Creativity in Crisis:

Rebooting Australia's Arts and Entertainment Sector After COVID

By Alison Pennington and Ben Eltham

The Centre for Future Work at the Australia Institute

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Level 1, Endeavour House, 1 Franklin St
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Tel: (02) 61300530
Email: mail@tai.org.au
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About the Author

Alison Pennington is Senior Economist with the Centre for Future Work. Her research focus is on work in Australia today, and in the future. She received a Master of Political Economy from the University of Sydney.

Dr Ben Eltham is a lecturer in the School of Media, Film and Journalism at Monash University. He is a member of the Culture, Media, Economy research focus program at Monash, and of the Kinomatics Group of international interdisciplinary creative industries researchers. He writes regularly about Australian culture for publications including *Crikey*, *Meanjin, Sydney Review of Books* and *The Guardian*.

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Introduction & Summary

Decades of underfunding had weakened Australia's arts and entertainment sector long before COVID-19 hit. The policy architecture established in the 1970s Whitlam era created the foundations for arts as a public good, and a strong role for government in funding and promoting it. That era created norms – still widely held among Australian people – about the centrality and importance of the arts to Australia's identity.

But this consensus about the primary role of public investment in facilitating an arts sector has been eroded through decades of "market-first" economic ideas. From the 1980s, investment criteria for government spending established in post-war public policy-making (such as in healthcare, education, infrastructure, and the arts) were increasingly constrained and shortened. Corporate short-term metrics like efficiency and productivity were mistakenly grafted onto long-term government spending. Public policy actors (including public servants and the thousands of entities receiving government funds to deliver goods and services) were forced to demonstrate that receipt of funds would generate immediate economic returns – or get no funding at all. These ideas displaced and narrowed government's critical investment role in building a stronger economy and society, and weaponised bipartisan policies of austerity and privatisation. Investment in stable provision of public goods has been consistently cut, supposedly due to failure to demonstrate 'value for money.' These destructive government financing trends are particularly evident in the arts and cultural sector.

With an eroding and unstable funding base, the arts and cultural sector has been reduced to endless, resource-intensive, short-term grant cycles and philanthropic dependency. Meanwhile, the diminishing pool of available public arts funds has increasingly been directed away from areas of greatest need, such as grassroots arts organisations and independent artists. Cultural content policies have been deregulated, to the advantage of global technology corporations and large media owners. The quality and quantity of jobs in the sector have been sacrificed to restricted funding arrangements. Permanent 'good' jobs in the arts have become even more scarce, and precarious work in its myriad forms has exploded (including casual work, gigs, contracting, and freelancing).

The consequence of this policy failure is a once-vibrant ecosystem of cultural production in Australia, fed from the grassroots up, has been partly dismantled. Access to arts and culture has diminished – especially for lower socio-economic groups. In 2018, only eight per cent of performing arts event attendees were from the lowest income quintile, compared with over 22 per cent of attendees from the highest income bracket (ABS, 2019). An Australia Council survey

(2020d) found one-third of Australians are not attending as many arts and culture events as they would like due to the cost of tickets. Once considered part of the core curriculum in public schooling, music and arts education have been gutted from school programs due to persistent education funding cuts. No longer every child's right, an arts education is increasingly an extra-curricular activity reserved for higher-income families and private schools.

For decades, this market-first policy agenda has eroded the richness and diversity of arts and culture in the community, our education system, and the economy more broadly. Then the COVID-19 pandemic hit. The pandemic saw nearly the entire arts and entertainment sector grind to a halt, virtually overnight. Both COVID and the resulting recession have uniquely and severely impacted on the arts and entertainment sector. Total employment declined by 18 per cent between February and May in 2020. 53 per cent of businesses in the sector had ceased operating at April 2020. Survey data identified $24 billion in lost output and 80,000 jobs lost after COVID hit (Burke, 2021).

All the while, Australians have turned to the arts in this time of need. Australians love the arts. During the pandemic, nearly three-quarters of Australians (73 per cent) sought out artistic and cultural goods to improve their mood and quality of life (Australia Institute, 2020). Live performances were attended at least once by 54 per cent of the population before the pandemic, and 20 per cent attended more than one live music performance. In 2018, 82 per cent of the population attended at least one cultural venue or event, including art galleries, museums, cinemas, libraries, and live performances (ABS, 2019a). 92 per cent of Australians – 19 million - listened to recorded music in 2019, and 72 per cent read for pleasure (Australia Council, 2020d). These are measures of participation and engagement that most other parts of our economy could only dream about.

The Morrison government's response to Australia's creativity in crisis has been late and inadequate. The federal government has fallen far short of providing the necessary crisis supports to ensure artists remain financially secure, to say nothing of the cultural projects, activities and organisations they facilitate. Policy measures like JobKeeper and the arts funding package only partially cushioned the impact of the pandemic on artists' and workers' livelihoods. The premature ending of JobKeeper in March 2021 – even as many venues and festivals remained closed or faced new shutdowns in Melbourne, then Sydney – concludes a government approach to the arts that has been insufficient in guaranteeing its long-term stability and vitality. In fact, the hostility of government policy to the arts, to public broadcasting, and to universities became increasingly clear during the pandemic, with the federal government weakening local content rules supporting the production of Australian cultural goods, and doubling the price of studying the arts in universities.

Australia performed well globally in initially suppressing COVID infections in the community. But as the recent Melbourne and Sydney lockdowns have shown, the possibility of future transmission and a disorganised federal government vaccination program prohibit any real "snap back" to pre-COVID operations for large sections of the economy – and nowhere more acutely than for Australia's arts and entertainment sector.

There is a strong economic case to rebuild a strong arts and cultural sector in Australia. It is a jobs-rich, value-added industry. Defined narrowly as "arts and entertainment", the sector employs around 230,000 people; a broader definition of cultural industries estimates employment at more than 354,000 people. These activities undoubtedly make a significant contribution to the Australian economy. The arts and entertainment sector contributed $17 billion in value added (GDP) in 2018-19. But the economic contribution of arts and culture is far greater than these standard measures capture, providing creative inputs that feed production across many industries. Indeed, stronger arts and culture industry policies would allow the sector to make an even greater economic contribution, through measures like local content quotas to support local film and television production. But despite large and demonstrated economic benefits, decades of framing arts as a 'commercially viable' activity in order to justify government funding is a paradigm that has reached its limits. Rebuilding the arts after this crisis requires that we recentre arts and culture as a public good: affordable, accessible and participatory.

The pandemic has accelerated the sector's pre-existing challenges. It has revealed that the 'snap back' predicted by Prime Minister Scott Morrison is not sufficient for rebuilding a vibrant, accessible arts and entertainment sector. Australia's slow vaccination roll out and ongoing lockdowns in several major cities will undermine the commercial viability of the cultural sector for years to come.

Australia needs a complete public-led reboot of the arts. This cultural reconstruction must ensure that the sector does not just survive the pandemic, but stands ready to flourish on the other side. It must lay the groundwork for a sustainable, vibrant future for arts and culture built through ambitious, large, sustained public investment and planning across many sectors of our economy. This includes large fiscal investments to help rebuild skills, jobs and incomes in the cultural sector, long-term funding for arts organisations and artists, wage subsidies, intervention in cultural regulations, and a holistic plan for culture across the nation.

Australia's arts and entertainment sector is at a policy crossroads. This report provides key information about the sector to navigate this historic moment. It provides a profile of the economic importance of the sector in terms of total employment, its value-added contribution, and the volume and trajectory of government spending on the arts in Australia. It then considers the economic crisis affecting the arts and entertainment sector as a result of the pandemic, cataloguing the various federal and state government fiscal stimulus programs. We discuss the shortcomings of the federal government's policy response. Finally, we outline how the arts and culture can be put at the heart of an ambitious, public-led reconstruction effort, with recommendations made for a multi-level government, comprehensive policy agenda for a renewed, productive and vibrant cultural sector.

Economic Profile of the Arts & Entertainment Sector

This section provides an economic profile of the arts and entertainment sector, including total employment, and contribution to GDP. It discusses the challenges of measuring the value-added contribution of the entire creative ecosystem – which supports additional jobs, output, and productivity across the wider economy.

DEFINING THE ARTS AND ENTERTAINMENT SECTOR

The arts and entertainment sector is comprised of a wide variety of artists, workers and creative professionals across live performance, film production, libraries, sound recording and other activities. The profile below measures the sector primarily as captured by the following Australian Bureau of Statistics (ABS) sub-industry categories: Creative and Performing Arts Activities, Motion Picture and Sound Recording Activities, Publishing (except Internet and Music Publishing), Internet Publishing and Broadcasting, Heritage Activities, Library and Other Information Services.

These sub-industries fall within the Australian Bureau of Statistics' (ABS) larger industry groups of Arts and Recreation and Information Media and Telecommunications. However, those broader industry groups cover more expansive sections of the economy than just the arts and entertainment sector, including jobs and output within non-arts sector areas like sports and recreation and telecommunications. For this reason, we use more detailed sub-category data. The arts and entertainment definition we use is smaller and narrower than broader definitions that academic research sometimes calls the "cultural" or "creative industries".

STANDARD MEASURES UNDERESTIMATE THE ARTS

It is worth briefly unpacking the way that government statistics measure the arts and entertainment sector. This section draws on official ABS reported arts and entertainment sector data. The ABS use a system called the Australian and New Zealand Standard Industry Classification (ANZSIC) to measure industries across various categories and sub-categories. The ABS publishes most of its industry data using a top-level category of industry 'divisions', of which "Arts and Recreation Services" is one. Because of this, much of the data about the impact of COVID-19 on the cultural sector is known only in broad brushstrokes and with a fairly coarse level of detail. The way the ABS defines arts, culture and entertainment can also make analysis difficult. Unfortunately, the definition of the Arts and Recreation industry division excludes industries that many people would consider artistic or cultural: such as publishing, broadcasting, film and television production, music recording and libraries. On the other hand, the Arts and Recreation category also includes activities that are decidedly more like recreation than art, such as lotteries and casinos. In other words, the Arts and Recreation Services division is not a perfect measure of the arts and culture in Australia.

The official ABS definition of "cultural industries" uses a definition of economic activity at the lowest level of ABS industry classification, the so-called 4-digit industry "classes" (ABS, 2012). Using these 4-digit classifications, the ABS identifies 21 industries across the economy as cultural. The ABS definition of cultural industries includes zoos and parks, arts education, libraries, museums and galleries, publishing, broadcasting and internet production, film and television production, music production, live performance, as well as design, printing, photography, architecture, advertising, and independent artists, musicians and performers. It also includes cultural retail outlets like book shops, cinemas and record stores. This definition is a much better measure of cultural activity in the formal economy than the "Arts and Recreation Services" division, but not much data at this more precise level of definition is available.

The most recent data available using this more detailed definition is from the 2016 Census (see Table 1). Using the broader, more expansive measure of arts and culture, total employment in the cultural industries is around 350,000.

Whichever way the data is sliced, standard measures of the arts, entertainment, recreation and cultural industries do not account for the full scope and scale of the sector's economic contribution. This is because of the significant economic activity generated in arts-adjacent and integrated industries. The arts support, and are supported by, other employment across the economy, including workers in industries like education, hospitality, transport, accounting, and finance. This further expands the economic footprint of the arts and entertainment sector. The sector is tightly integrated into the wider multi-industry 'night-time economy' which includes industries like hospitality, retail, and tourism. For instance, arts consumers who purchase a ticket to enjoy a live performance often couple the experience with purchasing meals and drinks from nearby restaurants and bars. These purchases show up in the sales, employment and value-added data for the accommodation and food services sector, rather than the creative sector. Similarly, a casual music teacher working at a university will be classified as working in higher education, not in the arts. The arts also indirectly provide creative inputs into businesses across the economy more broadly, with firms benefiting from the wider cultural production of ideas and concepts in product design, marketing and communication functions that flow on in

Table 1 Jobs in Cultural Industries (at 2016 Census)	
4-Digit ANZSIC Industry Class	**Persons Employed**
Libraries and Archives	7,393
Museum Operation	8,781
Zoological and Botanical Gardens Operation	3,659
Nature Reserves and Conservation Parks Operation	9,119
Printing	28,092
Newspaper Publishing	15,342
Magazine and Other Periodical Publishing	5,367
Internet Publishing and Broadcasting	2,120
Book Publishing	4,303
Other Publishing (except Software, Music and Internet)	204
Book and Magazine Wholesaling	1,679
Entertainment Media Retailing	3,718
Newspaper and Book Retailing	19,171
Architectural Services	39,235
Advertising Services	33,437
Other Specialised Design Services	26,697
Motion Picture and Video Distribution	491
Motion Picture and Video Production	9,968
Motion Picture Exhibition	10,343
Post-Production Services & Other Motion Picture/Video Activities	966
Music Publishing	217
Music and Other Sound Recording Activities	1,389
Reproduction of Recorded Media	1,638
Radio Broadcasting	5,658
Free-to-Air Television Broadcasting	13,735

Cable and Other Subscription Broadcasting	3,363
Performing Arts Operation	6,084
Creative Artists, Musicians, Writers and Performers	20,799
Performing Arts Venue Operation	4,806
Video and Other Electronic Media Rental and Hiring	1,556
Professional Photographic Services	11,014
Arts Education	19,321
Religious Services	28,417
Funeral, Crematorium and Cemetery Services	6,609
Total Cultural Industries	**354,691**
Data: ABS 6273.0; ABS Census microdata. 2016.	

all sorts of complex and unpredictable ways. This can be understood as the wider creative ecosystem that a healthy arts and entertainment sector supports (Throsby, 2008).

One example of how official measures of employment in the arts and entertainment sector underestimate this wider range of economic activity is the operation of arts venues. Arts venues combine a range of activities, including the performing arts, rental and administration services, food and beverages, ticketing and programming, transport and logistics services, and more. Therefore, of the 7,000 jobs supported by businesses associated with arts venue activity in Australia, only a portion will be reported to the ABS as arts and entertainment sector employment (IbisWorld, 2020).

The insecure and time-bound organisation of work within the arts and entertainment sector is another characteristic of arts activity impacting how employment is measured. Many workers do not work in formal employment relationships, with most arts and entertainment workers in informal jobs (including irregular contracts, and cash-in-hand 'gig' work), according to the ABS data. The informal, deregulated nature of employment in the arts means incomes are low and often insufficient to meet living costs (Communian & England, 2020; Morgan & Nelligan, 2018; Throsby & Petetskaya, 2017).

This means arts workers are more likely to undertake multiple jobs. Often their main income-earning job (recorded in the formal ABS statistics) is outside the arts and entertainment sector. For instance, a musician could deliver 1-2 performances per week, but be employed part-time as a high-school instrumental music teacher, and hence counted within education sector employment statistics. A fine recent essay by writer Ryan Bautista in the *Sydney Review of*

Books tells the story of his career writing for *BuzzFeed* while paying his rent as a retail clerk. “Then there’s me, still on the shop floor, working on my cultural capital,” Bautista notes ruefully (2021). The tight integration of arts and entertainment with other industries also affects measures of employment. Many artists and creative production workers (like musicians and sound technicians) may also be employed as food and beverage assistants, or in administrative roles within the same venues they perform creative paid work. For these reasons, formal employment statistics underestimate the real number of workers employed and deriving incomes within the arts and entertainment sector.

Finally, culture is a public good. Economic measures alone do not capture the myriad social and personal benefits to Australian society of a vibrant arts and entertainment sector. Culture is very widely enjoyed by ordinary Australians, with 97 per cent of the population listening to recorded music for recreation, and 79 per cent regularly reading books (Australia Council, 2020). As philosophers and anthropologists have long realised, consuming and participating in arts and cultural activities helps us create ideas, develop curiosity, embrace different perspectives, and build a sense of belonging (DeNora, 2000; Barba, 2003). The arts have wide benefits for mental and physical health, and support learning, focus, and concept acquisition through education (Winner, Goldstein, & Vincent-Lancrin, 2013). Many Australians evidently believe the arts have a unique value in and of themselves, regardless of the instrumental and extrinsic benefits they also bring.

A LARGE EMPLOYING SECTOR

Regardless of the employment measurement issues documented above, the arts and entertainment sector is undeniably a significant employer in the Australian economy. Approximately 228,000 people were employed in arts and entertainment in February 2021, according to the ABS (ABS, 2021). If we consider the broader cultural industries including activities like printing, newspaper and book retailing, advertising, architecture and graphic design, this figure is larger (as specified in Table 1): 354,000. More people work in the arts and entertainment sector than the entire electricity, gas, water and waste industries (151,000), and other areas of the economy which receive greater policy supports such as finance (202,400), aviation (40,500), and coal mining (48,900).[1]

[1] ABS 6291.0.55.001, Table 6. Latest data February 2021.

The arts and entertainment sector is a jobs-rich, employment intensive sector, creating 6 jobs for every $1 million in turnover. This compares to just 0.25 jobs in the oil and gas extraction sector per $1 million in turnover, and only one job per $1 million turnover in construction.[2]

Jobs in arts and entertainment also incorporate a wide mix of different occupations and professions. Table 2 provides details on the composition of employment by sub-sectors that make up aggregate the employment figure of 228,000 mentioned above. The largest employing sub-divisions are the creative and performing arts (50,500), heritage activities (36,800) and broadcasting (32,100), with internet publishing employing the lowest number of Australians (4,100). Impacts of the pandemic crisis on employment in the arts and entertainment sector are considered in the next section.

Table 2
Employment in Arts & Entertainment by ANZSIC Sub-Division, February 2021

	Total Employment
Creative & Performing Arts	50,500
Motion Picture & Sound Recording Activities	30,600
Broadcasting	32,100
Heritage Activities	36,800
Publishing	23,400
Internet Publishing	4,100
Libraries	19,500
Printing & Recorded Media	30,900
Total	**227,900**

Data: ABS 6291.0.55.001, Table 6. Latest data February 2021.

[2] Authors' calculations from ABS 8155.0, Table 1, and 6291.0.55.001, Table 6.

ECONOMIC OUTPUT

The ABS provides most recent value-added (GDP) data by industry sub-division for the financial year 2018-19. The data reported below excludes government business entities which are key service delivery organisations in culture, particularly in heritage and library services. This economic output data hence does not reflect the full extent of value-added activities in arts and entertainment.

Despite years of significant funding pressures and policy neglect, the arts and entertainment sector make a significant economic contribution to the Australian economy: $17 billion in value added (GDP) in 2018-19. This represents 0.9 per cent of GDP.

Table 3
Value-Added in Arts & Entertainment by Sub-Division (2018-19)

	GDP ($m)
Creative & Performing Arts	2,479
Heritage Activities	521
Motion Picture & Sound Recording	3,113
Broadcasting	3,329
Publishing	3,274
Internet Publishing & Broadcasting	1,003
Libraries	95
Printing & Recorded Media	3,206
Total	**17,020**

Data: ABS. Australian Industry, Table 3. Figures for 2018-19.

INSECURE EMPLOYMENT TRENDS IN THE ARTS: THE ORIGINAL "GIG" WORK

Workers within the arts and entertainment sector deliver this sizeable and positive contribution to the economy despite increasingly insecure employment arrangements. Insecure work has markedly increased in the Australian labour market since 2012 (Carney & Stanford, 2018). There is no single indicator of insecure work, with the increasing incidence of insecure work visible in rising part-time, casual, short-term contract, labour hire and gig work arrangements (and more), which combine to constitute a multi-faceted deterioration in the quality of the working lives of many Australians.

The organisation of work on an increasingly insecure basis has been facilitated by weak labour market conditions, aggressive profit strategies by employers, and passivity by labour regulators. The result was that by 2017, the share of total employment accounted for by permanent full-time paid jobs with normal leave entitlements fell to below 50 per cent, for the first time in recorded statistics. It's still low, with around half (50.5%) of all jobs permanent full-time with paid entitlements at end-2020.[3] This means that around half of employed Australians now confront at least one aspect of insecurity in their work.

Several additional global trends have underpinned growth in insecure work within the production and distribution of arts products, such as digitalisation, increased market integration, and the privatisation of public arts organisations. Dominant economic ideas promoting deregulation and austerity have seen employers within the cultural sector (like other sectors of the economy) dismiss traditional employees and re-hire on a short-term capacity as self-employed or casual workers. This trend has reduced employers' fixed labour costs, but increased the insecurity of their workforce. A good example is the ABC. The national broadcaster has a surprisingly high level of casualisation, and in 2020 the ABC was found by the Fair Work Ombudsman to have underpaid 1,900 casual staff more than $12 million (ABC, 2020). The result is that many artists and entertainment workers are engaged in project- or task-based work on a fixed-term basis, often as independent contractors, where they could be engaged as permanent employees given better funding and support.

There is a high incidence of precarious work in the arts and entertainment sector. In February 2021, around 45 per cent of all employees in arts and recreation services were in casual roles (defined as employment without access to basic paid leave entitlements, like holiday and sick leave, and superannuation).[4] Casual employment has also increased over the year to February

[3] Author's calculations from ABS 6291.0.55.003. EQ04. Includes owner-managers.

[4] Author's calculations from ABS 6291.0.55.003. Table 1. EQ05. Employees only. Excludes owner-managers.

2021 – rising by one percentage point as a proportion of all employees. But this ABS measure of insecure employment underestimates the scale of insecure work in the sector since it measures *employees* only (excluding, for instance, self-employed and gig workers). Among artists, the majority operate as freelancers or self-employed individuals. According to data from a survey of more than 1,000 artists by economist David Thorsby, only 19 per cent of professional artists in Australia (across all artforms) work in secure, salaried employment (Thorsby & Petetskaya, 2017). The endemic insecurity amongst the cultural labour force in Australia has been called a "permanent recession" (Goodwin, 2019).

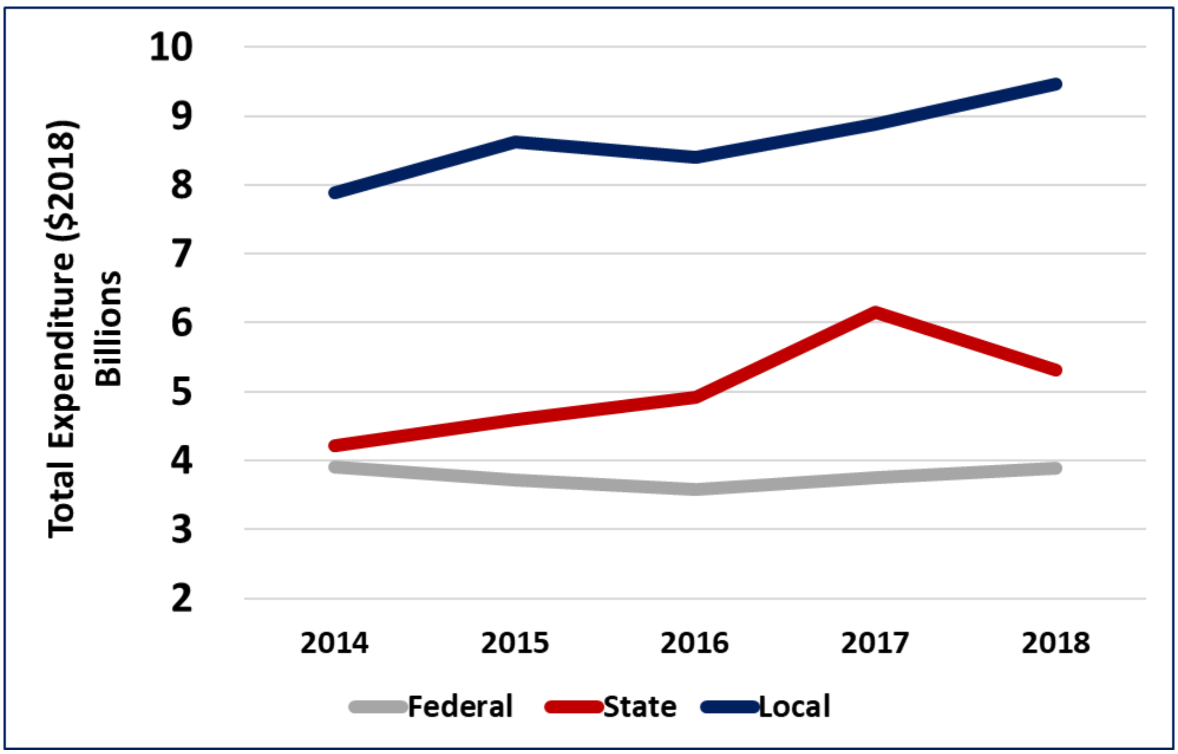
The insecure, low-paid nature of most self-employment across the economy is evident on several grounds. Almost two-thirds of all self-employed workers are not incorporated, and almost 60 per cent of these 'businesses' have no employees (meaning their access to paid time off work or continuing income in case of illness is minimal). Earnings for many self-employed Australians are also low and unstable: for example, median earnings for part-time self-employed individuals with no employees are around 60 per cent lower than for full-time paid employees (Carney & Stanford, 2018). Insecure employment arrangements damage the incomes, stability, careers, and skills development of the arts sector workforce. This undermines the quality and sustainability of the provision of artistic public goods to all Australians. Ironically, when the pandemic hit, these very conditions of insecurity then became a barrier for many cultural workers accessing the federal government's JobKeeper subsidy.

INADEQUATE GOVERNMENT FUNDING

The OECD provides comparative international data on government cultural spending under the integrated expenditure category 'Recreation, Culture and Religion'. This composite measure combines recreational and sporting services; cultural services; broadcasting and publishing services; religious and other community services; research and development in recreation, culture and religion; and other spending not elsewhere classified. Given the intersection of arts and cultural activity with categories more broadly associated with culture (for example, local government funding of community cultural events for religious or ethnic groups), and the large volume of unclassified integrated data, we have elected to present the data by this entire function to compare spending undertaken by each level of government (federal, state, and local). We then utilise available OECD data on total government funding (all levels of government) for two smaller sub-categories of activities within the arts and entertainment sector: Culture, and Broadcasting and Publishing. This data is provided separately in Table 4. Due to changes in methodology, comparable data was only available for the period 2014 to 2018 (latest available). Nominal figures have been converted to real terms using the ABS State and Local Government Final Consumption deflator.

Figure 1 shows government spending on culture, recreation and religion disaggregated by each level of government: federal, state and local. The figure shows that despite the federal government's superior capacity to invest and raise funds for policy, it is the least active level of government in funding the arts. Federal funding has languished far below contributions made by state and local governments over the past several years, declining by 1 per cent in real terms since 2014 to $3.88 billion in 2018. Over the same period, real spending by state governments increased by 26 per cent from $4.21 billion to $5.31 billion. State government spending declined in 2018, but still increased on trend from 2014. Local government is doing the heaviest lifting of all levels of government, contributing $9.47 billion in 2018, and lifting their spending by 20 per cent in real terms since 2014.[5] These stark funding divergences reflect the ongoing failure of policy makers to create a more coherent and balanced arts and entertainment sector policy across all levels of government (see Recommendation 6 below).

Figure 1. Government Expenditure on Culture, Recreation and Religion by Level of Government



Source: Authors' calculations from OECD (2019). *Government Expenditure by Function.* Figures adjusted to 2018 dollars.

[5] To avoid duplication of funding allocations across different levels of government, the OECD uses consolidated data which factors in transactions and debtor/creditor relationships between governments.

The last decade has seen much of the fiscal burden of cultural funding shifted down to the level of government (local) with the least ability to support it. Over half of all government expenditure on arts and culture is contributed by local governments. The federal government's contribution has declined from 24 per cent of all funding in 2014 to only 20 per cent in 2018. State and local governments both lifted their contributions to compensate for a less active federal government, lifting total spending by approximately 2 percentage points over the same period, reaching 28 per cent and 51 per cent of all spending in 2018, respectively. The Commonwealth is increasingly shirking its responsibility in this sphere, despite being the level of government with the strongest fiscal capacity.

Turning to the two smaller sub-categories of government spending on cultural activities – culture, and broadcasting and publishing – total Australian government spending on both areas increased steadily over the 2014–18 period, reaching its highest point in 2017 at $8.14 billion in total funding (see Table 4). This was primarily driven by a significant boost in cultural services spending of $726 million in the year 2016-17. Total spending then declined by a significant $323 million to $7.81 billion in 2018 the following year. By sub-sector, Australian governments have increased funding on cultural services, with overall funding reaching its peak of $6.35 billion in 2017 – an increase of $1.22 billion on 2014 levels. But then funding was cut by a substantial $233 million the following year. Funding for broadcasting and publishing declined between 2014 and 2018. Even when the sector benefited from a large boost in funding in 2017, total spending was still $166 million below its peak of $1.95 billion in 2014. In 2018, the sub-sector received just $1.69 billion in funding.

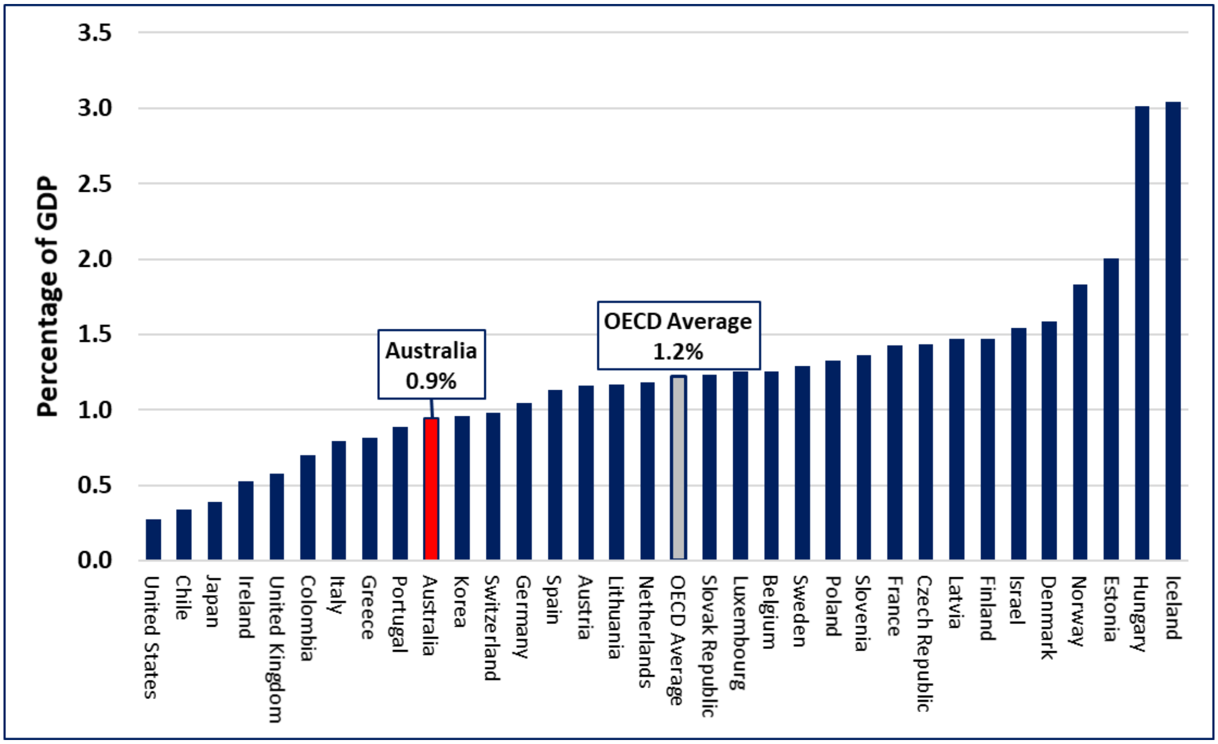
Table 4
Government Expenditure on Culture, Broadcasting & Publishing (2018 dollars)

	2014 ($B)	**2015 ($B)**	**2016 ($B)**	**2017 ($B)**	**2018 ($B)**
Cultural Services	5.14	5.23	5.63	6.35	6.12
Broadcasting & Publishing	1.95	1.89	1.60	1.78	1.69
Total*	7.10	7.14	7.22	8.14	7.81

Data: Authors' calculations from OECD (2019), *Government Expenditure by Function.* Figures adjusted to 2018 dollars. Due to rounding, some totals may not correspond with the sum of the separate figures.

By international standards, Australia ranks low in its funding support for the arts and culture. Figure 2 presents OECD data on total government spending on culture, recreation and religion as a percentage of GDP. It shows Australia ranks low among OECD countries (24th out of 33 countries listed in 2019), allocating just 0.9 per cent of GDP to these functions. That was one-quarter below the OECD average, of 1.2 per cent of GDP.

Figure 2. Government Expenditure on Cultural Sector as Percentage of GDP (OECD, 2019)



Source: OECD National Accounts Statistics, National Accounts at a Glance. Cultural sector includes spending on culture, recreation and religion. Total spending measured as percentage of GDP.

While useful for international comparisons, the OECD's data on government expenditure by function lacks refined detail about arts and cultural sector spending, and longitudinal data describing that spending over a longer period of time. Unfortunately, policy neglect in the arts and entertainment sector is reflected in the poor availability and consistency of government data in Australia. For example, the ABS abolished its specialist cultural statistics group during Tony Abbott's prime ministership (some data is still supported by the Cultural Ministers Council). Cultural statistics and survey data series have been discontinued several times, and then relaunched under new methodologies which undermine long-term trend analysis.

The most complete, authoritative arts and cultural expenditure data is the ABS' Catalogue 4183.0 *Cultural Funding by Government.* This data captures spending on culture across departments, government entities and funding programs for all levels of government. It includes funding for arts and cultural organisations, large and small: including the best-known cultural institutions like the National Gallery of Australia, Australian Broadcasting Corporation (ABC), and Bangarra Dance Theatre; and the many thousands of arts and cultural sector individuals and entities spread across cities, regions and remote Australia.

Commencing in 1994-95 and experiencing several iterations over the series' course, the series was suspended after its last release in 2012-13, due to funding cuts. Therefore, no data is available for 2013–14 and 2014–15 since the ABS did not collect data in these years. Since then there have been three *Cultural Funding by Government* data releases prepared by the ABS on behalf of the Meeting of Cultural Ministers, however only the most recent year (2017-18) is publicly available.

Independent think-tank A New Approach have used customised ABS *Cultural Funding by Government* series data to analyse over a decade of government spending on arts and culture from 2007-08 to 2017-18.[6] Using figures adjusted to the Wage Price Index (WPI), their analysis found Australian public expenditure on arts and culture grew slowly from just over $6 billion in 2007-08 to its peak in 2017-18 of $6.9 billion (the final year of available data). However, this spending fell far short of population growth. Table 5 presents data on changes in per capita expenditure on the arts and entertainment sector by the three levels of government, between 2007-08 and 2017-18. Public expenditure on cultural activity per capita declined by 4.9 per cent from $289 per person in 2007-08 to $275 in 2018.

Table 5
Government Spending Per Capita on Cultural Sector by Level (2007-08 to 2017-18)

	2007-08	2017-18	Change (%)
Federal	$131.93	$107.02	-18.9%
State and Territory	$92.03	$95.65	-3.9%
Local	$64.78	$71.93	+11.0%
Total	**$288.75**	**$274.60**	**-4.9%**

Source: A New Approach (2019). Pg. 16.

The data presents a stark picture of the federal government's departure from its once-leading role in funding culture and the arts in Australia – with a reduction in federal spending per capita of around 19 per cent between 2007-08 and 2017-18. Over the same 11-year period, local governments increased per capita expenditure by 11 per cent, while state and territory governments increased expenditure by 3.9 percent.

[6] Figures were adjusted to June 2018 using the Wage Price Index (WPI).

To sum up the economic data, the arts and entertainment sector is jobs-rich and economically significant, employing around 230,000 people, and contributing $17 billion in value-added (GDP) in 2018-19. The sector is by definition a ‘mixed’ sector of the economy, combining highly competitive private sector activity with very large and important government inputs. Despite this, in recent decades governments (particularly federal government) have provided insufficient funding to the arts and entertainment sector. As a result, Australia now ranks in the bottom quarter of OECD countries in public support for the arts and culture – investing the equivalent of just 0.9 percent of GDP. Inadequate funding undermines the capacity of the sector to continue delivering its wide economic, social and health benefits.

Impact of the Pandemic Crisis on Arts and Entertainment

Globally, creative industries were among the most affected by the global pandemic and resulting recession. The volume of bankruptcies and unemployment in the sector rose significantly (OECD, 2021). The arts and entertainment sector were most impacted by pandemic shutdowns in Australia. Venues and productions relying on the gathering of people like museums, performing arts, live music, festivals, and cinemas were hardest hit by social distancing measures. The cancellation of live performances erased months of planned work for performing artists and technical workers, as the entire performing arts sector was frozen. New lockdowns now threaten to wither what green shoots emerged from the damage of 2020.

This section provides a snapshot of the economic, employment and skills impacts of the ongoing COVID crisis on the arts and entertainment sector. It provides data on employment losses over the initial three months of the pandemic (Feb–May 2020), and employment recovery over the year to February 2021.

ECONOMIC IMPACTS

The arts and entertainment sector experienced significant economic setbacks from COVID-19. Restrictions on public gatherings, changes in consumer behaviour (including involuntary changes like loss of income, and voluntary shifts towards consumption of more digital products), and prolonged, severe unemployment have taken a big toll on the sector. There were significant insolvency events, including the collapse of major Sydney arts venue Carriageworks in May 2020. Public health restrictions still limit venue capacity, with major events sitting on the precipice of cancellation in the event of new COVID transmission – as seen with the last-minute cancellation of the Byron Bay Blues Festival in March 2021, and Melbourne's Rising festival in May 2021.

Measuring the full scope and scale of this economic impact is made difficult due to the size and diversity of the many sub-sectors that undertake arts and cultural activity. Nonetheless, the data available shows the depth of the pandemic recession affecting arts and culture in 2020.

The abrupt collapse in revenues resulted in reduced wage earnings and large lay-offs, with repercussions for multiple industries across the value chain of suppliers and downstream beneficiaries from creative and non-creative sectors alike. Wages in the Arts and Recreation sector declined, with average weekly full-time ordinary earnings for workers in the sector dropping from $1525 a week in November 2019 to $1464 in November 2020 – despite the impact of JobKeeper. The ABS’ measure of total weekly earnings for Arts and Recreation (which covers all workers in the sector, including part-timers) decreased from $853 a week to $799 across the same period, a fall of 7 per cent in real terms (ABS, 2021). These figures are likely to underestimate the impact on more vulnerable categories of cultural workers, such as performers and musicians, for the reasons discussed above.

The ABS Business Impacts of COVID-19 Survey shows Arts and Recreation Services were hit harder than any other industry by the pandemic.[7] 53 per cent of businesses had ceased operating at April 2020 (ABS, 2020). From the March to June quarters in 2020, household spending on culture and recreation fell by over 15 per cent. Household spending in associated and arts-adjacent sectors of hotels, cafés and restaurants fell by over 56 per cent. Other indicators of economic impacts on the sector include survey data from Live Performance Australia, showing $24 billion lost output and 79,000 lost jobs since COVID (Live Performance Australia, 2020). A Victorian survey of the arts and music industry found 74 per cent of music workers had experienced a decrease in income; the incidence of full-time work fell from 34 per cent to 7 per cent of all employed; and 44 per cent of respondents reported losing all of their music-related paid work during the pandemic (Strong & Cannizzo, 2020). Arts venue industry revenue is forecast to decline by 6 per cent over the next five years to 2025 (IbisWorld, 2020).

There will clearly be long-term damage to the sector from the pandemic and recession. Many venues and organisations will not be in a position to re-boot. In the medium term, the sector is likely to experience a permanent drop in output. The exodus of workers from jobs most impacted by the pandemic is already visible in hospitality, and anecdotal reports suggest it is also happening in the arts. As arts and entertainment sector workers opt not to return to work in what remains a low wage, insecure sector, this could even lead to new skills shortages if borders re-open in 2022, allowing a rebound in tourism and population growth. Conversely, where workers displaced by the pandemic are unable to quickly find new employment, they are more likely to experience negative impacts on their longer-term employment and wage prospects (Mavromaras, Sloane & Wei, 2015).

Sector-specific measures of the impact of the pandemic will not account for wider economic damage wrought in arts-adjacent and integrated industries, like hospitality, retail, and tourism. For instance, the Australia Council of the Arts (2020a) finds demand for the arts and tourism are tightly integrated. Tourists who travel for arts and cultural activities are high value tourists:

[7] As noted above, Arts and Recreation Services is the ABS’ broader industry category and includes sports and gambling, creative and performing arts activities, fitness, recreation and sport, gambling and heritage activities, but not publishing, broadcasting, design, screen production or libraries.

travelling further, staying longer and spending more than domestic tourists overall. This intersection is just one example of how reduced demand in the arts and entertainment sector impacts demand in other industries.

EMPLOYMENT IMPACTS

Table 6 summarises changes in total employment by sub-sectors within the broader arts and entertainment sector, for the period February to May 2020 (the initial months of the downturn) and then over the year to February 2021 (most recent data available). There were stark differences in the extent of initial job losses for different sub-sectors. Overall employment across all arts and entertainment sub-sectors fell by close to 18 per cent in the first 3 months of the pandemic.[8] But some groups were hit much harder. Total employment in libraries almost halved (-46.5%), with employment cuts of approximately one-third experienced within creative and performing arts (-32.5%), and in motion picture and sound recording activities (-37.5%).

Table 6
Changes in Arts and Entertainment Employment Feb 2020-Feb 2021

	Feb 2020 (000s)	May 2020 (000s)	% Change Feb-May 2020	Feb 2021 (000s)	% Change Feb-Feb
Creative & Performing Arts	45.2	30.5	-32.5%	50.5	+11.7%
Motion Picture & Sound Recording Activities	34.9	21.8	-37.5%	30.6	-12.4%
Broadcasting	28.1	39.7	+41.4%	32.1	+14.3%
Heritage Activities	38.4	31.7	-17.4%	36.8	-4.1%
Publishing	26.1	20.0	-23.3%	23.4	-10.2%
Internet Publishing	0.9	1.3	+38.2%	4.1	+350.7%
Libraries	20.6	11.0	-46.5%	19.5	-5.3%
Printing & Recorded Media	31.9	29.8	-6.6%	30.9	-3.2%
Total	**226.1**	**185.8**	**-17.8%**	**227.9**	**+0.8%**

Source: Authors' calculations from ABS 6291.0.55.003 Labour Force, Detailed, Quarterly.

[8] The data in Table 2 are not seasonally adjusted, and hence incorporate normal seasonal fluctuations as well as the effects of the pandemic.

In contrast, digital-enabled sub-sectors – including internet publishing and broadcasting – experienced employment growth of 38.2 per cent and 41.4 per cent, respectively. This dichotomy in job losses is closely correlated with the spatial and social aspects of the respective jobs. Workers in people-facing roles, like performing artists and librarians, were severely restricted in the initial shutdowns, while people able to perform their jobs largely on computers could relocate work to home with less disruption in work and income. There was also growth in demand for their work due to health restrictions which increased consumer demand for digital arts and entertainment services (like ICT services, digital communication, media, and audiobooks).

Since the significant employment losses during the initial worst months of the pandemic, employment has recovered in the arts and entertainment sector. In fact, total employment moderately increased by 0.8 per cent over the year to February 2021. Employment in broadcasting increased by 14 per cent over the year. Internet publishing experienced the highest growth over the pandemic, with a total of 4,100 jobs at February 2021 (up sharply from 900 jobs in February 2020[9]). Creative and performing arts has grown by 11.7 per cent over the year, with 4,300 additional jobs created. This likely reflects the positive impact of various stimulus support measures introduced by governments in response to the crisis (we discuss government policy responses in more detail below). Outside of these sub-sectors, the majority of arts and entertainment sub-sectors (5 out of 8 areas) experienced employment losses over the year, with the largest in motion picture and sound recording activities (-12.4%) and publishing (-10.2%).

IMPACTS ON EMPLOYABILITY & SKILLS

Arts and entertainment sector workers are experiencing significant ruptures in employment arrangements due to the pandemic. These include a lack of demand within their profession, decreased employability, interrupted careers pathways, and a loss of predictability and control over their work.

The reduction in demand for the arts sector damages workers' long-term employability. Performing artists and crew must practice their skills regularly to retain employability. Restrictions on live performances, but also on related professional networking events like workshops and meetings, deprive creative workers of important spaces for coordinating paid

[9] Changes in definition of this rapidly changing sub-sector likely play a significant role in this rapid proportional growth.

work opportunities with key industry gatekeepers (such as event organisers and producers). The result is that many arts workers are isolated, and severed from relationships needed to secure future paid work once the pandemic is over. This poses risks of shortened arts and entertainment sector careers.

As an already marginalised and precarious workforce, many arts and entertainment workers have sought alternative sources of income, often in even more precarious forms of work (e.g. dancers teaching yoga online as gig workers) or completely outside of their industry (e.g. sound engineers working as supermarket clerks). This represents a significant loss of skills and capacities individually and across the sector. Some of these workers have found alternative employment and may never return to the sector, representing a net loss of skills and human capital to the creative sector.

In sum, the COVID pandemic has taken a deep toll on the arts and entertainment sector, exacerbating problems that were already endemic in these industries. Venues, concerts, festivals and public programs were the first to be closed down by health orders, and have been the last to open again. Until Australia vaccinates its population, the sector faces an ongoing risk from renewed outbreaks of contagion and the consequent reinstatement of social distancing and restrictions on gatherings. Although overall employment in arts and entertainment has rebounded since the worst of the shutdowns last year, even growing slightly compared to pre-pandemic levels, this rebound is uneven. While total employment has grown across the sector, there are fewer jobs now than pre-pandemic in 5 out of 8 subsectors. Ongoing instability from the failed vaccination rollout, combined with the absence of widespread, long-term government supports, prevent the arts sector from rebooting to anything resembling pre-pandemic conditions for the foreseeable future.

Government Policy Falls Short

The federal government has not adequately responded to the scale and severity of the crisis gripping the arts and entertainment sector. This section documents federal aid programs to the arts and entertainment sector: including Budget 2021-22 arts measures, sector-specific $250 million relief announced in June 2020, and the impact of wider economy-wide income support programs including the JobKeeper wage subsidy and Coronavirus Supplement. The section focuses on the federal government, due to its superior role in generating and raising funds to meet national economic and social priorities, and its primary policy responsibility to respond to urgent national crises. During the COVID-19 pandemic, the federal government has implemented increasingly hostile policies in the arts and cultural sector, including weakening local production quotas and increasing the cost of studying creative fields.

GOVERNMENT AID PROGRAMS

As outlined above, declining federal arts and culture expenditure since 2007-08 has corresponded with an increase in government spending at both state and local levels. This re-weighting of funding responsibilities between levels of government has been demonstrated in the larger direct contributions made by state governments, and deregulatory policies pursued by the federal government. Table 7 catalogues various federal and state government funding programs extended to the arts and entertainment sector in response to COVID. Local government initiatives have not been included due to the diversity and complexity of those entries. However, as discussed earlier, local government has played a sizeable and increasingly important role in funding Australian arts and culture – accounting for 51 per cent of total government expenditure on culture, recreation and religion pre-pandemic in 2018.[10] The shock to household and business incomes due to the pandemic, as well as the exclusion of local governments from federal fiscal supports like JobKeeper (due to their public sector status), has likely impacted their capacity to continue playing that outsized arts funding role.

Table 7 shows all states introduced arts and cultural aid programs. These included direct cash injections, contestable grants, and loans to local arts and entertainment sector firms and workers. These programs enabled the sector to continue partial producing during lockdowns,

[10] Authors' calculations from OECD (2019), *Government Expenditure by Function,* General Government Accounts. For more details on calculation methods, see discussion above on "Inadequate Government Funding".

Table 7
Commonwealth and State Government COVID Support Programs for Arts and Entertainment Sector

Government	Date Announced	Value ($)	Description
Commonwealth	April 2020	$27m	Targeted support to indigenous arts, regional arts and arts. Package included $10m to support regional artists, $7m to indigenous artists and arts organisations, & $10m to arts charity Support Act for crisis payments to live music sector workers.
Commonwealth	June 2020	$250m	Package included $50m for film industry insurance claims (the Temporary Interruption Fund). Remaining $200m comprised of $75m in grants to assist in reboot of events and productions (RISE); $35m in direct financial assistance to arts organisations; and $90m in concessional loans.
Commonwealth	March 2021 / Budget 2021-22	$135m	Further $125m to the RISE fund; $10m in crisis supports to live music sector workers (Support Act). (Re-announced in the Budget.)
Commonwealth	Budget 2021-22	$285.2m	$79.9m to national collecting institutions; $75m to restore the Production Offset to 40% for feature films; $20m for independent cinemas; $33m for Screen Australia for production and script funding; $18.8m for the Digital Games Tax Offset; $15m for public interest news journalism (AAP); $14.9m for children's television production (ACTF); $11.4m for regional arts and festivals programs; $8m for community broadcasting; $5m for

			Playing Australia touring programs; $4.2m to ACMA to administer the news media bargaining code.
New South Wales	November 2020	$50m	Package includes grants to 160 arts organisations (60 regional NSW); funding for a regional residency program & grants to community-based arts organisations
Victoria (1)	September 2020	$13m	$13m package includes: $9m in grants to 106 live music venues, & arts sector jobs. New planning controls to protect venues. $3m in grants valued at $4,000-$50,000 for artists and entertainment workers, including upskilling funds. $1.2m to 10 arts organisations for professional development.
Victoria (2)	November 2020	$17.2m	$17.2m package includes $7.9m to state-owned arts entities for public productions and events; $9.3m to support 16 festivals ad new live music events.
South Australia	September 2020	$20m	Direct funding and contestable grants to artists and arts SMEs, rent relief to organisations, and investment in new events to support sector recovery.
Queensland	June 2020	$22m	Package includes $11.3m grants to live music and performing arts organisations and venues; $4.2m funding for future pipeline of arts and live music productions; $4.15m in grants to support audience and market access; $2.9m to local councils, venues, artists, festivals and organisations to support employment.
Western Australia		$27m	$20 million in grants and loans to artists and arts organisations, capital works funding, and a $7 million share of total COVID relief fund distributed from Lotterywest surpluses.

Tasmania		$3.5m	Grants to assist affected artists and organisations to record, digitalise and promote content; grants to arts organisations; support up to $250,000 for COVID-safe film productions.
NT, ACT	Various	Total funding allocation unannounced	Grants to arts organisations, artists and entertainment sector workers in cities and regions to support productions, mentorships, residencies, skills development, and community engagement in arts.
Source: Authors' compilation.			

such as through digitalisation projects to create COVID-safe art, and funds to reboot the return of live venues, productions, and festivals.

FEDERAL ARTS EMERGENCY STIMULUS RESPONSE

The federal government announced a relief package of $250 million for the sector in June 2020 – more-than two months after health order shutdowns were introduced. With immediate job losses and a collapse in output occurring in real time, supports were desperately needed. However, the design and delivery of the package fell far short of its glossy announcement. Under half (only 44 per cent) of all federal emergency support was allocated for direct financial assistance to producers through “Restart Investment and Sustain and Expand” (RISE) funding ($75 million) and direct payments to arts organisations ($35 million). Remaining relief funds included $50 million in film industry insurance claims called the “Temporary Interruption Fund”, and $90 million for concessional loans. The latter required cash-strapped entities to risk launching projects during ongoing lockdown uncertainty, and then return all borrowed funds back to the Commonwealth.

The inappropriate design of the initial Commonwealth arts emergency program meant that funding failed to be allocated across the stumbling sector. Announced in June 2020, almost none of the so-called ‘emergency’ funding was spent until November, and the first batch of RISE funding contracts were not distributed until December. The first Temporary Interruption Fund projects were not funded until September. $35 million provided for the Australia Council’s Arts Sustainability Fund was particularly slow to flow – only $16 million had been allocated by May 2021. While the federal government claims that the Temporary Interruption Fund has allowed “projects with combined production budgets of over $330 million to start or restart” (Fletcher, 2021), there was sufficient funding remaining in the fund’s budget to extend the duration of the program through to end-December 2021.

There are also unequal distributional consequences arising from the poor design of these policies. RISE funding, the largest direct funding program, has been flowing through to the sector. RISE’s recipients represent a more diverse set of winners than typical Australia Council rounds, with a significant number of commercial entertainment companies and events receiving funding – including big musicals, music festivals and contemporary art exhibitions. RISE funding has also gone to some important non-profit cultural organisations, including theatres, museums, festivals and regional arts companies. There is no doubt that RISE funding will be welcome and will help fill some (but by no means all) of the funding and revenue shortfalls suffered in 2020. But it is not clear that the group of recipients funded through RISE corresponds to the areas of greatest need – which are overwhelmingly amongst artists and smaller, grassroots cultural enterprises.

Little of the government's emergency funding has reached small and medium arts enterprises (which generate the majority of arts sector activity), with support for individual artists and cultural workers left to JobKeeper. As late as March, *The Guardian* (2021) reported only eight companies had been approved for direct funds, with the majority of funds distributed to four large organisations: NIDA ($3.75m), the Melbourne Symphony Orchestra ($3m), Sydney's Museum of Contemporary Art ($2m) and the Brandenburg Orchestra ($1.14m). Indigenous and regional visual arts received $27 million in April to support the music industry outreach program, 'Support Act'. All funding for this program had been allocated by October.

Finally, funded organisations comprise only a small segment of arts and entertainment industries. Over 90 per cent of artists, creators and businesses do not receive public funding (Anatolitis, 2020). This means most people in the sector have been unable to benefit from the government's arts relief measures. It also suggests the addition of 4,500 jobs in creative and performing arts in the year to February 2021 was probably due to a bounce-back in the for-profit entertainment sector, supported at that stage by JobKeeper, as well increased hiring by the larger funded arts organisations receiving federal stimulus funds. This demonstrates the positive job creation potential of adequate fiscal supports, properly distributed to the sector. When funding reaches arts organisations, they create jobs.

BUDGET 2021-22

The 2021 federal Budget offered limited additional support for arts and culture of $135 million (pre-emptively announced earlier in March). This funding comprised $125 million in new RISE funding, likely to be distributed to larger performing arts organisations, museums, galleries, musicals and touring companies. An additional $85 million in funding was promised to national cultural institutions such as the National Library, National Gallery and National Museum (though no funds for the National Archives). $30 million went to Screen Australia for production funding, and $20 million was invested in local independent cinemas. Small amounts of funding were distributed to regional arts, performing arts touring, and the music charity Support Act. Broadcaster SBS, newswire service AAP, and the Australian Children's Television Foundation and community radio broadcasters also received small increases in funding (Department of Infrastructure, 2021).

Despite these moderate funding allocations, there was no increase in base funding for the federal government's key arts funding body, the Australia Council. This locks in nearly a decade of funding cuts to the Australia Council, with total funding still below that provided when Rudd-Gillard government left office in 2013. In the 2013-14 fiscal year, the Australia Council distributed $199 million in cultural funding (Australia Council, 2014). In the 2019-20 year, this figure was $187 million (Australia Council, 2020). This is a 14 per cent decrease in real terms.

Budget 2021-22 included yet another funding cut to the ABC, taking the total accumulated funding cuts to the national broadcaster under the Coalition to $780 million since 2013 (Dawson, 2020). The ABC's total operational funding allocation is now only $880 million a year, with further cuts baked into the forward estimates. The ABC's funding continues to fall in real terms, despite rising wage and production costs. Not surprisingly, the national broadcaster has embarked on several rounds of job cuts in recent years. The federal government's unceasing war on the ABC is especially damaging, as the national broadcaster continues to deliver high quality public interest broadcasting and journalism – including emergency broadcasting during natural disasters – on a shrinking budget.

Budget 2021-22 also locked in surprisingly large funding cuts to public universities, with the higher education sector slated for approximately $1 billion in funding cuts to 2024. While not directly targeted at the arts and cultural sector, these cuts will harm Australian arts education in an already reeling university sector that has suffered significant revenue declines and job losses as a result of the pandemic. A number of universities announced cuts to creative arts courses in 2020, with some universities amalgamating drama and art schools, or closing them altogether.

Overall, Budget 2021-22 was an inadequate offering to the arts and cultural sector given the scale of the crisis presented by the pandemic. Some measures, such as funding increases for the national cultural institutions, are best viewed as partially repairing the damage done in previous rounds of austerity. While the sector undoubtedly welcomes limited measures like the RISE fund which will invest $200 million across two years, Budget 2021-22 falls far short of funding required to fuel transformative, big picture public investment that might kick start a more sustained creative recovery.

The budget's shortcomings are especially noticeable when compared with more ambitious cultural recovery policies enacted in other countries. A recent analysis by researchers at the University of South Australia compared the Australian government's cultural support measures in response to COVID-19 with those of France, Germany, Canada and the UK. Australia's fiscal support measures for culture were lower than all these nations as a percentage of gross domestic product. The authors conclude that "the current Federal Australian government is now a global outlier" and that the Morrison government harbours "a more fundamental antipathy to arts and culture which many ascribe to the 'culture wars'." (Pacella, Luckman & O'Connor, 2021).

JOBKEEPER

The $90 billion JobKeeper wage subsidy program was the federal government's largest direct fiscal stimulus measure. It was introduced in March last year and provided $1500 fortnightly payments to eligible employees and sole traders, gradually tapering to lower rates until it was phased out in March 2021. JobKeeper boosted cash flow in the Arts and Recreation Services industries when they needed it, increasing cash flow by 3.5 per cent relative to their reduced operating surpluses at December 2020.[11] JobKeeper was effective at keeping eligible workers connected to their jobs during lockdowns, and it also raised incomes for workers across the sector, as the wage data makes clear (ABS, 2021). However, the subsidy was prematurely cut to workers and sectors still badly impacted by the COVID pandemic and resulting recession, especially in tourism, hospitality, aviation and the arts. When JobKeeper ended in March this year, large sections of the economy had still not returned to pre-COVID levels of activity.

The arts and entertainment sector, like other customer-facing sectors, is still experiencing COVID health restrictions including venue capacity limits, unpredictable border closures and barriers to international acts entering Australia. Six months before JobKeeper was completely cut, the federal government introduced a two-tiered subsidy program based on whether the worker undertook part-time or full-time work before the pandemic. This tapering had already reduced the incomes of arts and entertainment workers more than any other industry (forming 26 per cent of all JobKeeper recipients at September 2020), due to the high composition of casual and part-time work in the sector.[12] Demand is also still rebounding, and has been crimped again by renewed outbreaks and lockdowns. Largely as a result of ongoing uncertainty around pandemic restrictions, the sector was still highly dependent on JobKeeper when it was tapered, with around 1 in 5 arts and entertainment workers receiving the payment when the subsidy ended, according to figures crunched by the Labor opposition spokesperson Tony Burke (Burke, 2021). This is to be expected, given that the crisis in the arts and entertainment was significantly deeper and longer-lasting than in less affected parts of the economy.

While positively supporting arts workers and businesses, unnecessarily restrictive eligibility criteria for JobKeeper excluded many thousands of casual employees who had been with their current employer for less than 12 months. The program was particularly inaccessible to freelancing workers on short-term contracts, very common in the arts and entertainment sector. The National Association for the Visual Arts (2020) found most of Australia's 50,000 professional artists were not covered by JobKeeper, due to either their casual working arrangements or their employers being unable to qualify under the eligibility criteria.

[11] ABS (2021). *Government support for business, December quarter 2020.*

[12] ABS (2021). Ibid.

On the other hand, the inclusion of independent contractors within JobKeeper eligibility was transformative for many sole trader arts sector workers. In many cases, the subsidy provided the first reliable and steady income that some cultural workers had received in years (demonstrating how precarious and low-income much of the sector was). In Australia, the simultaneous exclusion of short-term casuals created a situation where the employment relationship itself became a hindrance to accessing income supports. This was unusual compared to other international COVID government policy responses, where the employment relationship guaranteed greater access to support programs on average, and where there was much better government policy understanding of the structure of cultural labour markets (Pulignano et al., 2021; Pacella, Luckman & O'Connor, 2021).

In sum, the key policy goal of JobKeeper – to save jobs and keep workers connected to their employers - was not fully realised in the arts and entertainment sector. In certain entertainment industries, because of the preponderance of short-term casual employees excluded from JobKeeper support, the connection between workers and their employers was significantly disrupted. Many arts and entertainment sector workers were left out of national support measures because policymakers did not acknowledge the reality of work relationships in the sector. Consequently, workers became untethered from their projects and creative teams dispersed. The damaging consequences on cultural production in Australia will be profound end enduring. The human impact was felt in exhausted savings, missed rent payments, and acute emotional distress.

ELIMINATION OF CORONAVIRUS SUPPLEMENT INCOME SUPPORT

The challenges faced by casuals and other arts sector workers facing forced shutdowns while excluded from the JobKeeper program were partially addressed through introduction of the Coronavirus Supplement in April 2020. This new allowance of $550 per fortnight effectively doubled the existing JobSeeker unemployment benefit rate (formerly called "Newstart"), and dramatically improved the lives of over two million unemployed, underemployed and low-income people. The increased benefit single-handedly removed 425,000 Australians from poverty: the biggest single anti-poverty measure in our history (Grudnoff, 2020). But despite clearly demonstrating the capacity of government to deliver ambitious income supports and provide a dignified, above-poverty existence for people (or perhaps *because* of this), the government cut the payment. This was undertaken in two stages: first reducing the payment in September 2020 by $300 per week, from $550 to $250 per fortnight, with the payment then eliminated entirely in April 2021.

As discussed, arts and entertainment sector workers had already been experiencing job and income insecurity before COVID-19. For thousands unemployed by the pandemic – those on "standby" while health restrictions and COVID contagion risk remains, and those whose pipeline of work evaporated due to recession – the unnecessary, harsh and premature elimination of the Coronavirus Supplement only deepened their poverty and precarity.

OTHER POLICIES

Other federal government policies – many introduced during the pandemic - have further undermined the arts and entertainment sector. These include reductions in local content quotas for Australian commercial television, weak and ineffective content quota proposals for international streaming platforms, cuts to federal arts organisations, and substantial increases in the costs of undertaking university studies in the arts and humanities. We briefly consider each of these policy failures:

Local Content Rules

As health restrictions and lockdowns were implemented, Australians flocked to on-demand streaming services. Schools shut for extended periods of time and people could no longer attend or participate in arts and sporting activities. While demand for digital video content was exploding, the federal government simultaneously and perversely weakened requirements on international streaming services to support the distribution of Australian-made content.

First, in April 2020 the federal government suspended local content rules for children's television productions on commercial broadcasters. With broadcasters no longer required to invest in the production of local children's series, many local film companies now face program cuts. This risks a situation where Australian children grow up with programs not reflective of their lived conditions and experience, with lower-cost American or British programs further dominating Australian children's programming (Potter, 2017).

Other countries including Canada, France, and Italy have responded to increased consumption of digital culture during the pandemic by legislating local content quotas on multinational streaming services like Netflix, Amazon Prime, Disney+, and Apple TV. The European Union requires 30 per cent of all revenues generated from subscriptions to be invested in locally produced content (Ward, 2021a). Unfortunately, in Australia, the Coalition government has proposed only 5 per cent of all Australian subscription revenue generated through streaming companies be spent on local production. Even this very low quota has been exempted in the case of streaming company Stan. Furthermore, tax minimisation strategies utilised by companies like Netflix call into question exactly how streaming quotas might be enforced. For instance, while Netflix generated between $700 million and $1.4 billion in estimated revenue from Australian subscriptions in 2020, it formally reported only $20.5 million in revenue for tax purposes (Ward, 2021b). If the quota were to be levied on *reported* revenue, 5 per cent of Netflix's reported Australian territory revenue would create only $1 million for local content production – not enough to support even one major film production in Australia. Furthermore, in September 2020, the federal government announced a unilateral reduction in Foxtel's Australian local content distribution requirements from 10 per cent to only 5 per cent.

While failing to support Australian film production, the federal government directly invested $400 million under the Location Incentive Program aimed at luring overseas productions to film in Australia (Morrison, 2020). While this may support some jobs in technical production in Australia, international productions often exclude many Australian workers who could undertake creative roles (including directors, writers, script editors, composers, artists and designers).

Cuts to Federal Public Arts Organisations and the ABC

Decades of austerity policies dressed up as improving public sector 'efficiency' have dramatically reduced funding to federal national arts entities and arts administrations. These include:

- more than $100 million in cuts to the Arts portfolio in 2014;
- $52.5 million in cuts to the Arts and Communications portfolio in 2015 by then-Treasurer Scott Morrison; and
- an additional $36.8 million cut from government-funded galleries and museums in the same year.

The Australia Council is the government's arts funding and advisory body. It had its budget cut by $105 million in May 2015 by then-Arts Minister George Brandis in a disastrous attempt to create a new 'Excellence' fund (Eltham, 2016); some of this funding was eventually restored, but not all. Long-term austerity has also been imposed on national collecting institutions. The National Gallery of Australia – Australia's preeminent gallery – has for several years faced funding shortfalls; in 2016, it closed its NGA Contemporary space due to funding constraints. In June 2020, the NGA announced a staff reduction of 10 per cent, and reduction in acquisitions from 3,000 to 100 per year. Meanwhile, the revised National Performing Arts Partnership Framework set by cultural ministers across the state and federal governments resolved to increase the potential number of funded entities without any increase in the level of funding (Australia Council for the Arts, 2020c). The National Archives of Australia has experienced such long-term funding austerity that it has now launched a crowd-funding drive to attempt to save many of its priceless records and artefacts. Small funding increases in the 2021-22 Budget to national cultural institutions have only begun to repair the damage of these long-term funding reductions.

The most dramatic example of federal austerity to cultural organisations is the ABC. A 2020 analysis of the national broadcaster's funding levels indicated up to $780 million in cumulative funding cuts since the Coalition took office in 2013 (Dawson, 2020), including a particularly savage $254 million cut in 2014. The ABC has undertaken several rounds of job shedding in recent years, and cut back on commissioning and production budgets. It has also been forced to absorb the costs of dramatically escalated emergency broadcasting demands, in the wake of the national bushfire crisis over the summer of 2019-20 and then the pandemic. The ABC remains one of the nation's most trusted sources of news and information, and there is broad public support for its role as a public service media organisation. However, ideological opposition from the Coalition government politicians has resulted in relentless funding reductions in real terms since 2013.

Undermining the Arts Sector Skills Pipeline

Policy changes outside the arts have also had negative impacts. In June 2020, the Morrison government introduced its "job ready graduates" legislation, changing the costs of university bachelor degrees. The costs of arts and humanities degrees more than doubled, while costs were moderately reduced for supposedly 'job ready' vocational degrees in nursing, teaching and maths. Cloaked in false economic arguments about aligning university offerings with demand, the government sought to recast worsening youth labour market outcomes (exacerbated by the COVID recession) as a matter for individual responsibility and better 'choices'. In fact, this policy contained significant funding cuts to many degrees; across the board, the policy locked in aggregate reductions in Commonwealth funding to universities (Thomson, 2020). Reflecting this, federal funding for university education is set to decline by more a billion dollars or nearly 9 per cent over the next four years, according to the 2021-22 Budget (Centre for Future Work, 2021). A number of major universities closed courses or cut funding and teaching to creative arts courses in 2020, including Monash University, the University of Sydney, the University of Newcastle, and Charles Sturt University.

Deteriorating economic conditions and government policy failure to secure education-jobs pathways underlie worsening job outcomes for university graduates. The proportion of bachelor-degree holders in full-time employment has fallen dramatically in the past decade, from 85 per cent in 2008 to only 68.7 per cent in 2020, the second-lowest rate in recorded history after 2014 (QILT, 2021). Masking inaction on the worsening youth jobs market, the government invoked the often-touted stereotype that 'STEM' skills and technical attributes are in short supply. This is not borne out in the data; graduates with sciences and mathematics degrees in fact have the worst employment outcomes of any degree field, with only 59 per cent in full-time work in 2020. Graduates of humanities and social sciences fields in fact did marginally better, with 61 per cent in full-time work.

Contrary to the government's derision of arts degrees, critical thinking, creativity, problem-solving, leadership, and people management are capacities that will be increasingly important in the future of work (World Economic Forum, 2018). Industry leaders are now calling for more arts and humanities graduates in their workforce – given their training in abstract, critical methods of inquiry. Many Australian employers in creative digital fields, for instance, have indicated a preference for employing humanities and social sciences graduates (rather than programmers) because they "know how to learn" (Bridgestock, 2016).

People undertake studies within the creative arts to acquire professional-level education, and exposure to conditions within their chosen industry. Doubling study costs to acquire professional cultural sector skills will impose the greatest disincentive to study for low-income, First Nations and international students. This diminishes diversity in Australia's cultural arts skills pipeline, and undermines the quality of creative conversation, interaction, and diverse representation within arts faculties representing the country at the highest level of education. This, in turn, threatens all forms of participation in the arts, including audience attendance, and demand for local cultural production.

The increase in degree fees for creative arts students will also have a pernicious long-term effect for graduates of those courses. Because workers in these industries typically have relatively low wages compared to the broader labour force, higher fees and larger student debts will take longer to pay off, and impose greater burdens on graduate incomes for these workers. This will exacerbate the problems of diversity in a sector where pathways for young artists and workers from poorer and more disadvantaged backgrounds are already constrained. The risk is that future cultural outputs will increasingly reflect a narrower set of experiences and understandings, further excluding voices from working class, migrant and marginalised communities.

In sum, federal support for the cultural sector since the pandemic has been patchy and insufficient. Many sectors across the economy were supported with funds, wage subsidies and industrial relations flexibilities to adjust their businesses to the shocks of the pandemic, with an explicit acknowledgement from government that fiscal support was required to allow firms to transform and survive. The arts, while certainly receiving some relief, have been denied the level of support required to adjust, transform and reboot. Worse still, the crisis has unleashed outwardly hostile policies from the federal government toward the domestic cultural sector in several dimensions – including arts education, local screen production quotas, and funding cuts to the ABC. This is despite widespread isolation and hardship associated with navigating the crisis increasing demand for cultural products among Australians.

Placing Culture at the Heart of Public-Led Reconstruction

The pandemic has taken a deep toll on the arts and entertainment sector, especially in vulnerable activities like live performance, festivals and events. And it has only accelerated the sector's pre-crisis political and economic challenges, revealing that 'snapping back' is not a viable option. The pandemic is not yet over: further lockdowns are again severely disrupting the entertainment sector. Unpredictable health restrictions mean the commercial viability of the arts will likely be hampered for years to come.

This is why Australia needs a complete reboot of the arts and entertainment sector. Cultural policy for this sector must be remade in a new and different model, one that puts the public at the centre of the policy discussion. This cultural reconstruction must ensure the sector does not just survive the pandemic, but stands ready to flourish on the other side. It will require governments invoking direct tools of public investment in the arts again. These are tools that have been abandoned for decades during a generation of "market-first" economic policy. But they are tools that are essential to the recovery of a vibrant, productive arts and cultural sector in Australia, and of the economy more broadly.

This public-led agenda must lay the groundwork for a sustainable future for the arts built through ambitious, sustained public investment and planning across many sectors of our economy. This agenda must include large fiscal investments to help rebuild skills, jobs and incomes in the sector, long-term and secure funding for arts organisations, wage subsidies, arts education accessible to all children, and reform to cultural labour markets to ensure that artists and cultural workers earn decent, living incomes.

Australia's economy employs the majority of workers in services industries (including public services like healthcare, education and social services). But governments and policymakers have not caught up with this labour market reality, with insufficient economic stimulus flowing to jobs-rich sectors like arts and entertainment, and greater emphasis on pouring concrete, "shovel-ready" construction and physical infrastructure (such as the government's generous tax incentives for asset purchases).

The arts and entertainment sector is both a public good and a critical, jobs-supporting, value-producing industry in its own right. Public investment in the arts builds a creative ecosystem that enriches our lives and contributes valuable creative inputs that benefit all industries in the Australian economy. A macroeconomic strategy that includes building arts and culture as part of the social infrastructure of the economy (along with education, health, and other human services) would contribute enormously to employment growth, incomes, and quality of life for all Australians. During the pandemic, 73 per cent of Australians said the arts improved their mood and quality of life. Half of Australians (51%) agree government should double funding for the arts to help the sector reboot from the crisis (Australia Institute, 2020).

Targeted industry policies could grow the arts and entertainment sector in Australia. Australia runs a sizeable deficit in cultural products, consuming high volumes of internationally produced content. According to data from the United Nations Conference on Trade and Development, Australia ran a $US10.9 billion trade deficit in cultural goods and services in 2014, the latest year for which data is available (UNCTAD, 2018). To take one dramatic example, the proportion of Australian movies and TV shows on the local Netflix repertoire is less than 2 per cent (Bureau of Communications, Arts and Regional Research, 2021). And yet, Australians have shown repeatedly that they have a strong appetite for domestic content when offered it. Triple J, with a better-than-50 per cent Australian content ratio, remains one of the ABC's most successful networks. With better policy settings, we can close the cultural products deficit and produce as much as we consume.

In recent months, momentum for a reconstruction of Australia's arts and cultural sector has grown. The Australia Council has released a major new report on an extensive consultation across the arts sector, while think tank A New Approach has called for a 2030 strategy for Australian culture (Australia Council, 2021; Trembarth & Fielding, 2021). The Australia Council report in particular showed very strong support from within the arts sector for better quality working conditions, and more job security for artists and cultural workers. It also clearly demonstrated growing agitation within the cultural sector for more diversity, equality and justice in the way funding is distributed and culture is made. Both reports point to the pressing need for a stronger vision for Australian culture in the coming decade.

POLICY RECOMMENDATIONS

1. **Expand cultural funding to community arts organisations and artists, introducing a new Commonwealth creative fellowships program.**

A clear priority for rebuilding Australian cultural policy is better support for working artists and smaller cultural organisations. As demonstrated above, labour market conditions for artists and cultural workers are insecure and precarious. The majority of Australian cultural funding flows to large organisations like the ABC, SBS, film and television production companies, and large capital city galleries, museums and performing arts companies (Schulz, 2010). But this funding does not easily trickle down to workers in the sector. Australia Council grants available to individual artists comprised a maximum of 12 per cent or $23 million of the Council's grants budget, based on 2018-19 figures. As the Australia Council acknowledges, there is a huge level of "unfunded excellence", with many high-quality artists and projects unable to access federal support due to a lack of available funding. For instance, the Australia Council received 4,065 applications in 2018-19 for arts projects and career development grants and fellowships, but funded only 587 – a success rate of 14 per cent (Australia Council, 2019).

Smaller cultural organisations are also suffering. The so-called 'small-to-medium' sector of cultural organisations has long been acknowledged as the most artistically vibrant and innovative part of the sector, producing the majority of the new work in the Australian funded arts sector (Eltham and Verhoeven, 2018). Small-to-medium organisations are also the most important reservoirs of cultural and artistic diversity, and are crucial employers of artists across the literature, performing arts, and visual arts sectors. But the Australia Council's ongoing funding to the small-to-medium sector remains static at around $28 million per year, and the number of Australia Council-funded small-to-medium organisations has fallen from 147 in 2015 to 95 this year. Significant funding increases for working artists and smaller cultural organisations are urgently required. Any increase in federal funding to the arts should be prioritised to these recipients.

One of the most significant things an expanded federal cultural policy could do would be to directly intervene in cultural labour markets to improve working conditions for Australian artists. This was in fact one of the original goals of the Australia Council, as set out by Gough Whitlam when introducing the legislation for the funding body in 1974 (Whitlam, 1974).

The Australia Council should greatly expand the number of creative fellowships it offers (currently less than 10 a year), and improve the wages and conditions of these fellowships to pay artists a living wage.

A modest beginning would see 300 artists funded for 3-year fellowships at a living wage with entitlements. We suggest this wage could be based on the average annual full-time wage in the arts and recreation services industries. In February 2021, this figure was $76,128. Including 9.5% super, this equates to a total package of $83,740 a year. In the first year of operation, this would cost around $26 million including administration costs.

An ambitious model would see 300 three-year fellowships offered annually; by the third year of operation this would mean a rolling total of 900 fellows would be funded on an on-going basis. Paying 900 artists at the average annual full-time wage for the Arts and Recreation industries will cost around $84 million per year by 2023. This is still less than what the Australia Council spends on funding major performing arts companies, and less than one-third of the money the Commonwealth currently spends on tax incentives for screen production.

A comparable program already exists outside the cultural sector, in Australia's universities. The Australian Research Council offers around 320 new research fellowships to academic researchers annually (Australian Research Council, 2020). However, there is no comparable program for artists and cultural creators, either federally or in any state or territory. While many cultural organisations do pay artists, as observed, they tend to do so in a temporary, short-term and relatively insecure fashion.

The fellowship model gives artists security. They would enjoy the same rights and conditions as full-time employees in other industries, such as parental leave, sick leave and superannuation. Artists receiving fellowships would pay tax on their income, just like other employees. The Australia Council is well placed to administer such a program, given it already runs a large number of grants and projects annually, including the existing (very small) fellowships program. The Australia Council could simply award the new fellowships through a greatly expanded version of its existing peer review mechanisms.

In addition to the new creative fellowships program, two additional funding schedules should also be implemented through the Australia Council:

- Increase the '4-year funding' round for the Australia Council to $87 million annually, to support the funding of at least 200 small-to-medium cultural organisations with multi-year agreements.
- Increase Australia Council funding for cultural projects through peer-reviewed competitive funding to $46 million annually.

2. **Create a whole-of-Australia public streaming platform.**

Cultural infrastructure has been dominated by the built environment, well into the internet age. When we think of cultural infrastructure, we typically think of iconic cultural buildings such as the Sydney Opera House. Government ministers enjoy cutting ribbons on new galleries, museums and cultural centres. Cultural funding in general is often skewed towards large institutions and their buildings, as a recent analysis has confirmed (Pacella, Luckman and O'Connor, 2021). Unfortunately, support for less tangible forms of cultural infrastructure has lagged well behind.

In the digital age, digital cultural infrastructure is critically important. In culture, digital infrastructure must mean more than simply the National Broadband Network, but must also encompass the 'full stack' of systems on which digital culture relies. As culture becomes increasingly digitised, cultural organisations require better and more robust information and data systems to support their services.

Data and software capabilities are fundamental to the future of Australian culture, but there is relatively little investment in this crucial area. To take one example, the National Library's world-beating Trove website served 25 million sessions in 2019-20. This activity requires significant server upkeep, systems maintenance and development costs. Trove received an $8 million grant from Arts Minister Paul Fletcher in 2020, but that was the first meaningful refresh of the site's capabilities since its launch in 2010 (National Library of Australia, 2020).

The ABC's digital infrastructure is similarly creaking. The ABC runs multiple platforms and the digital aspect of the national broadcaster's content delivery has become a growing cost centre. The need for a whole-of-ABC refresh of its digital infrastructure was the genesis of the never-realised 'Project Jetstream' proposal, plans for which were widely rumoured, but never released or realised.

Mooted at $500 million, Project Jetstream was intended to bring the ABC's polyglot and often jury-rigged digital systems into the 21st century, "establishing a digital database to house all ABC content such as videos, television shows and audio material in one place" (Duke and Koizol, 2018). The project fell afoul of internal ABC politics and the entrenched hostility to public broadcasting of the Morrison government. However, there is no doubt that the ABC requires significant new investment to modernise its digital infrastructure. The same is equally true of SBS and many collecting institutions such as the National Library of Australia.

One opportunity for transformational investment in this area is the creation of a national public streaming platform that could leverage the vast content bases of Australia's public cultural organisations at much lower cost and with better uptime and quality. In addition, it would allow Australian citizens to access content that in many cases they have paid for through taxpayer funded grants, but which they cannot easily access at present. A national platform could host publicly-owned and funded content from the ABC, SBS, the national collecting institutions, as well as screen content funded by Screen Australia and arts content funded by the Australia Council.

There is a precedent for this kind of transformative investment. Since 2008, the federal government has invested tens of billions in the National Broadband Network. The Commonwealth already spends around $180 million a year on ABC transmission infrastructure, such as television and radio transmitters, in long-term contracts with private providers (after the infrastructure was privatised during the Howard government). There is very little corresponding investment in digital infrastructure for public culture, however.

In addition to initial capital investment, ongoing funding would be required for maintenance, upkeep, commissioning and copyright fees. A further advantage of such a platform is that, if funded appropriately, it could provide a significant new revenue stream to artists and copyright holders whose work appears on the platform. The platform would be best managed by the ABC, but with significant buy-in from other participating organisations.

The ABC itself also needs extra operational funding after years of debilitating funding cuts from the Coalition government. The ABC needs an immediate funding injection to meet existing programming and broadcasting demands, as well as to fund new program commissions and rebuild its newsgathering capabilities. The ABC's operational funding should be increased from $880 million annually to $1.1 billion a year.

3. **Lift government funding for arts education at Commonwealth and state and territory levels.**

Education in the arts has long been seen as an important part of the growth and development of every child, and the arts are formally recognised in the Australian national curriculum through to year 10. There is a significant body of academic literature which shows that a rich and well-supported syllabus of arts education brings significant benefits to individual children (Martin et al. 2013), and by extension, to society as a whole.

However, pressed by a renewed focus on the '3Rs' by many state and territory education departments, and by the exigencies imposed by national testing, recent years have seen many public schools de-emphasise arts education in favour of core curricula in reading, writing and mathematics (Chapman, Wright & Pascoe, 2018). Funding and support for arts education has atrophied in recent years, off an already low base. A review of funding for arts education in 2010 (Ewing, 2010) concluded that "to date Commonwealth and state governments have provided relatively little funding or resources to support the adequate resourcing of arts education," and matters have hardly improved since. National reviews of music education and visual arts education undertaken in the 2000s (Pascoe et al., 2005 & Davis, 2008) also found grave levels of under-funding.

Well-funded private schools with rich and immersive music and art programs show what is achievable with appropriate funding and support. There is a pressing need for expanded Commonwealth and state investment in arts education, as nearly all players in the field acknowledge.

There has also been a significant negative impact on arts education at a tertiary level in 2020, as a result of Commonwealth funding cuts under the ‘job ready graduates’ policy. A number of major universities have closed down courses or announced significant reductions to teaching the creative arts and media, including major closures of performing arts courses at Monash University, the University of Sydney, Charles Sturt University and the University of Newcastle.

A strategy to rebuild arts education in Australia should include the following:

- Increase funding for arts education across schools through existing Commonwealth-state schools funding agreements.
- Fund a program of instrumental music tuition, ensemble programs and expanded music programs in public primary and secondary schools in every state and territory.
- Reverse Commonwealth funding cuts to university creative arts, media and humanities courses from the “job ready graduates” policy.

4. **Introduce a digital platforms levy to fund a merged-content production fund.**

The recent Digital Platforms Inquiry by the ACCC (2020) and resulting controversy over the News Media Bargaining Code have focused attention on how to regulate the giant tech platforms whose dominance extends into almost every corner of Australia’s digital economy. The Morrison government imposed fairly limited requirements on Facebook and Google to bargain with traditional news media outlets (such as Nine and News Corp Australia) for use of their news content. Incremental payments will thus be made by the big tech companies to a number of Australian media companies, including the ABC and SBS, as a result of the new Code.

There is a need to impose a genuine regulatory impost on dominant tech platforms – corporations that have been allowed to establish monopolies in major digital markets (search, social media, messaging, etc.). A digital platforms levy could impose a realistic and effective regulatory requirement on dominant platform operators. In our view, the best model for this was the one proposed by the ill-fated Convergence Review of 2011 (Australian Government, 2012). The Convergence Review recommended what it called a “converged content production fund”, funded by levies on major media organisations including tech platforms. Importantly, the converged content fund was technology-neutral, and the levy would apply to any form of media (online, broadcasting, or print).

A meaningful levy on tech platforms could quickly raise significant amounts of revenue (Eltham, 2017). We suggest that the appropriate levy rate should begin at 5 per cent of Australian territory revenue (not profit), once any operator in any medium reaches an audience threshold of 500,000 or a revenue threshold of $250 million.

To address platform dominance, the levy should rise to 25 per cent of local revenue once any operator exceeds more than 40 per cent of the market share in their particular market (streaming video, search, etc). Care would be required to properly audit the revenue threshold, to prevent multinational corporations from reporting artificially low local territory revenues in order to dodge the levy. Funds raised by the levy should be invested in local content through existing funding agencies, such as Screen Australia and the Australia Council, and through targeted Commonwealth funding of public-interest journalism. As per the recommendations of the Convergence Review, the converged content production levy would work in tandem with harmonised local content quotas, in order to stimulate local content investment and production.

Importantly, this proposal would regulate all content providers in a technology-neutral way. It would address dominant players in markets other than search and social media, imposing meaningful regulation on Netflix in streaming video and on Spotify in streaming audio. The proposal would also future-proof content regulation, covering new platforms as they reach significant Australian audiences.

5. **Introduce a single technology-neutral Australian repertoire quota on all content services, including international streaming platforms.**

Australia needs a technology-neutral local content quota. Australia once had a fairly comprehensive set of local content guidelines mandating meaningful percentages of locally produced content on our television screens and radio waves (Office for the Arts, 2011). In recent years, however, Australian media law has been progressively deregulated. Content quotas for television and radio have been reduced and regulatory regimes enforcing them have been watered down. Australian television networks are still required to meet strong local content quotas for free-to-air broadcasts. But the rise of streaming content platforms created powerful new media players who face no content quotas whatsoever. Australian content ratios on streaming platforms are low: according to research by Ampere Analysis commissioned by the federal government, Netflix has less than 2 per cent Australian repertoire on its service (Bureau of Communications, Arts and Regional Research, 2021).

In response, the Morrison government's recent Green Paper on media reform (Australian Government, 2020) proposes to adjust the bar downwards, reducing content obligations on free-to-air broadcasters and freeing up spectrum for sale to mobile phone providers.

Importantly, the Green Paper does canvass imposing local content obligations on streaming services, and seeks to harmonise content regulations. It doesn't set a figure for what the quota should be, however. This has led many in the sector to worry that the most likely result is a race to the bottom, as free-to-air broadcasters seek to reduce their Australian content down towards the low bar set for digital services.

In Europe, regulators are taking a different approach, imposing a 30 per cent European content obligation on streaming video services. We believe a higher content quota is a better regulatory approach, forcing the big streaming services to offer or commission more Australian content. There is strong support amongst Australian audiences for more Australian content on streaming services, as both opinion polls and the government's Green Paper acknowledge.

The government's proposals do not cover streaming audio. However, there is a clear need to regulate streaming audio platforms in order to encourage Australian music and podcasts. There are no figures available for Australian content on Spotify (the dominant streaming audio platform in Australia), but anecdotal evidence supplied to the authors from APRA-AMCOS suggests that Australian repertoire on Spotify is in the 15-20 per cent range, and that 'discoverability' of local content is low.

Our view is that the best way forward is a single, technology-neutral local content quota for all media. A viable figure is 25 per cent Australian content, enforceable on streaming video, advertising video, streaming audio, broadcast television and radio. Such a figure would not necessarily water down the existing 55 per cent quota for main channel free-to-air television, as careful design could ensure that existing restrictions are not reduced while increasing quotas on subsidiary and datacasting channels.

The 25 per cent Australian content requirement could be met either by the provision of Australian content, or by an equivalent figure paid to the converged content production fund. Where scarce spectrum is sold at auction, as envisaged by the Green Paper, this could also be paid into the fund.

6. **Fund the national cultural institutions properly.**

As with the Australia Council, long-term austerity has also dangerously degraded the capacity and infrastructure of national cultural institutions such as the National Library, National Gallery, National Museum, National Archives, Film and Sound Archive, National Portrait Gallery, Bundanon Trust, and the Museum of Democracy. Many of these institutions have suffered from years of creeping funding cuts, leading to significant job losses and the deterioration of the physical buildings housing them. The National Gallery of Australia was so short of funding it was forced to close its contemporary art space in 2016, while the National Archives has openly admitted it does not have enough funds to safeguard the physical integrity of its archival artefacts. The government belatedly recognised this in the 2021 budget, but much more funding is required to repair the accumulated neglect. Significant ongoing increases to the Commonwealth's base funding are required for these institutions, which are federal institutions and belong to all Australians. Initial steps toward addressing this shortfall should include:

- Permanently exempt the national collecting institutions from budget efficiency dividends.
- Increase the annual budget in the Arts portfolio for the national collecting institutions from $250 million to $350 million.

7. **Better coordinate cultural policy between federal, state and local government levels, especially during the COVID-19 recovery.**

One of the lesser noticed aspects of the Gillard government's ill-fated *Creative Australia* cultural policy of 2013 was its commitment to better coordinate cultural policy between the three levels of government. Eight years later, much remains to be done. While the Cultural Ministers Council meets semi-regularly to provide a forum for the Commonwealth and states and territories to discuss arts and cultural policy, there remains little policy articulation or coordination between the three levels of government.

This is particularly important in culture, because much of the most important and relevant cultural policy that affects ordinary citizens happens at local government level. Local, regional and municipal councils are critically important parts of the cultural policy fabric, funding local cultural infrastructure such as performing arts centres, galleries, libraries and museums, as well as festivals and cultural activity at community level.

A good example of the need for better coordination is the patchwork quilt of local, state and Commonwealth initiatives aimed at supporting the cultural sector during the COVID-19 pandemic. All levels of government participated in subsidies and rescue packages, but there was relatively little coordination or planning in their roll-out. The pandemic also demonstrated the wide disparity in available resources vertically between the Commonwealth and lower levels of government, and horizontally across highly unequal divides between urban and rural councils, big states and smaller states and territories. To take one example, JobKeeper was not made available to local governments, despite the significant number of cultural employees stood down from local government operated cultural institutions.

The COVID-19 recovery offers a good opportunity to better coordinate cultural policy across levels of government to support a sector that is still struggling with a patchy and uneven rebound from the lockdowns and shutdowns of 2020.

An effective existing model is the federal government's Regional Arts Fund, which channels Commonwealth funding to eligible regional local governments for cultural activity. At just $3.6 million annually, the Regional Arts Fund itself requires expanded investment and support to fulfil its duties to support regional arts and culture, as discussed above.

In addition, the Commonwealth should establish a 2-year COVID-19 Local Government Cultural Recovery Fund, modelled on the Regional Arts Fund machinery, that provides direct funding to cultural activity in local communities. Many local government cultural institutions were ineligible for the Commonwealth's JobKeeper program and were therefore hit hard by the pandemic; this fund could assist those institutions to rebuild. The program could effectively piggy-back on existing Commonwealth support programs, such as the RISE fund, but it should be specifically targeted at local and street level cultural expression.

The need for better coordination of cultural policy across the three levels of government goes beyond funding. Many important policy issues facing the arts and entertainment sector are regulated at the local level, such as noise standards and town planning regulations for live music venues. The Live Music Office, jointly funded by the federal government and APRA-AMCOS, has done important behind-the-scenes work in regulatory reform for live music venues in this area, and provides a good model for federal-state-local cooperation on cultural policy reform.[13]

We propose the following specific measures to strengthen inter-governmental arts and culture support in the wake of the pandemic:

- Expand funding to the Regional Arts Fund to $20 million annually, retaining its current policy settings and remit.
- Establish a $150 million 2-year COVID-19 Local Government Recovery Fund. The funding should be front loaded, with $100 million available this financial year and $50 million in 2022-23. Where possible, funding should flow via local government funding schemes already in existence, ensuring funding flows to the community level.
- Develop better policy coordination between the Cultural Ministers Council and local government cultural policy makers, using the model of the Live Music Office.

[13] A good example is the Live Music Office's helpful resources for venues and local governments, such as their downloadable templates for venue events and artist contracts (Live Music Office, 2021).

8. **Fund community broadcasting and public-interest journalism.**

The 2021 budget contained small but welcome funding increases for community broadcasting and for public-interest journalism. $8 million was provided for community broadcasters, a broad and diverse set of media organisations that play a vital role in grassroots arts and music communities across the continent. Community broadcasters are majority funded by listener subscriptions, and often operate with relatively precarious finances and ageing infrastructure. But community broadcasters are often lynchpins of their local music scenes, and can also provide critical local news and information services (including in emergencies like the 2019-20 bushfires). The government also funded news wire agency AAP with $15 million in recognition of its irreplaceable news gathering capability – without which large swathes of Australian court, local government and regional reporting would disappear.

While the funding was welcome, it fell far short of what is required given the clear need for quality journalism and community-minded broadcasting in the current Australian mediascape. As even the Morrison government acknowledges, technological change and policy deregulation have led to the rapid erosion of news media revenues, particularly in regional and rural areas, and the corresponding loss of thousands of journalism and reporting jobs across the Australian media in the past decade. Despite the squeamishness of many journalists and media proprietors about accepting public funding, there is a clear need for arms-length public funding of independent journalism in contemporary Australia. Such schemes appear to operate effectively in a number of European countries already, such as Norway, France and Canada (Syvertson et al., 2014). This funding should not solely be funnelled to media outlets favoured by politicians (as currently happens regularly for bigger media companies like Nine and Foxtel), but must also be equally accessible to smaller and more specialized media outlets undertaking specialised reportage and investigations in subject areas such as health, local politics, science and the arts.

To strengthen the capabilities of community and public-interest media, we propose the following specific measures:

- Introduce a permanent federal funding program of $50 million per year for public-interest journalism, using revenue from a digital content levy on big tech platforms.

- Introduce a permanent federal funding program of $50 million per year for community broadcasting.

9. **Strengthen pay and conditions for arts and entertainment sector workers.**

The analysis above highlighted the desperately precarious nature of most jobs in the arts and entertainment sector, dominated by part-time, casual, freelance, and gig positions. To ensure the industry can attract and retain professionals, in jobs with decent conditions and appealing career paths, a comprehensive arts policy needs to urgently improve the stability and quality of work in the sector. To that end, we propose several specific measures:

<u>Reinstate the JobKeeper wage subsidy:</u> The re-introduction of lockdowns will hurt workers in customer-facing sectors most – hospitality, retail, and arts and entertainment. Workers in these sectors are more likely to hold casual positions, and thus face immediate lay-offs. The federal government's decision to prematurely wind up JobKeeper now exposes these workers to lay-offs without employment and income protection, and demonstrates the fragility of the employment rebound experienced in the last half of 2020. JobKeeper should be reinstated for workers in the arts and entertainment sector (and other hard-hit industries). Further, where JobKeeper was originally focused on making it feasible for employers to retain existing employees, with many arts and entertainment workers laid off due to ineligibility, new lockdowns impacting activity in the sector, and many more in need of work, the JobKeeper program should take on a wider wage subsidy function assisting arts and entertainment employers to hire new people (of all ages) as the economy recovers.

<u>Expand collective bargaining rights:</u> Artists need expanded collective bargaining opportunities, and appropriate representation structures. Industry-level bargaining offers an institutional mechanism to restore collective bargaining in the sector, promoting wages growth, quality jobs, and equality in pay outcomes (Pennington, 2019). There is only patchy coverage for cultural workers in many enterprise agreements; further, national awards are routinely ignored in favour of engaging workers as contractors. Industry-level bargaining can provide a mechanism through which arts workers can improve their wage and conditions, and have more presence in the formulation of policy.

<u>Stronger income support</u>: Arts and entertainment sector workers need stronger income supports to provide real long-term protection against labour market shocks and ongoing economic difficulties after the pandemic. These supports could include direct, targeted income supports to the sector, and more generous unemployment benefits. Arts sector income benefits could be funded though integrating social contributions into general taxation, with the additional benefit of reducing employer incentives to resort to short-term, insecure and gig work instead of employing paid employees.

<u>Stronger minimum standards:</u> Declining demand for arts and entertainment work during the pandemic increased employer bargaining power in the labour market. This led to workers accepting lower pay rates and unfavourable working conditions. The introduction of minimum standards regarding employment, hours and wages, such as the MEAA's minimum $250 payment for musicians, would be a good step in establishing fair working conditions in the creative industries (both offline and digital).

Enhancing employability: Society risks losing long-acquired skills in the sector as the pandemic drags on. Workers need access to training funds, including access to required infrastructure (like rehearsal and studio spaces). For workers transitioning out of the arts into new sectors, reskilling supports should be extended including free or subsidised VET or university training.

Making good jobs a condition of receiving public funding: Government-funded organisations and agencies (including the not-for-profit sector) should provide properly paid, stable and secure employment as a condition of receiving public funds. Procurement rules should be changed at all levels of government to support transparency and quality work in the sector. This could be based on the Arts Council of Ireland's (2020) Paying the Artist policy which commits the Council, the government of the Republic of Ireland, and cultural organisations receiving cultural funding to a best-practice model that pays artists properly, treats them fairly, and ensures that remuneration and contracts reflect the full scope of what an artist is expected and required to deliver.

Prioritise cultural diversity and equality: Australia is a diverse and multi-cultural nation. But many parts of the arts and entertainment sector are far less diverse than their audiences. In particular, Australian television has a well-documented lack of onscreen diversity (Turner, 2020; Screen Australia, 2015) while the cultural sector as a whole has entrenched racial, gender and income inequality in leadership positions.

Most problematically, the full richness and diversity of Australia's First Nations are still not afforded the central place they deserve in Australian culture. The Australia Council's recent sector consultation (Australia Council, 2021) revealed a groundswell of support for centring any future vision of Australian culture from and by First Nations artists and cultural organisations. The consultation document points to the need for "the need for structural and systemic transformation of the industry to achieve equity and a safe and just environment" and for specific policies like greater self-determination and quotas to improve the working lives of artists from First Nations, migrant and culturally diverse backgrounds. The breadth of this vision suggests the scale of the reform task required.

Conclusion

Culture is an inescapable part of what it means to be human. We can no more imagine a life without the arts than we can imagine a life without language, custom, or ritual. Cultural expression and past-times are a central part of our everyday lives, from watching a new show on Netflix, to reading a novel or a story, to the arts and crafts that millions of Australians engage in every week. Australia is home to the oldest continuing cultural traditions on the planet, and some of the world's most renowned actors, musicians and artists. More people work in broad cultural industries (over 350,000) than many other areas of the economy. Despite years of significant funding pressures and policy neglect, the arts and entertainment sector contributed $17 billion in GDP to the Australian economy in 2018-19.

We can all be proud of the vitality and richness of the culture we collectively make. But while we have a proud story to tell, the future of Australian culture looks increasingly uncertain. Movie stars and vibrant local arts scenes cannot disguise significant sectoral problems. The pandemic has badly damaged the arts and cultural sector. Many venues and companies will not survive the current crisis and make it to the other side, and many artists and cultural workers will be forced to leave the industry in search of secure incomes. The federal government has not adequately responded to the scale and severity of this dire crisis.

Inadequate federal government emergency supports exacerbate deep-seated problems of cultural policy neglect in Australia. Decades of destructive market-first policies eroded the richness and diversity of arts and culture long before COVID-19 hit. We must acknowledge that endless short-term grant cycles and philanthropic dependency are both inadequate and unsustainable arrangements for any society that values the production of, and participation in arts and culture for its people. Australia needs a total public-led reboot of the arts. This program must ensure the sector does not just survive the pandemic, but stands ready to flourish on the other side. It must lay the groundwork for a sustainable, vibrant future for the arts and culture, built through ambitious public investment and planning across many sectors of our cultural economy.

While damage to the sector has been grave, the pandemic presents an opportunity to rebuild a better culture. This report has presented clear policy measures to reinvest in our culture and deliver a richer, more vibrant, and more diverse cultural sector. These measures include: expanding funding to community arts organisations and artists; implementing a new Commonwealth creative fellowships program; creating a whole-of-Australia public streaming platform; introducing an Australian content quota on all services, including international streaming platforms; coordinating cultural policy better between federal, state and local governments; and strengthening the quality of jobs for artists and cultural sector workers. These policy measures would go some way to supporting the arts and cultural sector to contribute to Australia's economic, social and cultural reconstruction after the COVID-19 pandemic. The benefits will flow to all Australians. And it's an opportunity policymakers should seize.

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