this is included in biennual Cultural Funding by Government survey?

Are there any other things that you would like to see in a National Cultural Policy?

We recommend an upgraded commitment to government data collection, analysis and review supporting the cultural and creative industries in Australia. This involves the continuation of the Cultural and Creative Statistics Working Group (CCSWG), formerly part of the Meeting of Cultural Ministers, which has assisted with an evidence base and a coordination nexus between levels of government. It could be taken further through upgrading the Commonwealth's capacity to authoritatively collect, analyse and review all relevant data relating to and supporting the cultural and creative industries in Australia and undertaking cutting-edge research such as the Bureau of Communications, Arts and Regional Research (BCARR) 2019 paper *Creative skills for the future economy*. **This could be through an upgrade of components of the BCARR and the Office for the Arts and their refocus as a hybrid research, policy development and industry engagement arm supporting Australia's creative and cultural industries.**

We recommend the implementation of the following recommendations from *Sculpting a National Cultural Plan: Igniting a post-COVID economy for the arts*: Inquiry into Australia's creative and cultural industries and institutions.

- The Commonwealth Government provide additional funding to the Australian Bureau of Statistics to produce the Cultural and Creative Satellite Accounts annually, gather and publish data on levels and type of employment, trends, revenue, geographic trends across the creative and cultural industries.
- The Australian Bureau of Statistics add questions to the Census which better account for the professions of those working in gig economies, and across the creative and cultural industries with recognition of paid and unpaid work.

Finally, we recommend a review of the creative industries and creative economy in Australia, as each of the points raised throughout this submission point to the larger question of the underdeveloped, 'hot and cold'[9] approach adopted in Australia thus far. The UK Government's (2017) Independent Review of the Creative Industries stands out as an example.[10]

[9] Stuart Cunningham (2015). You're hot then you're cold: Creative industries policy making in Australia. In L. Anderson, P. Ashton, & L. Colley (Eds.), *Creative Business in Australia: Learnings from the Creative Industries Innovation Centre 2009-2015*. Sydney: UTS ePRESS. Retrieved from https://eprints.qut.edu.au/89368/7/__qut.edu.au_Documents_StaffHome_StaffGroupR%24_rogersjm_Desktop_You%27re%2Bhot%2C%2Bthen%2Byou%27re%2Bcold.pdf.

[10] See https://assets.publishing.service.gov.uk/government/uploads/system/uploads/attachment_data/file/649980/Independent_Review_of_the_Creative_Industries.pdf