Australian Government

Australia Council for the Arts

INTERNATIONAL ARTS ACTIVITY – AUSTRALIAN ARTS SECTOR

SURVEY DETAILED REPORT

SEPTEMBER 2015

COVER
Image: Gosia Wlodarczak, *Frost Drawing for the Moscow Manege* (2013) a 21-day drawing performance and installation on interior glass architecture of the Moscow Mange Exhibition Hall, the 5th Moscow Biennale of Contemporary Art: More Light, curated by Catherine de Zegher, Moscow. Pigment pen on glass, approximate overall size 230m^2.
Credit: Longin Sarnecki. Courtesy the artist and the Moscow Biennale of Contemporary Art Foundation.

International Arts Activity – Australian Arts Sector Survey Detailed Report
September 2015

Commissioned by the Australia Council for the Arts.

Report by: Jackie Bailey, Hung-Yen Yang, Sarah Penhall & Tarecq Shehadeh,
BYP Group, http://bypgroup.com

INTERNATIONAL ARTS ACTIVITY – AUSTRALIAN ARTS SECTOR SURVEY

DETAILED REPORT

SEPTEMBER 2015

International Arts Activity – Australian Arts Sector Survey Detailed report

September 2015

Commissioned by the Australia Council for the Arts.

Report by: Jackie Bailey, Hung-Yen Yang, Sarah Penhall & Tarecq Shehadeh, BYP Group, http://bypgroup.com

Contents

Executive Summary

This is a report on findings from the Australia Council for the Arts *International Arts Activity Survey,* conducted in January and February 2015.

FINDINGS

International arts activity takes time and money.

Respondents who undertook international arts activity in 2013-14 tended to spend a month or more per year on this activity. Most independent artists spent less than $10,000 per year on international arts activity, whilst organisations were more likely to spend more than $20,000 per year.

Artists and organisations believe that international arts activity is important for their reputation and artistic practice.

Most respondents thought that international arts activity was only marginally important to financial viability. For independent artists, artistic development, participation in the global arts landscape, and future international projects are the top three outcomes from international arts activity. Organisations tended to choose market development as a top-three outcome, rather than artistic development.

Collaboration, partnerships and reciprocity are already a key feature of international arts activity and will continue to be over the next five years.

Collaboration and reciprocity are already key features of international arts activity, both inside and outside Australia. ‘Undertaking collaborations, partnerships or reciprocal programs with international artists and organisations,’ was one of the most common international arts activities domestically and internationally. Organisations also regularly bring artists or arts workers from overseas into Australia.

Collaborations, partnerships and reciprocal programs will continue to be a priority over the next five years. Australian artists and organisations hope to engage in creative collaborations and reciprocal exchanges and are already planning wide-ranging activities including skills exchange, co-creation and community cultural development.

Australian artists and organisations are tapping into the local diaspora to inform their work.

Using connections to culturally diverse and/or Indigenous communities in Australia to inform or support international activities was one of the most common international arts activities undertaken in Australia, by both artists and organisations.

A lack of support to develop relationships is the key challenge for artists and organisations.

Independent artists are also faced with limited knowledge of international market opportunities and the process of engaging internationally. Organisations feel that support is there, but it is not strategic, and that support to conduct on-the-ground market research is also lacking.

Respondents who had not received government funding for their arts activities in the last two years also reported a lack of support to conduct on-the-ground market research, and a lack of strategic support. The absence of government funding may make these needs more pressing for this group when compared to government-funded respondents.

Artists and organisations want to increase the financial sustainability and direct return on investment from international engagement.

For most artists, international arts activity does not have a 'direct' financial return on investment. Most artists spend more money on international activity than they earn from it, and many rely heavily on their own cash as a funding source. For example, respondents reported that their own cash comprised on average 43 percent of their total funding for international activity, followed by fees/sales (18 percent) and the Australia Council (11 percent).

Artists and organisations' goals for the next five years include developing sustainable touring models, driving sales and developing markets. Artists and organisations also want to build on the opportunities from previous international work.

Organisations are more likely than independent artists to engage in international activity for market development reasons.

Organisations were far more likely than independent artists to include audience development, market development and building international partners (such as agents and managers) in their top three outcomes. Organisations also tend to earn greater amounts from international activity than the general respondent population.

Western Europe continues to be a priority market, but artists and organisations are increasing their focus on North Asia.

Western Europe and North America were the two most common regions of activity in the last two years, followed by North Asia and South-East Asia. When analysed by country, the US, UK, France, Germany and Canada were the five most common locations of activity.

Over the next five years, artists and organisations will continue to prioritise Western Europe, with increased interest in North Asia to match the level of interest in North America.

Previous activity and future interest in the combined North, South and South-East Asia regions is roughly equal to the level of activity and future interest in Western Europe as a whole. At the country level, we see artists and organisations increasing their interest in China, Japan, the US, UK and Germany.

Artists and organisations believe that the best ways to help them engage in international arts activity are through funding, support for international collaborations and relationship development, and support for cultural learning and exchange.

Independent artists also want help to make arts activity profitable and information about opportunities. Organisations seek support for artists to come to Australia and capacity-building

1 Introduction

This is a report on the findings from the Australia Council for the Arts *International Arts Activity Survey*.

BACKGROUND

The purpose of the survey was to consult the arts sector in the development of the Australia Council's future support for international arts activity. The specific research questions and objectives were:

Objectives	Research questions
Benchmark the international activity currently engaged in by artists and arts organisations	How are artists and arts organisations engaging internationally? What are the activities they are doing? How much are they engaging? Where are they going? What is the value of international arts activity? What are the impacts or outcomes of their activity?
Understand what artists and arts organisations want from the future of international engagement	What do artists and arts organisations want to do in the next 5 years? Where do they want to go?
Understand expectations of the Australia Council in supporting International Engagement	What sort of support do they need from us? What are the barriers to engaging internationally?

METHODOLOGY

Survey design

The survey was designed by the BYP Group in consultation with the Australia Council, drawing in part from the 2014 Asialink Arts *Cultural Engagement in Asia Survey*.

Sampling

The target population for the research was essentially all artists and arts organisations to capture information from the broadest population. The Australia Council emailed the survey to a broad range of networks to reach as many artists and arts organisations as possible. These included:

- Regularly-funded arts organisations (about 170).
- State and Territory arts agencies for distribution to their contacts.
- Facebook, Twitter and LinkedIn.
- Other groups.

The Australia Council also wanted the survey to be broadly representative, and to include representation from artists with disability, from culturally diverse backgrounds and Indigenous artists. The Australia Council asked organisations working with diverse artists to distribute the survey to their networks. This included organisations such as Groundswell NSW, Multicultural Arts Victoria, Arts Access Victoria and ICE (Information and Cultural Exchange). This helped to ensure that the research reached a diverse audience.

Implementation

The Australia Council distributed the survey online via SurveyGizmo. The survey was open from 21 January to 13 February 2015.

Analysis

We have conducted statistical analysis of the survey results and thematic coded analysis of open text fields. Questions were mostly not mandatory, so we have analysed each question based on completed survey responses where the question was answered. Where this is not the case, this has been noted in the report.

Wherever possible, we have provided analysis of variations by:

- Artform.

- Independent artists vs organisations (we have added representatives of groups/collectives with independent artists).
- Respondents who have received government funding for their arts activity in the last two years vs respondents who have not (‘government-funded’ vs ‘non-funded’ respondents).

2 Recent International Arts Activity

Research Questions:

- **How are artists and arts organisations engaging internationally?**
- **What are the activities they are doing?**

INTRODUCTION

We asked survey respondents about their activities inside and outside Australia over the last two years (2013-14). This section looks at:

- 'Inbound' activity (international activity undertaken in Australia).
- 'Outbound' activity (international activity undertake outside Australia).
- Variations in activity by artform, independent artists vs organisations, and government-funded vs non-funded respondents.

OUTBOUND ACTIVITY

The top three activities undertaken outside of Australia were:

- Travelled overseas to develop networks, including to meet agents and managers (69 percent).
- Tours, exhibitions, presentations or international publications (64 percent).
- Undertaken collaborations, partnerships or reciprocal programs with international artists or arts organisations (59 percent).

Table 1: Outbound activity, all respondents, 2013-14

Outbound Activity	Independent artists	Organisations	All Respondents
Sold work or rights while overseas	26%	17%	25%
Created new work overseas	50%	25%	45%
Undertaken international market research	23%	28%	26%
Exhibited or presented at international art fairs or markets	27%	32%	31%
International artist or arts worker residency/ies	35%	34%	38%
Travelled overseas to undertake professional development or training	41%	39%	42%
Travelled overseas for cultural learning or exchange	39%	42%	46%
Travelled overseas to see work	50%	49%	53%
Tours, exhibitions, presentations or international publications	60%	60%	64%
Undertaken collaborations, partnerships or reciprocal programs with international artists or arts organisations	55%	68%	59%
Travelled overseas to develop networks (including to meet agents and managers)	63%	72%	69%
Other (please specify)	12%	9%	12%

Independent artists vs organisations

The independent artists and organisations who responded to this question undertook similar levels of activity, with the following exceptions:

- Organisations were more likely to travel overseas to undertake collaborations, partnerships or reciprocal programs (68 percent, compared to 55 percent of independent artists) and develop networks (72 percent, compared to 63 percent of independent artists).
- Independent artists were more likely than organisations to create new work overseas (50 percent, compared to 25 percent of organisations) and sell work or rights while overseas (26 percent, compared to 17 percent of organisations).

Funded vs non-funded survey respondents

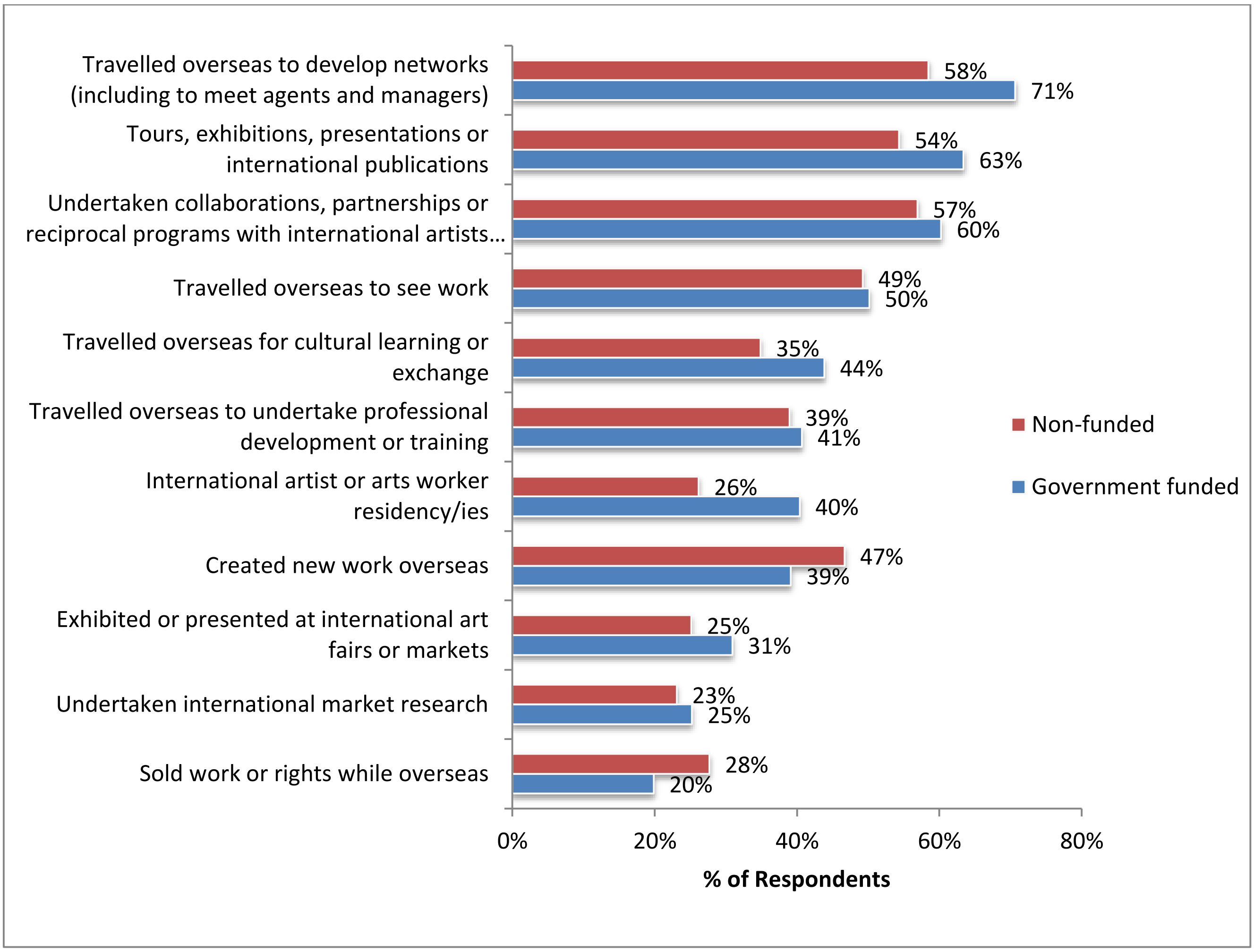
Government-funded vs non-government funded respondents undertook similar levels of activity, with some exceptions. For example, government-funded respondents were more likely to:

- Travel overseas to develop networks (71 percent compared to 59 percent of non-funded respondents).
- Undertake tours, presentations or exhibitions overseas (63 percent compared to 54 percent of non-funded respondents).
- Travel overseas for cultural learning (44 percent compared to 35 percent of non-funded respondents).

Non-funded respondents were more likely than funded respondents to:

- Sell work or rights while overseas (28 percent compared to 20 percent of government-funded respondents).
- Create new work overseas (47 percent compared to 39 percent of government-funded respondents).

Figure 1: International arts activity outside Australia, non-funded vs government-funded respondents



Variations by artform[1]

The following table outlines the most common outbound activity for each artform.

Table 2: Most common outbound activity, by artform

Artform	Most common outbound activity/ies	%
Dance	Undertaken collaborations, partnerships or reciprocal programs with international artists or arts organisations	75%
	Travelled overseas to develop networks (including to meet agents and managers)	75%
Visual arts and craft	Travelled overseas to see work	70%
Literature	Travelled overseas to develop networks (including to meet agents and managers)	70%
Theatre	Travelled overseas to develop networks (including to meet agents and managers)	70%
Contemporary music	Tours, exhibitions, presentations or international publications	79%
Multi-artform	Travelled overseas to develop networks (including to meet agents and managers)	77%
Other	Travelled overseas to develop networks (including to meet agents and managers)	74%
All respondents	Travelled overseas to develop networks (including to meet agents and managers)	70%

There were several variations by artform. For example:

- Visual arts and craft respondents were more likely than others to travel overseas to see work.
- Dance and theatre respondents were the most likely to travel overseas for professional development or training.
- 'International residencies' and 'creating new work overseas' were also common activities for dance respondents.

[1] We have not provided detail for artforms where we received less than 20 responses (ATSI, EEA, CACD, physical theatre/circus and classical music/opera). These artforms are included in 'all respondents.'

Table 3: Outbound international activity by artform, 2013-14

	Dance	Visual arts and crafts	Literature	Theatre	Contemporary music	Multi-artform	Other (please specify)	All respondents
Travelled overseas to see work	38%	70%	26%	61%	25%	52%	60%	52%
Travelled overseas to develop networks (including to meet agents and managers)	75%	67%	71%	70%	64%	77%	74%	70%
Travelled overseas to undertake professional development or training	58%	44%	29%	52%	32%	43%	31%	42%
International artist or arts worker residency/ies	63%	47%	34%	24%	4%	34%	34%	38%
Created new work overseas	63%	58%	29%	30%	36%	48%	31%	45%
Undertaken collaborations, partnerships or reciprocal programs with international artists or arts organisations	75%	49%	51%	55%	46%	75%	54%	59%
Tours, exhibitions, presentations or international publications	67%	67%	54%	61%	79%	52%	60%	64%
Exhibited or presented at international art fairs or markets	25%	35%	43%	33%	32%	23%	37%	32%
Sold work or rights while overseas	4%	35%	23%	18%	43%	18%	29%	25%
Undertaken international market research	21%	28%	20%	30%	29%	32%	23%	27%
Travelled overseas for cultural learning or exchange	46%	51%	49%	49%	25%	48%	46%	45%
Other (please specify)	4%	9%	17%	9%	4%	21%	17%	12%

INBOUND ACTIVITY

The top three international arts activities undertaken in Australia were:

- Collaborations, partnerships or reciprocal programs with international artists or arts organisations (57 percent).
- Brought artists or arts workers from overseas into Australia (43 percent).
- Used connections to culturally diverse communities in Australia to inform or support international activities (42 percent).

'Culturally diverse communities' could have been interpreted to include Indigenous communities, communities of migrants and/or people who speak a language other than English at home.

Table 4: Inbound activity, all respondents, 2013-14

	Independent artists	Organisations	All Respondents
Sold work or rights internationally	35%	20%	32%
Exhibited or presented at international art fairs or markets held in Australia	16%	27%	22%
Participated in key visitor programs in Australia	21%	35%	27%
Showcased / presented at international showcase events held in Australia	26%	35%	34%
Used connections to culturally diverse communities in Australia to inform or support your international activities	39%	40%	42%
Brought artists or arts workers from overseas into Australia	31%	63%	43%
Collaborations, partnerships or reciprocal programs with international artists or arts organisations	46%	73%	57%
Other (please specify)	12%	9%	10%

Independent artists vs organisations

Organisations were more likely than independent artists to engage in international activity in Australia, with the exception of selling work or rights (35 percent of independent artists compared to 20 percent of organisations).

Organisations had the same three most common inbound activities as the general respondent population. Independent artists had two of the same most common inbound activities, but replaced ‘brought artists or arts workers into Australia’ with ‘sold work or rights internationally.’

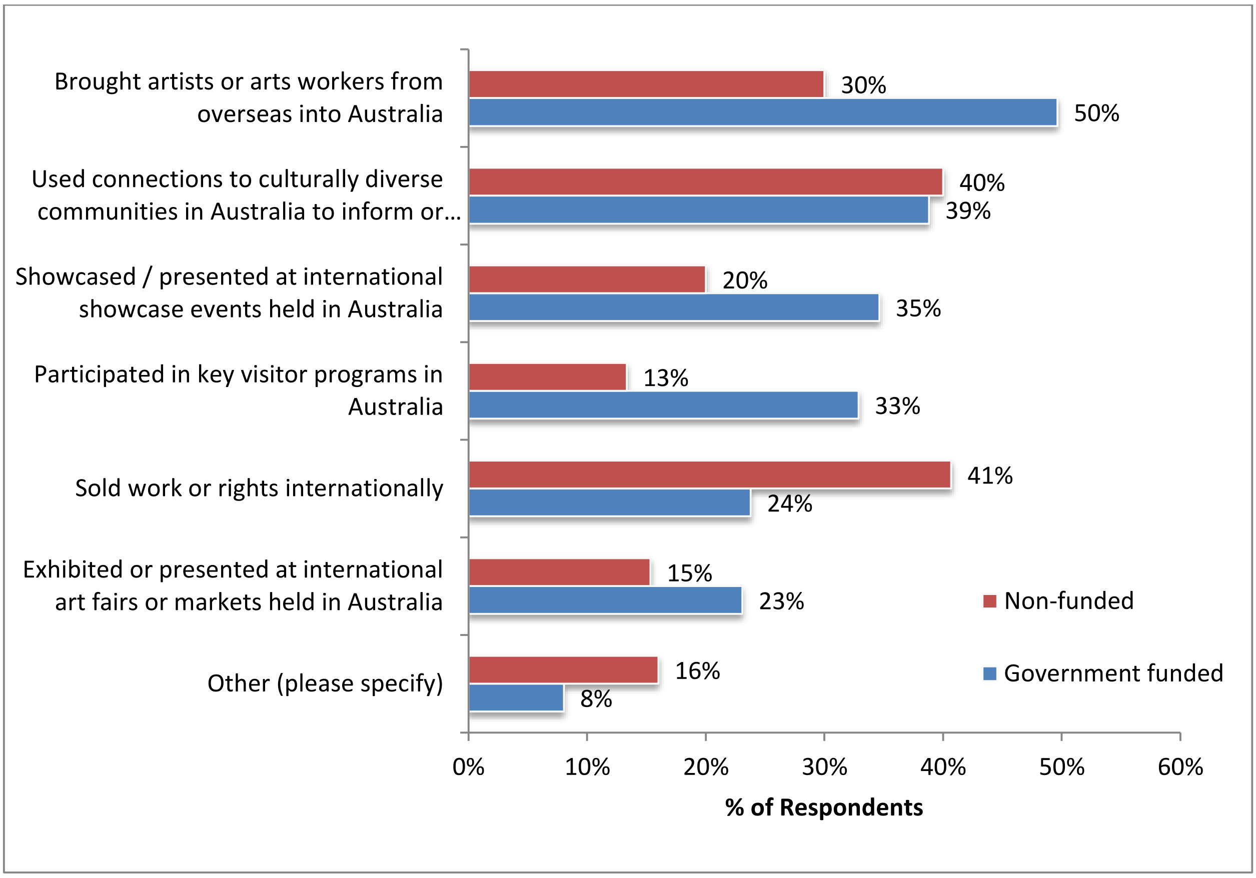
Government-funded vs non-funded respondents

For both government-funded and non-funded respondents, ‘collaborations, partnerships or reciprocal programs’ was the most common activity in Australia (59 percent and 51 percent respectively). Government-funded respondents were more likely than non-funded respondents to:

- Bring artists or arts workers from overseas (50 percent compared to 30 percent of non-funded respondents).
- Showcase/present at international showcase events held in Australia (35 percent compared to 20 percent).
- Participate in key visitor programs (33 percent compared to 13 percent).
- Exhibit or present at international art fairs or markets held in Australia (23 percent compared to 15 percent).

Non-funded respondents were more likely than government-funded respondents to sell work or rights internationally in Australia (41 percent compared to 24 percent of government-funded respondents).

Figure 2: Inbound activity, government-funded vs non-funded respondents



Variations by artform[2]

The following table sets out the most common inbound activity by artform.

Table 5: Most common inbound activity, by artform[3]

Artform	Most common outbound activity/ies	%
Dance	Collaborations, partnerships or reciprocal programs with international artists or arts organisations	52%
Visual arts and craft	Collaborations, partnerships or reciprocal programs with international artists or arts organisations	55%
Literature	Used connections to culturally diverse communities in Australia to inform or support your international activities	47%
	Collaborations, partnerships or reciprocal programs with international artists or arts organisations	47%
Theatre	Collaborations, partnerships or reciprocal programs with international artists or arts organisations	58%
Contemporary music	Sold work or rights internationally	61%
Multi-artform	Collaborations, partnerships or reciprocal programs with international artists or arts organisations	73%
Other	Used connections to culturally diverse communities in Australia to inform or support your international activities	56%
All respondents	Collaborations, partnerships or reciprocal programs with international artists or arts organisations	57%

Artform respondents varied somewhat in terms of their activity. For example:

- Multi-artform respondents were the most likely to bring artists or arts workers to Australia, use connections with culturally diverse communities to inform international activity, and engage in international collaborations, partnerships or reciprocal programs in Australia.
- Contemporary music and literature respondents were the most likely to make international sales of rights or work whilst in Australia.

[2] We have not provided detail for artforms where we received less than 20 responses (ATSI, EEA, CACD, physical theatre/circus and classical music/opera, as well as 'Other, please specify'). These artforms are included in 'all respondents.'

[3] As above.

Table 6: Inbound activity by artform, 2013-14[4]

	Dance	Visual arts and crafts	Literature	Theatre	Contemporary music	Multi-artform	Other (please specify)	All respondents
Showcased / presented at international showcase events held in Australia	33%	31%	33%	50%	26%	34%	42%	34%
Collaborations, partnerships or reciprocal programs with international artists or arts organisations	52%	55%	47%	58%	48%	73%	50%	57%
Brought artists or arts workers from overseas into Australia	48%	42%	20%	50%	44%	57%	42%	43%
Exhibited or presented at international art fairs or markets held in Australia	29%	24%	7%	33%	17%	21%	22%	22%
Sold work or rights internationally	14%	43%	40%	21%	61%	18%	31%	32%
Participated in key visitor programs in Australia	43%	14%	33%	29%	13%	39%	28%	27%
Used connections to culturally diverse communities in Australia to inform or support your international activities	14%	30%	47%	38%	30%	59%	56%	43%
Other (please specify)	10%	10%	7%	4%	9%	11%	14%	10%

[4] As above.

3 Level of International Arts Engagement

Research Question:

- **How much are they engaging?**

INTRODUCTION

We asked respondents to estimate how much money and time they spend on international activity. This gives us a sense of the level of effort artists and organisations expend on engaging internationally.

In this section, we look at:

- The number of international performances, exhibitions and rights sales.
- The time and money spent on international activity for Australian artists and organisations.
- Sources of funding for international activity.
- Variations by artform, independent artists vs organisations, and government vs non-government funded respondents.

INTERNATIONAL PERFORMANCES, EXHIBITIONS AND RIGHTS SALES

38 percent of respondents reported international performances, and the same proportion reported international exhibitions. 12 percent of respondents reported international rights sales.

Most of the respondents who reported international performances, exhibitions or rights sales estimated fairly low counts of activity. For example, in the last two years:

- Of the 170 respondents who reported international performances, most (55 percent) had conducted 10 or fewer performances.
- Of the 170 respondents who reported international exhibitions, most (68 percent) had conducted 3 or fewer exhibitions.
- Of the 53 respondents who reported international rights sales, most (79 percent) had achieved 5 or fewer international rights sales.

However, a handful of respondents had conducted higher volumes of activity over the last two years. For example:

- 31 respondents had conducted 50 or more performances.
- 15 respondents had conducted 10 or more exhibitions.
- 8 respondents had achieved 10 or more international rights sales.

Figure 3: International exhibitions 2013-14

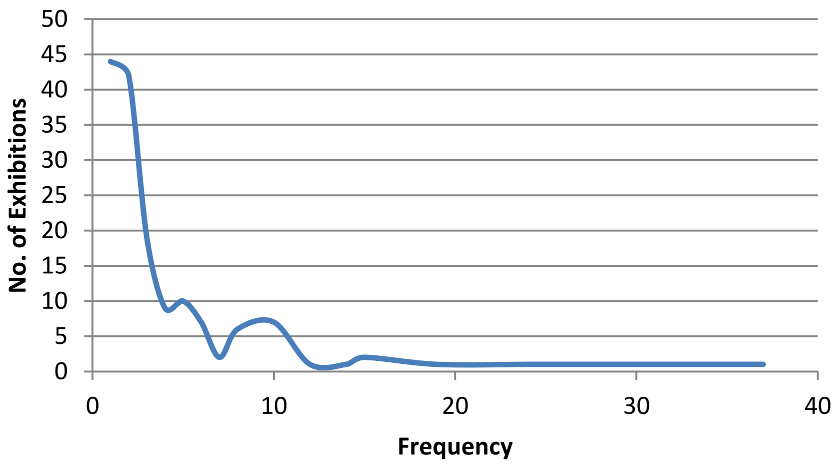


Figure 4: International rights sales 2013-14

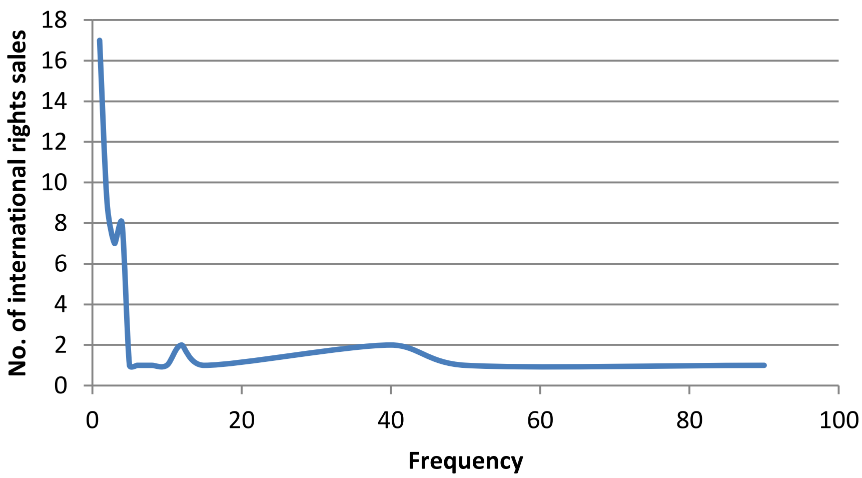
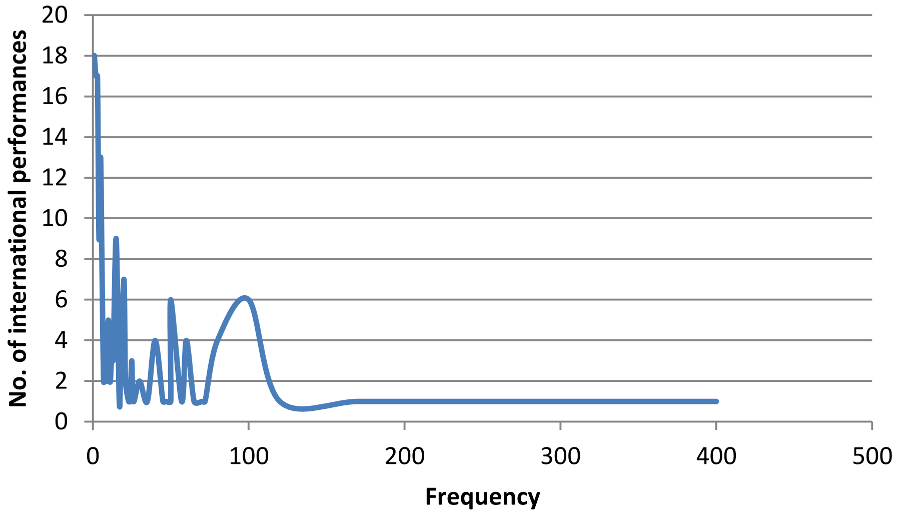


Figure 5: International performances 2013-14

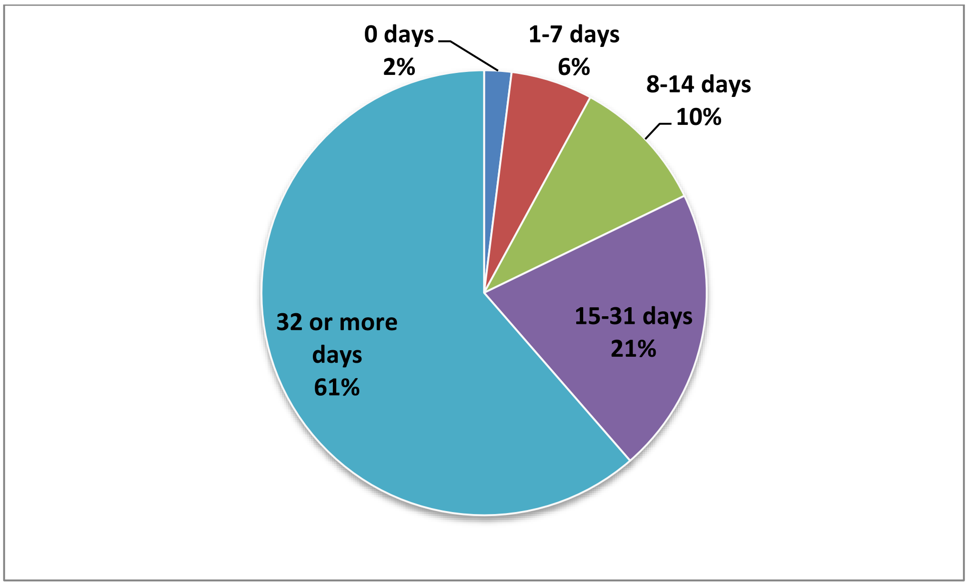


COST OF INTERNATIONAL ARTS ACTIVITY

Time spent on international arts activity

Respondents who undertook international arts activity tended to spend a month or more per year on this activity, which included preparing and undertaking the activity (62 percent). A fifth of respondents spent between two and four weeks (21 percent).

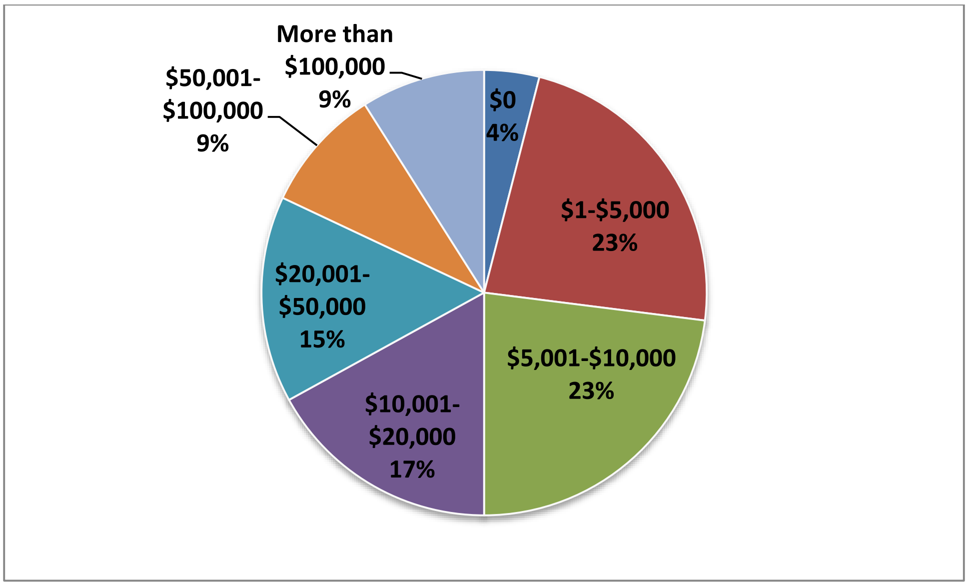
Figure 6: Estimated time spent per year on international arts activity, all respondents



Money spent on international arts activity

Overall, respondents tended to spend between $1-5,000 (23%) or $5,001-$10,000 (23%) per year on international arts activity.

Figure 7: Estimated money spent per year on international arts activity, all respondents



Independent artists vs organisations

As would be expected, independent artists tended to spend less than organisations on international activity, and earn less from international activity. For example:

- The majority of independent artists spent $10,000 or less per year on international arts activity (62 percent).
- The majority of organisations spent more than $20,000 per year on activity (59 percent).

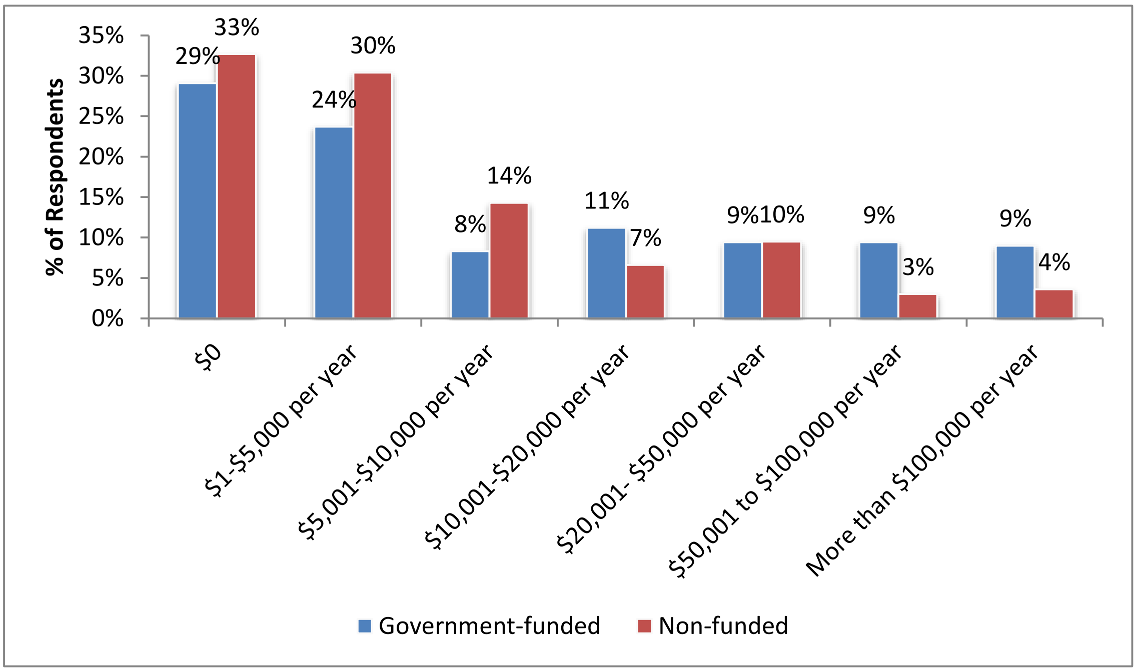
Table 7: Estimated amount spent per year, independent artists vs organisations

	Spent per year	
Range	**Independent Artists**	**Organisations**
$0	6%	4%
$1-$5,000 per year	32%	25%
$5,001-$10,000 per year	28%	22%
$10,001-$20,000 per year	19%	16%
$20,001- $50,000 per year	14%	16%
$50,001 to $100,000 per year	6%	8%
More than $100,000 per year	3%	9%

Government-funded vs non-funded respondents

Non-funded respondents tended to spend less than government-funded respondents. This may be partly because a high proportion of non-funded respondents are independent artists.

Figure 8: Estimated amount spent on international arts activity, government-funded vs non-funded respondents, 2013-14



FUNDING FOR INTERNATIONAL ARTS ACTIVITY

'Own cash' was the most common source of funding (43 percent of respondents), followed by income from fees/sales (18 percent) and the Australia Council (11 percent).

86 percent of respondents to this question[5] used their own cash as a source of funding for international arts activity. For these respondents, their own cash comprised on average about half of their funding.

[5] There were 337 responses to this question.

Half of respondents reported funding from fees or sales. For these respondents, fee/sale income made up on average about a third (36 percent) of funding.

About a third of respondents reported investment from the Australia Council as a source of funding for international arts activity (36 percent).[6] For these respondents, Australia Council funding made up on average 30 percent of funding.

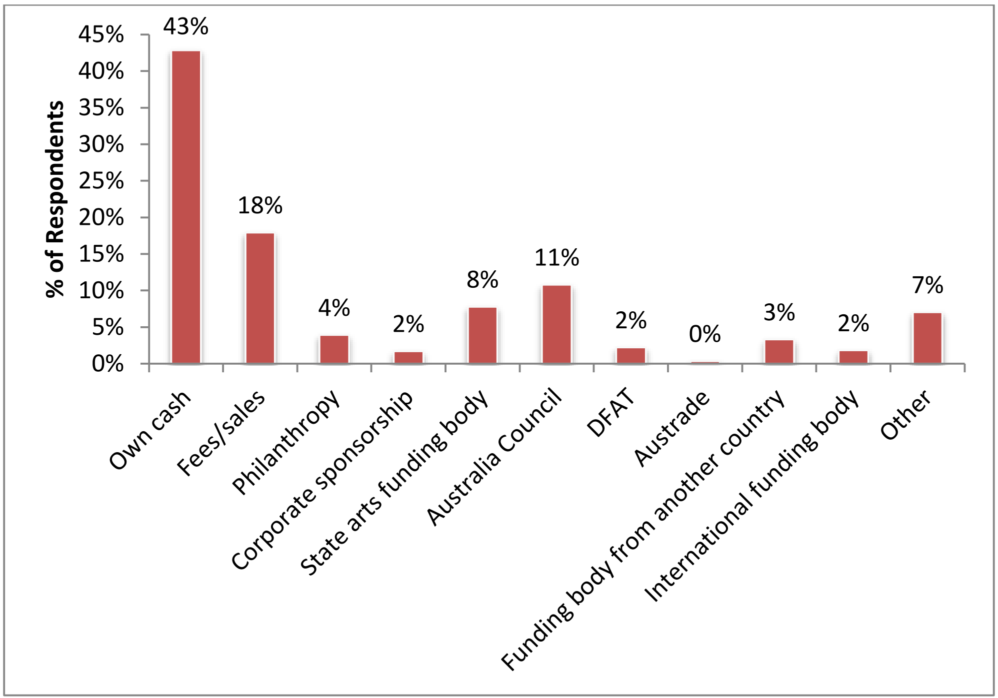
Just 12 percent of respondents reported the Department of Foreign Affairs and Trade (DFAT) as a funding source. DFAT funding represented on average 19 percent of total funding for these respondents, but just 2 percent of funding overall.

Table 8: Sources of funding: estimated breakdown

	Own cash	Fees/sales	Philanthropy	Corporate sponsorship	State arts funding body	Australia Council	DFAT	Austrade	Funding body from another country	International funding body	Other
% of respondents who used this funding source	86%	50%	19%	9%	28%	36%	12%	3%	16%	8%	20%
Average of this funding source (respondents who used it)	50%	36%	20%	19%	28%	30%	19%	14%	21%	24%	36%
Average of this funding source (all respondents)	43%	18%	4%	2%	8%	11%	2%	0%	3%	2%	7%

[6] This could include any funding from the Australia Council – project grants, initiatives, core funding and so on.

Figure 9: Average of funding sources across all respondents[7]



Australian vs international sources of funding

We asked respondents if their funding came mostly from Australian or international sources. 'Funding' could include own cash, government funding, philanthropy, fees and sales.

- 97 percent of respondents to this question reported Australian sources of funding[8] .
- 54 percent of respondents received both Australian and international funding.
- 7 percent of respondents received only international funding.

On average, Australian sources of funding represented 73 percent of total funding. Where respondents received international sources of funding, these represented about 40 percent of their funding.

[7] There were 337 responses to this question.
[8] There were 327 responses to this question.

Table 9: Australian vs international sources of funding

	Australian sources	International sources	Australian/ International sources
% of respondents who used this funding source	97%	66%	n/a
Average of this funding source (respondents who used it)	76%	40%	n/a
Average of this funding source (all respondents)[9]	73%	27%	n/a
% of respondents who used Australian sources only	n/a	n/a	39%
% of respondents who used international sources only	n/a	n/a	7%
% of respondents who used both Australian and international sources	n/a	n/a	54%

[9] This refers to the 327 respondents to this question.

4 Locations of Recent International Arts Activity

Research Question:

- **Where are they going?**

INTRODUCTION

Respondents were asked to select up to ten countries where they had conducted international activity over the last two years (2013-14). This section looks at:

- Countries of international arts activity.
- International regions of arts activity.
- Variations by artform.

COUNTRIES OF ACTIVITY

The five most common countries of international activity were the United States (US), the United Kingdom (UK), France, Germany and Canada.

Table 10: Most common countries of international activity (>30 respondents)

Country	Respondents (Count)	Respondents (%)
United States	161	45%
United Kingdom	138	39%
France	77	22%
Germany	75	21%
Canada	62	17%
China	56	16%
New Zealand	45	13%
Indonesia	44	12%
Netherlands	42	12%
Singapore	41	11%
Italy	35	10%
Japan	34	10%
India	33	9%
South Korea	33	9%
Hong Kong	32	9%

INTERNATIONAL REGIONS OF ACTIVITY

When analysed by international region, Western Europe was by far the most common region of Australian arts activity, with 32 percent of respondents having conducted activity there in the last two years. This was followed by North America (16 percent), North Asia (13 percent) and South-East Asia (11 percent).

The combined results for the North Asia, South Asia and South-East Asia regions represent 32 percent of international activity, equal to Western Europe.

Table 11: International regions of activity

Region	Count	%
Australia	29	2%
Central America and Caribbean	12	1%
Central Asia	0	0%
Eastern Europe	67	5%
North Africa and the Middle East	24	2%
North America	223	16%
North Asia	181	13%
Northern Europe	61	4%
Oceania	49	4%
South America	31	2%
South Asia	35	3%
South-East Asia	155	11%
Southern Europe	73	5%
Sub-Saharan Africa	9	1%
Western Europe	417	31%
Grand Total	**1,366**	**100%**

Variations by artform[10]

The following table sets out the top country and regions of activity by artform.

Table 12: Top country of activity by artform

Artform	Top country of activity	
	Country	***%***
Visual arts and craft	US	11%
Theatre	US	15%
Dance	France	13%
Literature	US	14%
Multi-artform	UK	10%
Contemporary music	US	14%

[10] We have not provided detail for artforms where we received less than 20 responses (ATSI, EEA, CACD, physical theatre/circus and classical music/opera, as well as ‘Other, please specify’). These artforms are included in ‘all respondents.’

Visual arts and craft

The top countries of activity for visual arts and craft respondents were the US (11 percent), UK (11 percent) and Germany (7 percent).

When analysed by region, Western Europe was the most common location of activity (32 percent), followed by North Asia (18 percent) and North America (13 percent).

Table 13: Visual arts and craft responses, location of activity by international region

Region	Count	%
Australia	11	3%
Central America and Caribbean	2	1%
Central Asia	0	0%
Eastern Europe	10	3%
North Africa and the Middle East	6	2%
North America	47	13%
North Asia	63	18%
Northern Europe	12	3%
Oceania	10	3%
South America	6	2%
South Asia	5	1%
South-East Asia	35	10%
Southern Europe	28	8%
Sub-Saharan Africa	2	1%
Western Europe	113	32%
Grand Total	**350**	**100%**

Theatre

The top countries of activity for theatre respondents were the US (15 percent), UK (12 percent) and Canada (6 percent).

Western Europe was the most common region of activity (30 percent), followed by North America (21 percent) and South-East Asia (13 percent).

Table 14: Theatre responses, location of activity by international region

Region	Count	%
Australia	1	1%
Central America and Caribbean	1	1%
Central Asia	0	0%
Eastern Europe	10	7%
North Africa and the Middle East	3	2%
North America	30	21%
North Asia	15	10%
Northern Europe	10	7%
Oceania	4	3%
South America	1	1%
South Asia	2	1%
South-East Asia	18	13%
Southern Europe	4	3%
Sub-Saharan Africa	2	1%
Western Europe	43	30%
Grand Total	**144**	**100%**

Dance

The most common countries of activity were France (13 percent), US (12 percent), the UK and Germany (8 percent each).

Western Europe was the most common region of activity (30 percent), followed by North America (14 percent), North Asia (9 percent) and South-East Asia (9 percent).

Table 15: Dance responses, location of activity by international region

Region	Count	%
Australia	0	0%
Central America and Caribbean	2	2%
Central Asia	0	0%
Eastern Europe	3	3%
North Africa and the Middle East	1	1%
North America	12	14%
North Asia	10	11%
Northern Europe	5	6%
Oceania	3	3%
South America	4	5%
South Asia	3	3%
South-East Asia	8	9%
Southern Europe	5	6%
Sub-Saharan Africa	1	1%
Western Europe	30	34%
Grand Total	**87**	**100%**

Literature

The US (14 percent), UK (13 percent), Germany (8 percent), India (7 percent) and Indonesia (6 percent) were the most common countries of activity for literature respondents.

Western Europe (31 percent), North America (17 percent) and South-East Asia (16 percent) were the most common regions of activity.

Table 16: Literature responses, location of activity by international region

Region	Count	%
Australia	1	1%
Central America and Caribbean	2	2%
Central Asia	0	0%
Eastern Europe	6	5%
North Africa and the Middle East	2	2%
North America	21	17%
North Asia	9	7%
Northern Europe	1	1%
Oceania	5	4%
South America	2	2%
South Asia	9	7%
South-East Asia	20	16%
Southern Europe	9	7%
Sub-Saharan Africa	1	1%
Western Europe	39	31%
Grand Total	**127**	**100%**

Multi-artform

The most common locations of activity were the UK (10 percent), the US (10 percent), France (7 percent), Canada and New Zealand (6 percent each).

Western Europe was the most common region of activity (27 percent), followed by North Asia (17 percent), North America (16 percent) and South-East Asia (13 percent each).

Table 17: Multi-artform responses, location of activity by international region

Region	Count	%
Australia	4	2%
Central America and Caribbean	1	1%
Central Asia	0	0%
Eastern Europe	7	4%
North Africa and the Middle East	1	1%
North America	26	16%
North Asia	28	17%
Northern Europe	4	2%
Oceania	11	7%
South America	5	3%
South Asia	4	2%
South-East Asia	22	13%
Southern Europe	7	4%
Sub-Saharan Africa	1	1%
Western Europe	45	27%
Grand Total	**166**	**100%**

Contemporary music

The US (14 percent), UK (11 percent) and Germany (9 percent) were the most common countries of activity. When analysed by region, Western Europe emerges as the most common location of activity (38 percent), followed by North America (20 percent).

Table 18: Contemporary responses, location of activity by international region

Region	Count	%
Australia	3	2%
Central America and Carribean	1	1%
Central Asia	0	0%
Eastern Europe	8	6%
North Africa and the Middle East	0	0%
North America	27	20%
North Asia	9	7%
Northern Europe	7	5%
Oceania	6	5%
South America	2	2%
South Asia	5	4%
South-East Asia	9	7%
Southern Europe	5	4%
Sub-Saharan Africa	0	0%
Western Europe	51	38%
Grand Total	**133**	**100%**

5 Outcomes of International Arts Activity

Research Questions:

- **What is the value of international arts activity?**
- **What are the impacts or outcomes of their activity?**

INTRODUCTION

This section looks at the value, impacts and outcomes from international arts activity. We examine survey responses about:

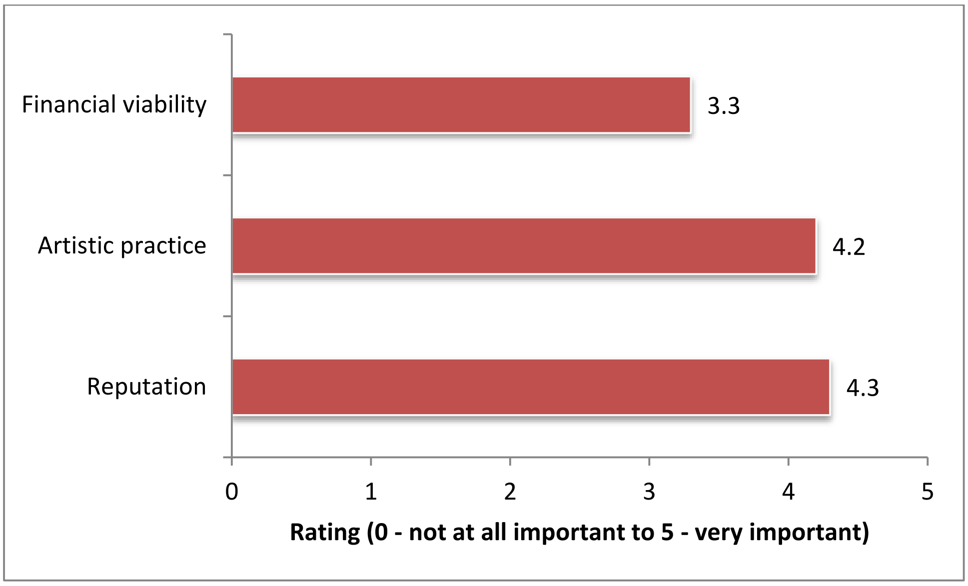
- Outcomes from international arts activity.
- Income from international arts activity.
- Perceived importance of international arts activity.

We also review variations by artform, organisations vs independent artists, and government-funded vs non-funded respondents.

IMPORTANCE OF INTERNATIONAL ARTS ACTIVITY

International arts activity is important for artists and organisations' reputation and artistic practice. There was very little difference between independent artists and organisations, or between government-funded and non-funded respondents.

Figure 10: Perceived importance of international arts activity, all respondents



Variation by artform[11]

Literature was the only artform segment to rate international activity's importance to artistic practice at less than 4.0 out of 5.0 (3.5).

Table 19: Perceived importance of international activity, by artform

	Dance	Visual arts and craft	Literature	Theatre	Contemporary music	Multi-artform	All respondents
Artistic practice	4.5	4.2	3.5	4.4	4.0	4.4	4.2
Financial viability	3.5	3.5	2.9	3.4	3.2	3.4	3.3
Reputation	4.1	4.5	4.0	4.5	4.5	4.2	4.3

[11] We have not provided detail for artforms where we received less than 20 responses (ATSI, EEA, CACD, physical theatre/circus and classical music/opera, as well as 'Other, please specify'). These artforms are included in 'all respondents.'

OUTCOMES FROM INTERNATIONAL ARTS ACTIVITY

Overall, the ‘development of artistic practice,’ ‘future international projects’ and ‘being part of the global arts landscape’ were the top three outcomes (45 percent, 45 percent and 42 percent respectively).

Table 20: Outcomes from international arts activity, all respondents

	Independent artists	Organisations	All Respondents
Formal and informal critical review	15%	5%	12%
Arts-related income	18%	14%	18%
Knowledge and skills	34%	23%	29%
New collaborators	24%	29%	25%
Building international partners, such as agents and managers	23%	33%	25%
Development of artistic practice	50%	33%	45%
Audience development	21%	33%	27%
Market development	18%	38%	25%
Being part of the global arts landscape	44%	39%	42%
Future international projects	44%	45%	45%

Independent artists vs organisations

Independent artists’ top three outcomes were the same as for the overall respondent population. For organisations, ‘market development’ was in the top three outcomes instead of ‘development of artistic practice.’

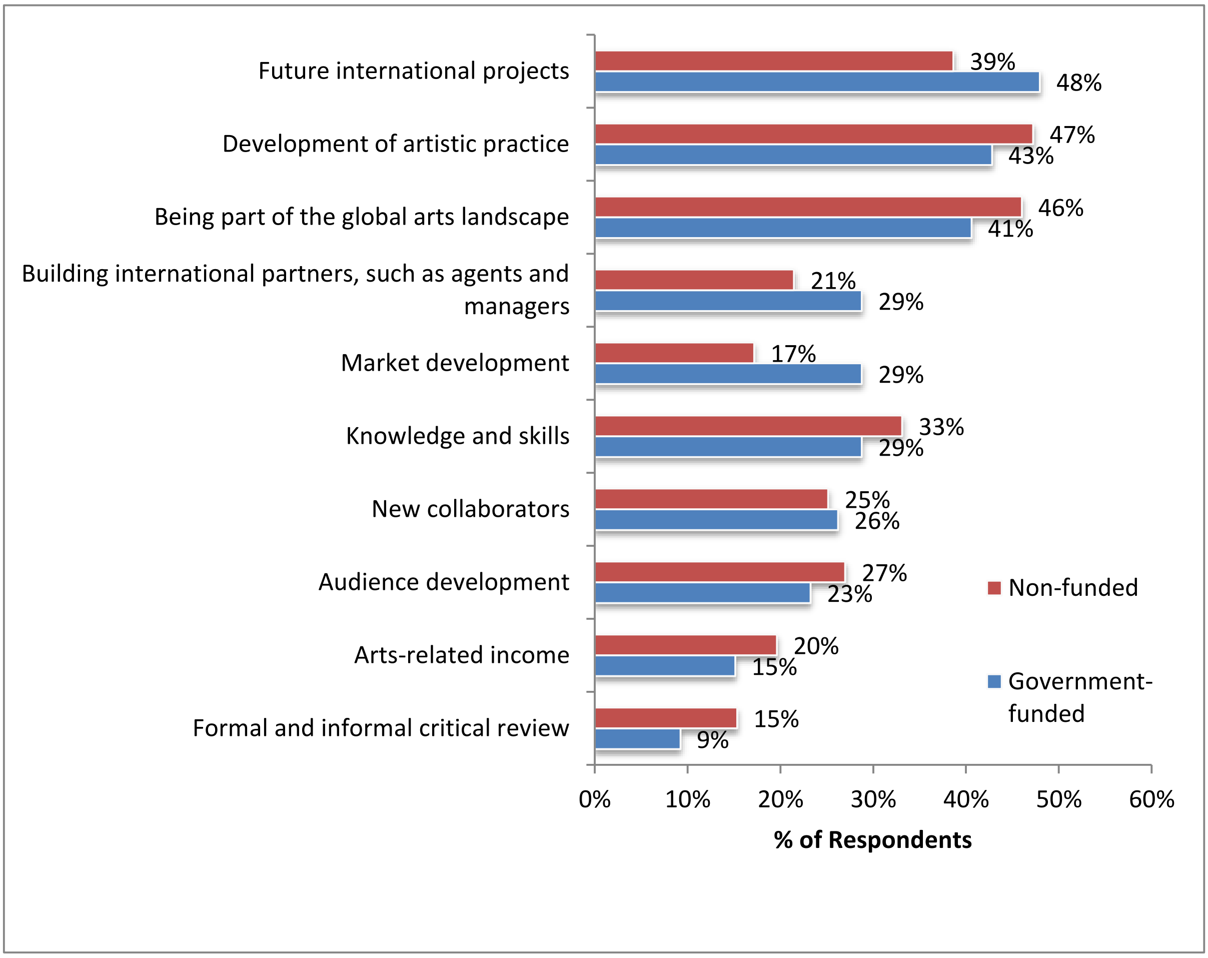
Independent artists and organisations also differed on the following outcomes:

- Organisations were more likely to include audience development in their top three outcomes than independent artists (33 percent compared to 21 percent).
- They were also more likely to include market development (38 percent compared to 18 percent of independent artists).
- Independent artists were more likely than organisations to include the development of artistic practice in their top three outcomes (50 percent compared to 33 percent of organisations).
- Organisations were more likely than independent artists to include building international partners, such as agents and managers (33 percent compared to 23 percent of independent artists).

Government-funded vs non-funded respondents

Both government-funded and non-funded respondents’ shared the same top three outcomes as the general respondent population. Government-funded respondents were more likely to include ‘market development’ than non-funded respondents (29 percent compared to 17 percent). This may be partly due to the higher proportion of independent artists amongst non-funded respondents.

Figure 11: Top three outcomes, government-funded vs non-funded respondents



Variations by artform[12]

The following table sets out the top outcome for each artform.

Table 21: Top outcome by artform, 2013-14

Artform	Top outcome	%
Dance	Future international projects	58%
Visual arts and craft	Development of artistic practice	52%
Literature	Audience development	53%
Theatre	Future international projects	53%
Contemporary music	Market development	52%
Multi-artform	Development of artistic practice	54%
All respondents	Development of artistic practice	45%

There were several variations by artform. For example:

- Audience development was in the top three outcomes for about half of literature and contemporary music respondents, compared to 27 percent of all respondents.
- Market development was in the top three outcomes for more than half of contemporary music respondents, compared to 25 percent of all respondents.
- Arts-related income was in the top three outcomes for about a third of theatre respondents, compared to 18 percent of all respondents.

[12] We have not provided details for artforms where we received less than 20 responses (ATSI, EEA, CACD, physical theatre/circus and classical music/opera, as well as 'Other, please specify'). These are included in 'all respondents.'

Table 22: Top three outcomes by artform, 2013-14

	Dance	Visual arts and craft	Literature	Theatre	Contemporary music	Multi-artform	All respondents
Arts-related income	8%	24%	17%	35%	14%	11%	18%
Audience development	17%	21%	53%	12%	48%	26%	27%
Development of artistic practice	54%	52%	39%	47%	28%	54%	45%
Knowledge and skills	17%	38%	33%	18%	17%	20%	29%
Future international projects	58%	42%	25%	53%	48%	44%	45%
Market development	17%	17%	22%	35%	52%	26%	25%
New collaborators	29%	23%	17%	27%	14%	24%	25%
Being part of the global arts landscape	50%	41%	50%	35%	28%	46%	42%
Formal and informal critical review	4%	16%	8%	9%	14%	22%	12%
Building international partners, such as agents and managers	38%	21%	22%	27%	31%	20%	25%
Other (please specify)	4%	2%	6%	0%	0%	7%	5%

INCOME FROM INTERNATIONAL ARTS ACTIVITY

Most respondents earned little or no income from their international activity. For example:

- 30 percent earned nothing (directly) from their international arts activity.
- 37 percent earned between $1 and $10,000 per year.

Table 23: Estimated average income earned per year from international arts activity, royalties or sales, all respondents

	Independent artists	Organisations	All respondents
$0	31%	30%	30%
$1-$5,000 per year	31%	17%	26%
$5,001-$10,000 per year	12%	7%	11%
$10,001-$20,000 per year	11%	7%	9%
$20,001- $50,000 per year	9%	10%	9%
$50,001 to $100,000 per year	4%	13%	7%
More than $100,001 per year	2%	16%	7%
Total	**100%**	**100%**	**100%**

Independent artists vs organisations

Organisations are more likely to earn greater amounts than the general respondent population. For example:

- 16 percent of organisations earn more than $100,000 per year (compared to 7 percent of all respondents).
- 13 percent earn between $50,001 and $100,000 per year (compared to 7 percent of all respondents).

Direct return on investment

Overall, respondents do not directly recoup their investment in international activity. As a group they tend to spend more than they earn from activities.

However, it does appear that organisations earning more than $50,000 per year are making a positive, direct return on investment.

Table 24: Estimated average expenditure and income, all respondents

	Independent Artists		Organisations		All Respondents	
	Spent	Earned	Spent	Earned	Spent	Earned
$0	6%	31%	4%	30%	4%	30%
$1-$5,000 per year	32%	31%	25%	17%	25%	26%
$5,001-$10,000 per year	28%	12%	22%	7%	22%	11%
$10,001-$20,000 per year	19%	11%	16%	7%	16%	9%
$20,001- $50,000 per year	14%	9%	16%	10%	16%	9%
$50,001 to $100,000 per year	6%	4%	8%	13%	8%	7%
More than $100,000 per year	3%	2%	9%	16%	9%	7%

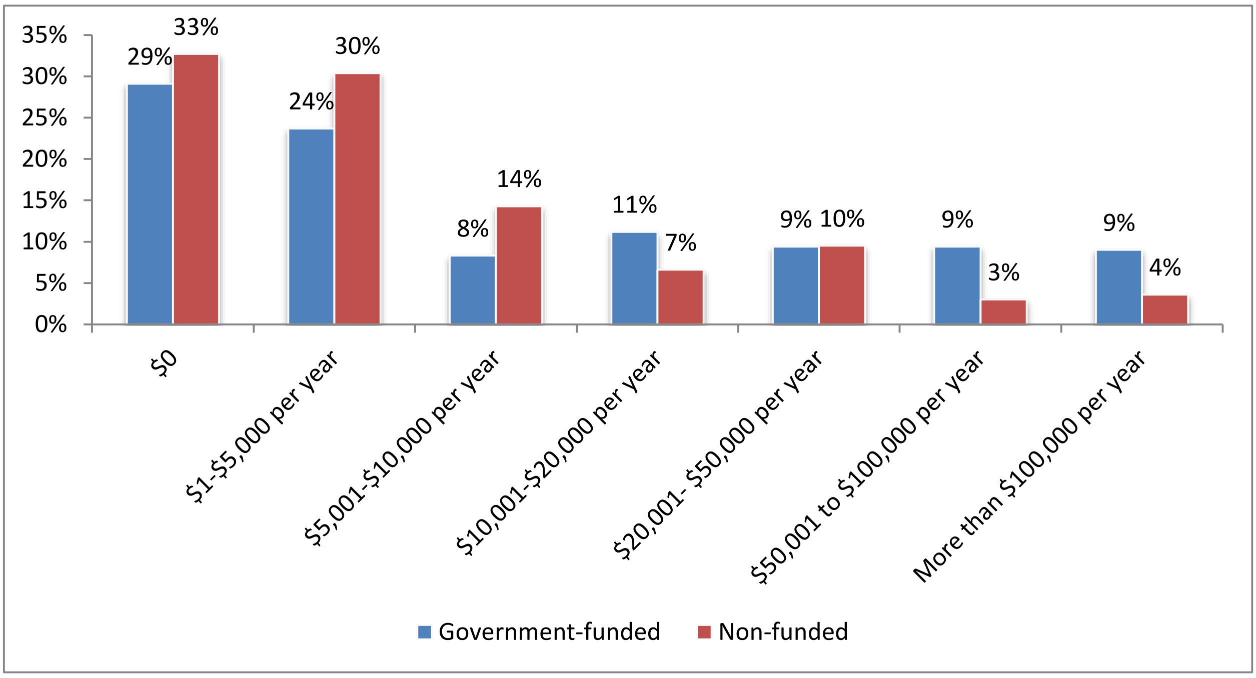
Non-funded vs government-funded respondents

Non-funded respondents tended to earn less from international activity than government-funded respondents. This may partly be due to the high proportion of non-funded respondents that are independent artists. For example:

- 30 percent of non-funded respondents earned between $1 and $5,000 per year (compared to 24 percent of government-funded respondents).
- 14 percent earn between $5,001 and $10,000 per year (compared to 8 percent of government-funded respondents).

- They were less likely to earn more than $50,000 per year than government-funded respondents (7 percent compared to 18 percent of government-funded respondents).

Figure 12: Income from international arts activity, government-funded vs non-funded respondents



6 Challenges of International Arts Activity

Research Question:

- **What are the barriers to engaging internationally?**

INTRODUCTION

Respondents were asked to identify the top three challenges encountered when engaging in international arts activity. This section looks at challenges and variations by:

- Organisations vs independent artists.
- Government-funded vs non-funded respondents.
- Artform.

TOP THREE CHALLENGES

Overall, the top three challenges from the list provided encountered by respondents while engaging internationally were:

- Lack of support to develop relationships (48 percent).
- Support is there, but it is not strategic (29 percent).
- Limited knowledge of international market opportunities (29 percent).

30 percent of respondents included a challenge in the 'other, please specify' option in their top three. We examine these later in this section.

Table 25: Top three challenges, all respondents

	Independent artists	Organisations	All Respondents
Visa constraints	18%	10%	16%
Limited knowledge of working in other cultures	10%	11%	11%
Taxation issues	14%	13%	14%
Non-competitive pricing of your work overseas	19%	16%	17%
Limited knowledge of the process of engaging internationally	27%	16%	23%
Limited knowledge of international market opportunities	31%	25%	29%
Inadequate support for preparatory activities, such as a translation or a remount of your work	27%	25%	26%
Lack of support to conduct on-the-ground market research	24%	32%	27%
Support is there, but it is not strategic	26%	37%	29%
Lack of support to develop relationships	43%	52%	48%
Other (please specify)	29%	27%	30%

Organisations vs independent artists

Organisational respondents included, ‘lack of support to conduct on-the-ground market research’ in their top three challenges. This replaces ‘limited knowledge of international market opportunities.’ This aligns with organisations including ‘market development’ in their top three outcomes from international activity, rather than ‘development of artistic practice.’

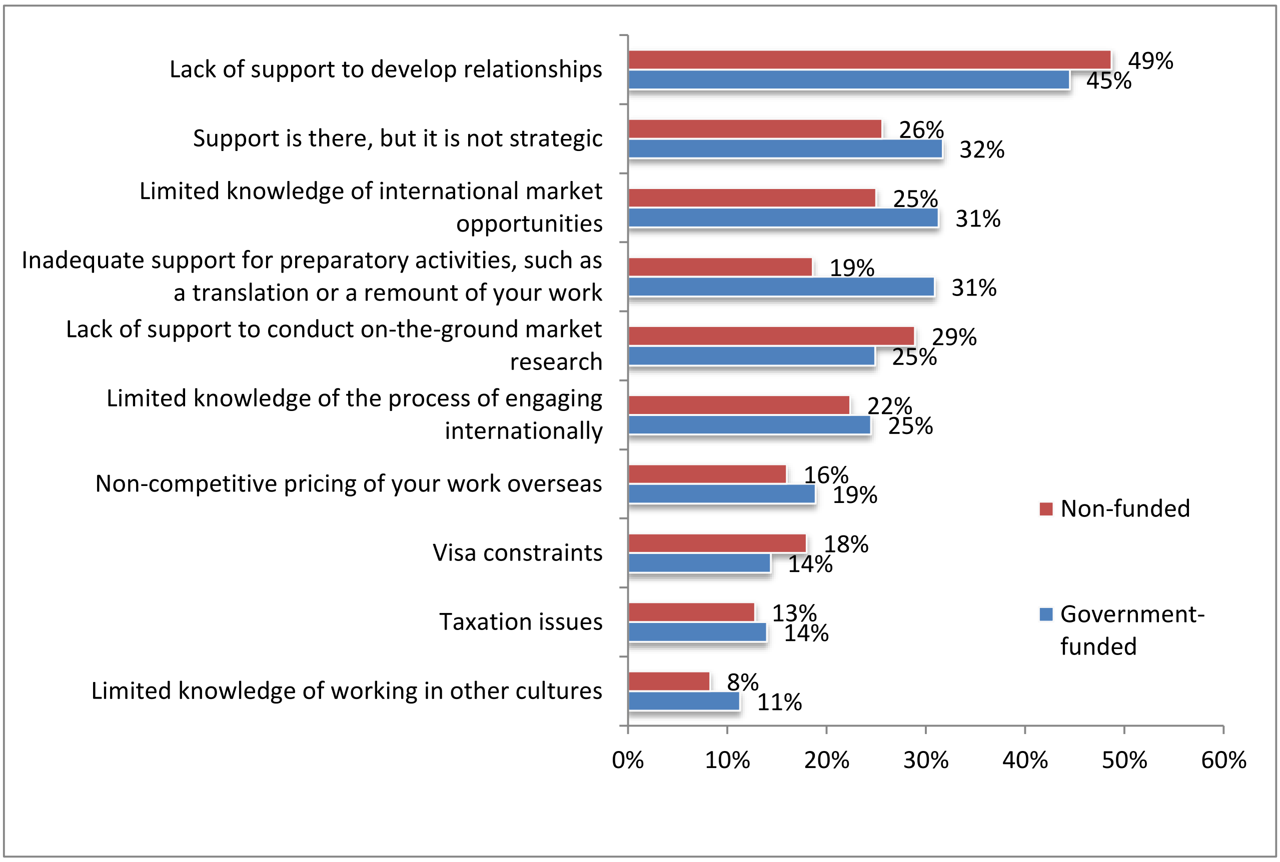
Independent artist respondents included ‘limited knowledge of the process of engaging internationally’ (27 percent) and, ‘inadequate support for preparatory activities, such as a translation or a remount’ (27 percent) in their top challenges.

Government-funded vs non-funded respondents

Government-funded respondents shared the same top three challenges as the general respondent population. For this group, ‘inadequate support for preparatory activities’ was an equal top third challenge to, ‘limited knowledge of international opportunities’ (31 percent each).

Non-funded respondents shared the same top three challenges as organisational respondents. This is not due to the proportion of organisations in this group, because independent artists are over-represented amongst non-funded respondents. We surmise that an absence of government funding may make the need for support to conduct on-the-ground market research more pressing for non-funded respondents.

Figure 13: Top three challenges, government-funded vs non-funded respondents



Variations by artform[13]

The following table sets out the top challenge for each artform. Theatre was the only artform where the top challenge was not, 'lack of support to develop relationships.'

Table 26: Top challenge by artform

Artform	Top outcome	%
Dance	Lack of support to develop relationships	42%
Visual arts and craft	Lack of support to develop relationships	53%
Literature	Lack of support to develop relationships	50%
Theatre	Inadequate support for preparatory activities, such as a translation or a remount of your work	41%
Contemporary music	Lack of support to develop relationships	46%
Multi-artform	Lack of support to develop relationships	59%
All respondents	Lack of support to develop relationships	48%

There were several variations by artform. These included:

- About a third of theatre respondents listed taxation in their top three challenges, compared to 14 percent of all respondents.
- About a third of theatre and contemporary music respondents included visa constraints in their top three challenges, compared to 16 percent overall.
- Inadequate support for preparatory activities was more of a problem for dance (38 percent) and theatre (41 percent) respondents than the general survey population (26 percent).

[13] We have not provided details for artforms where we received less than 20 responses (ATSI, EEA, CACD, physical theatre/circus and classical music/opera, as well as 'Other, please specify.' These are included in 'all respondents.'

Table 27: Top three challenges by artform

	Dance	Visual arts and crafts	Literature	Theatre	Contemporary music	Multi-artform	All respondents
Limited knowledge of international market opportunities	33%	34%	28%	31%	36%	24%	29%
Limited knowledge of working in other cultures	8%	16%	11%	16%	4%	7%	11%
Lack of support to develop relationships	42%	53%	50%	28%	46%	59%	48%
Support is there, but it is not strategic	38%	29%	28%	13%	36%	22%	29%
Non-competitive pricing of your work overseas	25%	12%	14%	31%	18%	17%	17%
Taxation issues	8%	7%	8%	34%	11%	20%	14%
Visa constraints	8%	10%	8%	28%	36%	20%	16%
Lack of support to conduct on-the-ground market research	8%	25%	28%	22%	39%	33%	27%
Inadequate support for preparatory activities, such as a translation or a remount of your work	38%	20%	28%	41%	11%	33%	26%
Limited knowledge of the process of engaging internationally	33%	32%	14%	28%	32%	11%	23%
Other (please specify)	38%	29%	25%	19%	18%	35%	30%

Open-text responses

30 percent of respondents included an open-text response in their top three challenges. An examination of these responses indicates that costs and financing are obstacles to international activity. This is the same for open-text responses from organisational and independent artist respondents, as well as government-funded and non-funded respondents.

7 Future International Arts Activity

Research Question:

- **What do artists and arts organisations want to do in the next five years?**

INTRODUCTION

This section sets out key findings from the survey in relation to respondents' future international arts activity. We have looked at results from the survey for:

- Open-text responses about goals of international arts activity for the next five years (2015 to 2019).
- Priorities for inbound and outbound activity.

GOALS FOR INTERNATIONAL ARTS ACTIVITY

94 percent of respondents hope to engage in international arts activity, either in Australia or overseas, over the next five years (2015 to 2019).

Respondents were asked to describe their top goals for international arts activity over the next five years. An examination of the open-ended responses suggests that the top goals that the majority of respondents are pursuing through their international activity fall into the following categories:

- Exhibiting, touring and presenting work (18 percent).
- Creative collaboration and reciprocal exchange (25 percent).
- Market development activity (25 percent).
- Enhancing the financial sustainability and return on investment of international engagement (17 percent).
- Residencies and artistic research and development (7 percent).
- Other goals, including studying overseas, developing new work for international markets, and professional development (7 percent).

Exhibiting, touring and presenting work

For many respondents, exhibiting, touring and presenting work in international contexts is key to their future plans. From large-scale tours or presentations at international festivals, biennales, museums and galleries to smaller scale presentations of work in local contexts, delivering work to international audiences are important goals for respondents.

Creative collaboration and reciprocal exchange

Engaging in creative and reciprocal exchange is another goal shared among many respondents across the breadth of artforms, but especially multi-artform and visual arts and crafts artists. Planned activity is wide-ranging and includes collaborating and co-producing new work, community arts and cultural development activity, cultural and skills exchange, workshops and developing artistic networks. Finding ways to continue the collaborative activity back in Australia was also important for some respondents.

Residencies and artistic research and development

Some respondents were keen to pursue the related goal of working in international contexts, for example via residencies.

Market development

Developing profile, professional on the ground market networks such as gallery or commercial representation, relationships with presenters, publishers etc. and attending or presenting at international art fairs, conferences or other showcases are also vital areas of activity for respondents.

Enhancing the financial sustainability of international activity and their direct return on investment from it

Finding ways to enhance the financial sustainability and return on investment of their international activity is very important for many respondents, especially those from the world of visual arts and crafts, literature, contemporary music and theatre. Developing sustainable touring models, fundraising, driving sales, recording and publishing were some ways in which respondents planned to pursue this goal along with building on the opportunities and success that their previous international activity had given rise to.

PRIORITY OUTBOUND ACTIVITIES

Respondents were asked to rate activities which take place outside of Australia in terms of their priority for themselves or their organisation over the next five years on a scale of 0.0 to 5.0 ('not a priority' to 'a top priority').[14]

Overall, the top priority outbound activities for respondents are:

- Tours, exhibitions, presentations and international publications (4.2).
- Undertake collaborations, partnerships or reciprocal programs with international artists or arts organisations (4.0).
- Travel overseas to develop networks (including to meet agents and managers) (3.9).

Table 28: Priorities for international outbound activity, all respondents

	Independent artists	Organisations	All Respondents
Travel overseas to see work	3.2	2.6	3.0
Sell work or rights while overseas	3.4	2.8	3.3
Create new work overseas	3.8	2.8	3.5
Exhibit or present at international art fairs or markets	3.3	2.9	3.3
Travel overseas to undertake professional development or training	3.6	3.0	3.5
Undertake international market research	2.6	3.1	2.8
International artist or arts worker residency/ies	3.7	3.3	3.6
Travel overseas for cultural learning or exchange	3.8	3.3	3.7
Travel overseas to develop networks (including to meet agents and managers)	3.9	3.9	3.9
Tours, exhibitions, presentations or international publications	4.2	4.1	4.2
Undertake collaborations, partnerships or reciprocal programs with international artists or arts organisations	3.9	4.2	4.0

[14] Open-text responses mirrored these options so we have not included a description here.

Organisations vs independent artists

Independent artists and organisations shared the same top three priorities as the general respondent population.

Independent artists were more likely than organisations to prioritise:

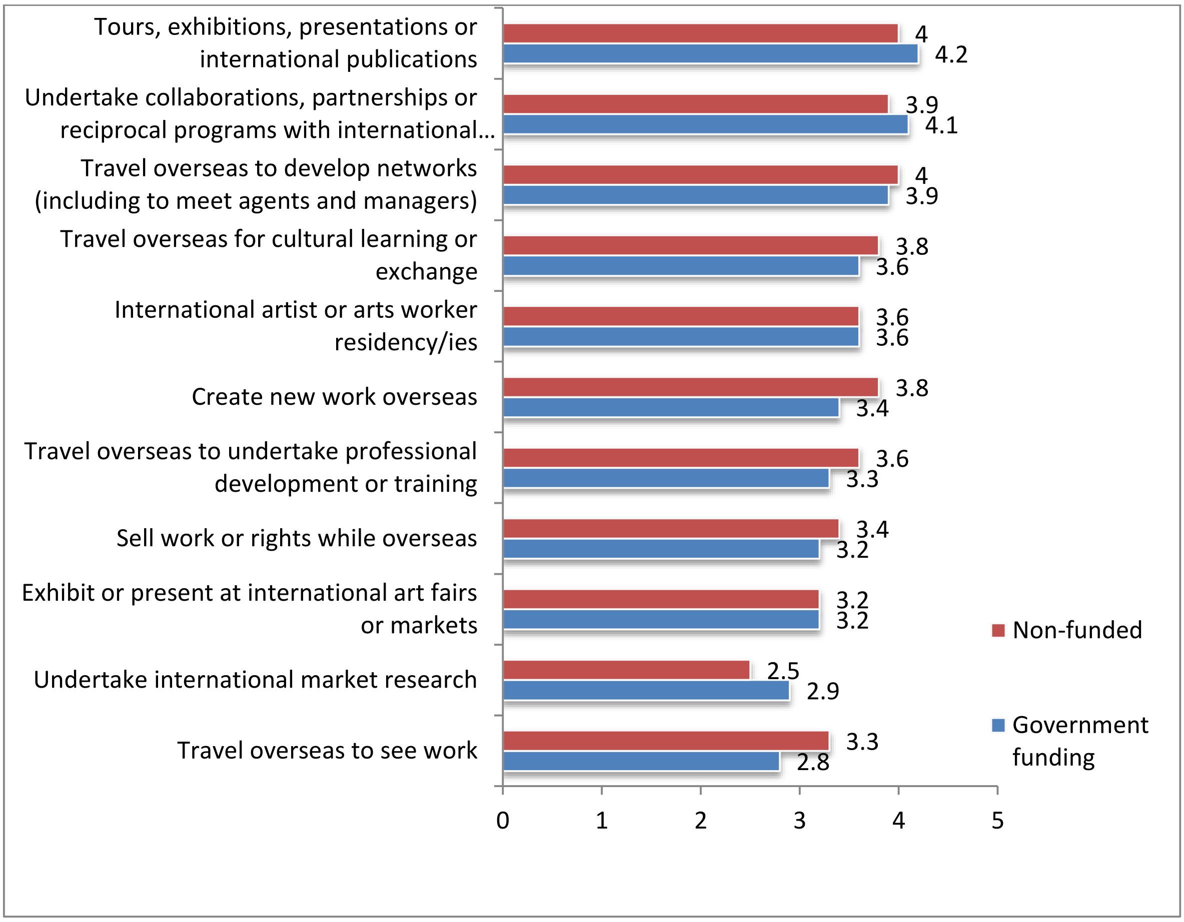
- Travelling overseas for cultural learning or exchange.
- Professional development or training.
- Creating new work overseas.
- Selling work or rights while overseas.
- Travelling overseas to see work.

Organisations were more likely to prioritise ‘market research’ than independent artists.

Government-funded vs non-funded respondents

There was little difference between non-funded and government-funded respondents.

Figure 14: Priorities for international arts activity outside Australia, government-funded vs non-funded respondents



Variations by artform[15]

The top priorities for outbound activity for each artform are outlined in the following table.

Table 29: Top priority outbound activities by artform

Artform	Outbound activity	Rating (out of 5)
Visual arts and craft	Tours, exhibitions, presentations or international publications	4.3
Theatre	Tours, exhibitions, presentations or international publications	4.4
Dance	Tours, exhibitions, presentations or international publications	4.5
Contemporary music	Travel overseas to develop networks (including to meet agents and managers)	4.1
Literature	Tours, exhibitions, presentations or international publications	3.8
Multi-artform	Undertake collaborations, partnerships or reciprocal programs with international artists or arts organisations	4.3

There were several variations by artform. For example:

- International residencies are a priority for most respondents (3.8), except for contemporary music respondents (2.5).
- As to be expected, exhibiting and presenting at international art fairs and markets is a priority for visual arts and craft, theatre and dance respondents, but not for contemporary music, literature or multi-artform respondents.
- Undertaking international market research is a priority for theatre, dance and multi-artform respondents, but not for visual arts and craft, contemporary music or literature respondents.

[15] We have not provided details for artforms where we received less than 20 responses (ATSI, EEA, CACD, physical theatre/circus and classical music/opera, as well as ‘Other, please specify.’) These have been included in ‘all respondents.’

Table 30: Outbound activity priorities, by artform

	Visual arts and craft	Theatre	Dance	Contemporary music	Literature	Multi-artform	All respondents
Travel overseas to see work	3.5	3.0	3.0	1.7	2.3	3.6	3.0
Travel overseas to develop networks (including to meet agents and managers)	4.0	3.9	3.8	4.1	3.5	4.1	3.9
Travel overseas to undertake professional development or training	3.6	3.3	3.5	2.8	2.8	3.6	3.5
International artist or arts worker residency/ies	4.0	3.7	3.9	2.5	3.0	3.8	3.6
Create new work overseas	3.7	3.4	4.0	3.2	2.9	3.8	3.5
Undertake collaborations, partnerships or reciprocal programs with international artists or arts organisations	4.0	4.1	4.3	3.5	3.6	4.3	4.0
Tours, exhibitions, presentations or international publications	4.3	4.4	4.5	3.8	3.8	4.2	4.2
Exhibit or present at international art fairs or markets	3.6	4.0	3.3	2.9	2.9	2.8	3.3
Undertake international market research	2.5	3.5	3.1	2.3	2.4	3.2	2.8
Sell work or rights while overseas	3.5	3.7	3.2	3.3	3.3	2.8	3.3
Travel overseas for cultural learning or exchange	3.8	3.6	3.4	2.8	3.4	4.0	3.7

PRIORITY INBOUND ACTIVITY

Respondents were also asked to rate international activities which take place in of Australia in terms of their priority for themselves or their organisation over the next five years on a scale of 0.0 to 5.0 (‘not a priority’ to ‘a top priority.’)

Overall, these activities were not considered as important as activities undertaken overseas. The top three priorities for all respondents were:

- Undertake collaborations, partnerships or reciprocal programs with international artists or arts organisations (3.8).
- Showcase/present at international showcase events held in Australia (3.6).
- Sell works or rights internationally (3.5).

Table 31: Priorities for inbound activity, all respondents

	Independent artists	Organisations	All Respondents
Exhibit or present at international art fairs or markets held in Australia	3.2	2.9	3.2
Sell work or rights internationally	3.6	3.2	3.5
Participate in key visitors programs in Australia	3.2	3.4	3.2
Use connections to culturally diverse communities in Australia to inform or support your international activities	3.3	3.5	3.4
Showcase / present at international showcase events held in Australia	3.6	3.6	3.6
Bring artists or arts workers from overseas into Australia	3.2	3.7	3.4
Collaborations, partnerships or reciprocal programs with international artists or arts organisations	3.8	4.2	3.8

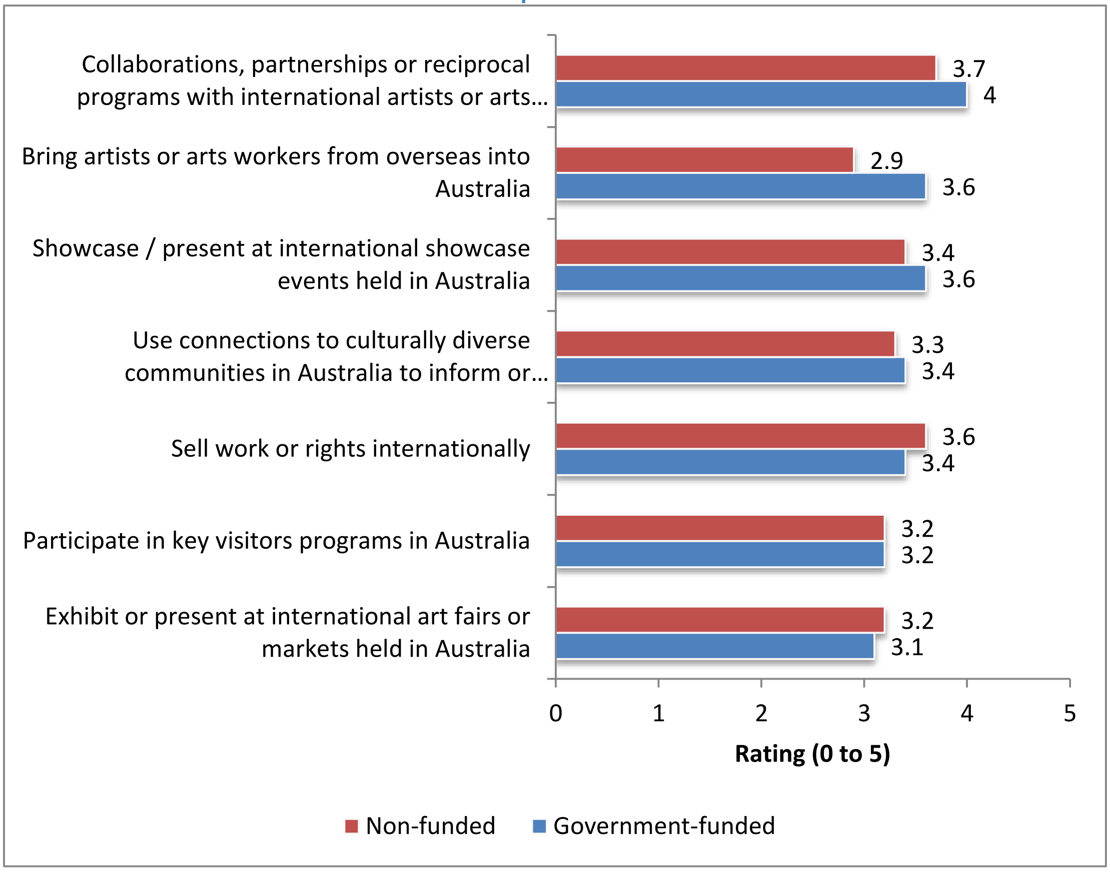
Organisations vs independent artists

Independent artists shared the same top three priorities as the general respondent population. Organisations included, 'bring artists or arts workers from overseas into Australia,' (3.7) in their top three priorities, replacing, 'sell works or rights internationally.'

Government-funded vs non-funded respondents

There was very little difference based on the funding status of respondents. The only exception was that government-funded respondents felt that bringing artists or arts workers to Australia was a priority, whilst non-funded respondents did not.

Figure 15: Priorities for international arts activity inside Australia, government-funded vs non-funded respondents



Variations by artform[16]

The top priorities for inbound activity for each artform are outlined in the following table.

Table 32: Top priority inbound activities, by artform

Artform	Outbound activity	Rating (out of 5)
Visual arts and craft	Collaborations, partnerships or reciprocal programs with international artists or arts organisations	3.7
Theatre	Collaborations, partnerships or reciprocal programs with international artists or arts organisations	4.1
Dance	Collaborations, partnerships or reciprocal programs with international artists or arts organisations	4.2
Contemporary music	Showcase / present at international showcase events held in Australia	3.6
Literature	Collaborations, partnerships or reciprocal programs with international artists or arts organisations Sell work or rights internationally	3.6
Multi-artform	Collaborations, partnerships or reciprocal programs with international artists or arts organisations	4.2

There are some variations by artform. These include:

- Bringing artists or arts workers to Australia is a priority for theatre and dance respondents (4.1 and 3.7 respectively).
- Exhibiting at arts fairs and markets in Australia is also a priority for theatre and dance respondents (4.0 and 3.7 respectively).
- Using connections to culturally diverse communities in Australia to inform or support international work was a priority for multi-artform respondents (3.6).

[16] We have not included details for artforms where we received less than 20 responses (ATSI, EEA, CACD, physical theatre/circus and classical music/opera). These are included in the 'all respondents' results.

Table 33: Inbound activity priorities, by artform[17]

	Visual arts and craft	Theatre	Dance	Contemporary music	Literature	Multi-artform	All respondents
Showcase / present at international showcase events held in Australia	3.5	4.0	3.9	3.6	3.1	3.3	3.6
Collaborations, partnerships or reciprocal programs with international artists or arts organisations	3.7	4.1	4.2	3.2	3.6	4.2	3.8
Bring artists or arts workers from overseas into Australia	3.3	3.7	4.1	3.1	2.6	3.5	3.4
Exhibit or present at international art fairs or markets held in Australia	3.2	3.8	3.5	2.5	2.6	3.1	3.2
Sell work or rights internationally	3.4	4.0	3.7	3.5	3.6	3.0	3.5
Participate in key visitors programs in Australia	3.3	3.6	3.7	2.5	2.8	3.4	3.2
Use connections to culturally diverse communities in Australia to inform or support your international activities	3.2	3.4	3.0	2.9	3.1	3.6	3.4

17 We have not included details for artforms where we received less than 20 responses (ATSI, EEA, CACD, physical theatre/circus and classical music/opera). These are included in the 'all respondents' results.

8 Locations of Future International Arts Activity

Research Question:

- **Where do they want to go?**

INTRODUCTION

This section looks at respondents' priority countries and international regions for activity from 2015 to 2019. We have also provided variations by artform.

PRIORITY COUNTRIES

Respondents' five most common priority countries for international activity over the next five years (2015-19) are the US, UK, China, Germany and France. For example:

- About half want to conduct activity in the US (53 percent) and the UK (46 percent).
- Just over a quarter (26 percent) hope to be active in China over the next five years, compared to 16 percent who have been active there in 2013-14.

Compared to their activity over the last two years, it appears that respondents are increasing their interest in Japan, China, US, UK and Germany. They hope to maintain their activity in India, South Korea, Hong Kong, Singapore, Indonesia, Canada and the Netherlands at about the same level as the last two years.

Table 34: Most common priority countries for future international activity, 2015-19 (>30 respondents)

Country	Respondents (Count)	Respondents (%)
United States	226	53%
United Kingdom	197	46%
China	113	26%
Germany	110	26%
France	95	22%
Japan	90	21%
Indonesia	65	15%
New Zealand	65	15%
Canada	60	14%
Singapore	52	12%
India	48	11%
Australia	44	%
Hong Kong	44	10%
Netherlands	42	10%
South Korea	42	10%
Italy	40	%

Table 35: Trends in the % of respondents conducting vs planning to conduct activity, by country

Location	2013-14	2015-19	Trend
United States	45%	53%	+8%
United Kingdom	39%	46%	+7%
France	22%	22%	0%
Germany	21%	26%	+5%
Canada	17%	14%	-3%
China	16%	26%	+10%
New Zealand	13%	15%	+3%
Indonesia	12%	15%	+3%
Netherlands	12%	10%	-2%
Singapore	11%	12%	+1%
Italy	10%	9%	-1%
Japan	10%	21%	+11%
India	9%	11%	+2%
South Korea	9%	10%	+1%
Hong Kong	9%	10%	+1%

PRIORITY INTERNATIONAL REGIONS

When analysed by international region, respondents are continuing to prioritise Western Europe for international arts activity. They hope to increase their activity in North Asia, whilst maintaining their interest in other international regions at about the same levels.

If we combine the results for North Asia, South Asia and South-East Asia, respondents' interest in these regions (31 percent) is about equal to Western Europe (29 percent).

Table 36: Trends in respondents conducting vs planning to conduct activity, by international region

Region	2013-14	2015-19	Trend
Australia	2%	2%	0%
Central America and Caribbean	1%	1%	0%
Central Asia	0%	0%	0%
Eastern Europe	5%	3%	-2%
North Africa and the Middle East	2%	2%	0%
North America	16%	16%	0%
North Asia	13%	17%	+4%
Northern Europe	4%	3%	-1%
Oceania	4%	4%	0%
South America	2%	3%	+1%
South Asia	3%	3%	0%
South-East Asia	11%	11%	0%
Southern Europe	5%	4%	-1%
Sub-Saharan Africa	1%	1%	0%
Western Europe	31%	29%	-2%

Variations by artform[18]

Contemporary music

Contemporary music respondents plan to maintain their interest in North America and increase their interest in North Asia.

Table 37: Trends in music respondents conducting vs planning to conduct activity, by international region

Region	2013-14	2015-19	Trend
Australia	2%	4%	+2%
Central America and Caribbean	1%	1%	0%
Central Asia	0%	0%	0%
Eastern Europe	6%	3%	-3%
North Africa and the Middle East	1%	1%	0%
North America	20%	20%	0%
North Asia	6%	14%	+8%
Northern Europe	3%	4%	+1%
Oceania	5%	5%	0%
South America	2%	1%	-1%
South Asia	4%	2%	-2%
South-East Asia	7%	10%	+3%
Southern Europe	4%	2%	-2%
Sub-Saharan Africa	0%	0%	-0%
Western Europe	41%	34%	-7%
Grand Total	**100%**	**99%[19]**	**-**

Dance

Dance respondents hope to increase their activity in North Asia and maintain activity in other regions.

[18] We have not provided detail for artforms where we received less than 20 responses (ATSI, EEA, CACD, physical theatre/circus and classical music/opera, as well as 'Other, please specify'). These artforms are included in 'all respondents.'
[19] Due to rounding of decimals.

Table 38: Trends in dance respondents conducting vs planning to conduct activity, by international region

Region	2013-14	2015-19	Trend
Australia	0%	3%	+3%
Central America and Caribbean	2%	0%	-2%
Central Asia	0%	0%	0%
Eastern Europe	3%	3%	0%
North Africa and the Middle East	3%	2%	-1%
North America	14%	16%	+2%
North Asia	9%	18%	+9%
Northern Europe	6%	3%	-2%
Oceania	3%	4%	+1%
South America	5%	1%	-4%
South Asia	3%	3%	0%
South-East Asia	9%	8%	-1%
Southern Europe	6%	4%	-2%
Sub-Saharan Africa	1%	3%	+2%
Western Europe	34%	32%	-2%
Grand Total	**100%**	**100%**	**-**

Literature

Literature respondents would like to slightly increase their activity in North Asia, whilst continuing activity in other regions.

Table 39: Trends in literature respondents conducting vs planning to conduct activity, by international region

Region	2013-14	2015-19	Trend
Australia	1%	1%	0%
Central America and Caribbean	2%	3%	+1%
Central Asia	0%	0%	0%
Eastern Europe	5%	2%	-2%
North Africa and the Middle East	2%	1%	-1%
North America	17%	15%	-2%
North Asia	7%	11%	+4%
Northern Europe	1%	2%	+1%
Oceania	4%	3%	-1%
South America	2%	3%	+1%
South Asia	7%	8%	+1%
South-East Asia	16%	14%	-2%
Southern Europe	7%	5%	-2%
Sub-Saharan Africa	1%	1%	0%
Western Europe	31%	31%	0%
Grand Total	**100%**	**99%**[20]	**-**

[20] Due to rounding of decimals.

Multi-artform

Multi-artform respondents are planning to continue activity in roughly the same regions, with a possible decrease in Western Europe.

Table 40: Trends in multi-artform respondents conducting vs planning to conduct activity, by international region

Region	2013-14	2015-19	Trend
Australia	2%	3%	+1%
Central America and Caribbean	1%	1%	0%
Central Asia	0%	0%	0%
Eastern Europe	4%	6%	+2%
North Africa and the Middle East	1%	1%	0%
North America	16%	15%	-1%
North Asia	17%	18%	+1%
Northern Europe	2%	2%	0%
Oceania	7%	5%	-2%
South America	3%	5%	+2%
South Asia	2%	3%	+1%
South-East Asia	13%	13%	0%
Southern Europe	4%	5%	+1%
Sub-Saharan Africa	1%	2%	+1%
Western Europe	27%	20%	-7%
Grand Total	**100%**	**100%**	**-**

Theatre

Theatre respondents are hoping to conduct more activity in North Asia, and continue activity in other regions, with a possible decrease in Eastern European activity.

Table 41: Trends in theatre respondents conducting vs planning to conduct activity, by international region

Region	2013-14	2015-19	Trend
Australia	1%	1%	0%
Central America and Caribbean	1%	0%	-1%
Central Asia	0%	0%	0%
Eastern Europe	7%	1%	-6%
North Africa and the Middle East	6%	7%	+1%
North America	21%	21%	0%
North Asia	7%	16%	+9%
Northern Europe	7%	4%	-3%
Oceania	3%	5%	+2%
South America	1%	1%	0%
South Asia	1%	1%	0%
South-East Asia	13%	11%	-2%
Southern Europe	3%	0%	-3%
Sub-Saharan Africa	1%	1%	0%
Western Europe	30%	31%	+1%
Grand Total	**100%**	**100%**	**-**

Visual arts and craft

Visual arts and craft respondents are also planning to continue activity in the same regions, with Western Europe as the most common region of planned activity.

Table 42: Trends in the % of visual arts respondents conducting vs hoping to conduct activity, by international region

Region	2013-14	2015-19	Trend
Australia	3%	4%	+1%
Central America and Caribbean	1%	1%	0%
Central Asia	0%	0%	0%
Eastern Europe	3%	3%	0%
North Africa and the Middle East	2%	4%	+2%
North America	13%	14%	+1%
North Asia	18%	16%	-2%
Northern Europe	3%	4%	+1%
Oceania	3%	4%	+1%
South America	2%	1%	-1%
South Asia	1%	3%	+2%
South-East Asia	10%	10%	0%
Southern Europe	8%	6%	-2%
Sub-Saharan Africa	1%	0%	-1%
Western Europe	32%	31%	-1%
Grand Total	**100%**	**100%**	**-**

9 Ideas for Support

Research Questions:

- **What sort of support do they need?**

INTRODUCTION

This section reviews ideas for how to support the arts sector's international ambitions.

INITIATIVES TO HELP ARTISTS AND ORGANISATIONS TO ENGAGE INTERNATIONALLY

Respondents were asked to select the top five initiatives which would best help them or their organisation to engage in international arts activity. Overall, the top five were:

- Funding (74 percent).
- Support for international collaborations (65 percent).
- Support for relationship development (52 percent).
- Support to make international arts activity more profitable (36 percent).
- Support for cultural learning and exchange (35 percent).

Table 43: Top five initiatives, all respondents

Initiative	Independent Artists	Organisations	All Respondents (%)
Information about opportunities	41%	21%	34%
Capacity building	17%	33%	21%
Funding	75%	70%	74%
Support for artists to come to Australia	25%	45%	31%
Support for relationship development	50%	57%	52%
Support for international collaborations	60%	76%	65%
Support to test new markets	21%	23%	22%
Support to make international arts activity profitable	39%	29%	36%
Incentives for international commissions	25%	21%	24%
Investment in market research	6%	16%	9%
Support for visits to Australia from international buyers/curators/presenters	20%	30%	23%
International showcase events in Australia	23%	24%	23%

Support for cultural learning and exchange	38%	26%	35%
Other (please specify)	8%	7%	8%

Independent artists vs organisations

Organisational respondents shared the first three of the general respondent population's five top initiatives. Organisations included 'support for artists to come to Australia' and 'capacity-building' in their top five, instead of 'support to make international arts activity more profitable,' and 'support for cultural learning and exchange.'

Independent artist respondents shared the first four of the general respondent population's top five initiatives. Independent artists included 'information about opportunities,' instead of 'support for cultural learning and exchange,' in their top five.

Independent artists were more likely than organisations to select the following initiatives:

- Information about opportunities (41 percent, compared to 21 percent of organisations).
- Support to make international arts activity profitable (39 percent, compared to 29 percent of organisations).
- Support for cultural learning and exchange (38 percent, compared to 26 percent of organisations).

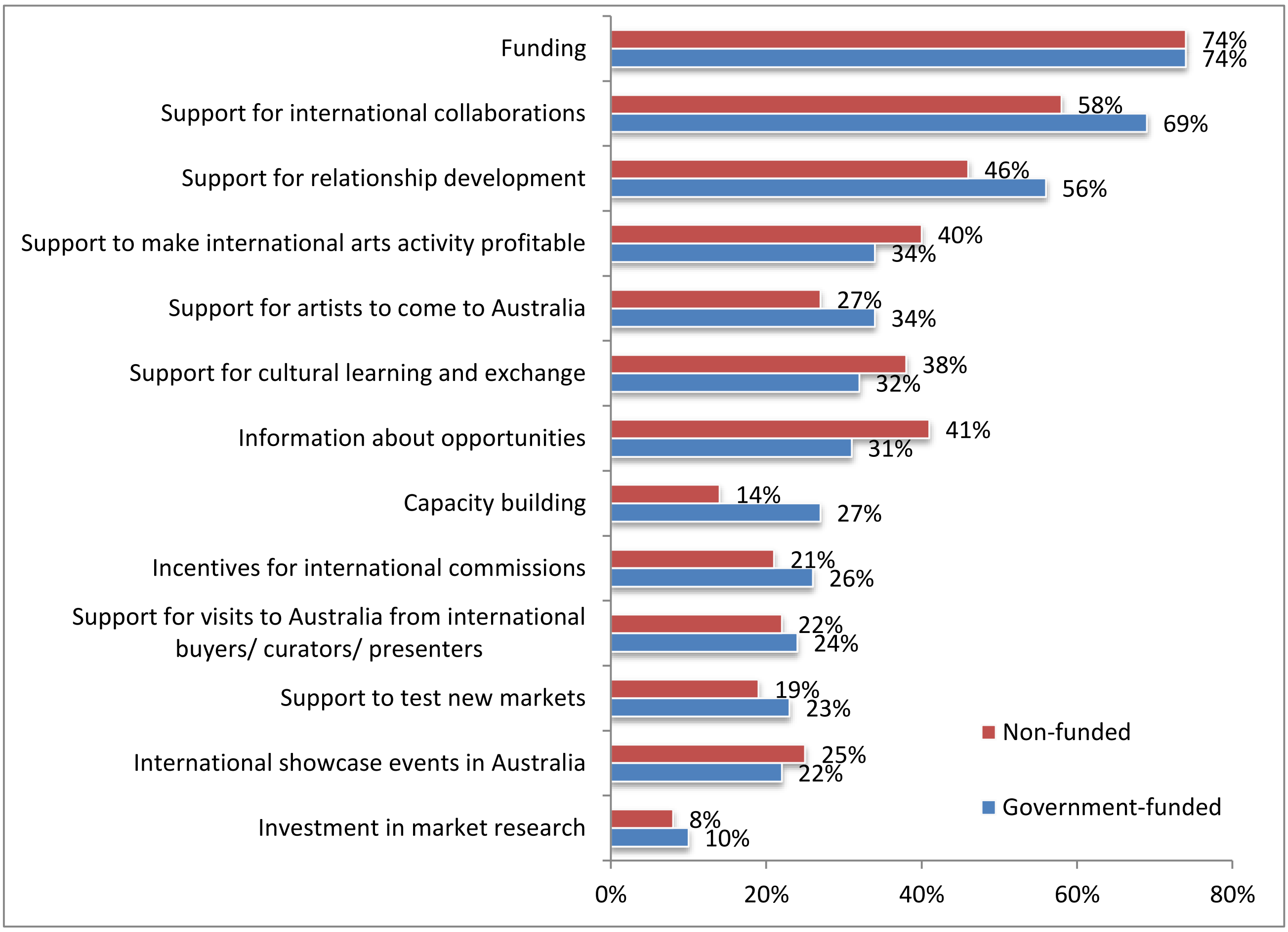
Organisations were more likely than independent artists to select the following initiatives:

- Capacity-building (33 percent, compared to 17 percent of independent artists).
- Support for artists to come to Australia (45 percent, compared to 25 percent of independent artists).

Government-funded vs non-funded respondents

Government-funded and non-funded respondents shared the same top five initiatives as the general respondent population.

Figure 16: Top five initiatives, government-funded vs non-funded respondents



Variations by artform[21]

Artform respondents varied as follows:

- Literature respondents were more likely than others to prioritise information about opportunities (51 percent compared to 34 percent of all respondents).
- Multi-artform respondents were the most likely to seek support for artists to come to Australia (44 percent compared to 31 percent of all respondents).

[21] We have not provided detail for artforms where we received less than 20 responses (ATSI, EEA, CACD, physical theatre/circus and classical music/opera, as well as 'Other, please specify'). These artforms are included in 'all respondents.'

- Dance respondents felt that incentives for international commissions would help them (42 percent, compared to 24 percent of all respondents).
- About a third of theatre respondents felt that international showcases in Australia would help them (36 percent, compared to 23 percent of all respondents).

Table 44: Top five initiatives by artform

	Dance	Visual arts and crafts	Literature	Theatre	Contemporary music	Multi-artform	All respondents
Information about opportunities	15%	39%	51%	41%	20%	32%	34%
Capacity building	31%	11%	28%	21%	25%	22%	21%
Funding	73%	75%	84%	82%	90%	57%	75%
Support for artists to come to Australia	35%	29%	21%	31%	20%	44%	31%
Support for relationship development	42%	50%	49%	39%	38%	70%	52%
Support for international collaborations	81%	63%	56%	54%	48%	74%	65%
Support to test new markets	19%	17%	19%	21%	30%	19%	22%
Support to make international arts activity profitable	58%	38%	21%	49%	55%	19%	37%
Incentives for international commissions	42%	25%	12%	31%	15%	33%	24%
Investment in market research	4%	4%	9%	8%	15%	7%	9%
Support for visits to Australia from international buyers/ curators/ presenters	27%	30%	16%	28%	18%	15%	23%
International showcase events in Australia	15%	25%	14%	36%	25%	22%	23%
Support for cultural learning and exchange	31%	43%	44%	23%	23%	39%	35%
Other (please specify)	4%	6%	9%	5%	10%	11%	8%

10 Conclusion

Australian artists and arts organisations are engaging in a breadth and depth of activities internationally. International arts activity is important to their reputation and artistic practice. They are already working collaboratively with international partners and are eager to build long-term relationships and reciprocal engagement.

Australian artists and organisations are maintaining their activity in traditional markets like Western Europe and North America, but are already active in growth markets like China. They aim to increase their activity in North Asia over the next five years, whilst maintaining activity in North America and Europe.

The arts sector invests significant time and money in international arts activity, mostly in pursuit of artistic outcomes. However, they also want to increase their direct return on investment from international activity.

Attachment 1: Respondent Profile

INTRODUCTION

This section reviews respondent profile data from the survey to determine the representativeness of the survey for the general artist population and sub-groups.

SURVEY REPRESENTATIVENESS

The survey can be read as broadly representative of the general artist population.

Government-funded artists are over-represented amongst respondents, as are artists who have conducted international arts activity. This is to be expected in a survey conducted by a government agency about international arts activity. Results have been broken down to take this into account.

We have also broken down the data by artform. However, these results should be read as descriptive as the number of responses was not large enough to be representative at the artform level.

TYPE OF RESPONDENTS

We received 439 completed responses to the survey. More than half of all respondents were independent artists (61 percent).[22] Just under a third represented arts organisations (31 percent). The remaining 8 percent described themselves as arts students, commentators, independent arts managers/consultants, producers and independent curators.

The organisational representatives comprised a mix of general managers/CEOs (44 percent), artistic directors (26 percent), and other staff members such as marketing managers, program managers and producers (30 percent).

Table 45: Types of respondents

Type of respondent	Count	%

[22] This includes 24 respondents who identified themselves as 'independent producers' and 'curators.'

Independent artist	245	56%
Representative of an artistic group or collective[23]	16	4%
Representative of an arts organisation	131	30%
Other	47	10%
Total	439	100%

MARGIN OF ERROR

The total artist population in Australia is estimated at about 44,000.[24] There is also an estimated 4,500 arts organisations in Australia.[25] Based on these figures, we calculate a confidence interval of 6 for independent artist results, and 8 for arts organisations. This means:

- survey results from independent artists can be read as representative of the Australian practicing professional artists population, within a margin of error of +/-6 percent
- survey results from organisations can be read as representative of Australian arts organisations in general, within a margin of error of +/-8 percent

GOVERNMENT FUNDING

60 percent of respondents had received government funding for their arts activity in the last two years (2013 and 2014). 40 percent had not.

The majority of non-funded respondents were independent artists (73 percent). This is more than the proportion of independent artists in the general survey population (56 percent). This means that results for non-funded respondents will be skewed towards non-funded independent artists.

[23] We have included these respondents in analysis for 'independent artists' for the purposes of this report.
[24] David Throsby and Anita Zednik, Do You Really Expect to Get Paid? An Economic Study of Professional Artists in Australia, Australia Council for the Arts, Sydney, 2010.
[25] Australia Council for the Arts, *Arts Nation: An Overview of Australian Arts, 2015 Edition*, Australia Council for the Arts, Sydney, 2015.

Table 46: Funding status by type of respondents

		Independent artists	Representative of an artistic group or collective	Representative of an arts organisation	Other	Total
Received government funding	*Count*	117	11	111	25	264
	%	44%	4%	42%	10%	100%
Did not receive government funding	*Count*	128	5	20	22	175
	%	73%	3%	11%	13%	100%

An estimated 29 percent of the total Australian artist population received grants, prizes or other funding between 2004-2009, compared to 43 percent of the individual artists who responded to the survey. [26] The survey results disproportionately represent the views of artists who have received government funding. This is to be expected of a survey distributed by a government agency.

Of those who received government funding for their arts activity, an estimated 61 percent received funding for international arts activity.

[26] Throsby and Zednik, Do You Really Expect to Get Paid?, 2010.

Table 47: Funding status of survey respondents vs general artist population

	Survey – All respondents		Survey – Independent artists only		General artist population[27]		Estimated confidence interval – independent artists only
	Count	**%**	**Count**	**%**		**%**	**+/-%**
Received government funding in last two years, 2013-14	264	60%	117	48%	Received a grant, prize or other funding, 2004-09	29%	7%
Did not receive government funding in last two years, 2013-14	175	40%	128	52%	Did not receive a grant, prize or other funding, 2004-09	71%	6%
Total	**439**	**100%**	**245**	**100%**		**100%**	**n/a**

INTERNATIONAL ACTIVITY

81 percent of respondents had undertaken international arts activity in the last two years, and 17 percent of respondents reported having received an international prize or award in the last two years. The most recent figures show that of the general artist population, an estimated 38 percent have had their work experienced overseas.[28] We can assume that survey results disproportionately represent the views of artists who have undertaken international arts activity. This is to be expected in a survey about international activity.

Of those who had not undertaken international arts activity in the last two years, 72 percent hope to undertake activity over the next five years.

LOCATION

The majority of respondents to this question were based in Victoria and NSW. Like the general artist population, most respondents were based in capital cities.

[27] Ibid, and Australia Council for the Arts, *Arts Nation*, 2015.
[28] Ibid.

Table 48: Respondents by State/Territory

State/Territory	Respondents (Count)[29]	Respondents (%)	Australian artist population[30] (%)
NSW	120	29%	33%
NT	21	5%	1%
QLD	43	10%	20%
SA	55	13%	8%
TAS	11	3%	2%
VIC	145	35%	25%
WA	15	4%	10%
Grand Total	**410**	**100%**	**100%**

ARTFORM

More than a quarter of all respondents identified as visual arts and crafts practitioners (29 percent), followed by multi-artform (13 percent), literature (10 percent), contemporary music (9 percent), and theatre (9 percent). 'Classical music or opera' and 'Physical Theatre and Circus' were equal at 2 percent.

The artform categories used in the survey do not exactly match the 'Primary Artistic Occupation' categories used by Throsby and Zednik in their study of the artist workforce. Care should therefore be taken when reading results at the artform level, as we cannot establish the confidence interval of data at that level of detail. In addition, Throsby & Zednik note that artists tend not to classify themselves strictly by artform, which is reflected in a trend in artists' increasingly identifying as multi-artform practitioners.

[29] 410 of the 439 respondents answered this question.
[30] Throsby and Zednik, Do You Really Expect to Get Paid?, 2010.

Table 49: Comparison of survey respondents vs general artist population[31]

International Arts Activity Survey			General Artist Population[32]	
Artform	**Count**	**%**	**Primary Artistic Occupation**	**%**
Dance	26	6%	Dancers	3%
Visual arts and crafts	122	29%	Visual arts and crafts practitioners	29%
Literature	44	10%	Writers	17%
Theatre	39	9%	Actors	16%
Physical theatre and circus	8	2%		n/a
Contemporary music	40	9%	Musicians	28%
Classical music or opera	8	2%	Composers	2%
Multi-artform	54	13%		n/a
Community and cultural development	16	4%	CACD workers	4%
Aboriginal and Torres Strait Islander arts and culture	9	2%	ATSI	n/a
Emerging and experimental arts	18	4%	EEA	n/a
Other (please specify)	44	10%		n/a

REPRESENTATION

The survey appears to be broadly representative of sub-groups:

- artists who identify as coming from CALD backgrounds
- artists who identify as persons with a disability
- artists who identify as being of Aboriginal or Torres Strait Islander descent

Table 50: Sub-groups represented in survey vs general artist population

Survey – Independent artists		General artist population[33]	
Culturally and linguistically diverse backgrounds[34]	26%	Artists born overseas	22%
		Artists whose first language is not English	8%

[31] 428 of the 439 respondents answered this question.
[32] Ibid.
[33] Ibid, and Australia Council for the Arts, *Arts Nation*, 2015.
[34] In the survey, 'culturally and linguistically diverse' was defined as including first generation migrants or those who self-identify or engage with the languages and cultural specificities of ancestral heritages that differ from Anglo-Australians. Throsby and Zednik did not collect using this categorisation. They collected

Disability	9%	Physical or mental disability or impairment	8%
Aboriginal or Torres Strait Islander descent	5%	Indigenous Australians	2%

INCOME AND SIZE

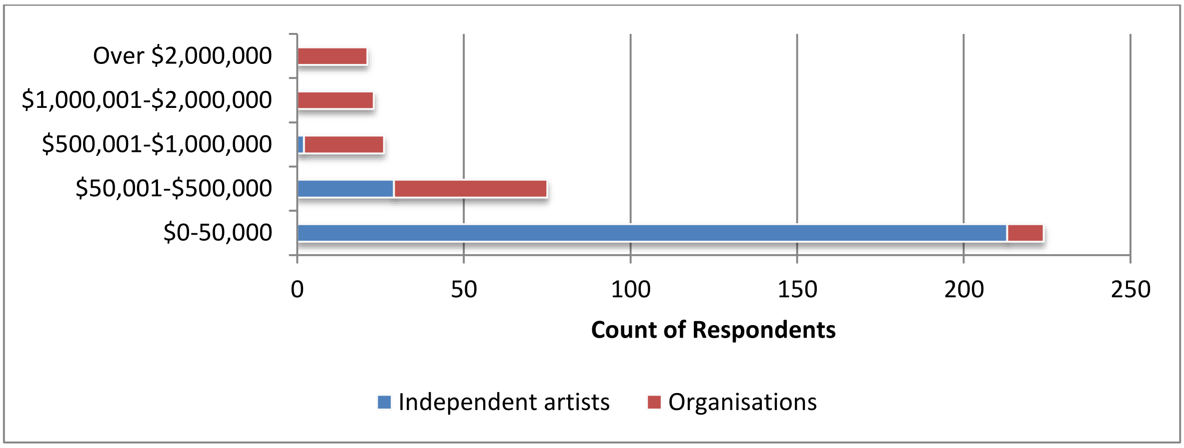
Most independent artists reported an annual gross artistic income of $50,000 or less (88 percent). 12 percent reported an income of between $50,000 and $500,000 and just 2 respondents reported income of more than $500,000.

Almost all of the organisations that responded to the survey are small to medium-sized organisations, with a staff of 10 or less (76 percent).

45 percent of organisations reported a turnover of greater than $500,000. More than a third of organisations reported a turnover of between $50,000 and $500,000 (37 percent). 16 percent earned $50,000 or less.

data about those who were born overseas or whose first language was different to English. We have included both here for purposes of rough comparison.

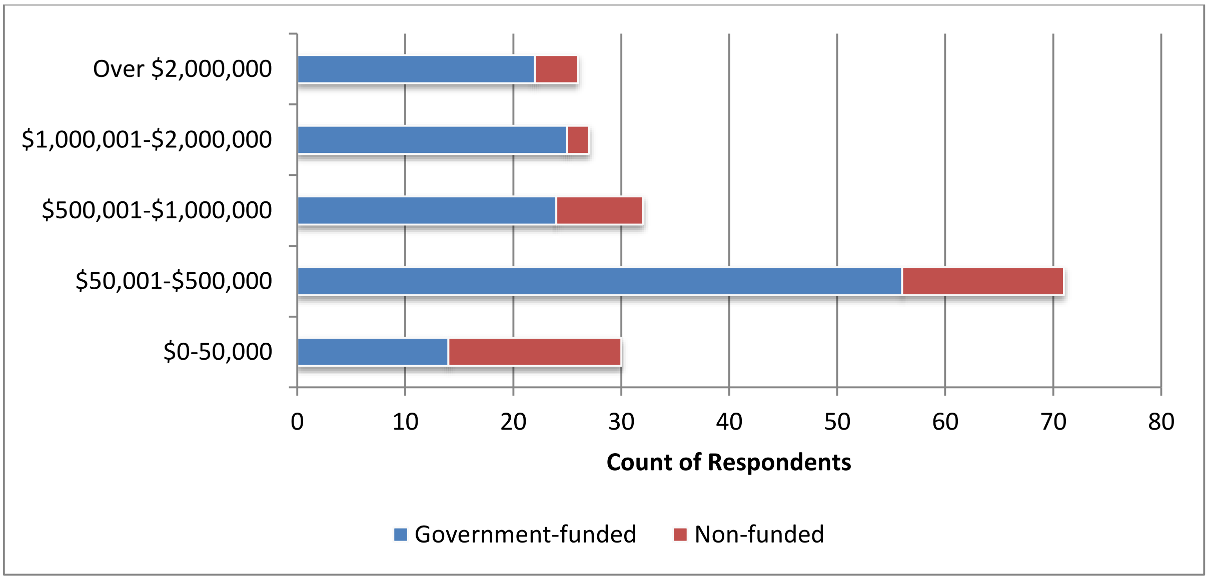
Figure 17: Estimated income, independent artist vs organisational respondents



Non-funded, independent artist respondents reported similar annual artistic income levels to government-funded, independent artist respondents. The majority in both segments reported income of $50,000 or less (85 percent of government-funded independent artist respondents and 90 percent of non-funded independent artist respondents).

Non-funded, organisational respondents tended to occupy lower turnover brackets than government-funded, organisational respondents to the survey.

Figure 18: Estimated annual turnover, government-funded vs non-funded organisational respondents



TYPES OF ORGANISATIONS

We also asked organisations if they were performing arts venues, festivals, galleries, publishers or service/peak body organisations.

- 27 percent were service or peak body organisations
- 20 percent were galleries
- 27 percent were festivals, publishers or venues (8 percent, 8 percent and 11 percent respectively)

26 percent of organisations did not identify as these categories. They may comprise organisations such as content producers, studios or recording labels.

Attachment 2: International Regions

The following table indicates the countries included in regions, as per Australia Council definitions.

EXPLANATORY NOTES

The following list includes countries which were selected by respondents to the survey. Other countries naturally fall within these regions, but we have not included them here. This is so that you can see the countries that each region actually refers to in this report.

Table 51: International regions and countries referred to in this report

Region	Countries
Australia	Australia
Central America and Caribbean	Cuba
	Mexico
Central Asia	n/a
Eastern Europe	Bulgaria
	Ukraine
	Czech Republic
	Estonia
	Hungary
	Latvia
	Lithuania
	Macedonia
	Poland
	Russia
	Serbia
	Slovenia
	Turkey
North Africa and Middle East	Cote d'Ivoire
	Egypt
	Iran
	Israel
	Jordan
	Lebanon
	Morocco

	United Arab Emirates
North America	Canada
	United States
North Asia	China
	Hong Kong
	Japan
	Macau
	North Korea
	South Korea
	Taiwan
Northern Europe	Denmark
	Finland
	Iceland
	Norway
	Sweden
Oceania	Fiji
	Mauritius
	New Zealand
	Samoa
South America	Argentina
	Brazil
	Colombia
	Chile
	Ecuador
	Peru
South Asia	Afghanistan
	India
South-East Asia	Cambodia
	Indonesia
	Malaysia
	Myanmar
	Philippines
	Singapore
	Thailand
	Timor-Leste (East Timor)
	Vietnam
Southern Europe	Andorra
	Cyprus
	Greece
	Italy
	Malta
	Portugal
	Spain

Sub-Saharan Africa	Ethiopia Kenya South Africa
Western Europe	Austria Belgium France Germany Ireland Luxembourg Netherlands Switzerland United Kingdom

Attachment 3: International Activity Survey 2015

WELCOME

Welcome to the Australian International Arts Activity Survey. The Australia Council for the Arts is conducting this survey. We want to understand how Australian artists and arts organisations engage internationally. We will use the survey results to inform our strategy for supporting international arts activity.

We invite you to contribute your experience and views in this survey. The survey is open to all Australian artists and arts organisations, whether or not you have done international arts activities in the past. (This survey has not been designed for funders of arts activity.)

The survey should only take about 15 minutes to complete. Your responses are confidential and anonymous.

The survey is open from **21 January to 11 February 2015**. Once you start the survey, you can pause and come back using the 'Save and Continue later' button. If you close the survey before you have finished it, the system will not save your responses and we cannot send out a new link to the survey.

If you are responding on behalf of an arts organisation or group, please make sure that there is just one response from your organisation or group.

If you have questions, please contact Marija Vojdanoska, Research and Evaluation Adviser, Australia Council for the Arts, on (02) 9215 9000 or **m.vojdanoska@australiacouncil.gov.au**

ABOUT YOU

Throughout this survey, "international arts activity" refers to any arts-related activity you have conducted overseas; sales to international buyers; presentations internationally; and collaborations with foreign artists, in Australia or overseas.

1) Are you:*

( ) An independent artist
( ) A representative of an artistic group or collective
( ) A representative of an arts organisation
( ) Other (please specify): ____

2) What is your role?

( ) Artistic Director
( ) General Manager/CEO
( ) Other (please specify): ____

3) In the last two years (2013 and 2014), did you / your organisation receive government funding for your arts activity?

( ) Yes
( ) No
( ) Don't know

4) Was any of this funding for international arts activity?

“International arts activity” refers to any arts-related activity you have conducted overseas; sales to international buyers; presentations internationally; and collaborations with foreign artists, in Australia or overseas.

( ) Yes
( ) No
( ) Don't know

5) Have you / your organisation engaged in international arts activity over the last two years?*

“International arts activity” refers to any arts-related activity you have conducted overseas; sales to international buyers; presentations internationally; and collaborations with foreign artists, in Australia or overseas.

( ) Yes
( ) No
( ) Don't know

INTERNATIONAL ARTS ACTIVITY

The following questions are about your international arts activity over the last two years (2013 and 2014), both overseas and in Australia.

“International arts activity” refers to any arts-related activity you have conducted overseas; sales to international buyers; presentations internationally; and collaborations with foreign artists, in Australia or overseas.

6) Have you / your organisation done any of the following activities outside of Australia over the last two years?

Select all that apply.

[ ] Travelled overseas to see work
[ ] Travelled overseas to develop networks (including to meet agents and managers)
[ ] Travelled overseas to undertake professional development or training
[ ] International artist or arts worker residency/ies
[ ] Created new work overseas
[ ] Undertaken collaborations, partnerships or reciprocal programs with international artists or arts organisations
[ ] Tours, exhibitions, presentations or international publications
[ ] Exhibited or presented at international art fairs or markets
[ ] Sold work or rights while overseas
[ ] Undertaken international market research
[ ] Travelled overseas for cultural learning or exchange
[ ] Other (please specify): ____

7) Some international activity takes place in Australia. Have you / your organisation done any of the following international activities in Australia over the last two years?

Select all that apply.

[ ] Showcased / presented at international showcase events held in Australia
[ ] Collaborations, partnerships or reciprocal programs with international artists or arts organisations
[ ] Brought artists or arts workers from overseas into Australia
[ ] Exhibited or presented at international art fairs or markets held in Australia
[ ] Sold work or rights internationally
[ ] Participated in key visitor programs in Australia
[ ] Used connections to culturally diverse communities in Australia to inform or support your international activities
[ ] Other (please specify): ____

8) Over the last two years, what countries have you / your organisation conducted international arts activity in?

If you have been active in more than ten countries in the last two years, please just select the top ten countries where you have been active.

[Country 1 drop down]
[Country 2 drop down]
[Country 3 drop down]
[Country 4 drop down]
[Country 5 drop down]
[Country 6 drop down]
[Country 7 drop down]
[Country 8 drop down]
[Country 9 drop down]
[Country 10 drop down]

9) Over the last two years, roughly how many international performances, exhibitions and / or rights sales have you / your organisation conducted?

International performances: ____
International exhibitions: ____
International rights sales: ____

LEVEL OF ACTIVITY

10) About how much time per year do you / your organisation spend on international arts activity?
This includes developing the activity, preparing for it and then conducting and evaluating the activity.
( ) 0 days
( ) 1-7 days
( ) 8-14 days
( ) 15-31 days
( ) 32 or more days

11) About how much per year on average do you / your organisation spend on international arts activity and sales?

( ) $0
( ) $1-$5,000 per year
( ) $5,001-$10,000 per year
( ) $10,001-$20,000 per year
( ) $20,001- $50,000 per year
( ) $50,001 to $100,000 per year
( ) More than $100,000 per year

12) About how much on average per year do you / your organisation earn from international arts activity, royalties or sales?
Please do not include philanthropy, sponsorship or grants.
( ) $0
( ) $1-$5,000 per year
( ) $5,001-$10,000 per year
( ) $10,001-$20,000 per year
( ) $20,001- $50,000 per year
( ) $50,001 to $100,000 per year
( ) More than $100,000 per year

13) Please estimate the rough breakdown of funding for your / your organisation's international arts activity.

Estimate a % for all that apply. For example, "Own cash": 25%; "Australia Council for the Arts": 50%; "International funding body": 25%. Your total should equal 100%.

________Own cash
________Fees / sales
________Philanthropy
________Corporate sponsorship
________State arts funding body
________Australia Council for the Arts
________Department of Foreign Affairs and Trade
________Austrade
________Funding body from another country (eg Goethe Institut or Thai government)
________International funding body (e.g. Asia-Europe Foundation)
________Other (please specify in comments box below)
Comments:

14) About how much of your funding for international arts activity comes from Australian and international sources?

Estimate a % for each of the below. For example, "Australian sources": 55%, "Overseas sources": 45%. The total should equal 100%.

________Australian sources
________International sources (this includes organisations like the British Council, foreign governments, foreign residency providers)

OUTCOMES AND CHALLENGES OF INTERNATIONAL ARTS ACTIVITY

15) In your view, what have been the top three outcomes from your / your organisation's international arts activity?

[ ] Arts-related income
[ ] Audience development
[ ] Development of artistic practice
[ ] Knowledge and skills
[ ] Future international projects
[ ] Market development
[ ] New collaborators
[ ] Being part of the global arts landscape
[ ] Formal and informal critical review
[ ] Building international partners, such as agents and managers
[ ] Other (please specify): ____

16) What are the top three challenges you have encountered while engaging internationally?

[ ] Limited knowledge of international market opportunities
[ ] Limited knowledge of working in other cultures
[ ] Lack of support to develop relationships
[ ] Support is there, but it is not strategic
[ ] Non-competitive pricing of your work overseas
[ ] Taxation issues
[ ] Visa constraints
[ ] Lack of support to conduct on-the-ground market research
[ ] Inadequate support for preparatory activities, such as a translation or a remount of your work
[ ] Limited knowledge of the process of engaging internationally
[ ] Other (please specify): ____

17) Where 0 is "not important at all" and 5 is "very important," please rate the importance of international arts activity for your / your organisation's:

Artistic practice	0 5	________________________[__]_____________________________
Financial viability	0 5	________________________[__]_____________________________
Reputation	0 5	________________________[__]_____________________________

FUTURE INTERNATIONAL ACTIVITY

We would now like to find out about your future ambitions for international arts activity.

18) Do you / your organisation hope to engage in international arts activity, either in Australia or overseas, over the next five years (2015 to 2019)?*

( ) Yes
( ) No
( ) Don't know

GOALS FOR FUTURE INTERNATIONAL ACTIVITY

19) What are your top three goals for international arts activity over the next five years (2015 to 2019)?

1: ____
2: ____
3: ____

20) Over the next five years (2015 to 2019), what are your / your organisation's top five priority countries for international arts activity?

[Country 1 drop down]
[Country 2 drop down]
[Country 3 drop down]
[Country 4 drop down]
[Country 5 drop down]

21) Where 0 is "not a priority" and 5 is "a top priority," please rate the following international activities which take place outside Australia in terms of their priority for you / your organisation over the next five years:

Travel overseas to see work	0 ____________________[__]_________________ 5
Travel overseas to develop networks (including to meet agents and managers)	0 ____________________[__]_________________ 5
Travel overseas to undertake professional development or training	0 ____________________[__]_________________ 5
International artist or arts worker residency/ies	0 ____________________[__]_________________ 5
Create new work overseas	0 ____________________[__]_________________ 5
Undertake collaborations, partnerships or reciprocal programs with international artists or arts organisations	0 ____________________[__]_________________ 5
Tours, exhibitions, presentations or international publications	0 ____________________[__]_________________ 5
Exhibit or present at international art fairs or markets	0 ____________________[__]_________________ 5
Undertake international market research	0 ____________________[__]_________________ 5
Sell work or rights while overseas	0 ____________________[__]_________________ 5
Travel overseas for cultural learning or exchange	0 ____________________[__]_____________ ___ 5

Comments:

22) Where 0 is "not a priority" and 5 is "a top priority," please rate the following international activities which take place in Australia in terms of their priority for you / your organisation over the next five years?

Showcase / present at international showcase events held in Australia	0 ____________________[__]__________________ 5
Collaborations, partnerships or reciprocal programs with international artists or arts organisations	0 ____________________[__]__________________ 5
Bring artists or arts workers from overseas into Australia	0 ____________________[__]__________________ 5
Exhibit or present at international art fairs or markets held in Australia	0 ____________________[__]__________________ 5
Sell work or rights internationally	0 ____________________[__]__________________ 5
Participate in key visitors programs in Australia	0 ____________________[__]__________________ 5
Use connections to culturally diverse communities in Australia to inform or support your international activities	0 ____________________[__]__________________ 5

Comments:

VIEWS AND SUGGESTIONS

24) Of the following, please select the top five initiatives which would best help you / your organisation to engage in international arts activity.

[ ] Information about opportunities
[ ] Capacity building
[ ] Funding
[ ] Support for artists to come to Australia
[ ] Support for relationship development
[ ] Support for international collaborations
[ ] Support to test new markets

[ ] Support to make international arts activity profitable
[ ] Incentives for international commissions
[ ] Investment in market research
[ ] Support for visits to Australia from international buyers/ curators/ presenters
[ ] International showcase events in Australia
[ ] Support for cultural learning and exchange
[ ] Other (please specify): ____

25) Please provide any other information that you think would be helpful for the Australia Council in supporting your ambitions for international arts activity. For example, what does Australia Council do that works well for you? Are there other ways Australia Council could best support you?

____

____

26) Please use the space below to tell us anything else you would like to share about international arts activity. For example, what do you think are the big opportunities in international arts?

____

____

RESPONDENT PROFILE

Now please tell us a bit about you / your organisation.

27) Over the last two years, have you / your organisation received any international arts awards or prizes?

Note: this does not include competitive residencies or grants. These are covered in other questions.

( ) Yes
( ) No
( ) Don't know

28) What is your / your organisation's postcode?

____

29) Do you / your organisation primarily work with any of the following?

Select all that apply.

[ ] People with disability
[ ] Indigenous Australians
[ ] Culturally diverse Australians
[ ] Young people
[ ] Regional communities

30) Do you:

	Yes	**No**
Identify as a person from a culturally or linguistically diverse background? Culturally and linguistically diverse could include first generation migrants or those who self-identify or engage with the languages and cultural specificities of ancestral heritages that differ from Anglo-Australians	[ ]	[ ]
Identify as a person of Aboriginal or Torres Strait Islander descent?	[ ]	[ ]
Identify as a person with a disability or do you have an impairment that affects the activities you can do?	[ ]	[ ]

31) What is your approximate annual gross artistic income?

( ) $0-50,000

( ) $50,001-$500,000

( ) $500,001-$1,000,000

( ) $1,000,001-$2,000,000

( ) Over $2,000,000

32) What is your organisation’s approximate annual turnover?

"Turnover" refers to the organisation's total income before tax.

( ) $0-50,000
( ) $50,001-$500,000
( ) $500,001-$1,000,000
( ) $1,000,001-$2,000,000
( ) Over $2,000,000

33) How many staff does your organisation employ?

Measured as Full-Time Equivalents (FTE).

( ) 1-10
( ) 11-20
( ) 21-50
( ) 51-100
( ) 101-250
( ) Over 250

34) What is your / your organisation’s primary artform?

( ) Dance
( ) Visual arts and crafts
( ) Literature
( ) Theatre
( ) Physical theatre and circus
( ) Contemporary music
( ) Classical music or opera
( ) Multi-artform
( ) Community and cultural development
( ) Aboriginal and Torres Strait Islander arts and culture
( ) Emerging and experimental arts
( ) Other (please specify): ____

35) Is your organisation any of the following:

Select all that apply.

[ ] Performing arts venue
[ ] Festival
[ ] Gallery
[ ] Publisher
[ ] Service / peak body organisation

THANK YOU!

Thank you for taking our survey. Your response is very important to us and will help to inform our strategy for supporting international arts activity.

If you have any questions about the survey, please contact Marija Vojdanoska, Research and Evaluation Adviser, Australia Council for the Arts, on (02) 9215 9000 or m.vojdanoska@australiacouncil.gov.au

Please feel free to forward the survey on to other Australian artists and arts organisations who might be interested in participating.
http://www.surveygizmo.com/s3/1956459/International-Activity-Survey-2015