Giving Attitude 2.5

Private Sector Support Survey | Pandemic Edition

creative partnerships australia

instinct and reason

Impact Words Consulting

Our Acknowledgement of Country

Creative Partnerships Australia acknowledges the Traditional Owners of Country throughout Australia and recognises their continuing connection to land, waters, and community. We pay our respects to them and their cultures; and to Elders both past and present.

Cover image: Darlinghurst Theatre, Once production
Photo: Robert Catto

Image: Burning Country by Lucinda White
Photo: Warlayirti Artists

Contents

Image: Australian Dance Party, From The Vault
Photo: Lorna Sim

Foreword

Giving Attitude was established in 2018 as a biennial survey, with the hope that over time it would provide a rich set of data tracking private sector support for Australian arts and culture. As well as capturing the all-important numbers, it would also track the sentiment of those working in arts and cultural organisations – telling the story in a way that dollar amounts can't do.

Conscious of not burdening the sector with more reporting, Creative Partnerships decided to conduct the survey every second year. However, what we didn't know then was that we were about to face what will likely be the biggest disruptor to affect the sector in our lifetimes: a global pandemic. When Australia shut its borders and, in most states, all large-scale gatherings were banned, it was immediately apparent that the impact on the production and consumption of arts and culture would be significant.

At Creative Partnerships, we felt that it was important that we capture the effect of the pandemic on private sector support. Therefore, we decided to conduct an additional survey in what would have been an in-between year, covering 2020/21.

We weren't surprised to find that for many arts organisations, filling out yet another survey was beyond them, at a time when they were emerging from the pandemic and focused on getting back to business, which we now know will be a slow recovery for the sector. However, we have gathered enough data to gain important insights into the effect of the pandemic on fundraising for arts and culture. These insights reinforce the importance of philanthropic and business support for the sector as a source of funding, alongside government funding and earned income.

What we found was an uneven pattern of success. Unsurprisingly, larger organisations with fundraising teams were able to continue to engage with their donors and supporters more easily than smaller organisations. Similarly, organisations experienced loyalty from existing supporters, but found it more difficult to engage with prospective new supporters when they could not engage them with their work in-person.

While the overall amount of private sector support for arts and culture declined in this year, the arts and cultural sector was both resolute in its importance as part of the funding mix, and optimistic that it would continue to grow.

Importantly, *Giving Attitude 2.5* demonstrates that Creative Partnerships' mantra stands and helps to support organisations through good and bad times. To succeed in attracting and maintaining business partnerships and philanthropic gifts, organisations need to apply a whole-of-organisation approach, led from the top; employ dedicated fundraisers; and understand that building relationships requires the investment of time and resources.

With this in mind, we hope that arts and cultural organisations can use this and future *Giving Attitude* reports to inform their fundraising strategies and investment, in the knowledge that supporters and donors bring more than just much-needed funding to organisations. They are champions, promoters and collaborators, and are invested in your success.

Chief Executive Officer
Creative Partnerships Australia

Executive summary

Introduction

Giving Attitude is a biennial survey of Australian arts and cultural organisations about private sector support. It tracks total private sector support for the sector, trends in fundraising and private giving, and sector sentiment on challenges and opportunities in attracting private sector support.

Giving Attitude 2.5 is an important follow-up from *Giving Attitude 2* that provides additional insights on the disruption of the COVID-19 pandemic. It captures private sector support received by organisations in the 2020 calendar year or 2020/21 financial year, impacts of the pandemic on fundraising and private giving, and how the industry felt about attracting private sector support during the pandemic.

Method

The Giving Attitude study surveys a representative spread of arts and cultural organisations across Australia. The national estimate methodology provides an estimation of the total value of private sector support in the arts and cultural sector using a combination of data from the survey and Australian Charities and Not-for-Profit Commission (ACNC) reports such as the Annual Information Statement (AIS).

While the study usually captures private sector support data every two years, *Giving Attitude 2.5* is an additional study capturing private sector support in the next reporting period following *Giving Attitude 2*, to better understand the impacts of the pandemic.

The sample size was smaller for *Giving Attitude 2.5* (n=223) than *Giving Attitude 2* (n=380) and *Giving Attitude 1* (n=551). This needs to be considered when interpreting the results as reliability is lower than the last survey. However, the data from *Giving Attitude 2.5* still provides valuable insights and information. Unless otherwise noted, any differences discussed are significant at a 95% level of confidence.

Image: Footscray Community Arts, ArtLife Artist, Ibby Ibrahim.
Photo: Jackie Dixo

Part A: Private sector support received during the pandemic

Reliance on private support remained despite the value declining

Giving Attitude 2.5 estimates the total value of private sector support to be $398 million for the 2020 calendar year and 2020/21 financial year, down from an estimated $540 million for the 2019 calendar year and 2019/20 financial year (*Giving Attitude 2*, which covered the first four months of the pandemic).

The COVID-19 pandemic has had a major impact on the total value of private sector support. The latest estimate represents a 34% decline compared to *Giving Attitude 1*, when the value was $608 million prior to the pandemic (during the 2018 calendar year and 2018/19 financial year).

Despite this decline, the industry has continued to rely on private support for 21% of all turnover. Since *Giving Attitude 2*, the reliance on government funding rose significantly (43% to 48% of all turnover) as the forced closure of face-to-face operations due to ongoing COVID-19 restrictions led to reductions in box office sales (from 34% to 25%).

The type of private support was disrupted

The economic downturn caused by the pandemic has affected philanthropic activity with a $142 million reduction in support since the last study. This was driven by an overall $90 million reduction in cash support across donations, fundraising, bequests and sponsorships. A $64 million reduction in the value of volunteer hours has also had a significant impact.

Giving Attitude 2 found donors and sponsors stuck by the arts and cultural sector by injecting cash support during the initial months of the pandemic. Both *Giving Attitude* 2 and *Giving Attitude 2.5* demonstrate that cash support has remained a significant contributor to the sector alongside government support and earned income, with *Giving Attitude 2.5* finding the $287 million in cash support received accounted for 72% of private sector support and 15% of all turnover.

The ongoing suspension of creative programs resulted in less volunteering, with the value of volunteer hours declining from $97 million to $34 million. However, donors and sponsors pivoted as economic pressures built to provide more in-kind sponsorships (from $25 million to $38 million) and pro bono support hours (valued at $32 million up from $27 million).

Individuals continue to provide the greatest share of support for the industry (over 90%). However, the average number of supporters per organisation declined significantly during the pandemic: individuals from 115 to 89, business sponsors from 5 to 3, and trusts/foundations (including private ancillary funds) from 3 to 1.

A potential long-term transformation for fundraising programs

The challenges of the pandemic impacted fundraising programs. Overall, 28% of organisations in *Giving Attitude 2.5* had no fundraising program and 40% reported a negative impact on their programs. Increased demand for support within a competitive market combined with a perceived lack of community interest made gaining or retaining support more difficult. *Giving Attitude 2* reported the significant challenge early in the pandemic as 55% of all organisations reported a decline in overall revenue of an average of 45%.

This likely led to the reduced spending on fundraising activities found in *Giving Attitude 2.5* (from $198 million to $134 million) despite *Giving Attitude 2* having reported an initial increase in contributions during the first months of the pandemic. The industry reduced salaries (by around $25 million), event expenses (by around $11 million), and marketing (by around $11 million).

However, the industry demonstrated resilience and adaptability as COVID-19 restrictions disrupted programs. The industry shifted to digital platforms, such as online performances, virtual exhibitions, streaming services, and social media and crowdfunding campaigns. This may be transforming fundraising longer term, as *Giving Attitude 2.5* reports the growing use and importance of social media and crowdfunding campaigns and declining use of traditional approaches (events, raffles, and collection boxes).

Part B: Enhanced capability and belief in fundraising

Belief in the need for fundraising has continued to strengthen

Arts and cultural organisations' belief in both the need for, and their capability to raise, private sector support continues to strengthen irrespective of the challenges faced since the pandemic began.

Belief in the importance of private sector support has risen in both reports since *Giving Attitude 1*. Encouragingly, there is an ongoing improvement in the level of stated knowledge of, and experience in, seeking private sector support.

Giving Attitude 2.5 continues to demonstrate a higher level of perceived success in fundraising activities, as was also uncovered in the previous report. At the same time, belief in the importance of government funding continues to strengthen and overtake the importance of private funding, indicating government funding remains crucial.

As a result of the strengthened beliefs around private sector support, organisations initially spent more on fundraising activities in the early months of the pandemic. But naturally as the economic downturn continued and financial constraints built, spending was reduced.

Successes continue to be driven by personal approaches

Personal approaches remained the most effective strategy to raise private sector support during the pandemic. Giving Attitude continues to find that directly engaging with individuals and businesses for donations and sponsorships, along with using entertainment events, are the best opportunities to maximise private sector support. The importance of personal approaches likely influenced higher in-kind support as the pandemic progressed.

The industry's shift to digital platforms, such as social media and crowdfunding campaigns, was evident during the pandemic as social media campaigns continued to grow in success.

As a result, this activity has become a driver of private sector support and demonstrates that future fundraising success may be transformed from traditional approaches.

Despite improved successes, few organisations rated themselves as very successful at each fundraising activity, which is not surprising when considering the impact of the pandemic.

There is optimism about future fundraising despite the challenges of COVID-19

The industry reported negative impacts of the COVID-19 pandemic on their ability to raise private sector support in 2020 and 2021 (*Giving Attitude 2*), and this likely led to the estimated reduction in support shown in this report. *Giving Attitude 2* found 54% of organisations with a fundraising program believed that fundraising activities would be limited as long as COVID-19 restrictions were in place, and *Giving Attitude 2.5* confirmed 57% experienced negative impacts on their fundraising programs. Financial constraints faced by donors and sponsors due to the unstable economy added to the burden, with the industry highlighting challenges in market fatigue and competition for funding, as well as pressures around time and staff resources.

However, the industry was optimistic about the future of private sector support as reported in *Giving Attitude 2*, and this has remained the case in this *Giving Attitude 2.5* follow-up. 47% anticipate success in the next 12 months for their fundraising programs, influencing their belief that private support will be 25% of revenue within five years.

The growing understanding that private sector support is important has led to improved self-awareness and recognition of internal knowledge and experience. However, currently, only 1 in 4 organisations employ dedicated fundraising staff, and 3 in 5 have never done so. *Giving Attitude 2.5* continues to the show that to gain and retain relationships with donors and sponsors, there is a need for dedicated, experienced, and knowledgeable fundraising staff, and where possible, to leverage support and engagement from the organisation's board.

Part C: The different experiences of fundraising

The pandemic has exacerbated different experiences

The Giving Attitude study reveals varying experiences in the arts and cultural sector when it comes to raising private sector support. This disparity is particularly evident during times of economic crisis, like the COVID-19 pandemic.

The organisation's size, based on overall turnover, plays an influential role in terms of fundraising skills, knowledge, resources, and confidence in securing private sector support. For example, larger organisations have dedicated fundraising teams and established relationships with donors and sponsors which enable them to be more capable of sustaining and expanding private sector support.

The impact on smaller arts and cultural organisations

Smaller arts and cultural organisations tend to encounter greater difficulties in obtaining private sector support, which was exacerbated during the pandemic.

Giving Attitude highlights a decrease in private sector support for organisations with a turnover below $50,000 and between $50,000 and $250,000, which experienced declines of 41% and 47% respectively at the start of the pandemic (*Giving Attitude 2*), and a further 27% and 40% as the pandemic continued (*Giving Attitude 2.5*).

This has had a significant impact on micro arts and cultural businesses, as most of their turnover comes from private sector support (72% in the latest study). *Giving Attitude 2.5* shows vastly different ways support was received by size of organisation, where micro businesses were almost universally reliant on volunteer and pro bono support and thus, received less cash as a portion of their private sector funding compared to larger organisations.

Given their limited resources and capacity, these smaller organisations may face challenges in attracting and securing private sector funding. Micro and small businesses have less supporter numbers overall, which presents a significant risk to revenue if a few supporters no longer.

The impact on large arts and cultural organisations

In contrast, larger arts and cultural organisations with an annual turnover of $5 million or more witnessed an 18% increase in private sector support at the start of the pandemic, while organisations with a turnover between $1 million and $5 million experienced a remarkable 55% increase (*Giving Attitude 2*). However, as the pandemic continued, the organisations with an annual turnover of $5 million or more experienced a 30% decline in private support, while those with turnover between $1 million and $5 million experienced a 12% decline (*Giving Attitude 2.5*).

For large organisations, 54% of their turnover comes from government funding while only 20% is private funding, of which over 80% comes through cash support.

These larger organisations often benefit from established networks, dedicated fundraising staff, and enhanced visibility, which contribute to their success in securing private sector support. Notably, organisations with a turnover exceeding $1 million allocate more resources to fundraising, resulting in higher funds raised and a superior return on investment compared to smaller entities.

Introduction

Image: TarraWarra Museum of Art
Photo: Tourism Australia

The Giving Attitude study

Giving Attitude is a biennial survey of the Australian arts and cultural sector. It is designed to strengthen the knowledge base on private sector support to inform policy and advocacy for investment in the sector across Australia.

The first two studies, *Giving Attitude 1* and *Giving Attitude 2*, were published in 2019 and 2021 to provide depth and rigour to the question of what private sector support is raised in the industry, what is behind the successes, and how challenges to fundraising can be overcome.

The Giving Attitude survey gives us insight into how CEOs and fundraisers are thinking, feeling and behaving in relation to raising private sector support. It offers arts and cultural organisations a guide to the most successful fundraising strategies, and the ability to see how their fundraising income and costs compare with others.

It assists policy makers at all levels of government to understand what is required to be successful in fundraising, and what they can do to help build the fundraising capacity of the arts and cultural sector. Arts and cultural organisations can also see what is achievable, and the return on investment they can expect when they invest time and resources into fundraising activities.

Image: Hero Yong Production, Wern Mak
Photo: Tiffany Garvie

Giving Attitude 2.5

The *Giving Attitude 2.5* report is an important follow-up to *Giving Attitude 2* that provides a more complete understanding of how external factors, such as the COVID-19 pandemic, can significantly disrupt private sector support in the industry.

The final four months of the 2019/20 financial year were impacted by the COVID-19 pandemic and were captured in *Giving Attitude 2*. This report revealed that during the early stages of the pandemic, there were promising signs that donors and sponsors stuck by the arts despite the significant disruptions in the value and type of private support given.

Rather than waiting two years to deploy the next Giving Attitude survey, we undertook an additional survey for the 2020 and 2020/21 reporting period, with a smaller sample size, to capture the impacts of the COVID-19 pandemic on fundraising and private giving.

Key high-level findings from the survey are presented in this report. Further information about the Giving Attitude study will be available at *Giving Attitude Online* on the Creative Partnerships Australia website.

Image: Australian Dance Party, Water Tight
Photo: Lorna Sim

Method

Image: Australian Dance Party, LESS
Photo: Lorna Sim

Giving Attitude survey

The survey of Australian arts and cultural organisations focuses on tracking:

– the total value of private sector support

– trends in types of private sector support (such as donations, sponsorship, volunteering)

– spending on fundraising

– sentiment towards private sector support, including challenges and opportunities.

Image: A Monkey Baa Theatre Company Production, EDWARD THE EMU
Photo: Lisa Maree Williams

Giving Attitude study reference periods

Organisations surveyed in the Giving Attitude study complete a questionnaire that reveals their activities, spending and success with fundraising, and their financial private sector support results for either the calendar year or financial year, depending on the organisation's financial reporting period.

The Giving Attitude study usually captures private sector support data every two years. *Giving Attitude 2.5* is an additional study capturing private sector support data for the next reporting period following *Giving Attitude 2*, to better understand the impacts of the COVID-19 pandemic.

For *Giving Attitude 2.5*, 39% of the sample that completed the full survey reported on calendar year 2020 while 61% reported on financial year 2020/21. Both years had pandemic-related effects on arts and cultural organisations, albeit to varying extents.

The sentiment data must be interpreted with caution in relation to the financial data, as it was collected at the time the survey was completed, in late 2022 or early 2023.

	Published	Financial data	Sentiment data
Giving Attitude 1	2019	2017 calendar year or 2017/18 financial year	Collected Oct 2018–Jan 2019
Giving Attitude 2	2021	2019 calendar year or 2019/20 financial year (captured first four months of pandemic)	Collected Nov 2020–May 2021
Giving Attitude 2.5	2023	2020 calendar year or 2020/21 financial year	Collected Aug 2022–Feb 2023

The survey sample

The Giving Attitude study uses a multi-mode recruitment approach to achieve a representative spread of arts and cultural organisations across Australia.

The sample is recruited from a contact list of arts and cultural organisations provided by Creative Partnerships Australia. Creative Partnerships identifies organisations that had Deductible Gift Recipient (DGR) status for the purpose of being an arts or cultural organisation at the time the list is created.

By engaging a spread of arts and cultural organisations across Australia, the Giving Attitude study is able to provide a true representation of this sector through key characteristics such as the organisation turnover, geographic location, and primary art form or cultural activity. The study includes organisations that did not receive any private sector support in the financial reporting period to ensure the study revealed the true status of private sector support in the sector.

Arts and cultural organisations

There are many ways to define arts and cultural organisations. This research was designed based on the following International Classification of Non-Profit Organisations (ICNPO 1100) arts and cultural definitions:

Media and communications

Production and dissemination of information and communication, including radio and TV stations, publishing of books, journals, newspapers, and newsletters; film production; and libraries.

Visual arts, architecture, ceramic art

Production, dissemination and display of visual arts and architecture; includes sculpture, photographic societies, painting, drawing, design centres, and architectural associations.

Performing arts

Performing arts centres, companies, and associations; incudes theatres, dance, ballet, opera, orchestras, choirs, and music ensembles.

Historical, literary and humanistic societies

Promotion and appreciation of the humanities, preservation of historical and cultural artefacts, and commemoration of historical events; includes historical societies, language associations, reading promotion, war memorials, commemorative funds and associations, and poetry and literary societies.

Museums

General and specialised museums covering art, history, sciences, technology, and culture.

The following adjustments were made to the categories during the design process:

- Festivals were given a separate category.
- Galleries were combined with museums rather than being included in the overall visual art category.
- Cross-art form organisations were given a separate category to recognise that some organisations provide creative and/or cultural services that involve multiple art forms or are not art form specific and/or work in emerging and experimental arts.

Sample size and data confidence

We are confident that the data from *Giving Attitude 2.5* provides valuable information and insights to help make informed decisions.

However, the *Giving Attitude 2.5* sample (n=223) is smaller than in *Giving Attitude 2* (n=380) and *Giving Attitude 1* (n=551); and the response rate for *Giving Attitude 2.5* (13.8%) was lower than *Giving Attitude 2* (22.3%) and *Giving Attitude 1* (24.9%), resulting in a higher margin of error and more uncertainty in the results.

This needs to be considered when interpreting *Giving Attitude 2.5*. It is important to consider the magnitude of the difference between results, as if the differences are large enough, they may still be statistically significant and meaningful.

All tests for statistical significance have been undertaken at the 95% level of confidence, and unless otherwise noted, any differences reported between subgroups are significant at the 95% level of confidence.

Proportionally, organisations from across the different states and territories answered in similar numbers each survey, as did organisations by art form focus. However, there was a reduction in micro and smaller sized organisations participating in *Giving Attitude 2.5*. Measures are taken to ensure the quality and accuracy of the data that is received.

Image: Philharmonic South West Orchestra, Crescendo Club, Rhapsody
Photo: Ovis Creative

National estimate methodology approach

The national estimate methodology provides an estimation of the total value of private sector support in the arts and cultural sector using a combination of data from the survey and Australian Charities and Not-for-Profit Commission (ACNC) reports such as the Annual Information Statement (AIS).

This methodology enables a deeper understanding of what is driving the total value of private sector support through estimating the value of cash, in-kind, donations, sponsorships, bequests, fundraising activity, volunteer, and pro bono support, as well as the level of associated costs that were incurred to undertake any fundraising activities.

Wallis Consulting Group developed the methodology for estimating the value of private sector support income and expenses that is used in the Giving Attitude studies.

See the appendix for further detail on the survey design, data confidence, sample, and estimate methodology.

Image: National Theatre Ballet School
Photo: Jacinta Christos

Part A

Private sector support received during the pandemic

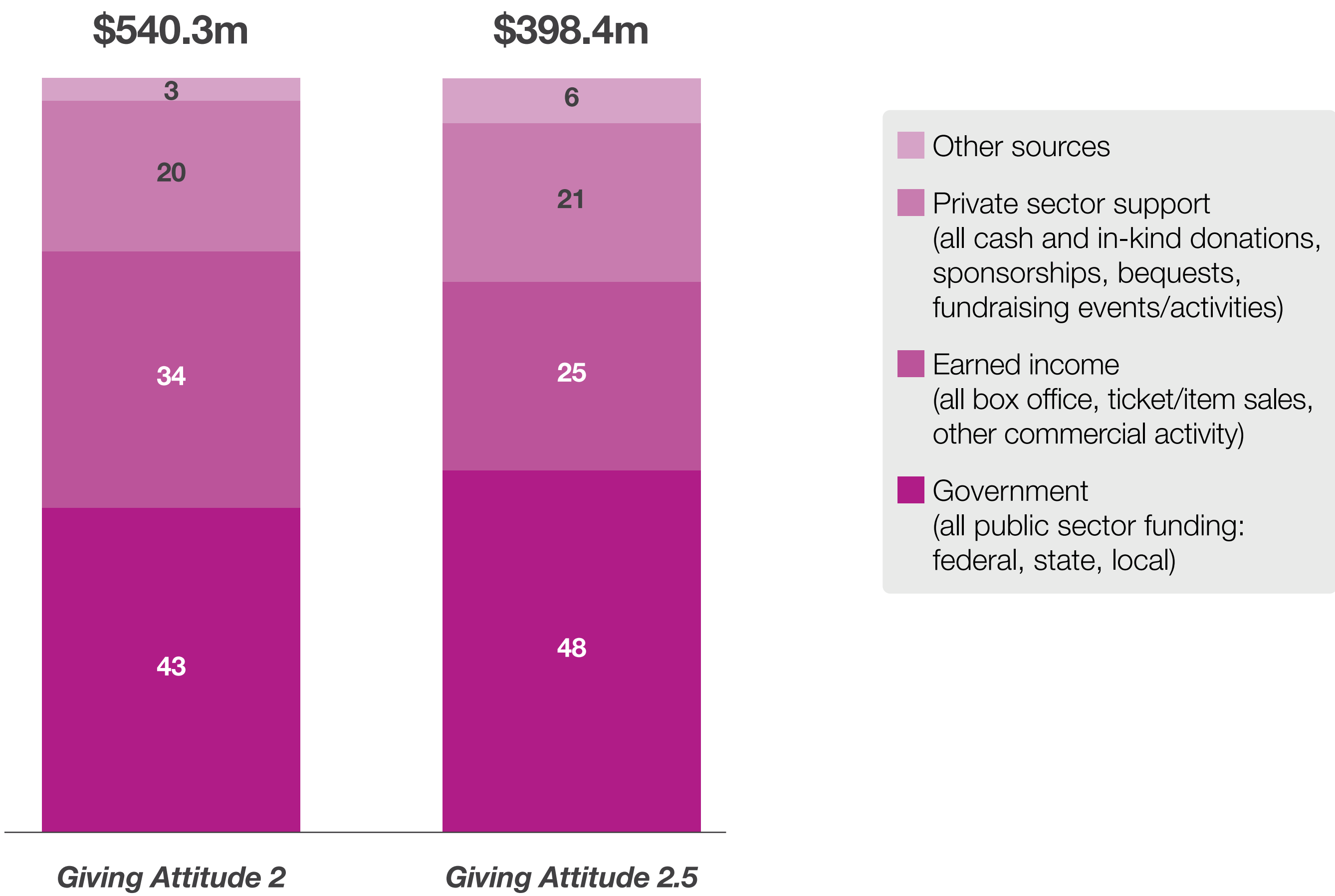
Image: Australian Dance Party, Soul Defenders
Photo: Lorna Sim

Total value of private sector support

The total value of private sector support to arts and cultural organisations is estimated to be $398 million. This is a decline of 26% from *Giving Attitude 2*, when total private sector support was estimated at $540 million, and a 34% decline from the $608 million estimated in *Giving Attitude 1*.

The industry has remained reliant on contributions from private sector support. Private sector support continues to account for 21% of all turnover in the arts and cultural sector – even as earned revenue dropped from 34% to 25% (Figure 1).

Figure 1: Distribution of turnover, previous study and current results (%)



Types of private sector support

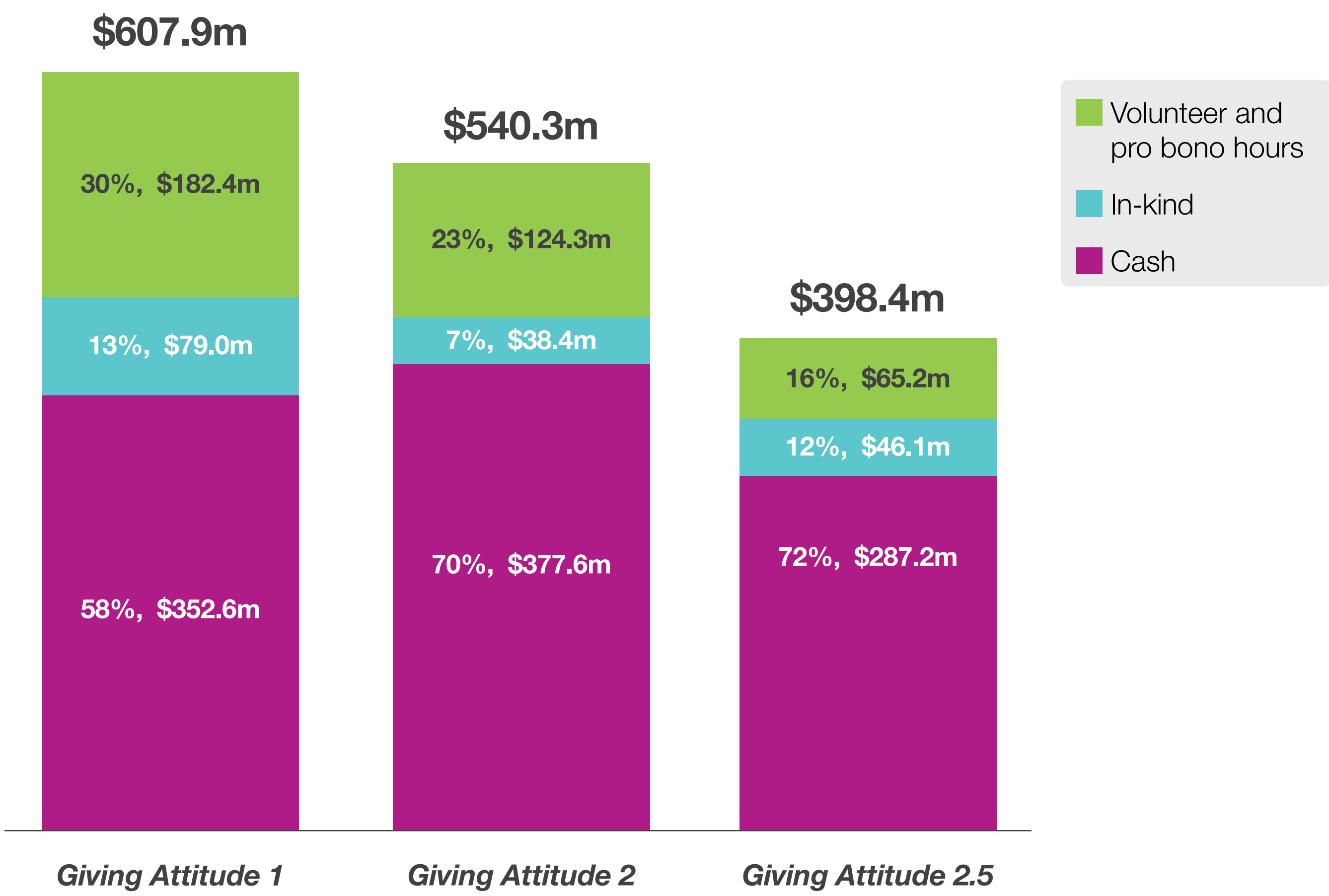
The decline in the value of private sector support since the previous study is attributed to a significant decline of cash support ($378m to $287m) and volunteer and pro bono support ($124m to $65m).

While cash support was significantly reduced during the pandemic, it has remained the dominant source (72% of private sector support, which equates to 15% of all turnover).

In-kind contributions grew from $38 million to $46 million after an initial decline in the first months of the pandemic. But this remains lower than pre-pandemic levels.

The value of volunteer and pro bono support hours dropped by two thirds since before the pandemic, accounting for 16% of all private sector support as compared to 30% in the first Giving Attitude study (Figure 2).

Figure 2: Distribution (%) and value ($) of private sector support by volunteering, in-kind and cash, across Giving Attitude studies



How private sector support is received

Cash has declined across all categories since the last study. The most value was lost from donations ($235m to $186m) and sponsorships ($103m to $80m), while there were large percentage drops in fundraising ($24m to $14m) and bequests ($17m to $7m) (Figure 3 and Figure 4).

Overall in-kind support rose due to in-kind sponsorships ($25m to $38m) despite in-kind donations declining ($13m to $7m).

A rise in the value of pro bono support hours ($27m to $32m) was not enough to overcome a significant decline in volunteer support hours ($97m to $34m).

The industry continues to rely on contributions from individuals, with over 90% of support coming from individual supporters. But the average number of supporters is down a lot: individuals from 115 to 89, business sponsors from 5 to 3, and trusts/foundations including private ancillary funds (PAFs) from 3 to 1 (Figure 4).

Figure 3: The distribution of private sector support types, across Giving Attitude studies (%)

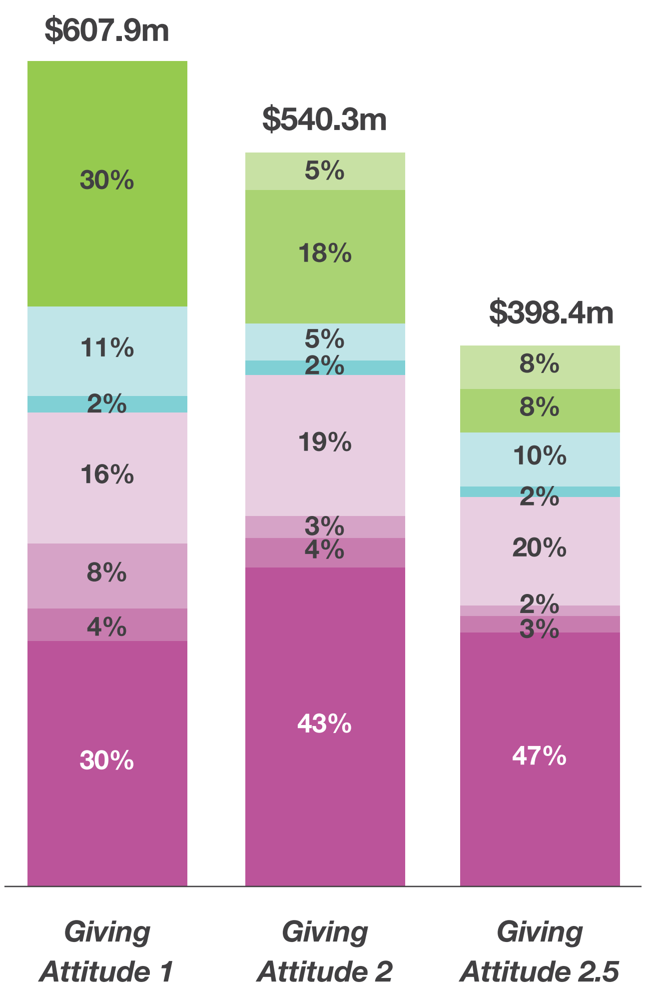


Figure 4: The value of private sector support types and average number of supporters by supporter types, across Giving Attitude studies

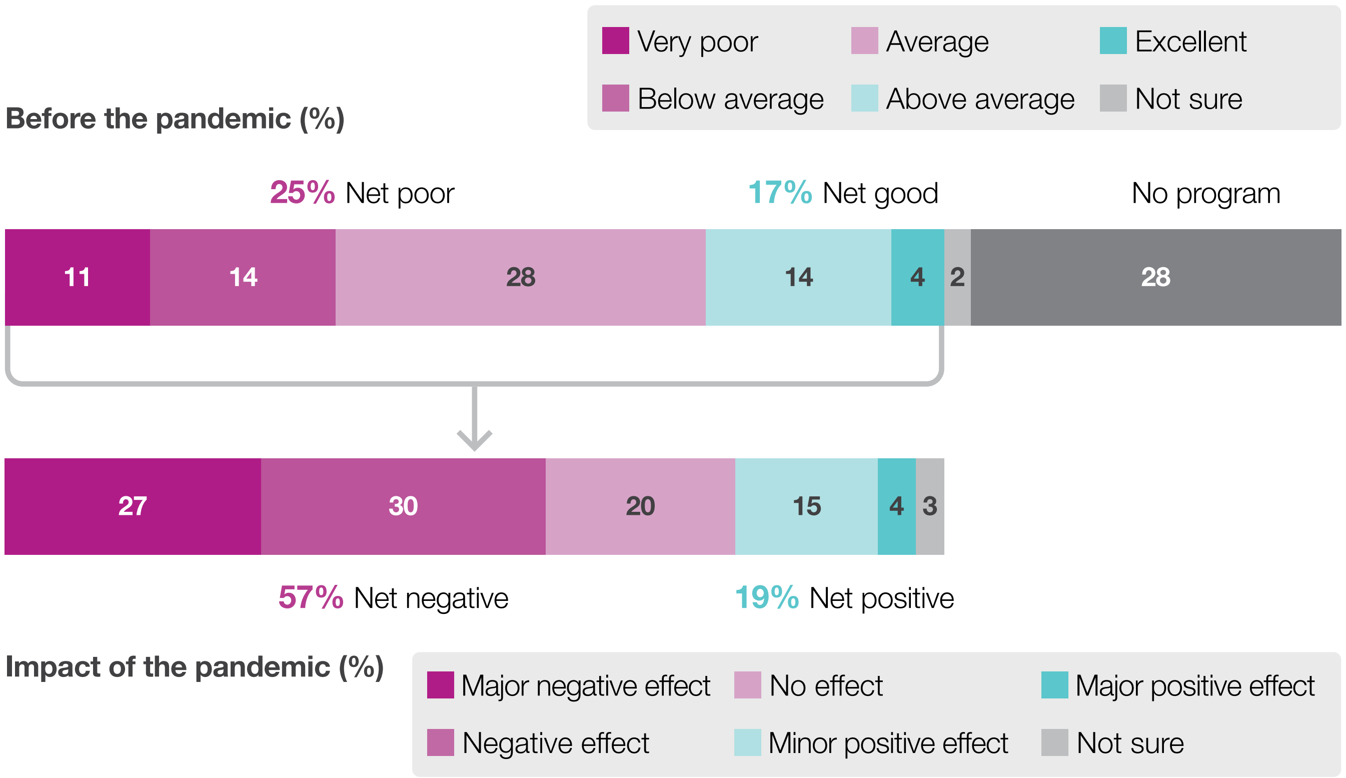
	Giving Attitude 1	*Giving Attitude 2*	*Giving Attitude 2.5*
HOURS TOTAL*	$180.0m	$124.3m	$65.2m
Pro bono hours	$180m	$27.1m	$31.6m (+17%; +$4.5m)
Volunteer hours		$97.2m	$33.5m (-65%; -$63.6m)
IN-KIND TOTAL	$77.0m	$38.4m	$46.1m
Donations	$9.7m	$12.5m	$6.9m (-45%; -$5.6m)
Fundraising	$1.5m	$524k	$917k (+75%; +$393k)
Sponsorships	$65.4m	$25.4m	$38.3m (+51%; +$12.9m)
CASH TOTAL	$351m	$377.6m	$287.2m
Donations	$183m	$234.6m	$186.4m (-21%; -$48.2m)
Fundraising	$23m	$23.5m	$13.9m (-41%; -$9.6m)
Bequests	$49m	$16.9m	$7.2m (-57%; -$9.7m)
Sponsorships	$96m	$102.5m	$79.7m (-22%; -$22.8m)
SUPPORTER TYPES (AVG.)			
Individuals	120	115	89
Business sponsors	16	5	3
Trust/ foundations (including PAFs)	4	3	1

*A breakdown of volunteer and pro bono hours was first asked in *Giving Attitude 2*.

Impact of the pandemic on fundraising programs

The COVID-19 pandemic had a significant impact on fundraising programs. 71% of organisations had a program in place before the pandemic. Of these, 57% reported a negative impact of the pandemic and 27% stated it had a major negative effect (Figure 5).

Figure 5: Impact of the pandemic on fundraising programs, *Giving Attitude 2.5* (%)



Spending on private sector support activities

The latest study found total costs incurred in raising private sector support were $134 million. This was a $65 million decrease on the last reporting period, when expenses totalled $199 million (Figure 6).

While all categories were down, the decrease was driven by drops in spending on salaries (by $24.6m), event expenses (by $11.4m), and marketing (by $11.3m).

Decreased spending was not enough to offset the reduction in private support, leading to a 23% decline in net private sector support (Figure 7).

Figure 6: Spending on private sector support, across Giving Attitude studies ($)

	Giving Attitude 1	*Giving Attitude 2*	*Giving Attitude 2.5*
Total	$175.4m	$198.8m *+$23.4m*	$134.2m *-$64.7m*
Salaries	$82.4m	$104.8m	$80.2m
Marketing	$14.0m	$20.3m	$9.0m
Consultancies	$5.3m	$7.7m	$3.5m
General expenses	$26.3m	$19.4m	$16.3m
Event expenses	$29.8m	$34.0m	$22.6m
All other costs	$17.5m	$12.6m	$2.6m

Figure 7: Net private sector support, across Giving Attitude studies ($ and percentage change)

	Giving Attitude 1	*Giving Attitude 2*	*Giving Attitude 2.5*
Total	$432.6m	$341.5m	$264.3m
Change		-21.1%	-22.6%

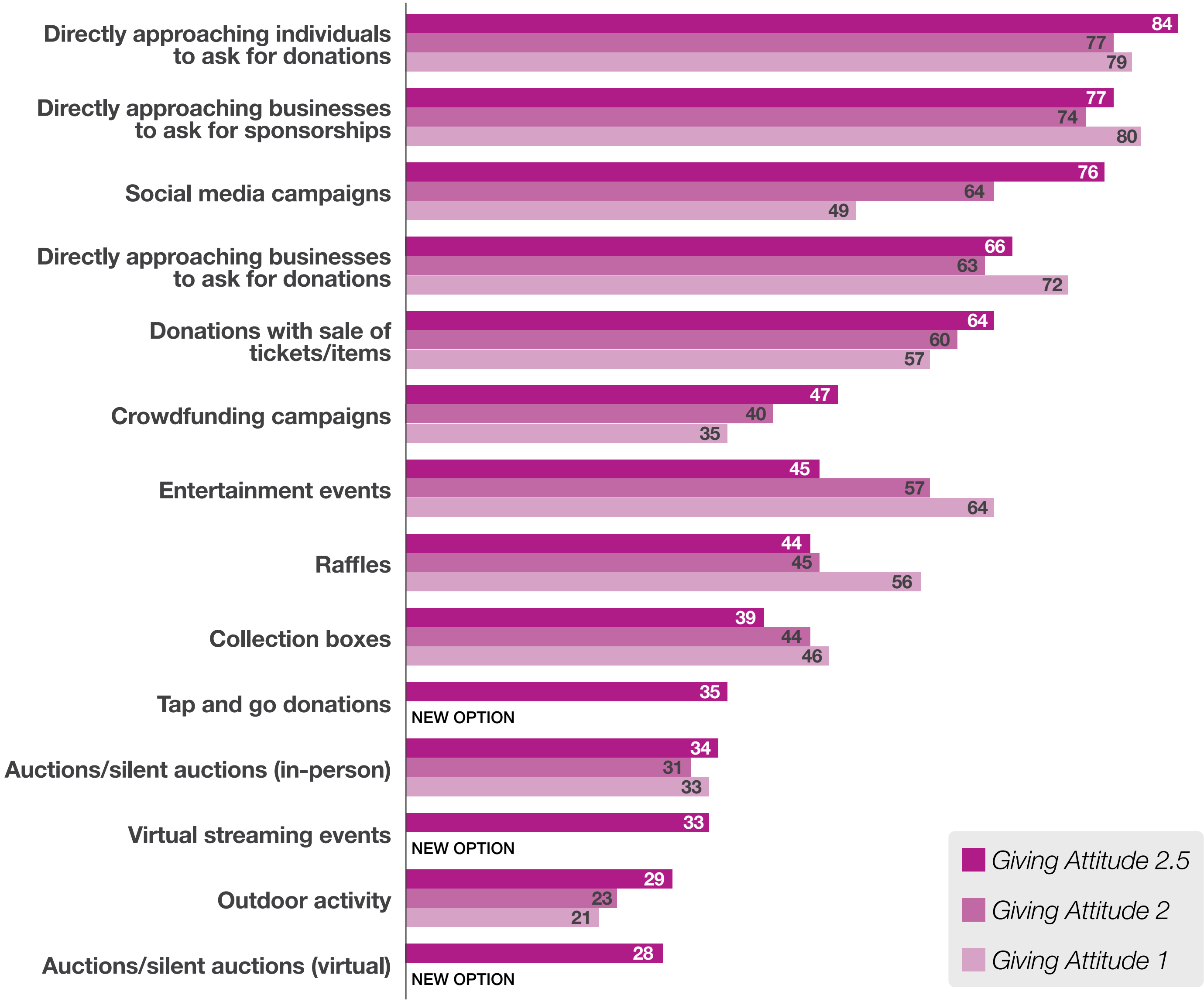
Private sector support activities undertaken

As found in *Giving Attitude 2*, directly approaching individuals for donations was found to be the most common fundraising activity (84%) in the current study.

The use of social media campaigns has increased significantly across the three studies: up from 49% in the first study to 64% in the second, and to 76% in the current study.

Unsurprisingly, results on engagement with other key fundraising activities were likely impacted by COVID-19 restrictions. For example, between the first and second studies there were declines in approaching businesses for sponsorships (80% to 74%) or donations (72% to 63%), entertainment events (64% to 57%), and raffles (56% to 45%) (Figure 8).

Figure 8: Private sector support activities undertaken, across Giving Attitude studies (%)



Part B

Enhanced capability and belief in fundraising

Image: Tasmania Youth Ochestra
Photo: Mike Morffew

Perceptions of private and public support

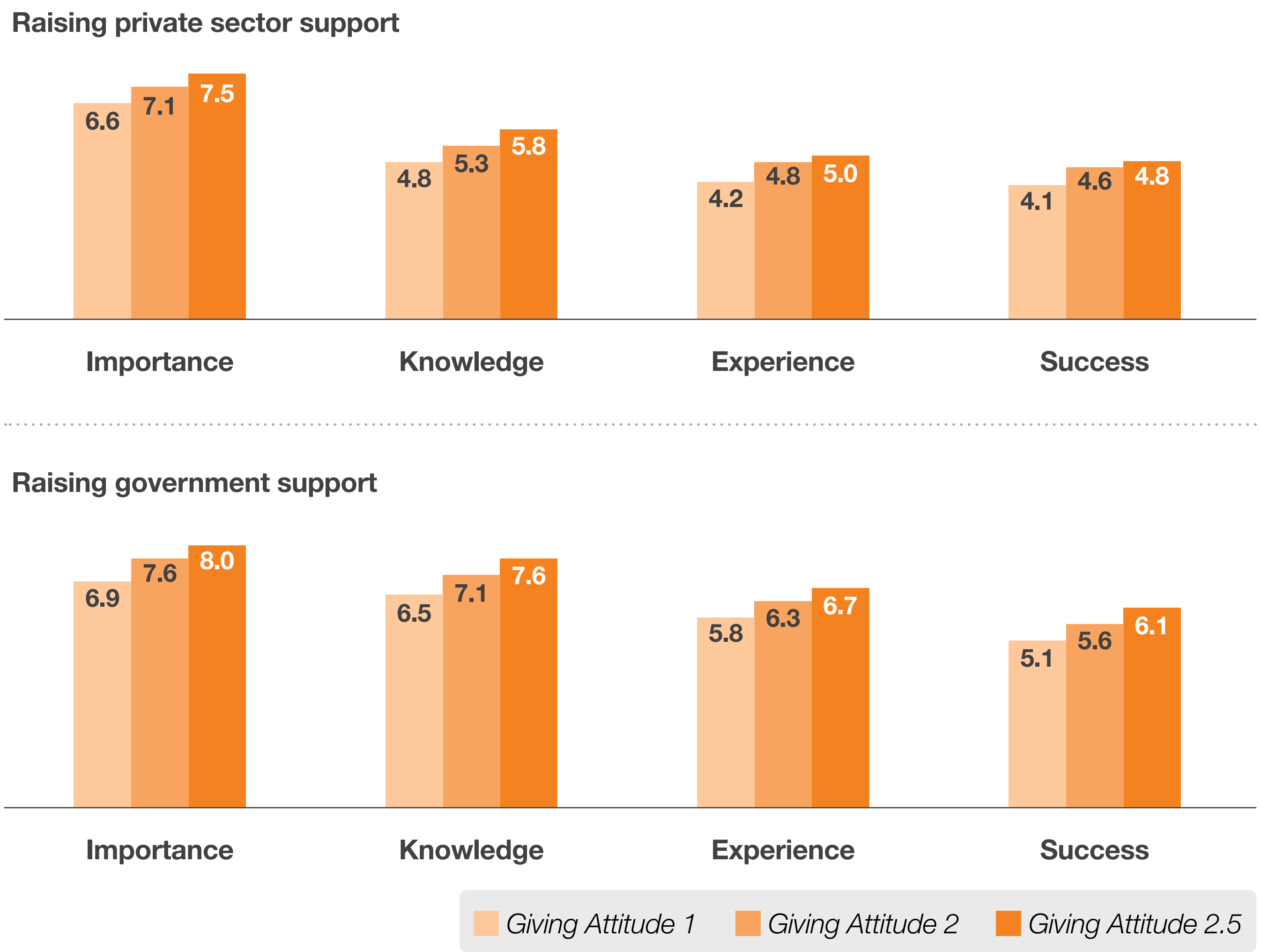
Despite the state of the economy, perceptions surrounding the need for private sector fundraising have continued to grow.

For example, the average rating for the importance of raising private sector support has increased from 6.6 out of 10 in the first study, to 7.1 in the second study and 7.5 in the current study.

Encouragingly, improvements were also seen across the three other key metrics over the three Giving Attitude studies, with increases in ratings of: knowledge of how to seek support (4.8 out of 10 to 5.3 and then 5.8), experience in seeking support (4.2 out of 10 to 4.8 and then 5.0) and success at doing it (4.1 out of 10 in 2018 to 4.6 and then 4.8).

However, organisations' perceptions of their government funding capability remain stronger overall, and these perceptions also continue to grow (Figure 9).

Figure 9: Perceptions of raising private and government support, across Giving Attitude studies (ratings out of 10)



Drivers of success

Giving Attitude continues to show personal approaches are the most effective strategy to success in raising private sector support.

The current study found asking for individual donations and business sponsorships, and running entertainment events, were both drivers of success (Figure 11) and where the industry perceived the best results (Figure 10).

Conversely, asking for business donations was a driver of success but perceived success was down during this time period, likely an influence of COVID-19.

Over time, social media campaigns have continued to grow in success, as have crowdfunding campaigns. This has led to social media campaigns becoming a driver of success in the current study.

Despite improved successes, few organisations rated themselves as very successful for each fundraising activity, which is not surprising when considering the impact that COVID-19 had on fundraising activity.

Figure 10: Perceived success of fundraising activities, across Giving Attitude studies (rating out of 10)

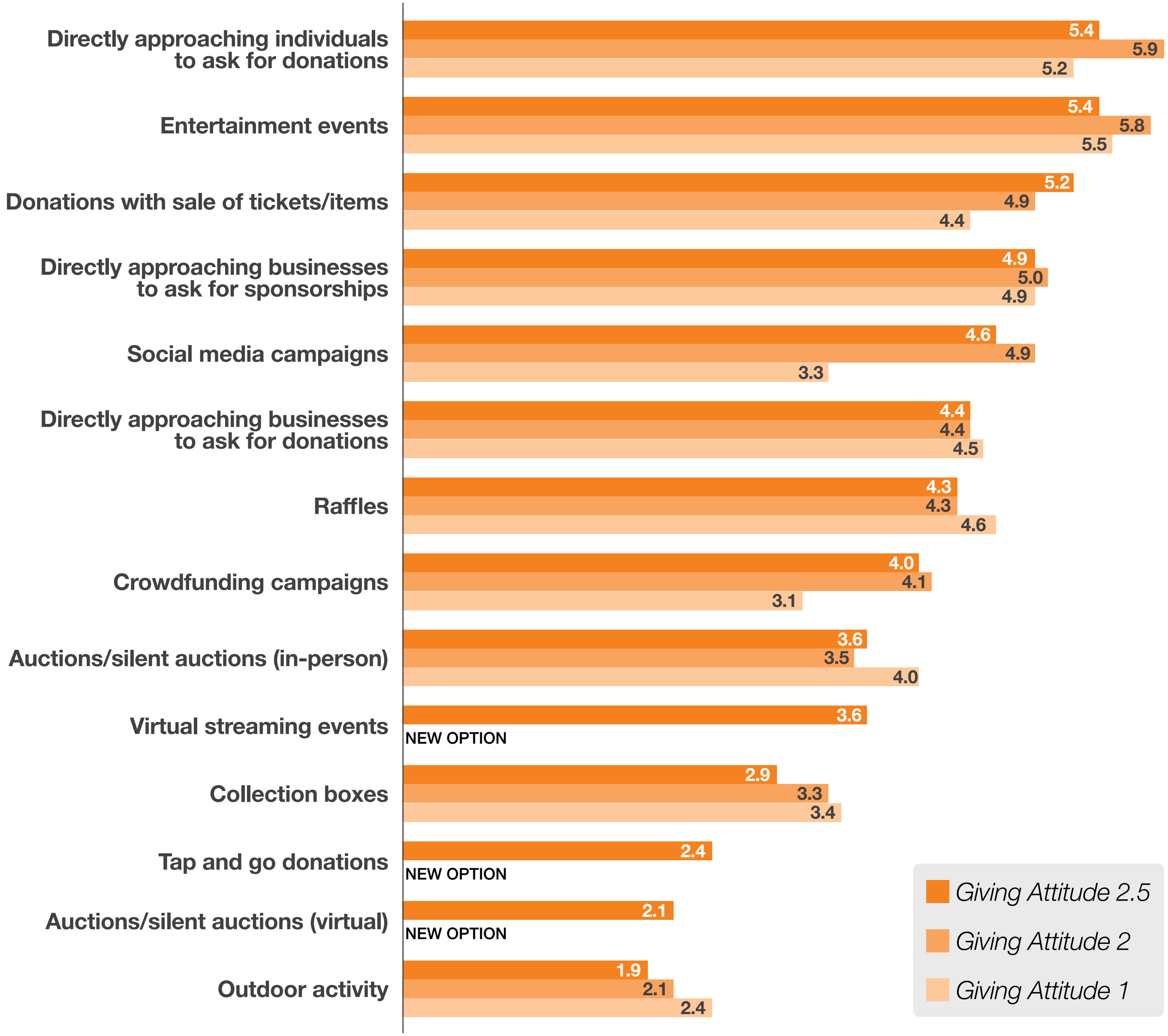
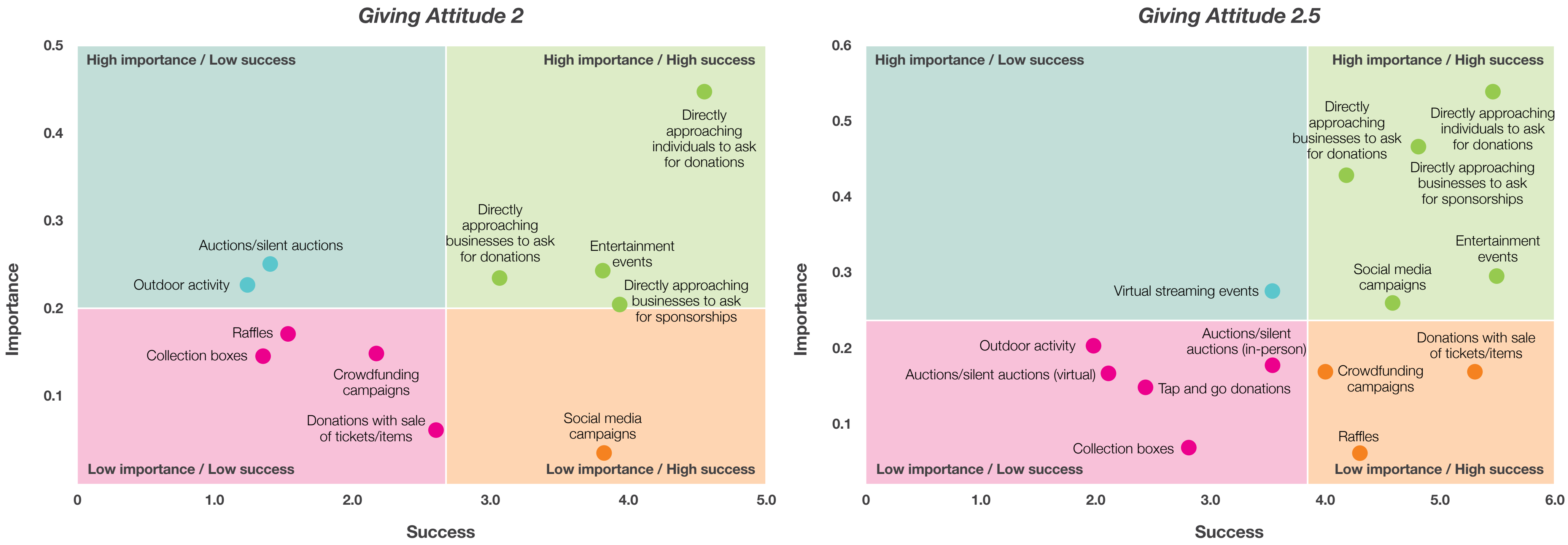


Figure 11: Drivers of success, previous study and current results

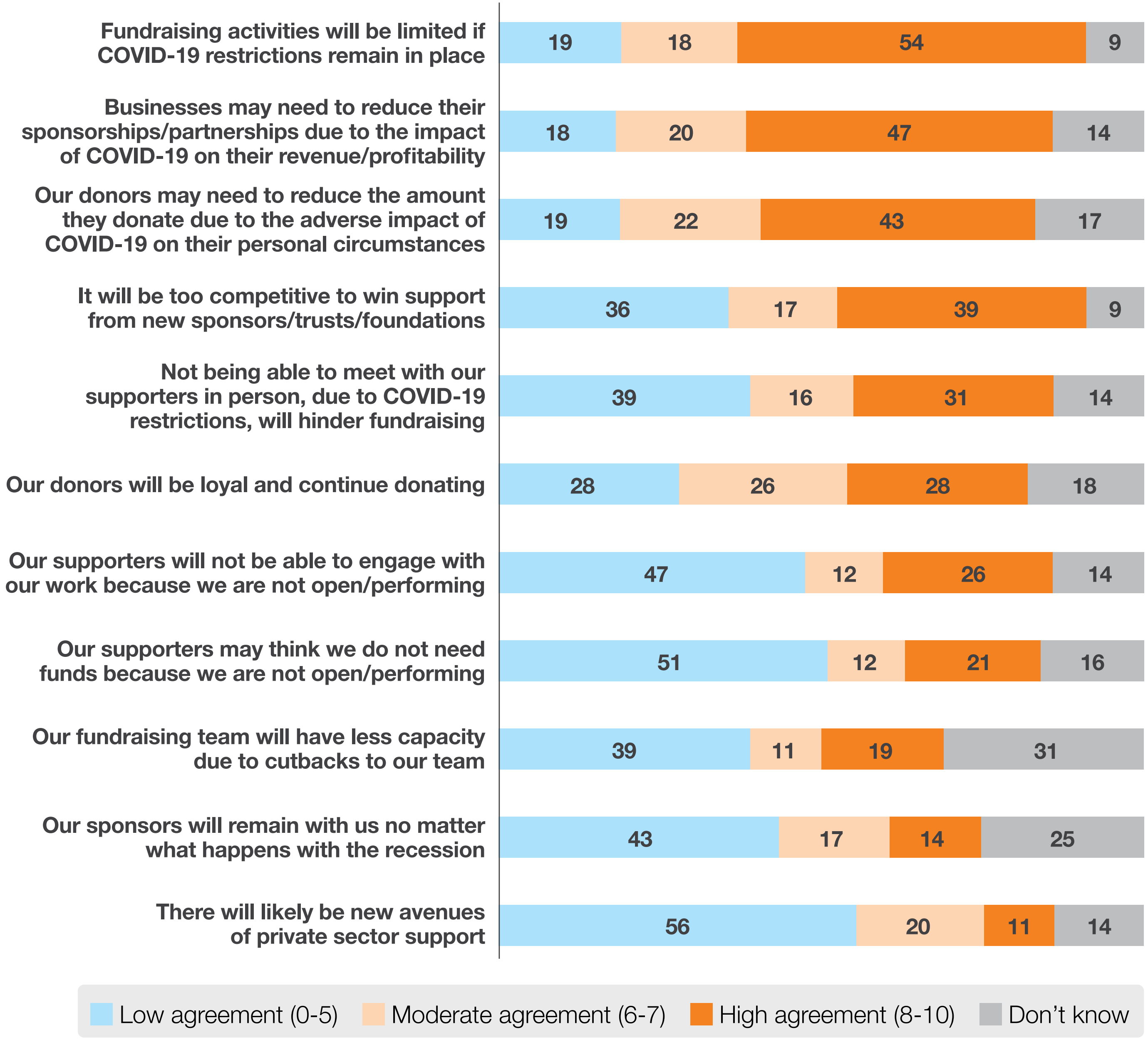


State of mind during the COVID-19 pandemic

Looking back at *Giving Attitude 2*, which captured attitudes during the pandemic, it showed COVID-19 negatively affected the perceived capability of arts and cultural organisations to undertake activities to raise private sector support, and that it had shifted the way they were thinking about their future.

54% of the organisations sampled at the start of the pandemic for *Giving Attitude 2* agreed that their fundraising activities would be limited as long as COVID-19 restrictions remained in place (Figure 12).

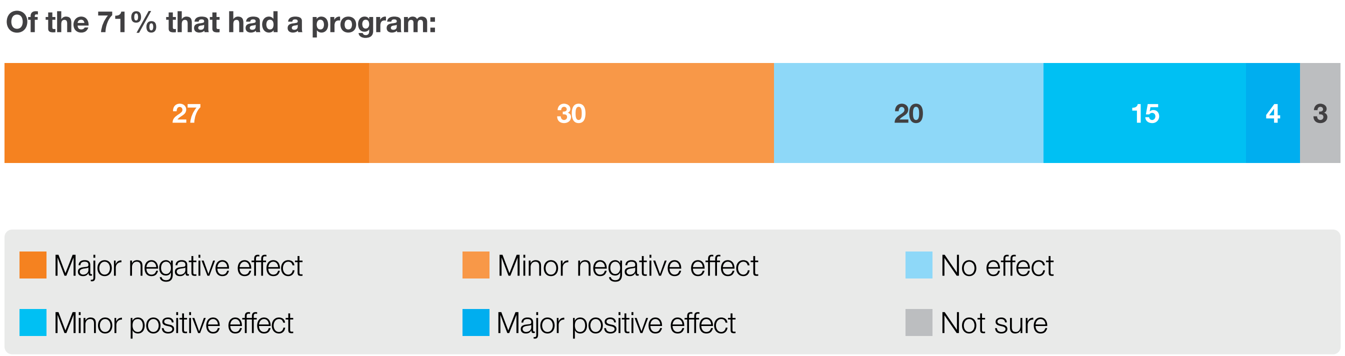
Figure 12: Attitudes during the pandemic, *Giving Attitude 2*



Impact of the pandemic on fundraising programs

Giving Attitude 2.5 confirmed that there was a significant impact on fundraising programs. 71% of organisations indicated a program was in place before the pandemic. Of these, 57% reported a negative impact of the pandemic, and 27% stated it had a major negative effect (Figure 13).

Figure 13: Impact of the pandemic on fundraising programs, *Giving Attitude 2.5* (%)



Challenges faced in raising private support

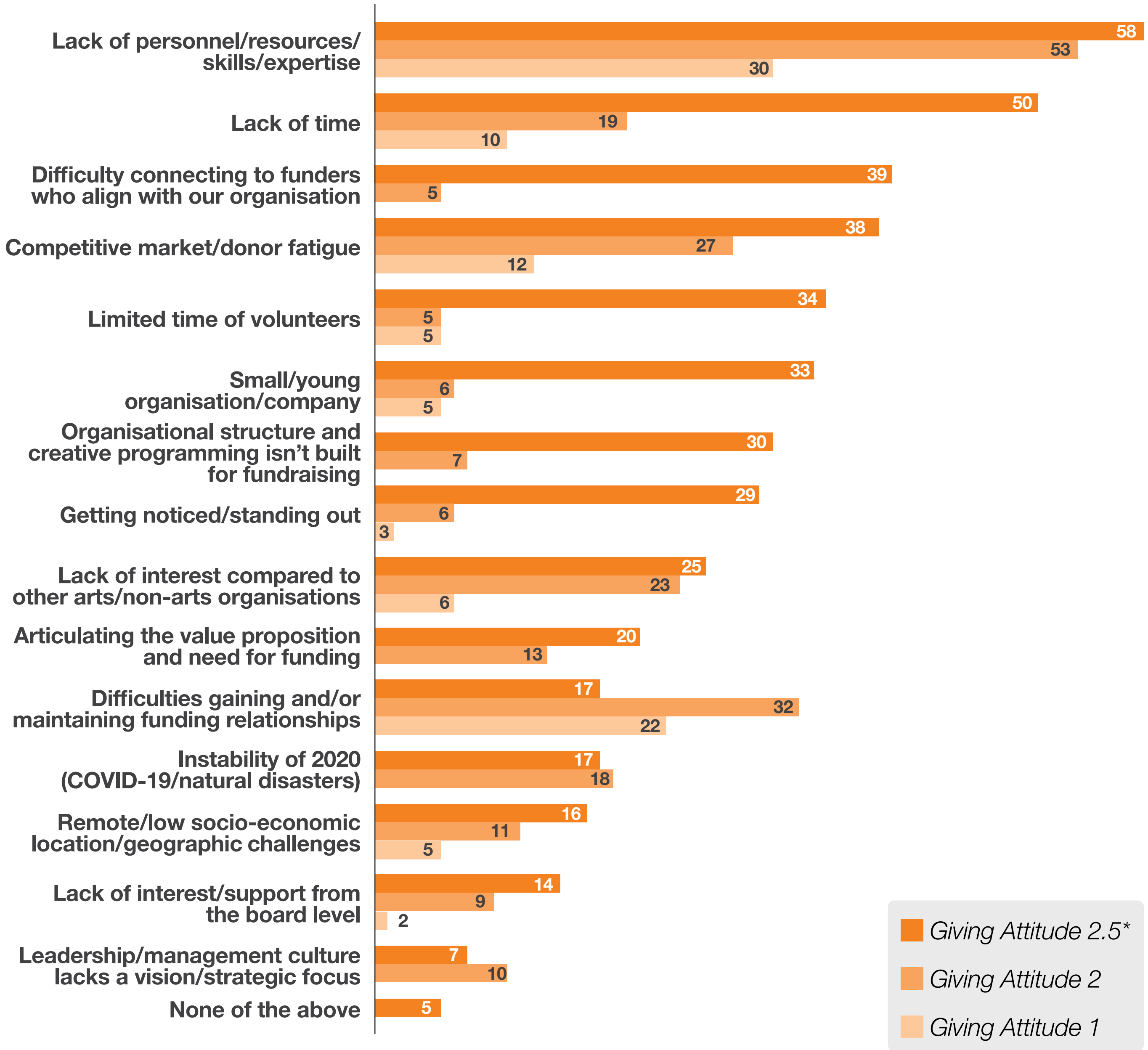
Instability during the COVID-19 pandemic was a significant burden to overcome in seeking out the right support. This likely influenced key challenges reported in *Giving Attitude 2* such as gaining or maintaining relationships, market fatigue and competition.

We know from the drivers of fundraising that personal approaches were the most effective strategy that arts and cultural organisations could employ to improve their success, yet many reported challenges with a perceived lack of skills and expertise in seeking private funding (53% in the previous study and 58% in the current study).

In *Giving Attitude 2.5*, we also saw continued challenges reported around lack of time/volunteer time, connecting to funders who align to their specific organisation, and being a younger inexperienced organisation (Figure 14).

*Interpret trend numbers with caution. The question was adapted into a multiple response question based on open-ended responses received in *Giving Attitude 1* and *2*.

Figure 14: Challenges faced in raising private support, across Giving Attitude studies (%)



The skills and expertise of staff

While securing the right skills and expertise has consistently been the biggest challenge, the industry has recognised the importance of having skilled staff to be successful in raising private support.

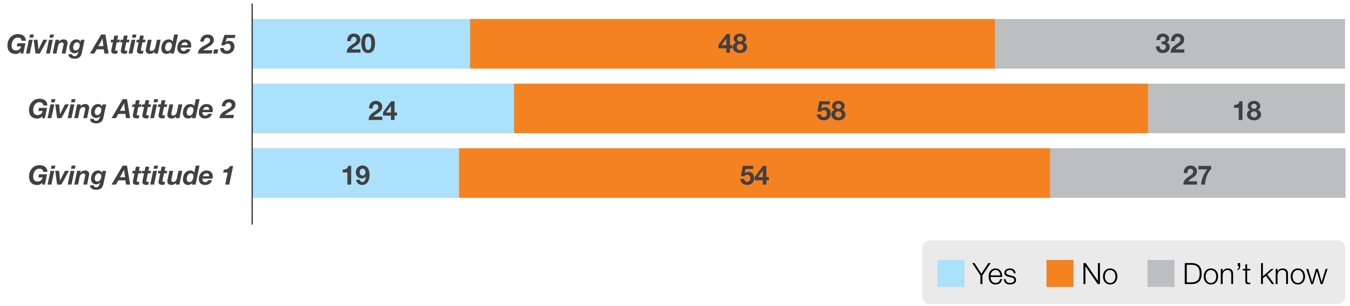
In *Giving Attitude 2*, 1 in 4 organisations indicated they needed dedicated skills and expertise, which has now dropped back to 1 in 5 in the current study.

Only 1 in 5 organisations reported that they employed fundraising staff in the current and previous study. Interestingly, new data collected for the first time in the current study has found that 58% of organisations have never employed fundraising staff (Figure 15).

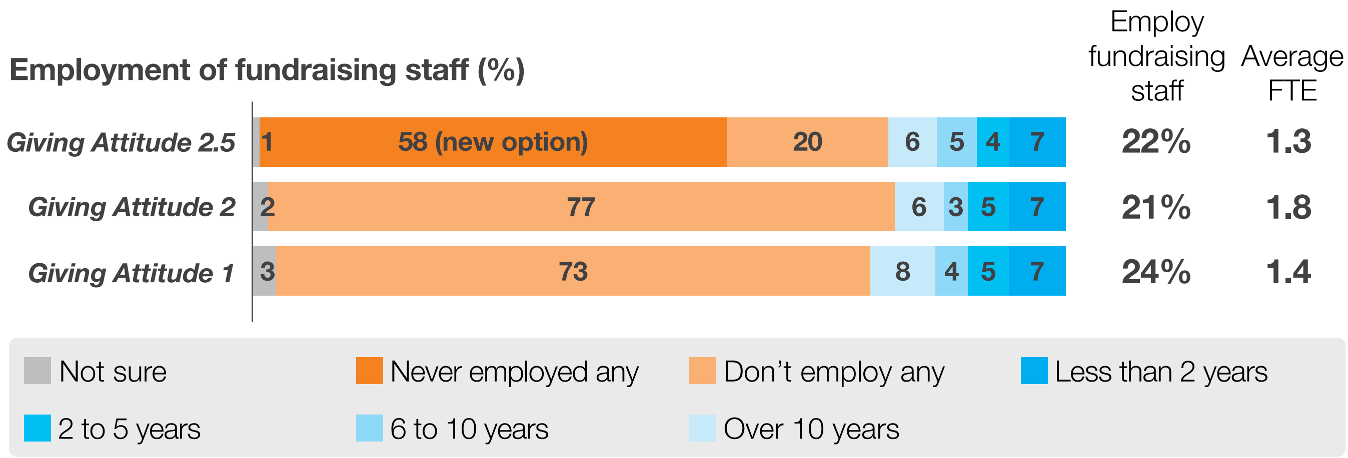
Spending on salaries for fundraising staff declined by $24.6 million during the pandemic (Figure 6).

Figure 15: Needs for skills and expertise and employment of fundraising staff, across Giving Attitude studies (%)

The need for dedicated skills and expertise (%)



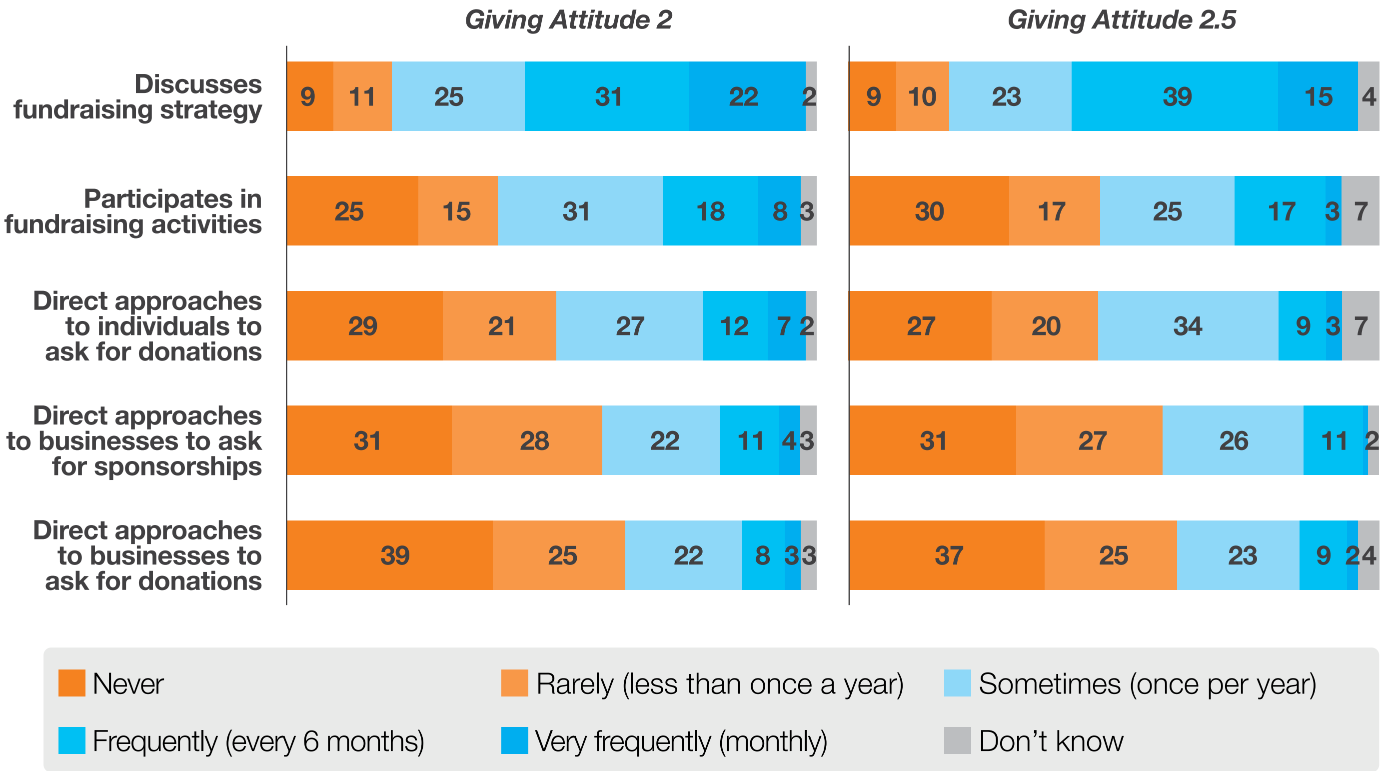
Employment of fundraising staff (%)



Board engagement

The industry also reported low levels of board engagement in the current study. A high proportion of board members were not actively engaged in activities that raised private sector support (Figure 16).

Figure 16: Board engagement, previous study and current results (%)



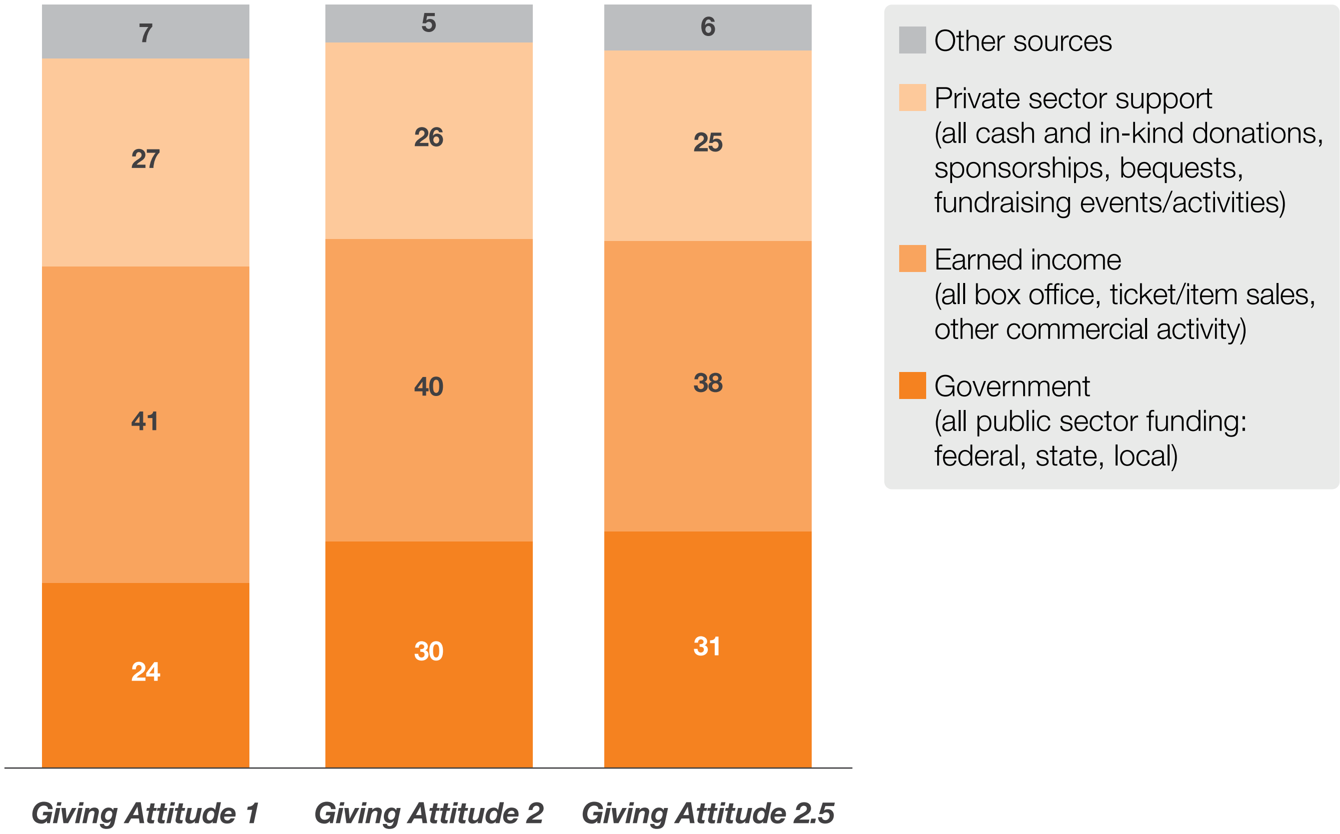
Anticipated funding mix in five years

Giving Attitude 2.5 found that in five years, the industry anticipates 38% of funding will come from earned income, 31% through government sources, and 25% through private sector support.

There is an expectation that the industry will rely more on private sector support, with this to take a higher share of their overall funding (+4%) in five years' time, growing it from 21% (Figure 1) to 25% (Figure 17).

In contrast, government support as a share of overall funding is expected to reduce in terms of organisational turnover (-17%), from 48% (Figure 1) to 31% (Figure 17).

Figure 17: Anticipated funding mix in five years, across Giving Attitude studies (%)



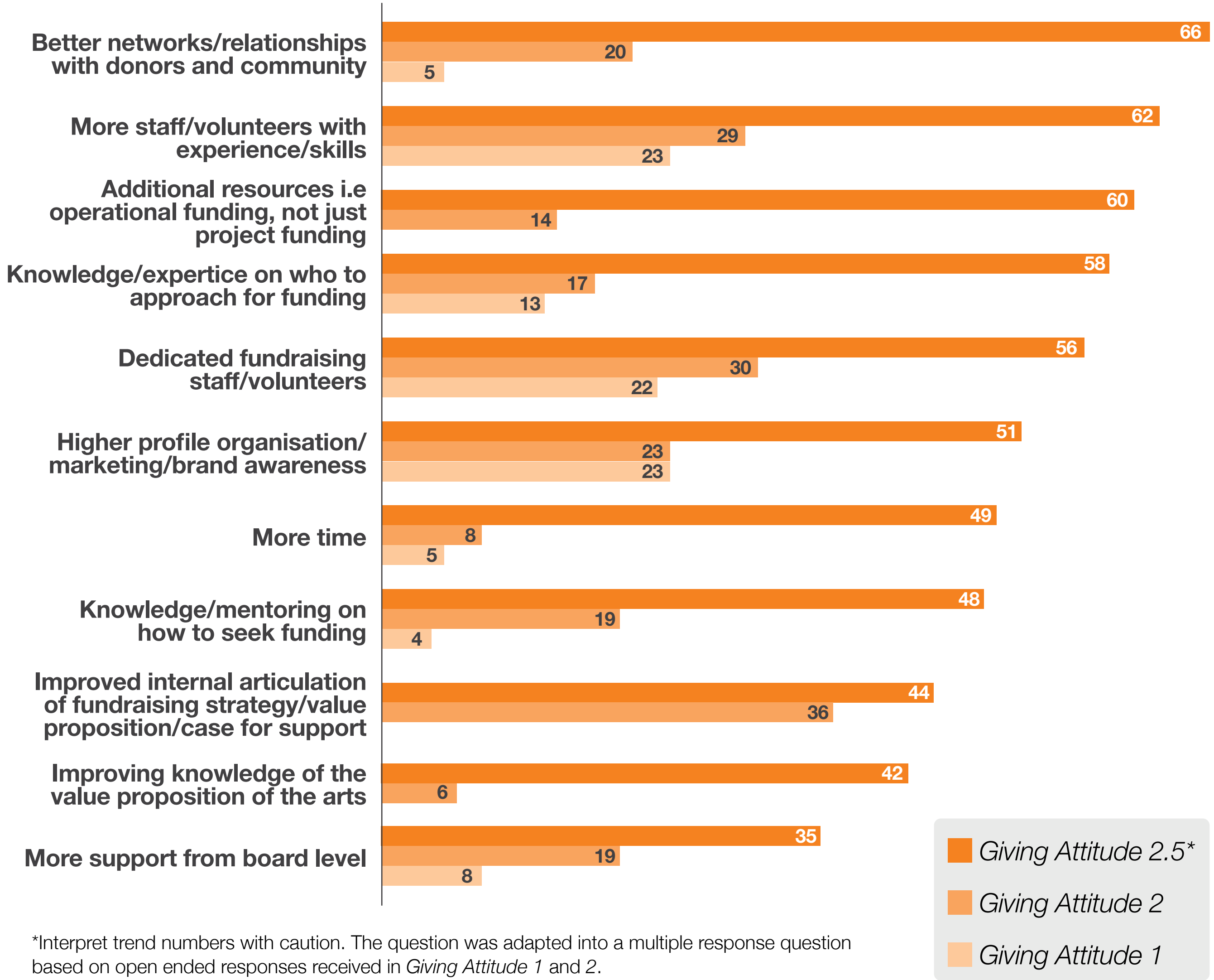
Where organisations see opportunities for success

The study asks organisations what they need to be more successful in raising private sector support.

In *Giving Attitude 2.5*, the most common response was that better networks or relationships with donors and community will provide opportunities for success, selected by 2 in 3 organisations. Many also reported needs around staffing, resources, knowledge, volunteers, time and skills (Figure 18).

These results differ from responses to *Giving Attitude 2*, captured in 2020 and 2021, when the need most commonly identified by organisations was to develop their fundraising strategy and case for support within their company, although caution should be used in comparing results between the studies due to different ways this question was asked.

Figure 18: Perceptions of what organisations need for success, across Giving Attitude studies (%)



*Interpret trend numbers with caution. The question was adapted into a multiple response question based on open ended responses received in *Giving Attitude 1* and *2*.

Part C

The different experiences of fundraising

Image: Australian Dance Party, Escape From Plastika
Photo: Lorna Sim

The varying distribution of turnover across company size

Giving Attitude 2.5 found that the larger an arts and cultural organisation is, the more funding they received from the government in the calendar year 2020 or financial year 2020/21.

For micro arts and cultural organisations, just 8% of turnover was government funding, and the majority of turnover (72%) came from private sector support (Figure 19).

For large organisations, 54% of turnover was from government funding and 20% was private sector support (Figure 19).

When looking at the total value of private sector support by organisation size, a significant decline in support has occurred since the previous study for micro (-27%) and small (-40%) organisations, which were already seeing significant declines in private support at the start of the pandemic (41% and 47% respectively) (Figure 20).

Figure 19: Distribution of turnover by organisation size, *Giving Attitude 2.5* (%)

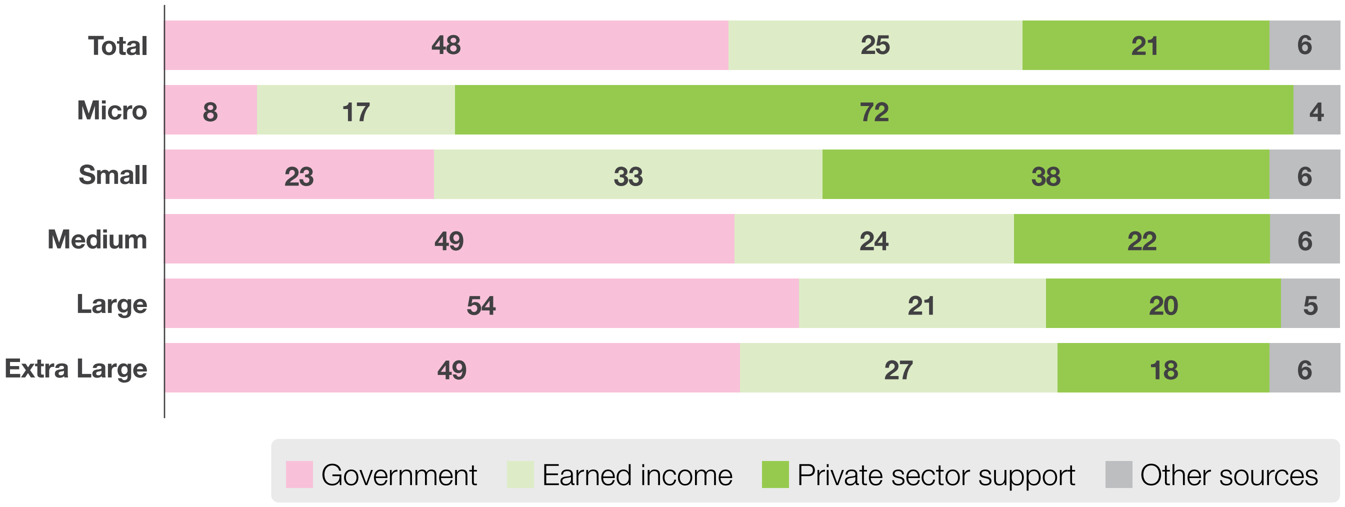


Figure 20: Total value of private sector support by organisation size, across Giving Attitude studies ($ and percentage change)

	Giving Attitude 1	*Giving Attitude 2*	*Giving Attitude 2.5*
Total	**$607.9m**	**$540.3m (-11%)**	**$398.4m (-26%)**
Micro (<$50k)	$16.9m	$10.0m (-41%)	$7.3m (-27%)
Small ($50k-$249k)	$62.6m	$33.1m (-47%)	$20.0m (-40%)
Medium ($250k-$999k)	$55.2m	$54.7m (-1%)	$51.7m (-6%)
Large ($1m-<$5m)	$67.5m	$104.3m (+55%)	$92.1m (-12%)
Extra large (>$5m)	$251.4m	$296.0m (+18%)	$206.8m (-30%)

Types of private sector support and organisation size

The third iteration of the Giving Attitude study shows vastly different ways support is received by size of organisation.

Smaller organisations receive less cash as a portion of their private sector funding compared to larger organisations (Figure 21).

Micro and small organisations also rely on lower supporter numbers (Figure 22), which presents a significant risk to their private sector income if a few supporters no longer provide existing levels of support.

Figure 21: Types of private sector support by organisation size, *Giving Attitude 2.5* (%)

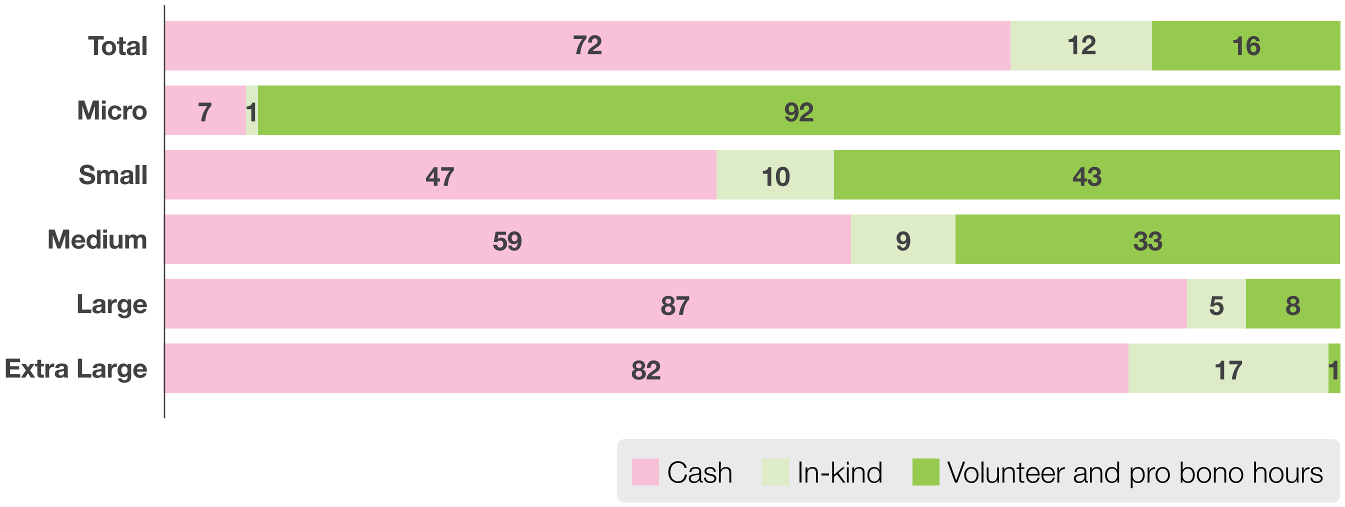


Figure 22: Types of private sector supporters (numbers) by organisation size, previous study and current results

	Giving Attitude 2			*Giving Attitude 2.5*		
	Individuals	Business sponsors	Trust/ foundations (incl PAFs)	Individuals	Business sponsors	Trust/ foundations (incl PAFs)
Total	**115**	**5**	**3**	**89**	**3**	**1**
Micro	38	4	2	15	1	0
Small	123	5	2	26	2	1
Medium	67	7	2	185	3	2
Large	256	9	4	176	5	4
Extra large	1014	13	10	863	17	10

Perceptions of private and public support by organisation size

There is a clear relationship between organisation turnover and the perceived levels of knowledge, importance, experience, and success in raising private sector and government support.

Given their limited resources and capacity, micro and smaller organisations have weaker results on all metrics (Figure 23).

Figure 23: Perceptions of raising private and government support by organisation size, *Giving Attitude 2.5* (ratings out of 10)

	Total	Micro	Small	Medium	Large	Extra large
Raising private support						
Knowledge	5.8	5.2	5.6	6.5	7.4	7.9
Importance	7.5	7.2	7.5	7.8	8.0	8.4
Experience	5.0	4.3	4.9	6.0	6.6	7.4
Success	4.8	4.1	4.7	5.7	6.5	7.2
Raising government support						
Knowledge	7.6	7.0	7.2	8.5	8.9	9.2
Importance	8.0	7.6	7.7	8.7	8.9	9.7
Experience	6.7	6.0	6.2	8.0	8.5	8.9
Success	6.1	5.6	5.5	7.0	7.8	8.2

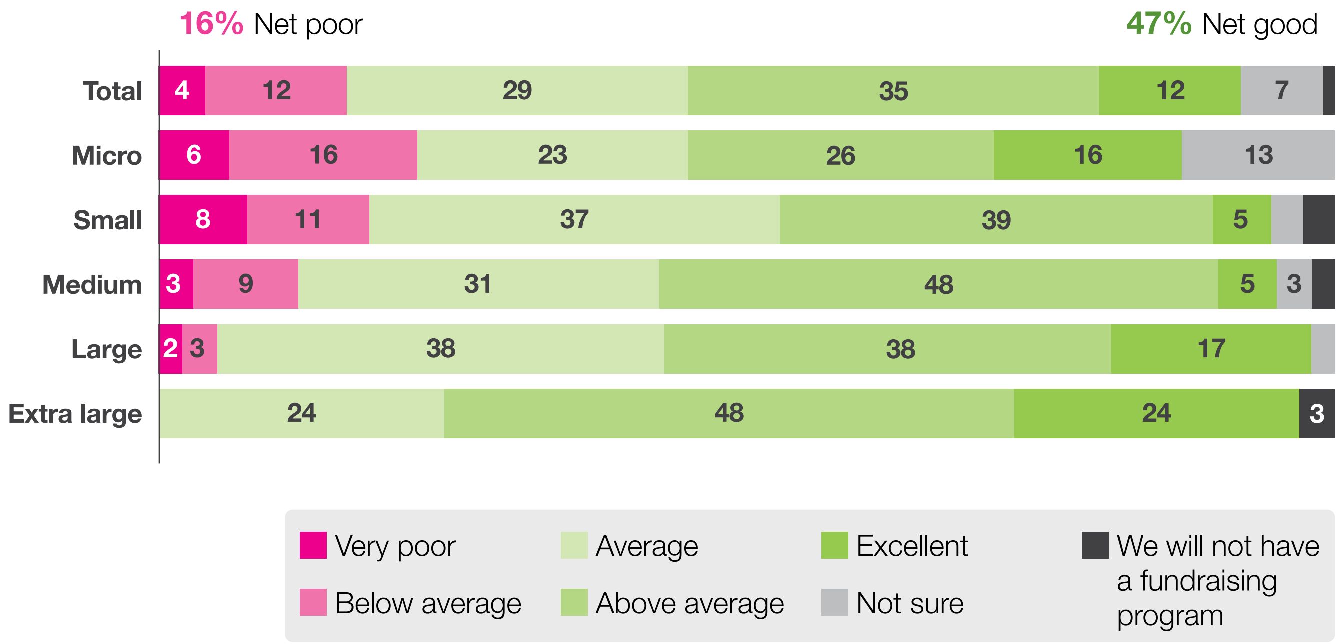
12-month anticipated fundraising

Looking ahead to the next 12 months, nearly all organisations reported a program was planned to take place. 47% of organisations rate the potential for the program to be above average or excellent, 29% report it will likely be average, while 16% report it is likely to be poor or below average.

In line with past actual support, larger organisations are more confident in their ability to fundraise in the future.

On the other hand, small and micro organisations are more likely to be unsure or to not have a program in the next 12 months. And for those that do, they are more likely to feel it will be very poor or below average (Figure 24).

Figure 24: Anticipated fundraising success in the next 12-months by organisation size, *Giving Attitude 2.5* (%)



Appendix

Detailed methodology

Image: The Push, RYMS - Real Youth Music Studios, St Kilda Festival
Photo: William Patston

Study design – recruitment and data inclusions

Data collection approach

The data was collected from 23rd August 2022–22nd February 2023.

The Giving Attitude study uses a multi-mode recruitment approach to achieve a representative spread of arts and cultural organisations across Australia. The participating organisations complete a questionnaire that reveals their activities and success with fundraising and their financial private sector support data. Wallis Consulting Group designed the methodology that has been repeated for this third Giving Attitude study.

The sample was recruited from a contact list of arts and cultural organisations provided by Creative Partnerships Australia. Creative Partnerships identified organisations that had Deductible Gift Recipient (DGR) status for the purpose of being an arts or cultural organisation at the time the list was created, where their primary purpose was arts or cultural activities.

- Invitations were first sent to this list.
- In addition, electronic direct mail (EDM) eNews campaigns to Creative Partnerships Australia newsletter recipients and a social media campaign were undertaken as an open invitation to register interest in Giving Attitude 2.5.
- Registered organisations were provided a unique online link to complete the study online. If a respondent preferred, they were able to complete the survey via phone or on paper. This data was then entered into an online system.
- All registered organisations who had incomplete surveys by late January 2023 were sent a paper-based version to fill in and return by reply-paid mail, which was then entered into the online survey by Instinct and Reason.

By engaging a spread of arts and cultural organisations across Australia, this study was able to provide a true representation of this sector through key characteristics such as organisation turnover, geographic location, and primary art form or cultural activity.

Data inclusions

This report references the data collected as *Giving Attitude 2.5*, and this is compared to the previous reports, now referred to as *Giving Attitude 1* and *Giving Attitude 2*.

The collected survey data was weighted to reflect the composition of arts and cultural organisations in the Australian Charities and Not-for-Profit Commission (ACNC) 2020 Annual Information Statement (AIS).

The questionnaire contained quantitative questions about financial information, fundraising activities, and sentiment towards fundraising.

The sentiment questions asked respondents about their perceptions for their organisation's:

- expected funding mix (for the reporting period)
- anticipated funding mix in 5 years fundraising activities carried out
- capacity and capability to fundraise, including in the past 12 months and expected success in the next 12 months
- successes, challenges and needs for raising support.

The financial questions asked organisations to report the following financial data for calendar year 2020 or financial year 2020/21:

- total income sources (earned income, government, private support)
- cash and in-kind support income raised through donations, sponsorships, bequests, and fundraising activities
- volunteer and pro bono support hours
- costs of raising private sector support to highlight the return on investment of fundraising activities
- the number of donors, sponsors, trusts/foundations (including private ancillary funds).

The study includes organisations that did not receive any private sector support in the financial reporting period to ensure the study revealed the true status of private sector support in the sector.

Study design – national estimate methodology

National estimate methodology approach

The national estimate methodology provides an estimation of the total value of private sector support in the arts and cultural sector. This methodology enables a deeper understanding of what is driving the total value of private sector support through estimating the value of cash, in-kind, donations, sponsorships, bequests, fundraising activity, volunteer, and pro bono support, as well as the level of associated costs that were incurred to undertake any fundraising activities.

Wallis Consulting Group developed the methodology for estimating the value of private sector support income and expenses using a combination of data from the survey and ACNC reports such as the AIS.

The methodology uses a combination of actual survey results (for organisations that gave permission for their survey data to be used) and survey averages (for organisations that did not gave permission for their survey data to be used). The data from three sources (recruitment, AIS, and the survey) are merged into one file so that the right survey data or averages are applied based on the size of the organisation.

Image: Arts Project Australia, Marcel Cooper and Valerio Ciccone
Photo: Arts Project Australia

Methodology steps

1. Determine the total number of arts and cultural organisations for the estimates:

a. Import all organisations used for recruitment (organisations that had Deductible Gift Recipient status for the purpose of being an arts or cultural organisation at the time the list was created, where their primary purpose was arts or cultural activities).

b. The Total Listing Data (Sample/Population) columns are updated with the relevant organisations' data, forming the basis of the total number of organisations for the estimates of the sector. It does not include an off-list registrations and all organisations will have a location for "State" applied, any national organisations are left blank.

2. Append Annual Information Statement (AIS) and survey data to the file:

a. The ACNC AIS data allows estimates to be determined by organisation size where no financial survey data is available.

- The AIS dataset is downloaded from https://data.gov.au for the calendar year of focus.
- The data of organisations that submitted AIS data is appended to the total listing (using the ABN to merge), ensuring the organisation size is available.

b. The Giving Attitude survey results are appended to the total listing when permission was given for their data to be linked to their organisation.

- Volunteer hours are calculated at $35.25 per hour (recommended in the *Handbook on Non-Profit Institutions in the System of National Accounts* that assigns the average gross wage of the community, welfare and social service occupation).
- Private sector funding received by Creative Partnerships Australia through the ACF is provided as total dollars of donations.

3. Calculate income and expenses figures for each organisation based on one of the following categories:

a. *Linked survey data.* Organisations that have given permission to link their survey results should use their survey's financial information.

b. *AIS data, but no linked survey data*

- Organisations that have AIS data available, but no linked survey data will not have the detail that is available through the survey (e.g., cash and in-kind donations, sponsorships, volunteer hours).
- Assumptions need to be made based on the survey data and applied to the AIS data to fill these gaps.
- Survey averages are applied calculated by organisation size (excluding zero) for the types of private sector support (INCOME) and associated costs (EXPENSES) and calculated by organisation size.

c. *Neither AIS nor survey data.* For these organisations, assumptions are made based on the entire survey data collected (not just the survey responses). As we don't know the size of these companies, combined averages from small and micro organisations are applied to avoid overestimation.

4. Total private sector support is calculated as follows and reported as the net value:

a. TOTAL PRIVATE SECTOR SUPPORT (INCOME): Sum of cash and in-kind sponsorships, donations, bequests, fundraising and volunteers (hours x $35.25)

b. TOTAL EXPENSES: Sum of salaries, marketing costs, consultancies, general expenses, event expenses and all other costs

c. NET PRIVATE SECTOR SUPPORT: income minus expenses

d. RETURN ON INVESTMENT: sum of net private sector support divided by expenses

Sample profile and comparability

223 of the 1,613 organisations in the sample provided financial and sentiment responses to *Giving Attitude 2.5*. The *Giving Attitude 2.5* sample is smaller than in *Giving Attitude 2* (n=380) and in *Giving Attitude 1* (n=551).

Overall, for *Giving Attitude 2.5*, 420 organisations registered to participate. 223 completes were recorded for all parts of the study, while an additional 68 organisations only completed the sentiment survey but were excluded due to an inability to categorise their size.

Several recruitment barriers were reported that prevented the full registered list from completing this study

Significant barriers were encountered during the data collection period for *Giving Attitude 2.5*. As a result, the data collection period was extended to six months, to maximise the sample. Barriers included:

1. Lack of buy-in to the research's relevance. It was difficult to persuade those with minimal or no fundraising activity to complete the survey in a time when their priorities were elsewhere.
2. Inability to contact organisations using known contact details. Evidence from the recruitment suggested contact details become out-of-date quickly.
3. Inability to contact relevant staff. Higher staff mobility, with more employees working-from-home, made it difficult to directly contact the staff required to complete the study.
4. Organisations' operational and creative focus. Organisations prioritised programming and operational tasks over participating in the survey.
5. A two-step process to provide an anonymous registration link then an individual survey link to organisations created a delay between expressing interest in being part of *Giving Attitude 2.5* and being able to complete the survey. This process was implemented to allow Creative Partnerships Australia to get in touch with arts and cultural organisations directly, rather than through Instinct and Reason.
6. Time had lapsed between the reporting period (calendar year 2020, financial year 2020/21) and when the data was collected. This resulted in difficulty encouraging buy-in to the value of participating and hesitancy to get involved due to the unusual fundraising and donations acquired in the reporting period compared to a non-pandemic year.

Image: SUE19, Mouse Mongo Sui. Francois Knoetze
Photo: Rosina Possingham

Sample profile and comparability

Sample consistency is paramount to any tracking study to ensure that changes presented are reflective of true industry changes and not a result of a variation in the sample.

Measures are taken to ensure the quality and accuracy of the data that is received, including using standardised data collection methods, statistical techniques to take account of outlier results in a smaller sample, and data quality checks to verify accuracy in the results provided.

As a result, we are confident that the data from *Giving Attitude 2.5* provides valuable insights to help make informed decisions.

However, there are limitations and considerations for the smaller sample:

The *Giving Attitude 2.5* sample (n=223) is smaller than in Giving Attitude 2 (n=380) and Giving Attitude 1 (n=551). This needs to be considered when interpreting the results of *Giving Attitude 2.5* as the reliability is lower than last survey.

- The response rate (13.8%) is lower than *Giving Attitude 2* (22.3%) and *Giving Attitude 1* (24.9%) resulting in a higher margin of error (+/- 6.09% vs. +/- 4.43% and +/- 3.62%, respectively). As a result, the smaller sample size is less representative of the entire population, meaning there is more uncertainty in the results. While a higher response rate and a lower margin of error are preferred, it is important to keep in mind that even with a lower response rate and a higher margin of error, the data from *Giving Attitude 2.5* still provides valuable insights and information. A higher margin of error means that the range of possible values is wider, but the estimated value is still likely to be close to the true population value. It is also important to consider the magnitude of the difference between results, as even if the margin of error is higher, if the differences are large enough, they may still be statistically significant and meaningful.
- There are no statistical differences between *Giving Attitude 2* and *Giving Attitude 2.5* for:
  - the size composition of the industry between the ACNC's Annual Information Statements (AIS) for 2022, which the weighting of the results is based on
  - the location of companies (states and territories) as they were similar numbers each year
  - art form focus. Performing arts companies make up 37% of the full sample in *Giving Attitude 2.5*, and 39% in *Giving Attitude 2*. Museums and galleries are the second largest group again, comprising12% of organisations (similar to 14% in the previous survey).
- A difference in *Giving Attitude 2.5* was the inclusion of more off-list organisations, with 6% for-profit, compared to 100% not-for-profit in *Giving Attitude 2*.

Image: Vulcana, Circus in a Tea Cup
Photo: Jade Ellis

61% of the sample that completed the full survey reported on financial year 2020/21, while 39% reported on calendar year 2020. Both of these years had pandemic-related effects on arts and cultural organisations, albeit to varying extents.

Proportionally, organisations from across the different states and territories answered in similar numbers each survey, as did organisations by art form focus, however there was reduction in micro and smaller sized organisations participating in *Giving Attitude 2.5*.

Sample profile and comparability: reporting and data handling

Data collection periods	Caution should be used when interpreting the data in this report. While comparisons between the data sets of *Giving Attitude 2.5, Giving Attitude 2* and *Giving Attitude 1* show no major changes that would impact the results, the start of the COVID-19 pandemic in the March 2020 impacts the calendar year reporting period in *Giving Attitude 2.5,* and the final 4 months of the financial year in *Giving Attitude 2*. As a result, the data period must be noted when understanding the results: **FINANCIAL DATA 2020/2021** the financial data was collected based on the company's reporting period (39% reported calendar year 2020 and 61% reported financial year 2020/2021). **SENTIMENT 2022/2023** the sentiment data must be interpreted with caution in relation to the financial data, as it was collected at the time the survey was completed, in late 2022 or early 2023.
Partial completes	Due to complexity with recruitment, n=84 organisations partially completed the survey. Of these, n=16 were added to the final sample as they completed enough questions to enable weighting to match earlier surveys. n=68 organisations did not provide their total turnover, and thus could not be included in *Giving Attitude 2.5* as their size could not be determined.
Weighting	Like the previous studies, all survey results are weighted according to the composition of arts and cultural organisations based on overall turnover within the 2019 ACNC Annual Information Statement.
Statistical significance	All tests for statistical significance have been undertaken at the 95% level of confidence, and unless otherwise noted, any notation of a 'difference' between subgroups means that the difference discussed is significant at the 95% level of confidence.

2018 data comparisons	Comparisons with the previous report are noted where significance testing (at the 95% confidence level) indicated a valid difference in results. There are no comparisons available where new questions or response options are noted, and caution should be used in interpreting trend data where refinements to questions are noted.
Data notes	**Treatment of means** - Where responses are scale variables, for example 1 to 5 where 1 is disagree strongly and 5 is agree strongly, the mean is also calculated with the removal of don't know. For numerical results, please refer to the data note on each slide. **Rounding of figures** – May result in anomalies of +/- 1%. All results have been rounded to the nearest whole percentage figure and anomalies of about +/- 1% may occur in charts i.e., total percentages for each bar add to 99%, or 100% or 101% due to rounding error. **Net figures are also rounded** – May result in anomalies of +/- 1%. Net results are also rounded after summing the separate proportions rather than simply summing two rounded figures. For this reason, anomalies of about 1% can occur between net results and the rounded results shown. For example, a proportion of 33.3% 'agree' rounds to 33%, and a proportion of 12.4% 'strongly agree' rounds to 12%, yet the combined result of 33.3% plus 12.4% equals 45.7%, which would be rounded to 46%.

Unweighted sample profile by key organisation characteristics

Location	GA 1		GA 2		GA 2.5	
Total sample	n=	%	n=	%	n=	%
NSW	174	32	109	29	59	26
ACT	15	3	17	4	8	4
VIC	150	27	94	25	47	21
QLD	74	13	45	12	37	17
WA	55	10	53	14	31	14
SA	42	8	31	8	28	13
TAS	18	3	15	4	6	3
NT	22	4	16	4	7	3

Size of organisation	GA 1		GA 2		GA 2.5	
Total sample	n=	%	n=	%	n=	%
Micro (<$50k)	92	17	69	18	31	14
Small ($50k-$249k)	143	26	91	24	38	17
Medium ($250k-$999k)	147	27	106	28	58	26
Large ($1m-<$5m)	97	18	78	21	63	28
Extra large (>$5m)	72	13	36	9	33	15

All art form/cultural activities	GA 1		GA 2		GA 2.5	
Total sample	n=	%	n=	%	n=	%
Festivals	81	15	98	26	21	9
Media and communications	75	14	94	25	12	5
Visual arts	145	26	114	30	18	8
Performing arts	271	49	229	60	85	38
Historical, literary, and humanistic societies	50	9	37	10	3	1
Museums and galleries	303	55	117	31	25	11
Cross-art form	N/A	N/A	69	18	34	15
Other	41	7	49	13	25	11

Years in operation	GA 1		GA 2		GA 2.5	
Total sample	n=	%	n=	%	n=	%
Five years or less	31	6	24	6	14	6
Six to ten years	43	8	27	7	23	10
Over ten years	476	86	321	84	186	83
Don't know	0	0	1	0	0	0

Profit focus	GA 1		GA 2		GA 2.5	
Total sample	n=	%	n=	%	n=	%
Not-for-profit	519	94	379	100	207	93
For profit	20	4	1	0	14	6
Don't know	12	2	0	0	2	1

Staff structure	GA 1		GA 2		GA 2.5	
Total sample	n=	%	n=	%	n=	%
Majority of staff are paid	334	61	248	65	164	74
Majority of staff are unpaid	216	39	132	35	59	26

Board type	GA 1		GA 2		GA 2.5	
Total sample	n=	%	n=	%	n=	%
Paid	13	2	5	1	11	5
Unpaid	475	86	356	94	192	86
No board	62	11	19	5	20	9

Indigenous organisation	GA 1		GA 2		GA 2.5	
Total sample	n=	%	n=	%	n=	%
Yes	43	8	22	6	8	4
No	507	92	358	94	233	96

Unweighted sample profile by location

Size of organisation	NSW	ACT	VIC	QLD	WA	SA	TAS	NT
Total sample n=	59	8	47	37	31	28	6	7
	%	%	%	%	%	%	%	%
Micro (<$50k)	20	13	21	11	0	4	33	14
Small ($50k-$249k)	19	25	15	16	16	21	17	0
Medium ($250k-$999k)	22	25	19	38	29	32	33	0
Large ($1m-<$5m)	29	25	30	22	35	21	0	71
Extra large (>$5m)	10	13	15	14	19	21	17	14

Primary art form/ cultural activities	NSW	ACT	VIC	QLD	WA	SA	TAS	NT
Total sample n=	59	8	47	37	31	28	6	7
	%	%	%	%	%	%	%	%
Festivals	29	0	33	14	5	19	0	0
Media and communications	25	0	42	17	8	8	0	0
Visual arts	22	11	17	11	11	6	6	17
Performing arts	28	4	19	16	18	9	5	1
Historical, literary, humanistic societies	67	0	33	0	0	0	0	0
Cross-art form	26	3	15	15	12	26	0	3
Museums and galleries	20	0	32	28	12	8	0	0
Other	24	8	8	16	20	12	4	8

	NSW	ACT	VIC	QLD	WA	SA	TAS	NT
Total sample n=	59	8	47	37	31	28	6	7
	%	%	%	%	%	%	%	%
Years in operation								
Five years or less	10	0	4	5	3	4	17	14
Six to ten years	8	25	9	3	16	11	33	14
Over ten years	81	75	87	92	81	86	50	71
Don’t know	0	0	0	0	0	0	0	0
Profit focus								
Not-for-profit	92	100	89	97	94	96	83	86
For profit	5	0	11	3	6	4	17	14
Don’t know	3	0	0	0	0	0	0	0
Staff structure								
Majority of staff are paid	73	75	74	57	81	79	100	86
Majority of staff are unpaid	27	25	26	43	19	21	0	14
Board type								
Paid	0	0	0	11	3	18	0	14
Unpaid	86	100	87	78	94	82	83	86
No board	14	0	13	11	3	0	17	0
Indigenous organisation								
Yes	2	0	2	0	6	0	0	57
No	98	100	96	100	90	100	100	43
Prefer not to say	0	0	2	0	3	0	0	0

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