

STATE OF THE ARTS IN CAIRNS REPORT 2019 (SoARTS)

ACKNOWLEDGEMENTS

Chief Investigators: Russell Milledge and Lisa Law, James Cook University

Researchers: Bruce Prideaux, Michelle Thompson and Leonie Cassidy (Central Queensland University, CQU), Cummings Economics

Research Assistance: Crystal Williams, Redbird Ferguson, Coel Dowsett

Project Champion / Cairns Regional Council Project Manager: Lesley Buckley, Cairns Regional Council

Graphic Design: Cairns Regional Council

Student Design Team: Christine Houston, Emily Robinson, Samantha Macqueen

Inaugural Advisory Panel (2018/19): Mayor Bob Manning (Cairns Regional Council), Cr Linda Cooper (Cairns Regional Council), Henrietta Marrie (TO & CQU), Jeanette Singleton (TO), Pip Close (TTNQ), Debbie-Anne Bender (Cairns Chamber of Commerce), Jodie Duignan-George (CQU), Sandra Harding (JCU), Curtis Pitt (MP), Michael Healy (MP), Warren Entsch (MP), Linda Kirchner (Cairns Regional Council), Rebecca Atkinson (Arts Queensland), Kim Houghton (Regional Australia Institute), John Oster (Regional Arts Australia), Stephen Foster (Cairns Regional Council).



FOREWORD

MESSAGE FROM CAIRNS MAYOR BOB MANNING

Culture and the arts is vitally important to the Cairns region. One of our highest priorities as a Council is to develop the infrastructure and the creative networks we need to turn the Cairns region into the Arts capital of Northern Australia. This goal, set out in our Culture and Arts Strategy 2022 and our Shared Vision 2050, is not just about supporting our communities and our arts, it is about developing and diversifying our economy. The activity, atmosphere, visitors and spending generated by a healthy arts sector is crucial to the future of our region.

This inaugural 2019 State of the Arts (SoARTS) report provides a detailed analysis of the strengths and opportunities in our arts community. In the midst of a global pandemic, it is timely to investigate the value of culture, the arts and creative enterprise, and its influence on the wellbeing and economy of Cairns. SoARTS gives us a baseline of information and data as we look to build and recover from the impact of COVID-19.

SoARTS tells us that in a usual year, the annual economic output of the arts sector is more than \$450 million in the Cairns region, and that the sector employs more than 3500 people, and supports hundreds more volunteers. Many Cairns people benefit from artists' efforts, whether that be through attending events, exhibitions, festivals or performances or buying creative works and services. Cairns boasts a strong creative community, but the report shows that our creative industries are undervalued and misunderstood in the wider community. The industry that supports culture and the arts in Cairns is significant and includes a wide variety of professional, business-minded and technically-skilled people.

We have great potential to showcase our talented community to the world - our Indigenous artists, performing artists, creatives in digital and new media and many more. Cairns is a cultural, artistic and creative industries hub for Far North Queensland with key links to Cape York, the Torres Strait and Papua New Guinea. Creative industries, like the tourism, accommodation and food services sectors, have been hit hard by the global COVID-19 pandemic. And these creative industries will be a pillar of our recovery efforts as we work to leverage the region's already-strong reputation as an arts and cultural hotspot into the Arts capital of Northern Australia.

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EXECUTIVE SUMMARY

Cairns Regional Council (CRC) has aspirations to become the Arts and Culture Capital of Northern Australia and has embedded this in their *Strategy for Culture and the Arts 2022* (CRC 2018a). The Strategy outlines steps to strengthen Council's ongoing commitment to growing the city's reputation as a key hub for artistic and cultural expression with outstanding cultural facilities and a distinctive character. As part of the Strategy, Cairns Regional Council engaged James Cook University (JCU) and Central Queensland University (CQU) to work alongside the five-year planning cycle to provide evidence-based research to support and guide future decision making and investment in regards to the three core priorities or focus areas of the cultural plan. The output of this process is a *State of the Arts in Cairns* (SoARTS) report that monitors and measures the outcomes of the Strategy, providing tangible evidence of the value of culture and the arts to the local community and economy. This *State of the Arts in Cairns 2019 Report* represents the first collation and analysis of data gathered over the 2018/19 period.

The *Strategy for Culture and the Arts 2022* supports the Council's Corporate Plan 2017-2022 which envisions Cairns as a vibrant, inclusive and healthy community. Cairns already has well-developed transport and logistical networks, extensive health and education services, a high standard of living, affordable housing and vibrant cultural amenities. Outstanding examples of cultural amenities include the award-winning Munro Martin Parklands, the Cairns Indigenous Art Fair (CIAF) and the well-established Tanks Arts Centre, but new examples such as the proposed Gallery Precinct will make a profound mark on the cultural vitality of the city. It is these attractors, especially when combined with easy access to UNESCO World Heritage listed reef and rainforest attractions, which make the Cairns region highly liveable. Indeed, Cairns ranks in the top ten of Ipsos's (2018) most liveable regions in Australia. Cairns has a vibrant arts and cultural sector which has recently been made more visible on the Council's Cairns Arts and Culture Map that highlights (at the time of writing) 45 organisations, 66 business across 25 industries, 301 historical places, 24 festivals, 44 facilities and spaces, 62 artists, 288 city collection artefacts and 199 pieces of public art. This collective evidence of activity and infrastructure requires more analysis for a better understanding of how arts and culture activities contribute to the economy, identity and community of Cairns.

Culture and the arts are already embedded in the livelihood and vitality of Cairns, and this report compiles relevant data into five sections/core research areas. **First** we report on the measure of economic value and potential growth of the sector, presenting a summary of research by Cummings Economics (Cummings 2019a, 2019b, 2019c) that suggests Cairns is already a leader in cultural services when compared to other northern cities such as Townsville and Darwin. Definitions of the arts and culture sector are then widened to include the broader field of creative industries, where there are important linkages, growth opportunities and multiplier effects (Cunningham et al 2019). Cairns leads in areas such as professional photography and jewellery manufacturing, for example, but there is potential to extend into areas such as software and digital content. **Second** we present a sector survey that reports on interviews with 26 stakeholders representing a cross-section of culture, arts and creative industry enterprises that frame the sector in Cairns. The stakeholders were asked a standardized set of questions pertinent to the *Strategy for Culture and the Arts 2018-2022*. We identify a diverse set of enterprises with a regional and sometimes international reach, their infrastructural needs, challenges they are facing and opportunities for growth. **Third**, we report on research conducted by CQU that begins to ask questions about what kinds of tourists might engage in arts and cultural activities, and how we might begin to grow that sector. **Fourth**, we explore the geographies of creativity in Cairns by exploring the Cairns Arts and Culture Map, plans for a new Gallery Precinct and a map of the reach/network of our stakeholder group. Here there are opportunities for spatial planning, and connecting to the Cairns Regional Council's broader masterplan for the central business district. **Fifth** and finally, we present some noteworthy case studies, the performing arts district The Precinct and The Young Company, an innovative enterprise for young creatives.

KEY FINDINGS

ECONOMIC ANALYSIS

The arts and culture sector has long formed an important part of the regional economy of Cairns. This section outlines three reports undertaken by Cumming Economics in 2019. Some key findings include:



3210 EMPLOYED

3210 people were employed in arts and culture jobs in the SA4 region at the 2016 Census, representing 3% of the total workforce.



\$460 MILLION

The economic output of this sector was \$460 million, accounting for 3.8% of gross regional product.



7% ANTICIPATED GROWTH

A survey of cultural, arts and creative industry businesses in 2019 suggest they anticipate an average growth of 7% over the next five years.

A significant economic impact is not accounted for in the contribution of volunteers and engagement in the recreational sector and is a vital element to be included in future economic analysis.

Cairns is a significant economic hub for the arts and culture sector, with a substantial economic footprint beyond its local government boundary. Most businesses serve the immediate and extended region with around 48% also doing business interstate and about 25% engaging internationally.

SECTOR INSIGHTS

This section reports on how different types of enterprises in the sector organize themselves, envision the sector and do business. It reports on interviews with 26 stakeholders that represent a cross-section of organisations and entities in Cairns. Some key findings include:

- Cairns is a cultural, artistic and creative industries hub for the Far North Queensland region and parts of Melanesia, with key links up to Cape York Peninsula and into the Torres Strait and Papua New Guinea
- Indigenous culture and arts are a local success story finding national and international audiences and opportunities
- Overall awareness of the role the culture and arts sector plays in northern Australia is low, and more is needed to promote an understanding of the sector's strategic importance
- Diversity is a highly valued aspect of the sector, with wide representation across age, gender, ethnic and cultural diversity as well as socioeconomic status (with Aboriginal and Torres Strait Islander arts practice as an important leitmotif)
- New and appropriate enterprise models for the arts that incorporate non-financial indices as economic indicators and outputs should be explored
- Large amounts of volunteer and in-kind work are evident in small-to-medium arts organisations
- Reduced federal arts funding has reduced operational support over the last five years, with local governments filling important gaps
- Landmark infrastructure such as Cairns Performing Arts Centre, Martin Munro Parklands and Cairns Art Gallery are vital for the sector, but less prominent venues and facilities such as arts infrastructure in schools, sheds associated with club activities, rented business premises and storage facilities are also crucial to creative production
- The sector critically needs to find traction with other industries especially tourism

TOURISM

International tourists visit Cairns for its natural attractions but their relatively short visits limit opportunities for engagement in cultural experiences. Domestic tourists are often repeat tourists and while they too visit the reef and rainforest, their length of stay provides more opportunities for cultural experiences. These need to be appealing and promoted on appropriate social media and other channels. The Cairns Indigenous Art Fair (CIAF) is a signature event that could be more widely promoted, helping the sector benchmark its relationship with tourism.

MAPPING

Cities have their own 'creative geography'. The places where creatives and creative business chose to cluster is shaped by a number of factors including the location of galleries, workshops, performance venues and other infrastructures necessary for the creative process. Three different maps are used to elaborate this spatial process: The Cairns Arts and Culture Map, plans for a new Gallery Precinct and a map of the reach/network of SoARTS stakeholders interviewed. Each of these maps show the depth and spread of the arts and culture sector in different ways. They also point to some areas where policy might be used to create new opportunities for multidisciplinary networking and cultural production.

CASE STUDIES

As part of reporting we have also included two case studies at the end of the report. Different case studies will feature in each State of the Arts in Cairns report, and present particularly noteworthy examples of creativity in Cairns.

They might be landmark pieces of infrastructure, successful arts and culture events, new models of creative enterprise or innovations in practice. Case studies help track our progress and this SoARTS report features The Performing Arts Precinct and The Young Company.



The Performing Arts Precinct, a state-of-the-art performing arts precinct consisting of the Munro Martin Parklands (MMP) and Cairns Performing Arts Centre (CPAC) is detailed here. The award winning MMP in particular is a key infrastructure investment in Cairns that provides a new open air civic space. Collectively the Precinct offers opportunities to link to economic development, community pride and individual wellbeing.



The Young Company (TYC), founded in 2009, is a not-for-profit theatre company providing instruction in acting methods and techniques while also providing mentorship and internships. TYC provides a self-sustainable funding model that provides pathways for young creatives.

ECONOMIC ANALYSIS

The State of the Arts in Cairns Report responds to a growing demand for understanding how arts and culture activities contribute to the regional economy of Cairns. The potential for the sector to positively contribute to the region's economic growth is slowly beginning to be understood. The sector's strategic importance, measured as its economic impact, complements the role of culture and the arts in making a conducive social environment in which creative industries can thrive.

What follows is an economic summary prepared through independent research convened by James Cook University. The summary utilises estimates of economic impact and comparative statistical analysis produced by Cummings Economics in consultation with Cairns Regional Council. The findings suggest Cairns is already a leader in cultural services when compared to other northern cities such as Townsville and Darwin and that the sector contributes \$460 million to the economy.

BACKGROUND TO THE ECONOMIC ANALYSIS

In 2019 Cummings Economics produced three reports detailing the economic activities of Culture and Arts entities for the Cairns Regional Council. As part of its arts and culture strategy setting process the Council commissioned an economic analysis of the creative industries in 2017 and 2014, both undertaken by Cummings. These reports are in addition to historical research commissioned by Arts Nexus in 2007 and before that by the Far North Queensland Cultural Industries Association in 1996.

THE SCOPE

In 2018, the JCU research team, Cairns Regional Council and Cummings Economics developed a research project that would explore the current economic impact of the sector using the latest Census data and an independent sector survey explicitly targeting the commercial culture and arts industries. At the same time, a discussion with Creative Industries researchers from Queensland University of Technology (QUT) emerged. The QUT researchers had identified Cairns as an economic 'hotspot' for their nationally focused project Australian Cultural and Creative Activity: A Population and Hotspot Analysis (Cunningham et al 2019). Cummings adopted the QUT definitions of Culture, Arts and Creative Industries in Census data for local reporting. Importantly this provided continuity of statistical definitions across all of the project research activity as it pertained to Cairns.

The QUT definitions identify occupations that are considered 'Cultural and Creative' within the sector and, importantly, identifies those located outside the sector as well. A creative occupation outside the Cultural and Creative Industries is known as an 'embedded creative'. It might include artists and designers whose occupation locates them in another industry—for example, a graphic designer who works for a health organisation. Conversely, the Culture, Arts and Creative Industries have occupations that are of a non-creative type, but whose contribution results in significant impact. For instance, a general manager of an Arts organisation. These definitions have been applied to Census data by Cummings Economics to provide statistical definitions for the sector in Cairns.

The three reports produced by Cummings Economics provide different perspectives on the sector from an economic viewpoint. The first provides extensive information on employment in Cultural and Creative activity in the Cairns region based on Census data: A Comparative Statistical Analysis (QUT Definitions) (Cummings 2019a). The second includes the results of a sector survey of over 100 businesses; Cultural and Creative Businesses Survey (Cummings 2019b). The third provides an analysis of the economic impact of the sector; Cultural and Creative Activities in the Cairns Region: Estimates of Economic Impact (2019c).

THE METHOD

This summary analysis draws on reporting by Cummings Economics that used standard economic statistics modelling to provide the order of magnitude estimates of the impact of the sector. The data relies on sufficient responses from creative businesses through the 2018-2019 survey to provide representative views to assist with strategy formation.

Geographic areas defined by the Census and relevant to reporting are the Cairns Local Government Area (LGA) and the Queensland Statistical Area Level 4 (SA4) defined as Cairns SA4. The Cairns LGA covers an area of 1687km² and extends from Wopen Creek and Eubenangee in the south, to Ellis Beach in the north. To the west, the LGA boundary follows the line of ranges behind Mount Peter and Mount Bellenden Ker to incorporate the Goldsborough Valley. Cairns SA4 is a much larger geographic area with a southern boundary just north of Ingham and including Hinchinbrook Island and Girringun National Park. To the north the SA4 boundary includes Wujal Wujal and Cape Tribulation; to the west Mareeba, Mount Garnet and the edge of Undara Volcanic National Park.

COMMERCIAL ARTS AND CULTURAL INDUSTRIES

This project implemented the Australian Bureau of Statistics and QUT definitions of the sector as the commercial Cultural, Arts and Creative Industries. It identifies 35 high-level segments from jewellery manufacturing and video production to arts and recreational services. Further, it recognises 90 occupations within 35 industry segments.

SUMMARY OF THE DATA

• Employment

In the latest Census data (2016) Cairns SA4 a total of 3,210 people were employed in association with Cultural and Creative activity, 2,472 of these positions were in the Cairns LGA. In Cairns SA4, this represents 3.0% and in Cairns LGA 3.4% of the total workforce.

• Economic contribution

The modelled Census (2016) estimate of the economic output of the combined SA4 sector is \$460 million. The Cairns LGA accounts for \$350 million of this output. Culture and the Arts account for 4.3% of Gross Regional Product in Cairns LGA and 3.8% in Cairns SA4 Region.

• Expectations of growth

In 2019 Cairns Cultural, Arts and Creative Industry businesses anticipate an average growth of 7% over the next five years.

WHAT THE DATA MEANS

Much optimism is evident within the Cairns Cultural, Arts and Creative Industries. This confidence is evidenced by a heightened awareness of the sector's economic impact and indications of the sector's growth.

While the bulk of activity occurs in the Cairns LGA, most businesses also serve the immediate and extended region with around 48% doing business interstate and about 25% engaging internationally. This activity indicates that Cairns is a significant economic hub for the sector with a substantial economic footprint beyond local government boundaries.

WHAT THE DATA DOESN'T TELL US

The Census data does not capture the number of people engaged in the economics of Culture and Arts as part-time, amateur or unpaid. Previous Cummings Economic studies suggest that comparatively large numbers of people contribute to the sector in a voluntary capacity. The value that recreational activity represents is a significant economic impact that is not counted with the figures presented. In providing Culture and Arts services locally, economic value is derived from lowering real costs of living and in the retention and attraction of workforce and population.

COMPARISON WITH OTHER PLACES IN
NORTHERN AUSTRALIA

The comparative study of Culture and Arts activity based on Census data 2011-2016 indicates that Cairns stands out within Northern Australia and Regional Queensland. In terms of a national snapshot of regional activity, Cairns rates high but not as high as Geelong and Richmond/Tweed regions.

In comparing the Census figures from 2011 and 2016, Cairns leads in terms of growth in creative occupations compared to other cities in Northern Australia.

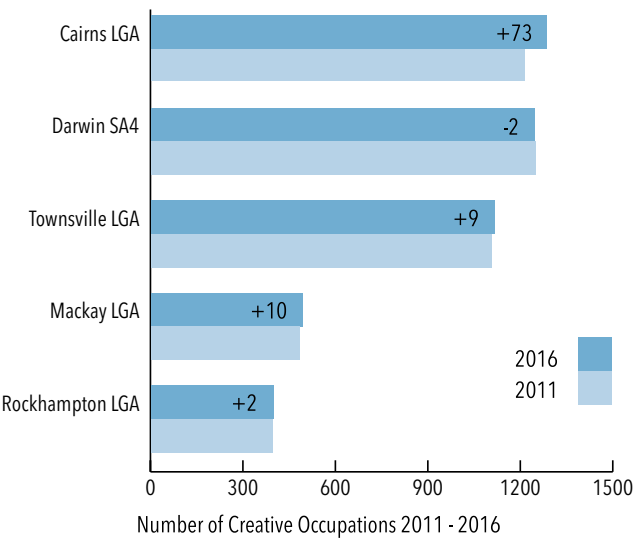


Table 1. Comparative numbers for growth of creative occupations in Australia’s northern cities.

THE CONCLUSION

WHAT WE CAN TAKE HOME FROM THE ECONOMIC REPORT

The economic output of the sector in Cairns is estimated at **\$460 million**.

The total number of people in Cultural and Creative occupations is around **3210**.

The sector is generally optimistic and in 2019 anticipated **7% growth** over 5 years.

A significant economic contribution goes uncounted in **volunteer and recreational engagement**.

Future evaluation methods will need to incorporate these.

Cairns is well placed to consider the economic impact of the Culture, Arts and Creative Industries and to promote the sector as an essential contributor to the region’s economic outputs. While the economic position of the sector is compelling, there remains a significant portion of activity that is not captured by Census data. Volunteering and recreational engagement is a substantial contribution to the economic impact of the sector and requires further investigation if we are to fully understand the value of the Arts, Culture and Creative Industries to the local economy.

SoARTS SECTOR INSIGHTS

BACKGROUND

Cairns Regional Council Cultural Services branch implemented an inclusive and detailed consultation process during 2017-18 to inform their current *Strategy for Culture and the Arts 2022* (CRC 2018a). The Strategy called for evaluative mechanisms that included independent and objective analysis of the sector's vitality in terms of wellbeing, resilience and economic impact. Insights into the long term viability of the Culture, Arts and Creative Industries in the Cairns region is a vital mechanism from which Cairns Regional Council intends to shape its cultural and economic policy direction.

DEFINING A REPRESENTATIVE STAKEHOLDER GROUP FOR THE SURVEY

The SoARTS Sector Insights report is derived from 26 stakeholder interviews representing a range of disciplines. The initial engagement fostered the participation of a spectrum of government agencies, education, commercial, not-for-profit and community groups. The sector grouping referred to Culture, Arts and Creative Industries in Cairns. All respondents have a primary business address within the Cairns local government area. A standardized set of interview questions relating to the Cairns Regional Council Strategy for Culture and the Arts 2022 were adopted as a basis to conduct the interviews. The stakeholder group represents the enterprise segments that frame the sector in the Cairns region. Therefore, the interview data is a cross-section of responses representative of the sector.

Positioning the sector

Inclusivity is a dominant theme for much of the enterprise that exists within the not-for-profit arts and cultural sector. These organisations represent service and discipline domains that have community and cultural development goals. Operating within a sector ecology, many of the commercial entities in the stakeholder group complement the attributes of the not-for-profits by sharing empathetic views towards social values. They are invested in a cohesive view of the arts, cultural and creative sector and see it as being highly desirable and beneficial for growth.

As part of the research process, the stakeholders were grouped for analysis purposes into one of three categories: Culture, Arts or Creative Industries. Activities associated with Culture are those engaged in museum and heritage practices, regional museums, historical societies and groups that identify along ethnic lines. Those that operate in the visual arts and performing arts are associated with the fine arts and described as Arts organisations. Creative Industries are commercial operators and include architects, publishers, graphic designers and filmmakers. Stakeholders suggest these divisions result from social and ideological differences in operational and organisational identity, but all are united by the fact that they are conducting a sector enterprise. An alternative view, held by some stakeholders, indicates that the social and commercial aspects of the sector do not reconcile easily. For them, social benefits exist independent of financial market impacts. The alternative view suggests that standard commercial business modelling may not be a good fit for some entities within the sector. We conclude that there is an opportunity to investigate specific enterprise models for the arts that can allow the sector to operate without hard divisions.

GOVERNANCE AND MANAGEMENT WITHIN THE SECTOR

Types of enterprises in culture and the arts

Current organisational models, governance and management within the sector take a variety of legal forms. Several of the stakeholders are employees embedded in, and representing, corporate structures that range from education and government to registered charities. Some of the participating entities are Australian proprietary and public companies limited by guarantee. Other stakeholders represent informal networks and private small business enterprise in the creative industries.

Styles of governance

Organisational governance styles of the region's not-for-profit arts and cultural entities have changed over time. These shifts reflect mainstream public expectations with a strong emphasis on economic sustainability indicators alongside contracts issued with government funding. Unexpected changes in successive government initiatives have impacted the way that publicly funded cultural and arts activity operates. In turn, this has shifted community expectations about representation in public institutions. The turning tides of cultural and arts agendas at a federal government level have affected the financial position of the region's small not-for-profit arts organisations and influence the way they manage their resources. The small-to-medium sector is acutely aware of negative impacts wrought by decreased levels of federal government funding. Notable is the reduced capacity of the Australia Council for the Arts and their expectations regarding the push to secure private and corporate philanthropic support. These financial pressures are heightened in a regional centre like Cairns where there are limited opportunities to secure corporate investor partnerships that are scalable across the breadth of the culture and arts sector.

Standard philanthropic business models do not quite fit the small-to-medium arts sector profile in Cairns, and an enduring and engaged arts business model has yet to be fully developed and understood. There are opportunities for sustainable operational frameworks and governance models to be further developed and adopted by some entities within the sector. Many stakeholders already participate in associations, companies or informal group structures. Still, a sector-specific operational model that suits the social and business frameworks of the sector can improve the impact and efficiency of the industry. Any new enterprise model appropriate to this segment of culture and the arts needs to incorporate non-financial indices into economic indicators and outputs. Appropriate social enterprise, practice-based, arts entrepreneurship and social wellbeing models provide clues to the economic sentiment of the sector.

Membership

Many organisations measure their impact and reach through an evaluation of their membership. Each organisational structure has a different relationship to membership by either having member subscribers or being subscribers to industry bodies, or both. Within the stakeholder sample, nine out of twenty-five entities had a model of paid subscribers as members. Membership numbers ranged from 14 to 650, with an average of 200 members. The number of paid subscribers is a very general indicator of impact as some organisational models are based on board membership only, and others focus on business-to-business services. As an example, a niche industry cluster might be represented by an advocacy body that services a small number of regional production centres which become their clients/stakeholders. However, the production centres themselves may have associate member artists that combine to be 400 to 500 strong. Therefore the advocacy organisation benefits a much larger community of practice than is indicated by looking at just the number of production centres it services as its core membership. For evaluative purposes the basis of measuring effectiveness by the number of members does not provide an accurate scope of an entity's impact within the sector or region.

GEOGRAPHIC REACH

The geographical area of engagement

Entities within the interview group have shown that an organisation's geographic reach is a significant measure of impact. Activity relating to a sphere of influence demonstrates tangible social and economic meaning. Most stakeholders identify that they engage locally, nationally and internationally through their core activities. Some 70% invest in local connections and resources, and 62% reach some form of international engagement. Strong links outside the Cairns local government area indicate that the sector thinks globally and acts locally in what can be considered a hub and spoke network model or ecology.

Local, national and international activities

Reported business and participation activity is concentrated in the region of Far North Queensland, specifically north of Townsville and firmly into the western and northern Cape York Peninsula. Intense activity is also evident in the Torres Strait and north to Port Moresby in Papua New Guinea. Cairns-based entities connect to the significant population centres of Australia, particularly Brisbane, Sydney and Melbourne. While there is some connection with other tropical cities in Australia such as Broome and Darwin, this is an area that will benefit from further development and organisational relationships. In particular, some stakeholders compare and benchmark their activities with those in Darwin; however, there can be more business-to-business activity with the Northern Territory's capital city.

The interviews indicate that international partnerships are significant to the sustainable development of the sector. Local entities can be catalysts for major international events, representing healthy exposure to expanding markets and institutions. An example of this is the ongoing international interest in the Indigenous visual arts, and new markets for Indigenous performing arts and fashion design. Global engagement occurs in places such as Melanesia, Samoa, French Polynesia, Micronesia, Republic of Nauru, Northern Mariana Islands, Philippines, Thailand, South Korea, Columbia, Canada, America, Africa, Europe, Netherlands and New Zealand.

DIVERSITY AND INCLUSION

Diversity in the Arts

The sector highly values social and economic inclusion reflecting a sentiment that cultural and creative diversity represents a healthy and vibrant community. The stakeholders actively engage in workplace diversity and the recognition of specific cultural and socio-economic groups. The sector is sensitive to specific cultural needs and the gaps that occur in mainstream culture and arts activity within the region. The charter of some entities allows them to focus on building particular capabilities, for example, with young people, remote and regional people or those with specific health or accessibility needs. Targeted inclusion aimed at identified groups and communities is a policy attribute for some arts organisations. For these entities, developing cultural health and mental wellbeing is a driving principle for which they engage in social and economic inclusion and creative recovery activity. No sector-wide guiding principles for diversity integration are currently standard. For culture and arts organisations, representation of diversity and Indigenous leadership at a management/board level warrants promotion as being particularly relevant and vital for the viability and wellbeing of the sector.

Identified groups

Culture and arts stakeholders have a range of responses to social inclusion, represented by the spot placement of people of diverse backgrounds in key leadership positions. The sector reports the development of aspirational human resource goals for equitable inclusion. These aims are a reflection of the society in which they live, and appear well represented in program activity. Inclusivity must extend to participation on management boards and in senior positions that are both creative and administrative. The value of cultural diversity is growing, and awareness of how diversity enhances the workplace is evident within the sector. More than 65% of the stakeholder group have placed or are seeking to place Aboriginal or Torres Strait Islander people in leadership roles within their teams. The sector acknowledges and accesses Traditional Owner groups frequently. The Aboriginal and Torres Strait Islander culture and arts movement provides influence and visibility for Indigenous practitioners. A palpable expectation within the stakeholder group is the basis that the cultural and artistic life of the region represents the particular values of these communities. These are expectations that have yet to become a core policy for some stakeholders. Yet those that have higher levels of diverse community access, engagement and public funding are more likely to be aware of the need for equitable representation across critical roles.

Gender equality

There are more women than men in arts leadership roles in the region. Perceptions of gender equality at a national and international level indicate that there are still more men than women in essential cultural and arts leadership roles. Stakeholders in the Cairns region demonstrate that women dominate the sector locally. A few stakeholders have gender equality strategies in place.

HUMAN RESOURCES, NETWORKS AND PROFESSIONAL DEVELOPMENT

Types of employment

The culture and arts sector engages people in many different types of employment and at various status levels. Many stakeholders contract staff on an as needs basis, on-demand and project-to-project indicating casualisation of employment conditions. It is particularly prevalent for technical or administrative roles to be part-time or casual. Several entities, including those identified as commercial creative industries, operate with a strong single advocate occupying a leadership role, who then assembles contract casuals and volunteers around specific outcomes, events or projects. Some stakeholders are embedded as employees or consultants in larger corporate environments, including government and education.

Volunteers

There are significant reports of volunteer and in-kind labour associated with most areas of the sector. Large amounts of volunteer and in-kind work are evident through the small-to-medium arts organisations in the region. In-kind labour contributions from employed staff in the not-for-profit and the education areas are similarly significant. Small businesses also report additional hours of in-kind contribution.

Volunteers go from organisation to organisation choosing projects of interest. Some stakeholders engage staff to coordinate their volunteers during signature events, and others have a large cohort of loyal volunteers that have been long associated with them and take on specific roles. Entities that are in the spectrum of the recreational arts can be 100% volunteer operated.

The economic value of the region's volunteer and in-kind contributions to the culture and arts is difficult to analyse because many organisations that rely on volunteer labour services do not have the resources to gather the requisite data. Based on responses by stakeholders from all levels, except for government departments, it can be identified

that volunteer and in-kind labour marks a considerable percentage of contribution to the sector. It is essential to build an understanding of the social and economic impact and potential of recreational activity, volunteerism and in-kind labour within the region. New research and data collection tools are required to evaluate some segments in the sector.

In very few cases, volunteerism is viewed with caution because it masks the real operational needs of an organisation. Where operational workloads are required to be demonstrated, to quantify for financial assistance from government agencies, volunteerism may be curbed or actively discouraged to emphasise the need for paid employment conditions and opportunities.

Networks

There is evidence of low-level informal networks structured around specific disciplines and communities of practice. It is also evident, however, that high-level advocacy is critically needed to promote growth across the sector. A united arts advocacy group that could draw together resources -- business acumen as well as skills in lobbying, policy development, esteem and impact building and networking -- is a shared vision of the region's arts leaders represented in the stakeholder group.

The region's culture and arts entities are well connected through organisational memberships to national and mainly state-based industry and advocacy bodies. At a local level, Chambers of Commerce have become more relevant. At a state and national level, appropriate advocacy and support groups have fluctuated over time. Key industry support providers responsible for services to the regional demographics of youth arts and visual arts have folded or significantly retracted. Some stakeholders identify these providers as having been critical to regional growth. The sector's perception is that retracted federal government arts funding levels to the Australia Council for the Arts has meant over 60 arts organisations nationally have lost operational support over the last five years. Individuals have been left vulnerable and without support when making critical decisions about their future in the sector. The ensuing gaps have also coincided with more emphasis on the economic sustainability of support services to the industry at the expense of community access, cultural and social health and wellbeing. There is stakeholder sentiment that the tacit and intangible benefits associated with culture and the arts are at risk of becoming undermined by explicitly economic imperatives, and that this may further inhibit a holistic value of the industry.

Professional sector services

Culture and the arts cover such a broad professional and discipline-specific spectrum that it is unlikely a single entity would be equipped with enough expertise or insight to provide all sector-wide services. However, there are typical organisational structures associated with the enterprise models identified through the stakeholder group. Three broad types of culture and arts entities would benefit the most from specific services designated for them: 1. Recreational arts associations, 2. Not-for-profit small-to-medium arts organisations, and 3. Small and micro businesses in the creative industries. Sector-wide culture and the arts advocacy focused on the growth fronts of cultural, social, political, and business development will provide the best service for these organisational models. The sector requires support and understanding of economic sustainability associated with small arts organisations and micro-businesses, including:

- government sourced project and operational funding;
- philanthropists and corporations who are seeking to give back to society;
- the aims of community wellbeing, cultural and social capital and creative recovery;
- partnerships and sponsorship for signature projects and events; and
- sector cohesiveness and cross-industry networks.

Our research did not have resources to reach individual practitioners, so their operational structures are not represented here. Recreational and not-for-profit arts organisations, who have the interests and wellbeing of individual practitioners as core values in their charter of aims, are well represented. The stakeholder group includes industry experts well placed to come together and determine what kind of services would benefit the sector in the Cairns region and what type of entity is required to deliver those services. A few stakeholders supported existing organisational structures, but a greater number of stakeholders were keen to explore new models of advocacy and a refreshed community and corporate identify for the arts and culture sector. Stakeholders did not identify Arts Queensland's devolved program, the Regional Arts Services Network (RASN), as an opportunity to engage in sector development and advocacy. Effective communication between the sector in Cairns and the RASN program will be of benefit.

Professional development

Professional development facilitates growth in the skills capacity of the sector. Providing professional development serves a nurturing and generative role for many stakeholders. An organisation that caters for the advancement of an employee's prospects through structured professional development is rare. There are instances where an organisation may have a passionate discipline advocate embedded within staff ranks. A catalyst for professional development can be a close associate who pushes for sustained professional development within an organisational structure. An example of an embedded industry advocate is an employee within local council arts and cultural services with close industry connection and understanding. Another example is an art form advocate in an arts organisation who leverages industry-focused development programs associated with signature public events.

Within the recreational arts spectrum, some strategies progress participants through professional-amateur (pro-am) development towards professional outcomes. These pro-am activities include coordinated experiences at an operational level such as facilitating visiting practitioner workshops. Another pro-am professional development example is the provision of a focused event for a group of advanced members to access the latest techniques.

For the not-for-profit organisations and small businesses, mentorships and internships are one way to provide applied training towards professional development. However, this only appears to be viable in a generous institutional or business setting. Some stakeholders that are small arts organisations indicated that their workloads and expectations of staff time would make mentorships challenging to facilitate. The stakeholders suggest that professional development within the sector has significant gaps for current participants and those in early career stages whose trajectory leads them towards smaller organisational settings.

Gaps in sector professional development

A setting that allows professional development is enabled by a combination of time, access and resources. Generally, the stakeholders feel disadvantaged by being regional or remote as this reduces access to professional development opportunities. Areas of the sector can become professionally isolated. While opportunities might occur locally, without strong advocacy for culture and arts in the region, national and international professional opportunities will be limited to some disciplines.

There is stakeholder sentiment that indicates higher education providers have reduced the capacity for provision of professional development opportunities in the region. Both at TAFE and university level, short capacity building programs and courses that have previously existed are no longer being offered. In part, the reduction is due to the changing economic demands on higher education institutions that are no longer willing to underwrite culture and the arts professional development programs.

In many cases, stakeholders experience a tyranny of distance where national service providers have a reduced capacity to engage with regional practitioners and members. A general reduction in operational funding levels provided by state and federal governments to the national arts sector has negatively impacted the range and types of services providers can offer the regions. Some of the gaps in advocacy and facilitation of services are taken up by local council departments.

COLLABORATIONS AND PARTNERSHIPS

Sector collaborations

Partnerships and collaborations build capacity and allow programs and projects to flourish at a scale that could not be achieved by individual entities. They drive the sector, and there is a broad interpretation of the types of relationships that constitute these arrangements. Small businesses are inclined to regard their clients as partners and their staff as collaborators. The not-for-profit arts organisations enter partnerships with government funding agencies and collaborate with other arts organisations on significant public or sector development programs. Several stakeholders engage in collaborations that strategically leverage opportunities to fulfil mutual aims, including sharing the cost of program activities with similar organisations in other cities. Local venue based organisations partner with state institutions to develop programs that are hosted in both sites, fulfilling a mutual need to showcase unique regional cultures and stories. Small arts organisations collaborate with microbusiness and individual practitioners to fulfil their programs.

Every stakeholder is actively engaged in partnerships and collaborations. Some identify the need for specialist staff in the form of a business development coordinator tasked with developing appropriate partnerships for their organisation. However, some small businesses remain guarded about the threat to their intellectual property and like a corporate business would form a non-disclosure agreement as part of the collaborative relationship.

Cross-sector collaborations and partnerships

Cross-sector collaborations and partnerships are not currently a prominent feature of the culture and arts sector. Partnerships are most likely to form where shared values exist such as with education and health services. Some small companies have also been able to identify transferable skills that allow them to work across employment and construction services. Surprisingly, for a region that has a strong tourism focus, there is only minor evidence of engagement in partnerships across this sector. One reason for this is that tourism operators demand consistency of product over long durations and consecutive seasons. Some of the operational tendencies of our stakeholders involve responsiveness to cultural and grassroots programming or expressions of innovative practice that include a level of risk and immediacy. These traits have not suited the traditional models of tourism in the region best known for its reef and rainforest. However, this also represents an opportunity for the broader promotion of culture and arts in Cairns as a destination attractive to the domestic and international cultural tourism and art tourism markets. For example, Cairns Regional Council venues such as the Botanical Gardens Precinct with the Tanks Arts Centre become centrepieces unique to the city with unmatched potential for destination and cultural tourism experiences.

A barrier that precludes many culture and arts enterprise, from engaging sustainably with tourism, is offering consistent presale product. While arts and culture can provide authentic experiences, there is an inherent attribute of innovation, constant renewal and originality that results in fewer tried and tested products suitable for the tourism market. Innovation and change are seemingly at odds with long-term tourism markets that need familiarity and certainty to guarantee forward sales. Another issue is the cost of participation. The tourism industry is very competitive and attracts high commercial stakes in brand promotion and advertising. Many small entities in the Culture and Arts sector are priced out or are uncompetitive. An exception is the Cairns Indigenous Arts Fair that is identified by the tourism and events industry as a regional signature event, marking it as a seminal project for benchmarking the sector's relationship with tourism.

Embedded creatives

Graphic and digital design professionals are some of the sector participants who are most likely to be working in industries outside of culture and the arts: in tourism, the public sector, and in health and education. A few stakeholders identified the value of cross-disciplinary placements where artists as creative thinkers are engaged as part of a project team contributing to the design phase of developments, such as private and civic architecture, the landscape design of parks and gardens, and tourist resorts.

International collaborations

Many of the recreational arts and not-for-profit stakeholders have engaged in international collaborations as a way of promoting and celebrating cross-cultural and inter-cultural cooperation. Small business is involved in international partnerships as part of their business strategy, and this includes promoting cultural diversity in the workplace. The higher education providers are interested in expanding their reliance on global markets.

There is a broader regional theme of collaborating with entities associated with Europe, the Asia Pacific and with tropical countries worldwide. There is also evidence of recent collaboration and exchanges with a focus on First Nation peoples globally and including with groups in Canada, North America and Africa.

There are expectations from a few stakeholders that international culture and art collaborations have the potential to grow in Cairns due to anticipated links with tourism and ongoing cultural exchange initiatives. There is also evidence of a global role for Aboriginal and Torres Strait Islander cultural ambassadors and artists to represent Australia, their unique cultures, and the region at international events and forums. An example of this is the ongoing relationship of Torres Strait Islander artist Alick Tipoti from Badu Island and Prince Albert of Monaco. This has included a major touring exhibition, travel to promote ocean conservation and a documentary film. Other recent examples are the representation of Cape York artists at the United Nations and international shows by the region's Indigenous communities.

INFRASTRUCTURE USE AND NEEDS

Current use of public infrastructure assets

Awareness of the Cairns Regional Council's contribution to capital infrastructure is high amongst the stakeholder group. It is also clear that activities delivered through the Council's programs have an impact on the sector. Programs such as the Festival 2018 associated with the Commonwealth Games and the opening event of the Cairns Performing Arts Precinct managed by the Cultural Services branch of Council are inclusive and provide access to civic infrastructure for community groups with diverse representation.

For the stakeholders, civic infrastructure represents themes that communicate pride and prestige, and attributes of community wellbeing and social health figure highly as well. The stakeholders agree that Cairns endowment of culture and arts infrastructure is higher than that in other regional cities. There are a few indications that the sector is defined, at least publicly, by the prominence and amount of landmark arts infrastructure in the town. The stakeholders stand divided about the current use of the existing public facilities. For a few stakeholders, the amount of infrastructure allows them to consider programming events that are "city-wide" and that gear towards the style and scale of a festival. Other stakeholders are aware of underrepresented groups, for example, young and emerging practitioners primarily excluded from accessing major venues. Furthermore, a few stakeholders are unable to utilise prominent sites because the cost of use is a barrier to access.

The most often cited infrastructure landmarks are the Cairns Performing Arts Precinct, Munro Martin Parklands and Cairns Art Gallery. However, beyond these civic buildings, the stakeholders also consider arts infrastructure in schools, sheds associated with club activities, rented business premises and storage facilities, as being just as significant to the sector. These smaller, less prominent venues and facilities are often associated with creative production rather than public presentation. The stakeholders remind us that infrastructure for the production of culture and the arts is as necessary as those more prominent venues that focus on display and civic pride.

Public infrastructure that is considered vital

Some stakeholders represent signature events that have considerable sector buy-in. These organisations are reliant on large venues for their core activities. Vital infrastructure for the Cairns Indigenous Art Fair (CIAF), for example, goes beyond presentation venues exclusively used for culture and the arts and the event accesses additional spaces at the Cairns Cruise Liner Terminal for its core activity. As a city-wide event, CIAF anticipates a programme that incorporates the majority of cultural infrastructure in Cairns CBD and city fringe venues. CIAF related activities have also utilised outdoor sites including CBD parklands.

Another example of non-arts infrastructure accessed by stakeholders is the hire of hotel meeting rooms and function spaces from time to time. For other stakeholders, vital infrastructure is more modest. It consists of operations in day-to-day premises where the focus is on supporting, servicing or producing culture and the arts. Small creative businesses dotted throughout the city and greater Cairns area access workplaces through private commercial leases.

Several culture and arts organisations have found operational accommodation within local or state government-operated facilities. However, others remain in rented accommodation owned by the private sector. Not all not-for-profit organisations feel there is parity in the industry when it comes to organisational accommodation. Subsidised operational settings for non-profit professional production-based organisations represents a gap in the non-commercial cultural and arts infrastructure in the region.

Public infrastructure that is missing

There are many views about infrastructure gaps, but there are only two or three themes. One theme is the need for a purpose-built regional museum and art gallery focused around an Indigenous 'keeping place' that incorporates museum-quality storage. The second theme is an infrastructure that supports production—a precinct whose purpose is to accommodate the messy business of developing new work. It is multifunctional, multidisciplinary and social. It incorporates a range of spaces including retail, café, meeting/rehearsal spaces, organisational accommodation, artist's studios, small creative businesses and public art.

A few of the stakeholders suggest a more hierarchical understanding of professional practice in the region. This understanding links the role each venue plays in the ecology of the sector. For these stakeholders, the ecology includes activities that can be considered recreational, pro-am through to professional. Their understanding is of a spectrum through which a practitioner progresses as they produce outputs towards professional career goals. Therefore, there is a view that one venue accommodates community groups and recreational practitioners, another experimentation and innovation and another that presents those practitioners whose practice has resolved into a professional quality that can be recognised by national and international industry. Other stakeholders view infrastructure needs very differently.

Some stakeholders identify perceived barriers to participation for members of the community who are marginalised or have special needs. There is sentiment that CBD centric infrastructure focuses on the capacity to deliver to the face of the city most influenced by tourism. They suggest that culture and arts infrastructure needs development in local places where the community live. This would provide better access to facilities for marginal communities. A facility similar to Munro Martin Parklands could be developed for the inner residential suburbs, for example, to provide an outlet for local cultural expression. This infrastructure would facilitate cultural development, engagement and empowerment of vulnerable communities who are the most disenfranchised from current cultural and arts infrastructure.

VIABILITY/SUSTAINABILITY

Succession Planning

Most stakeholders that operate as a business or with a company structure are engaged in some form of succession planning. A few stakeholders equate succession planning with generational change; others identify that the financial cycles imposed by operational funding rounds negate the capacity for succession planning because the periods of certainty are too short. The willingness for some stakeholders to acknowledge succession planning indicates they are thinking about the future viability of their organisation, the leadership role they play within it and how generational transitions will occur.

Generational change

Stakeholders whose organisational responsibility includes formal infrastructure have committees, boards or company directors that manage change at an internal membership level. However, many of the management boards associated with these stakeholders appear to be dominated by more senior members of the community with fewer instances of diversity. Conversely, stakeholder organisations that represent inclusive areas of culture and the arts tend to view generational change as a dynamic opportunity and as an integral part of their operational strategy. These stakeholders represent entities that have been established more recently in comparison to those indicating older board membership.

Planning for cultural representation

Stakeholders hold a range of opinions regarding cultural representation. A few identify clearly with a single cultural group, for example, "Indigenous youth from Australia". Others are less concerned with formalising policies and actions around reconciliation and inclusion. Entities influenced by operational funding agreements affecting company policies, such as rules of conduct, may have performance indicators that shape how a management committee or board of directors is constituted. These indicators, developed to match funding criteria with government policy, may stipulate the cultural diversity and inclusion appropriate for the organisation. Currently, there are no sector-wide guidelines adopted or that cultural organisations use to plan for diverse cultural representation within their operational structures.

SECTOR GROWTH AND INNOVATION

Anticipated growth of the sector

Many stakeholders anticipate growth in the sector being at least commensurate with population growth in the region. The development of state and local government infrastructure projects yields a perception of growth and an elevated economic outlook. A few stakeholders indicate impediments to growth, including the disparity in funding levels to organisations that deal with culture and those that deal with the arts. For example, community and regional museums do not have access to regular federal government programs. Such programs prioritise assistance, in the form of competitive operational and multi-year support, to arts organisations.

Potential to innovate

The unique cultural makeup of the region is considered to positively shape innovation. Some suggest the potential for innovation is more evident in culture and arts services than creative practice and presentation. The cultural perspectives of Aboriginal and Torres Strait Islander practitioners are in a strong position to provide innovative socially inclusive services within the sector. Unique international connections, particularly to Melanesia and the Pacific, also shape opportunities for innovation.

Due to a perceived lack of support or awareness from peak bodies, stakeholders independently find opportunities for innovation. There is a sense of finding one's own way to resources regardless of other comparable activity in the industry. Stakeholders identify unique narratives and opportunities and work at a grassroots level to effect positive outcomes. By their very nature, these become innovative solutions to regionally developed needs and initiatives.

BRANDING

Enhancing the image of Cairns

Welcoming visitors and giving them authentic local experiences is a valuable contribution the sector can make. A range of cultural and arts-related experiences across the city and region would express our local identity and sense of place that is enjoyed and embraced by tourists. Cairns Regional Council's investment in culture and arts is a tangible form of self-expression that has created beautiful spaces and places where people are inclined to linger. Shields Street is mentioned as a precinct where the integration of public art and public amenity has created a destination attracting people-oriented activity, including two university campuses. The development of the Cairns Esplanade, with Robinson's iconic Woven Fish, is also highlighted because of the proliferation of public art. Public art is an under-appreciated art form that enhances a connection between the local community and visitors.

Several stakeholders suggested that a coordinated approach to the 'image of Cairns' by sector leaders would provoke more vibrant discussion and elevate the place of culture and arts in the region. The sector's own self-reflection on their ability to impact the society and economy of Cairns is weak. While some stakeholders feel the industry is too small to have much of an effect, others believe a representative group has the potential to elevate the image of the arts and culture sector to a place where more benefits for the sector and wider community might flow. Commercial stakeholders have identified the potential of a "brand Cairns" project. Reflecting on the image of Cairns could be a motivating idea that interests stakeholders within the sector. Culture and arts enterprises can play an important role in agitating for action, finding innovative solutions and delivering creative events that enhance the appeal of the region.

Liveability

The stakeholder group identifies the region's liveability and the activity of the sector as strongly correlated. Elevated levels of high standard products are suggested as a next step of critical investment. Some argue that underwhelming artistic production and public art will reduce the capacity and potential of broader community and economic engagement with the sector. They suggest a potential negative impact on sector growth if quality standards do not align with national and international standards. The development of practitioner outputs must move towards industry expectations and critically acclaimed levels of quality for broader economic success within the sector to take hold.

Liveability includes making space for the production of cultural and art activity that enriches the lives of participants in the sector, allowing them to grow. The stakeholders identify cultural growth, and career and sector growth, through critical engagement with the regional environment and its potential impacts at a global level. Extraordinary artistic experiences are needed to change the perception that the region is ultimately about reef and rainforest. Many express they can do more to contribute to the city through expanding cultural and artistic programs beyond peak event times of the year. Some stakeholders want more to happen in Cairns where unique, authentic experiences far surpass what is currently on offer. The stakeholders believe that culture and the arts can be engaged to build those experiences which will enhance the liveability of the city and region.

Arts and culture capital of Northern Australia

Claiming the title of the Arts and culture capital of Northern Australia is the Cairns Regional Council's call to action and signals the importance of the sector to establishing a unique regional identity. Economically speaking, it helps identify the region from a point of difference that businesses can find leverage and benefit commercially. The variety of stakeholder responses to Cairns as a northern capital for culture and the arts suggests there are strengths and weakness to the claim. For some the concept of 'cultural capital' involves reciprocity, a situation that draws participants into the sector, at the same time producing exports. For others, there is an inherent truth to the claim because it is the meeting place for Australia's two distinct Indigenous peoples, Aboriginal and Torres Strait Islanders, whose traditional lands are bounded by the region the city services.

Evaluating the sector's capacity for production and quality is an important part of any consideration of Cairns as an arts and culture capital. Some stakeholders indicate that the potential for participants to operate at a national and international level is critical for the perception of a culture and arts destination. A capital is indicative of the flow of talent and services that are not only represented locally but also in the growth of touring work that goes out into the world. The stakeholders suggest more should be done to increase the capacity of local participants to reach levels of quality and production that will be recognised nationally and internationally.

There is uncertainty towards the image of Cairns as an arts and culture capital because of limited, mostly anecdotal, evidence. Stakeholder experiences of comparing Cairns to other tropical cities such as Darwin, Broome or Townsville suggest that Cairns has much more to offer in terms of culture and the arts. When reflecting on individual disciplines, however, the positives and negatives are profoundly mixed. There are indications that some segments are operating well below their perceived potential, for example, in the area of Film and TV. Conversely, there has been a rise in culture and arts activity generated around Aboriginal and Torres Strait Islander identity achieving success in terms of developing significant cultural capital for the region.

Many stakeholders believe the sector is underutilised. It has much to offer as a way of expressing the attributes of the region. There is a perception that the reef and rainforest persist as the dominant reference points when tourism and business promote Cairns. There is a sentiment that the Cairns region has the potential to develop and sustain the culture, arts and creative industries to a level that complements the claim of Cairns being northern Australia's cultural capital.

DATA FOR THE FUTURE

Assessing impact within community

The stakeholder interviews indicate that the sector represents the cultural and artistic diversity present in the community. Uniquely placed, the sector engages, supports and leads the cultural, arts and creative life of the region. Many of the stakeholders are active in the areas of sector development, wellbeing and social inclusion. These tacit attributes are not always clearly defined in economic analysis. It is critical to frame an evaluation of the sector with both the tangible and intangible qualities that contribute to its vitality and viability. These Sector Insights complement our understanding of culture and the arts by articulating a cross-section of experiences and attitudes.

The more closely an entity works with a government department, the higher the levels of reporting and data collection. However, many stakeholders represent significant activity that goes unreported. This undocumented economic and cultural contribution requires an alternative and accessible data gathering mechanism. There is a gap in data collection and reporting for micro-businesses, recreational activity and small community associations segments. It is also evident that the research data, collected from the touchpoints of the stakeholder group, has inconsistencies. To better gather appropriate qualitative and quantitative data, new data reporting mechanisms will need to be developed.

KEY POINTS

- The 2019 Sector Insights draw from interviews with 26 diverse Culture, Arts and Creative Industries enterprises in Cairns. The interview data is a cross-section of responses representative of the sector. The scope of the survey does not include individual practitioners.
- There is a view that standard commercial business modelling may not be a good fit for some entities in the sector. There is an opportunity to investigate specific enterprise models for the arts that can allow the industry to operate holistically.
- Geographic reach and sphere of influence reporting demonstrate tangible social and economic activity. Some 70% of those interviewed invest in local connections and resources, and 62% of have an international reach. Considered a hub and spoke socio-economic ecology, the sector is one for thinking globally and acting locally.
- The sector has a high awareness of cultural inclusion, but no sector-wide guiding principles for diversity integration are currently standard. Representation of diversity and Indigenous leadership at a management/board level warrants promotion as being particularly relevant and vital for the viability and wellbeing of the sector.
- A successive reduction in operational and project funding levels provided by state and federal governments has negatively impacted the range of services available to the sector. The local council takes up gaps in advocacy and facilitation of services.
- A shared vision of the region's arts leaders is the need for a united arts advocacy group that could draw together resources in terms of business acumen as well as skills in lobbying, policy development, esteem and impact building and networking.
- Collaborations and partnerships are a common strategy adding to the viability and sustainability of the sector.
- The sector critically needs to find traction with other industries, especially tourism.
- The Indigenous culture and arts are a local success story in finding national and international audiences and opportunities.
- A significant impact goes unreported in the segment of recreational participation and volunteer/unpaid activity.
- Cairns is a cultural, artistic and creative industries hub for the greater Far North Queensland region and parts of Melanesia. Low awareness of the leading role the sector plays in northern Australia represents an opportunity to broaden understanding and exposure.
- Landmark infrastructure such as Cairns Performing Arts Centre, Munro Martin Parklands and Cairns Art Gallery are vital for the sector. Less prominent venues and facilities such as arts infrastructure in schools, sheds associated with club activities, rented business premises and storage facilities are also crucial to creative production.

ARTS AND CULTURE TOURISM POTENTIAL FOR CAIRNS

A report published by Australia Council for the Arts (2020), *Domestic arts tourism: Connecting the country*, explores the potential of domestic arts tourism to support local jobs and economies while enriching and connecting Australians through creative experiences. The report suggests the untapped economic potential of this sector of the market, while at the same time using the arts to build community, increase wellbeing and enhance cultural identity and social cohesion. The report is a companion piece to the Australia Council's *International Arts Tourism: Connecting cultures* (2018), and examines day trips and overnight stays by domestic tourists to attend festivals and events, visit artist workshops and studios, attend live shows, visit museums and art galleries and experience First Nations art, craft and cultural displays. Figure 1 provides a graphic representation of the kinds of activities Australian domestic arts tourists undertook on their visits around Australia in 2018, with corresponding information on the growth of these sectors. Cairns is a city well poised to take advantage of this kind of tourism, to diversify beyond 'reef and rainforest' tourism and for First Nations arts and cultural offerings to be promoted.

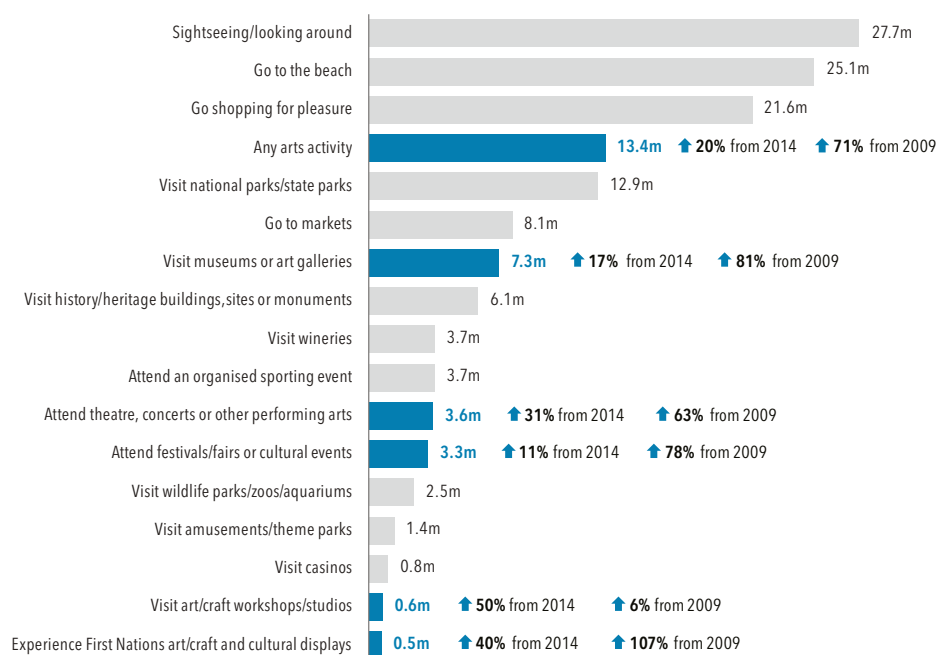


Figure 1. National snapshot: Selected activities undertaken on an overnight trip in 2018 (Australia Council for the Arts 2020)

As part of this SoARTS project, Cairns Regional Council commissioned Central Queensland University (CQU) to conduct a survey to assess the participation of domestic and international tourists in arts and cultural activities while visiting Cairns. CQU have conducted an exit survey of tourists departing the domestic terminal of Cairns airport for a number of years but in June 2018 added several new questions to develop a deeper understanding of the kinds of arts/cultural activities tourists engage in.

The airport survey was undertaken twice monthly on randomised days, and a total of 708 tourists were surveyed. The results reported here are based on the responses of these tourists, comprising 376 domestic and 332 international respondents (Prideaux and Thompson 2019). The majority of both international and domestic respondents were female (see Table 1).

Table 1. International and domestic respondents by gender n=708

	Male	Female	Total
Domestic	148 (39.4%)	228 (60.6%)	376
International	133 (40.1%)	198 (59.6%)	332
Total	281	426	708

It should be noted that the survey was administered in English and does not record the views of non-English speaking tourists, including the Japanese and Chinese markets. A number of significant market sectors—including those tourists travelling via road, rail and sea—or departing through the international terminal of Cairns Airport, are also not represented.

RESULTS/FINDINGS

The majority of domestic respondents (67.4%) had visited the Far North Queensland region previously. Only 7.6% of international visitors had previously visited. The average length of stay in Cairns for domestic respondents was seven nights while the average length of stay of international respondents was five nights.

Respondents were asked to indicate the activities they regarded as important when selecting a holiday destination. The results, shown in Table 2, indicate a high level of interest in cultural experiences with international respondents (69.6%) exhibiting a higher level of interest than domestic respondents (45.5%). Museums and galleries were of more interest to international respondents (27.4%) than domestic respondents (19.9%). Arts, defined as performing and/or visual and festivals, was not a major factor in destination selection for either international (11.8%) or domestic (7.2%) respondents.

Table 2. Importance of activities experiences when selecting a holiday destination

Activities	International n=365	Domestic n=347
Nature-based experiences	86.3%	72.9%
Cultural experiences	69.6%	45.5%
Local Food	53.2%	55.3%
Dining experiences	33.9%	50.7%
Museums/galleries	27.4%	19.9%
Nightlife experiences	25.5%	11.8%
Special events	15.1%	11.8%
Arts (performing/visual)	11.8%	7.2%
Coffee culture	11.2%	19.0%
Festivals	11.2%	11.2%
Activities for children	4.4%	14.1%

Respondents were asked about their participation in arts/ cultural activities during their visit to the Cairns region. Results are reported in Table 3. These results show that less than 15% of domestic and international male respondents, and less than 12% of domestic and international female respondents, took part in an arts or cultural activity while in Cairns.

Table 3. Participation in arts/cultural activities n=76

Respondents	Male	Female
Domestic	17 (12.1%)	24 (10.8%)
International	14 (10.8%)	22 (11.6%)

Table 4 ranks the importance of a range of motivations to visit the Cairns region for international respondents, while Table 5 shows the finding for domestic respondents. As illustrated in Table 4, 'to have fun' was the most highly ranked motive just above to 'visit the Great Barrier Reef' and 'experience the natural environment' by international respondents. To 'experience Aboriginal culture', 'visit arts and cultural spaces' and 'the event that I attended' were ranked 15, 16 and 17 respectively.

Table 4. Motives to visit the Cairns region for international respondents using a 5 point Likert scale (5 = most important; 1 = least important) n=332

Rank	Motivation	Mean
1	To Have Fun	4.56
2	Visit the Great Barrier Reef	4.44
3	Experience the Natural Environment	4.28
4	See Australian Wildlife	4.13
5	Visit the Wet Tropics Rainforest	4.11
6	Learn about the Natural Environment	3.88
7	Climate	3.85
8	Rest and Relaxation	3.84
9	Enjoy the Tropical Lifestyle	3.79
10	Visit National Parks	3.77
11	Visit World Heritage Areas	3.73
12	Visit the Beaches	3.69
13	The Price Matched my Budget	3.67
14	Spend time with my Family	3.21
15	Experience Aboriginal Culture	3.19
16	Visit Arts and Cultural Spaces	2.79
17	The Event that I attended	2.57
18	Visit Friends and Relatives	2.39

Table 5 shows the top motivation for domestic respondents was 'to have fun', followed by 'experience the natural environment' and 'visit the Great Barrier Reef'. Similar to international respondents, domestic respondents ranked 'experience Aboriginal culture', 'visit arts and cultural spaces' and 'the event I attended' as 14, 15 and 16 respectively.

Table 5. Motives to visit the Cairns region for domestic respondents using a 5 point Likert scale (5 = most important; 1 = least important) n=376

Rank	Motivation	Mean
1	To Have Fun	4.52
2	Experience the Natural Environment	4.30
3	Visit the Great Barrier Reef	4.13
3	Rest and Relaxation	4.13
4	Climate	4.10
5	Visit the Wet Tropics Rainforest	4.07
6	Enjoy the Tropical Lifestyle	4.02
7	See Australian Wildlife	3.90
8	Visit National Parks	3.80
9	Visit the Beaches	3.79
10	Visit World Heritage Areas	3.77
11	Learn about the Natural Environment	3.75
12	The Price Matched my Budget	3.73
13	Spend time with my Family	3.34
14	Experience Aboriginal Culture	3.18
15	Visit Arts and Cultural Spaces	2.88
16	The Event that I attended	2.54
17	Visit Friends and Relatives	2.31

Respondents were asked to name the arts or cultural activities they participated in. As shown in Table 6, the top two arts/cultural activities reported by respondents were Tjapukai and the Mossman Gorge Dreamwalk tour. Overall, the results indicate that Indigenous arts/cultural activities were more popular than other arts/cultural events. This may be a reflection of the commercial nature of the Indigenous arts/cultural activities. A number of the other arts/cultural activities that were mentioned by respondents are either free or do not appear in commercial tourism booking web platforms.

Table 6. Arts/cultural activities participated in

Activity	Domestic		International	
	Male	Female	Male	Female
Tjapukai	6 (4.1%)	7 (3.1%)	6 (4.5%)	4 (2.0%)
Mossman Gorge Dreamwalk Tour	2 (1.4%)	1 (0.4%)	1 (0.8%)	2 (1.0%)
Other Indigenous experiences	2 (1.4%)	4 (1.6%)	1 (0.8%)	7 (3.5%)
Galleries/ exhibitions	2 (1.4%)	4 (1.6%)	0	1 (0.5%)
Museums	2 (1.4%)	1 (0.4%)	0	1 (0.5%)
Festivals/ Parades	2 (1.4%)	1 (0.4%)	1 (0.8%)	0
Did not specify activity	1 (0.7%)	5 (2.2%)	1 (0.8%)	3 (1.5%)

POTENTIAL FOR CAIRNS

Tourists usually consider a range of experiences and other attributes when selecting a destination. In the case of international tourists, it is apparent that the appeal of Cairns' natural attractions and relatively short time spent in the destination limit their opportunities to engage in cultural experiences. This is not the case for domestic tourists, the majority of who have previously visited the region and are less likely to visit the Great Barrier Reef and the rainforest (as illustrated in Table 6). From a marketing perspective, it is this group which appears to offer the best prospects for engagement in cultural experiences. For engagement to occur cultural options need to be appealing and promoted on appropriate social media and other channels.

MAPPING CREATIVITY

Cities have their own 'creative geography'. The places where creatives and creative business chose to cluster is shaped by a number of factors including the location of galleries, workshops, performance venues and other infrastructures necessary for the creative process. Given the importance of space to creativity, it is useful to 'map' how creativity manifests itself in Cairns. This section uses three different 'maps' to elaborate this spatial process: The Cairns Arts and Culture Map, plans for a new Gallery Precinct and a map of the reach/network of SoARTS stakeholders interviewed. Each of these maps show the depth and spread of the arts and culture sector in different ways. They also point to some areas where policy might intervene to create new opportunities for multidisciplinary networking and cultural production.

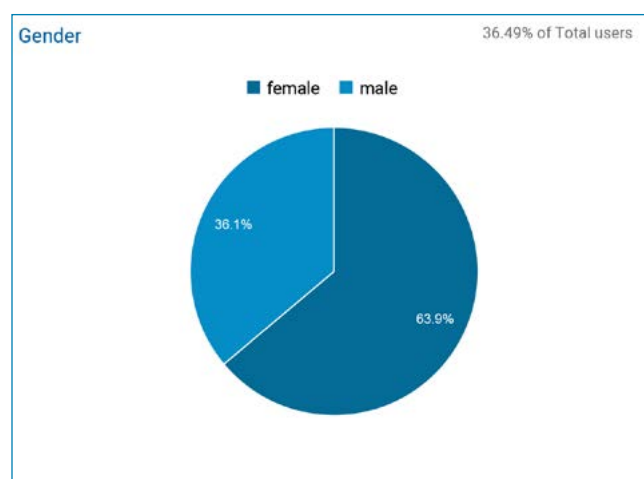
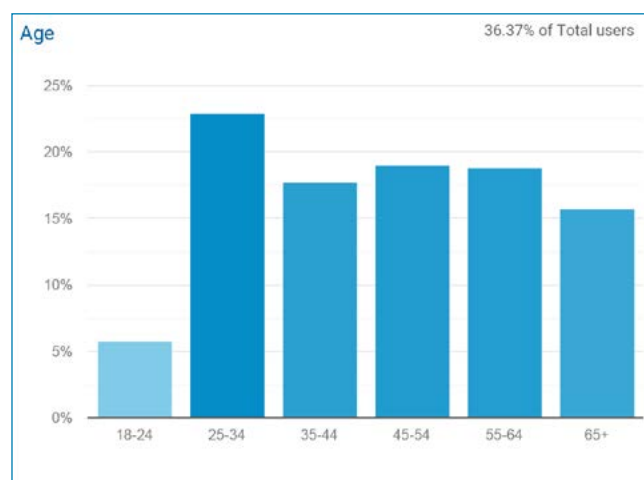


The Cairns Arts and Culture Map

[Cairns Arts and Culture Map](#) was developed by Cairns Regional Council and launched in 2018 as a one-stop-shop for information on the city's cultural assets. Council-owned art and cultural facilities are listed, including 'venue for hire' information about available Council facilities, as well as historical sites, information about festivals and cultural organisations. Creative businesses and individual artists create their own entry and can use the site as a way to promote their practice. The Map works to promote festivals and places as well as individuals and business.

According to data provided by Cairns Regional Council, the map grew to have over 300 contributors with 1412 listings during 2019. From 1 January to 27 November 2019, the Map had 14,351 users and 44,425 page views, with the majority of users being female (64.5%) and in the 25-34 year old cohort (22.99%) (see Figure 2):

Figure 2: Age and gender of Map users



Although the Map's users are primarily from Australia, it is viewed from many different countries (see Map 1):

Map 1: Cairns Arts and Culture Map users by number of hits

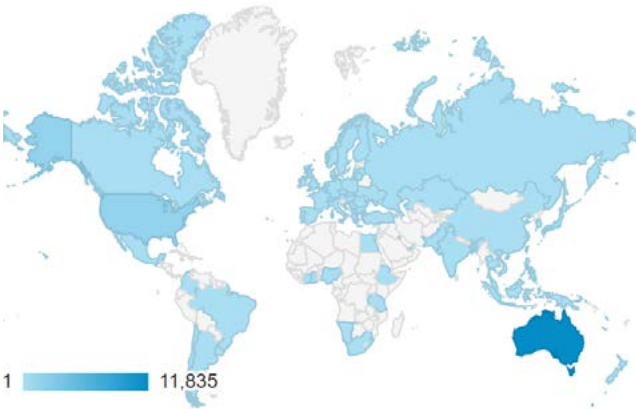


Table 7: Top pages and categories on the Map

Most popular pages (in order):
1. Cairns Festival
2. Cairns Performing Arts Centre
3. Carnival on Collins
4. Cairns Amateurs
5. Great Pyramid Race
6. Cairns Indigenous Art Fair

Most popular categories (in order):
1. Public Art
2. Artists
3. Festivals
4. Facilities and Spaces
5. Historical Places
6. Organisations
7. Industries
8. Collections

Research for the SoARTS report entailed importing Map data to establish any patterns of grouping or clustering. As predicted, the majority of listings on the map focus on the city centre and include flagship projects such as the new Cairns Performing Arts Centre and the Munro Martin Parklands, the Cairns Regional Gallery, the Centre of Contemporary Arts and the School of the Arts heritage building which now houses the new Cairns Museum (see Map 2). There was also a cluster around the Botanical Gardens Precinct and Tanks Arts Centre, an important venue for live music, art exhibitions, theatrical performances and community workshops. Public art tends

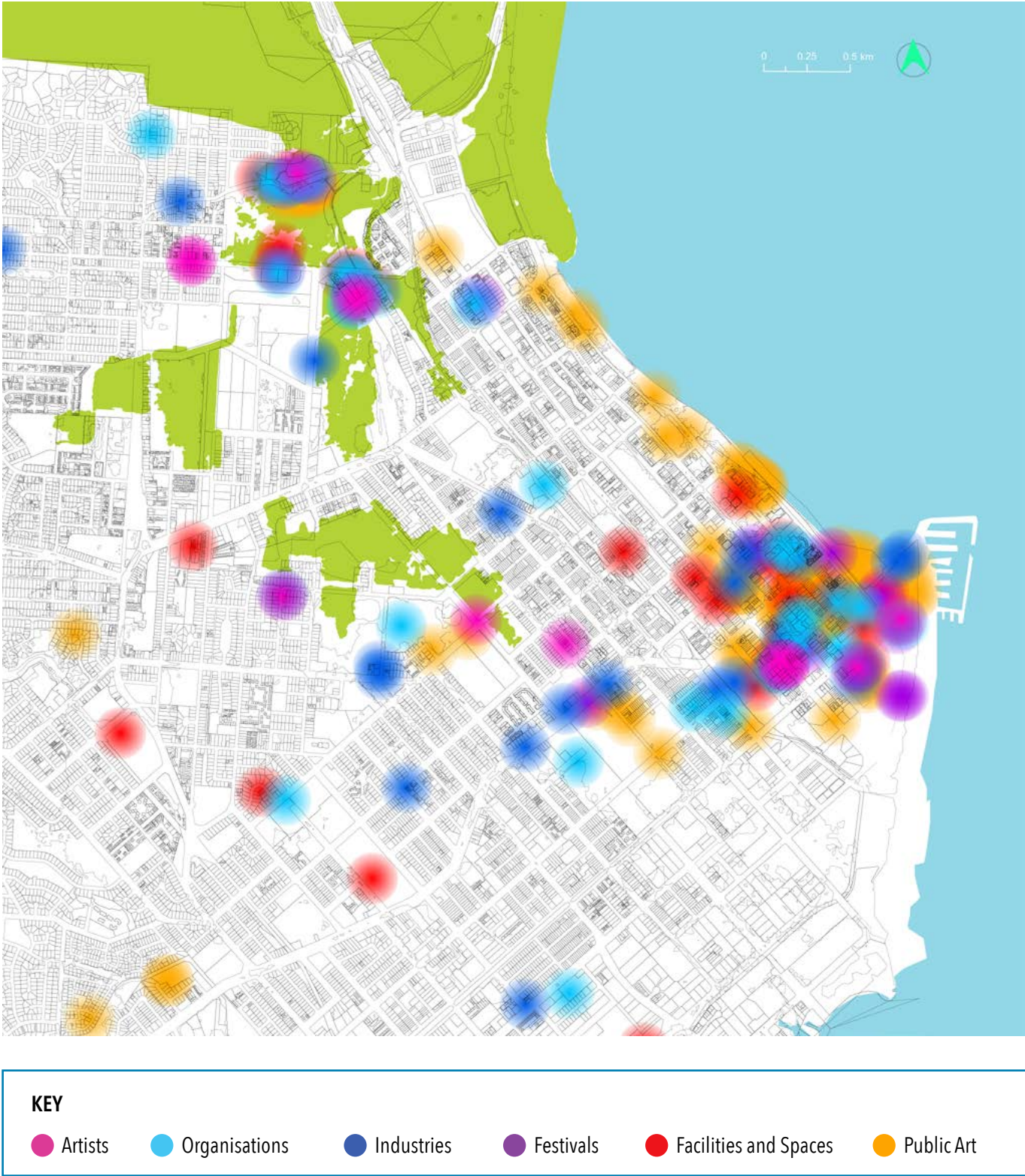
to cluster along the Cairns Esplanade and Shields Street, although has a relatively wider geography that reflects Council longstanding commitment to public art in placemaking.

Artists themselves had listings that were more dispersed, partly because some artists used residential addresses rather than business locations—thus reflecting housing affordability and lifestyle—while others were dependent on the availability of commercial space for lease. The same could be said of Industry listings on the map, often located in residential premises, although a particular cluster outside the central business district (CBD) is evident in the Edge Hill precinct near the Botanic Gardens.

As identified in the stakeholder interviews, the map does not capture the more informal facilities and infrastructure such as school art facilities or sheds associated with club activities, which are less focused on public presentation, or on markets that are more ephemeral. Non-arts infrastructure like hotel meeting rooms or outdoor space for CIAF is also not included. Empty CBD shopfronts could also create short- or longer-term pop-up spaces for emerging artists/creatives (like those listed in the former Cairns Regional Council Urban Spaces program). Places such as these could help remove barriers to participation and entry, create synergies between creatives and tourism businesses, lessen the blight of empty shops and improve the overall 'creative Cairns' brand value. All of these might be useful additions to the Map in terms of networking and seeking shared facilities and space, but are difficult to resource and keep up to date. Perhaps the overall promotion of the Map could encourage asset owners, artists, festivals and businesses to profile these spaces.

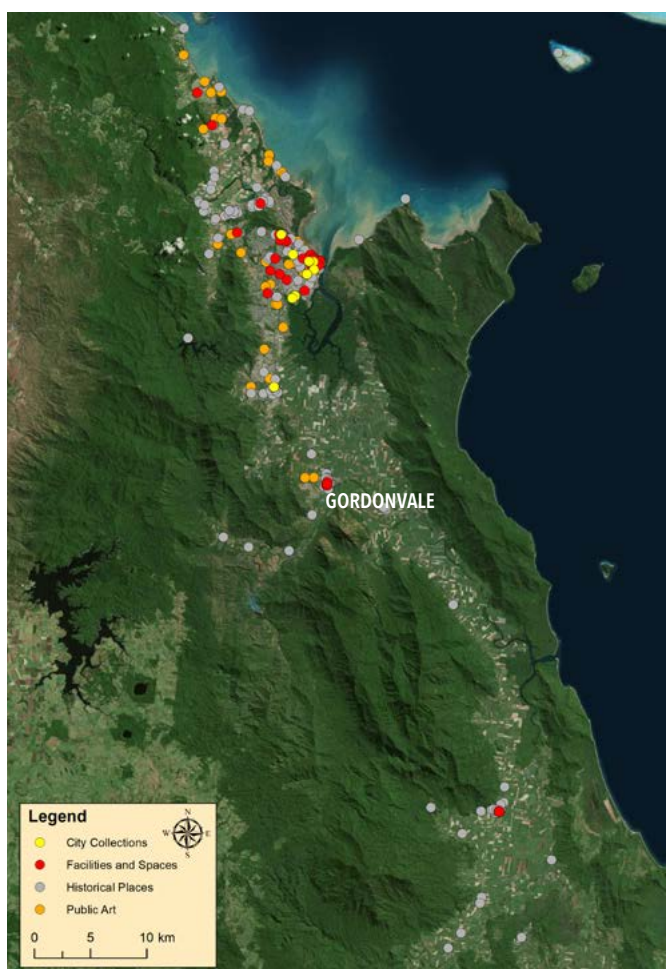
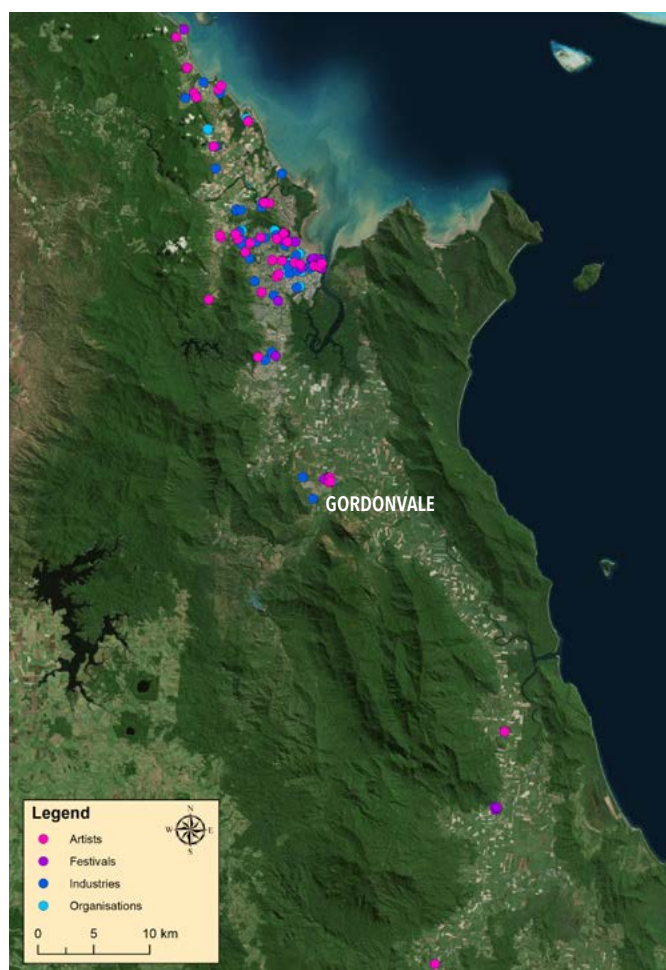
The CBD and the botanic precinct that incorporates Edge Hill, Greenslopes Street and the Tanks Arts Centre are the important 'hubs' for creativity in Cairns, with creativity tending to co-locate with scenic natural areas, commercial clusters, prominent venues and tourism traffic. Identifying these 'iconic' creative spaces and clusters is important, because these are important to the reputation of Cairns as an arts and culture capital and give it a cutting edge in terms of liveability for the city. The Map thus serves important functions in terms of networking and visibility. For a small city like Cairns this level of creative activity is a draw card for attracting new migrants and visitors to the city.

Map 2: Distribution of Map categories in the Cairns City Centre



While Cairns City was the clear focus of cultural production and exhibition on the Map, it should also be noted that Gordonvale appeared as an emerging creative hotspot (see Maps 3 and 4). A wide range of creatives, from film to interior design, and a retail 'renaissance', have created opportunities for creatives to locate in this still relatively affordable and historic town which urban sprawl has connected to the city. Investigations could be made in terms of the role Gordonvale might play in a wider creative ecosystem, and how its natural clustering might be supported.

Maps 3 and 4: Distribution of Map categories in the wider Cairns region



THE GALLERY PRECINCT

Cairns Regional Council has recently embarked on connecting the three regionally significant buildings – the existing Cairns Art Gallery, the Court House and the former Mulgrave Shire Council offices – into one new 'Gallery Precinct' (see Figure 3). The Gallery Precinct aims to provide a vibrant arts zone for international and domestic touring exhibitions as well as for contemporary local and indigenous art. The Precinct articulates well with Council's vision to support a diverse cultural environment by community engagement through providing accessible public facilities that raise the awareness and recognition of the Cairns artistic community. The Gallery Precinct should deliver these kinds of outcomes while at the same time providing much needed creative spaces and stimulating economic benefit through tourism.

VISION

The Cairns Gallery Precinct will transform three existing heritage-listed buildings within the Cairns city centre to create a dynamic and world class gallery precinct.



THE OLD COURT HOUSE CIRCA 1919

Constructed from 1919-21, the Court House building, fronting Abbott Street, was utilised as the city's court house until 1992. The Cairns Court House was renovated thereafter as the Cairns Courthouse Hotel in 1998 and acquired by Cairns Regional Council in 2016.



THE CAIRNS ART GALLERY CIRCA 1936

The Cairns Art Gallery building was designed in 1933 and completed in 1936. The original principal tenant of the building was the Public Curator's Office. Refurbishment started in September 1994 to transform the building into an art gallery space, with the Cairns Regional Gallery opened to the public on 15 July 1995.



FORMER MULGRAVE SHIRE COUNCIL OFFICES CIRCA 1912

The former Mulgrave Shire Council Chambers was constructed in 1912. Further internal alterations have occurred after this time. In 2016, the building became the Cairns and Tropical North Visitor Information Centre.

As outlined in the vision for the Gallery Precinct, this newly envisioned part of the city centre will meet the needs of the region's creative and cultural organisations and individuals by providing display space, retail opportunities and collaborative workspaces and production spaces. Preliminary design ideas suggest an emphasis on gardens, cafés/restaurants and bars, giving the area a niche in the tourism market. Indeed, because the Gallery Precinct is a celebration of the distinctive arts and culture created in Far North Queensland, it could play a key role in the emergence of Cairns as the Arts and Cultural Capital of Northern Australia and be better branded as the creative heart of Cairns.



Figure 3: The Gallery Precinct

CAIRNS IN A NETWORK OF CREATIVITY

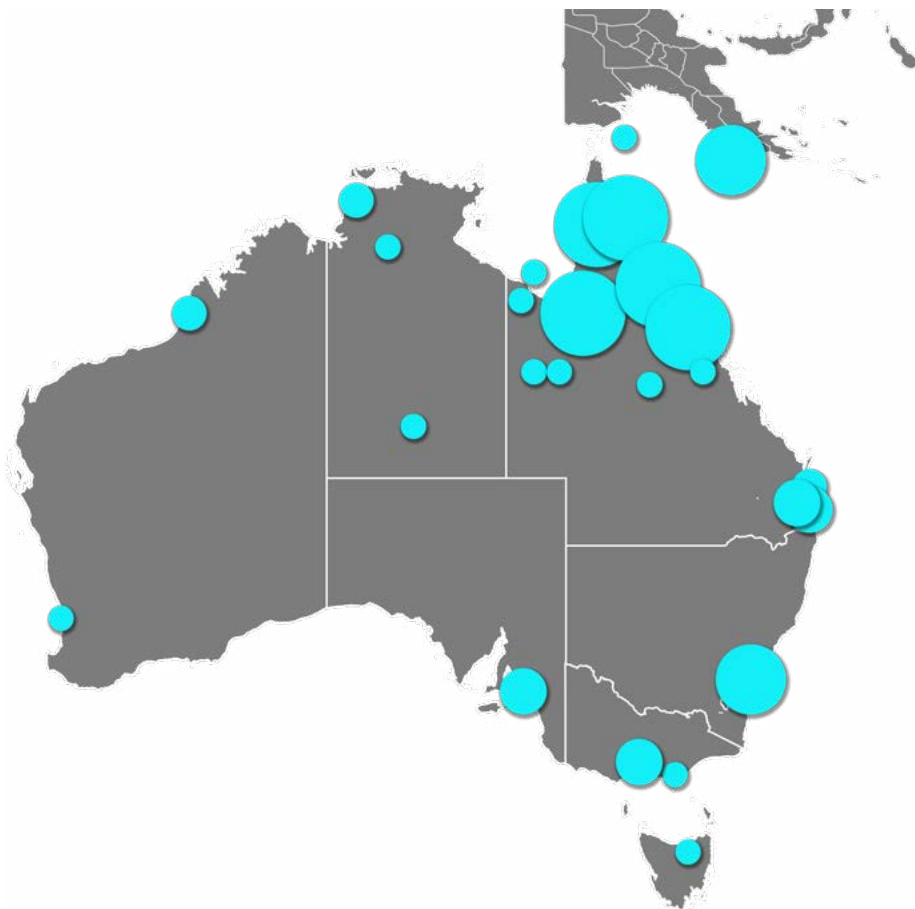
A final geography of culture and the arts in Cairns is provided through our SoARTS stakeholder interviews. The baseline data collected reveals that 25 of the 26 stakeholders divided their customers/clients between local, national and international markets. Table 8 shows the percentage of markets/audiences across these geographic boundaries and expresses how most stakeholders were supported by local business with further connections to other parts of the country and world.

Table 8: Geography of creative markets

	International	National	Local
Average (Mean)	15%	20.5%	63%
Median	5%	15%	70%

Just over 63% of stakeholders reached international markets/ audiences in places as diverse as Samoa, French Polynesia, Micronesia, Naru, Northern Mariana Islands, the Philippines, Thailand, Korea, Columbia, Canada, America, Europe, Netherlands and New Zealand. Map 5 expresses the number of stakeholders who link to clients, markets or audiences in Australia. The size of the circle reflects the number of participants with markets in these locations. Stakeholder connections spread across all states and territories, with a predictable large portion falling within the immediate Cairns region. But important links stretch north to the Torres Strait and Papua New Guinea and down the east coast of North Queensland as far south as Townsville and west to Mount Isa. If creative places are defined by their social, cultural and economic networks, these connections provide some of the distinctive aspects of the Cairns creative sector/economy. Cairns is uniquely connected to Indigenous communities all the way to the Torres Strait, with further connections to Southeast Asia and the Pacific. These regional and international links strengthen the arts and culture sector by linking to new and broader markets and provide international perspectives on cultural production.

Map 5: Geographic reach of stakeholder markets/audiences



CASE STUDY: THE PERFORMING ARTS PRECINCT

The Performing Arts Precinct is a state-of-the-art entertainment district consisting of Munro Martin Parklands (MMP) and Cairns Performing Arts Centre (CPAC). The combined venues are key infrastructure that support arts and culture activities enriching the lives of local and regional residents as well as visitors to Cairns and the Far North. The Performing Arts Precinct caters to a range of performances, from award-winning to newly discovered productions, local to national and international touring ensembles, and simple and pared back to vibrant festivals, all of which encourage vitality, growth and celebration of arts and culture.

Since early settlement, Cairns has been committed to arts and culture in the Far North (CRC 2018b). In 1883, eight years after its founding, the fledgling settlement established a public hall on the site where CPAC now stands, and a park for sports and recreation across the road, where the MMP is now situated. The hall was redeveloped with the first purpose-built theatre in regional Queensland (CRC 2018b). Opened in 1974 by Prime Minister Gough Whitlam, the Cairns Civic Theatre quickly become a focal point for the community of just 40,000 people. For over 40 years the theatre hosted more than 100 shows annually including touring productions, local competitions and musical productions. Eventually, Cairns outgrew the Civic Theatre and public consultation identified the need for improved infrastructure (CRC 2011). An ambitious project was proposed: the Cairns Entertainment Precinct including new theatres, a museum, as well as retail and meeting spaces (CRC 2011). Changing political and funding priorities combined with the challenges of developing on land with shared tenure led to a new plan, the redevelopment of the Cairns Civic Theatre and Munro Martin Park into the The Performing Arts Precinct.

On 14 August 2016 the MMP was opened as the first stage of The Performing Arts Precinct. The open-air venue has a capacity of 3000 and features the largest green proscenium stage in Australia (CRC 2019b). The facility contains botanical diversity, curated interpretation of the flora and unsung heroes of Cairns along with a large scale laser-cut steel sculptural entry statement to the Parklands. It is open to the public for free casual use seven days a week except during ticketed events. On 15 December 2018 CPAC was opened, completing the redevelopment. CPAC houses a 941-seat proscenium arch theatre lined with locally sourced timbers for improved acoustics, a full size stage and an orchestra pit capable of accommodating an entire symphony orchestra (CRC 2019a). In addition, there is a 400-seat studio theatre that can be reconfigured for concerts, seating-in-the-round or rehearsal space. A collection of eight artworks by significant Indigenous Queensland artists formed the basis of a curatorial approach for installations at CPAC with works purchased or commissioned at the 2017 Cairns Indigenous Art Fair (CRC 2019c).

As a regional centre, Cairns faces multiple challenges, geographic distance to the southern capitals, competition for limited government funding and the need to retain its youth for the future vitality and intellectual capacity of the city's future. Retaining youth is key to diversifying the economy. Key infrastructure investments like The Performing Arts Precinct are an opportunity to offer education and skills pathways that link to economic development, community pride and individual wellbeing. While The Performing Arts Precinct has its foundations rooted in Cairns' long-standing passion for arts and culture, it carries current and future generations into the 21st century, contributing to community pride, fostering a sense of belonging and providing opportunities for growth.



CASE STUDY: THE YOUNG COMPANY THEATRE

The Young Company Theatre (TYC) is a not-for-profit youth theatre based in Cairns. As industry leaders in their field, this award-winning organisation sets a professional standard for the arts and culture landscape of Far North Queensland. For more than ten years, TYC has developed the talent, capacity and creativity of youth in Cairns. Their innovative programs and professional pathways enable young people to pursue and explore creativity and be prepared for further education and employment in the arts, from the local to the international.

In 2009, Leigh Boswell founded TYC as a direct result of a Regional Arts Development Funded community consultation project surveying Cairns' youth. The project identified that young people in Cairns wanted more creative control and support to rise to their potential. Prior to the establishment of TYC, Cairns had a thriving community of performance-based schools, but few opportunities existed for young performers beyond examinations and Eisteddfods. Young talent migrated south to seek further development and employment. Today, TYC offers opportunities to develop and succeed right here in Cairns, through active participation in the arts. This engagement with the arts is essential for young people to develop an innovative and imaginative approach to the demands of 21st century life (Arts Queensland, 2015; Hughes and Wilson 2004; O'Toole 2012, p. 3-5). These young people are the future leaders, artists and members of the Cairns community.

When Leigh Boswell formed TYC, she brought together a small, tight-knit group of people with a shared vision to create a self-sustaining not-for-profit company. This business model enables TYC to be more independent of government funding

and adaptable to the changeable nature of today's economic environment. TYC strategically targets their grant applications to special projects such as improvements in infrastructure or the development of specialty skills and workshops, such as the building and performance skills used to build and animate the puppet 'Twitch' in The Five-Foot Giant a production for the Children's Festival.

TYC has a bespoke learning system that is outlined in their Ladder of Progression. Each student receives a learning passport to track their progress and proficiency in various acting methods, techniques and stagecraft skills. Mentoring and internships are an important aspect of student progression from learner to peer leader and teacher. Leigh is committed to professional outcomes and employment, setting a standard within an industry that traditionally relies heavily on volunteerism. Former students have completed Certificate III in Live Production with TYC, as well as attaining bachelor degrees and travelling internationally for employment and further educational opportunities.

The future is bright for TYC. Currently, Leigh and the team are expanding their programs throughout the Cairns region and their long-term goals include international aspirations. Wherever the future takes them, whatever project they are working on, TYC will continue to be passionately dedicated to developing young people's confidence, improving their quality of life and providing opportunities for their creative expression.



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