

D'Art report number 18

# Statistical Indicators for Arts Policy

June 2005

D'Art report 18: Statistical Indicators for Arts Policy, May 2005

#### About IFACCA

The International Federation of Arts Councils and Culture Agencies (IFACCA) is the first global network of national arts funding bodies. Inaugurated in December 2000, our mission is to create an international resource and meeting ground for all those whose public responsibility it is to support excellence and diversity in artistic endeavour.

#### About D'Art

Discover-Découvrir-Descubrir, or D'Art for short, is IFACCA's main research service. D'Art has a number of aims: to help people working in arts councils and culture agencies gain easier access to worldwide information on arts policy issues; to create international 'knowledge links'; and to consolidate arts policy knowledge and expertise into a central public resource. For more information visit [www.ifacca.org](http://www.ifacca.org)

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IFACCA is interested in hearing from anyone who cites this report.

**Disclaimer:** This report has been written by Christopher Madden, Research Analyst at IFACCA. Errors, omissions and opinions are the responsibility of the author and the Secretariat and cannot be attributed to the respondents listed in appendix 5, nor to the Board or members of IFACCA.

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## Foreword

Around the world there are increasing demands for accountability of public monies. Statistical evaluative measures have played an increasingly important role in meeting those demands. The field of arts and cultural policy is no exception. Much work has been done on improving cultural policy-related statistics and 'cultural indicators'. Statistical indicators are an integral part of the 'toolbox' that policymakers use to understand, evaluate and communicate the importance and effectiveness of their policies and programs.

The need for better cultural statistics and improved cultural statistical indicators has resonated throughout the information-sharing activities of the International Federation of Arts Councils and Culture Agencies (IFACCA), and has involved the Federation in a number of statistics-related projects (appendix 4). In April 2004, at its meeting in Washington DC, USA, the board of IFACCA discussed a preliminary paper on cultural indicators drafted by the secretariat, and considered how IFACCA could focus its own efforts in this area. The board reinforced the importance of indicators to arts supporters around the world and agreed to the publication of a discussion paper as a contribution to the global effort to develop more robust statistical indicators for arts policy monitoring and evaluation.

The discussion paper was released in our fortnightly news bulletin, ACORNS, in July 2004. Since its release, we have received comments, opinions and advice from a variety of sources, including researchers and analysts in the field, IFACCA's board members, and participants at a meeting of IFACCA researchers in Montréal, Canada, in August 2004. This D'Art report incorporates comments and feedback from these sources.

At its meeting in London in April 2005, the IFACCA board agreed that we should continue to work on indicator development. To this end, we will ensure that indicators are discussed at future meetings of IFACCA researchers, with a view to identifying ways forward, and to possibly proposing indicators that can be adopted and tested domestically by arts councils and ministries of culture.

I would like to thank the author of this report, Christopher Madden, and everyone else who contributed their expertise. Updates on IFACCA's work will continue to be announced in ACORNS. If you have any comments on this research, or would like to be kept in touch with IFACCA's work on indicators, please contact us at [info@ifacca.org](mailto:info@ifacca.org).

Sarah Gardner  
Executive Director

## Introduction

This D'Art report builds on a discussion paper released in July 2004. The report updates and incorporates comments and feedback received on the discussion paper. A list of people who commented and provided feedback on the discussion paper is contained in appendix 5.

The report takes a global view of work currently being undertaken on developing cultural indicators, drawing out some broad analytical and coordination issues and summarising ideas IFACCA has received for expediting future development work. A brief review of the cultural indicators literature is in appendix 2. The references used for the review are provided in a bibliography.

The aims of the report are to:

- identify current work being undertaken in developing cultural indicators;
- explore issues in future development work on cultural indicators;
- provide an introduction to the literature on quantitative cultural indicators;
- draw some recommendations of good practice found in the literature; and
- provide a list of useful references on cultural indicators.

Although some Spanish and French language research is referenced, the report concentrates mainly on English language resources. As usual, we welcome comments, suggestions and additional references and links in any language.

## Current global resources and activity on cultural indicators

There is a healthy level of development work, research and comment on cultural indicators. This activity is part of an effort to improve 'social' indicators more generally, in response to a widespread aspiration among governments and social scientists to develop better measures of progress and to meet the demands for greater accountability in government policies and programs. Substantial work is being undertaken in the social sciences and policy analysis to develop progress indicators, social indicators, indicators of development, and indicators for specific policy areas such as health, housing and education. While this work will not be summarised here (although some lessons from the 'social indicators' movement will be discussed), it is worth noting that interest in developing cultural indicators is part of a more general move in public policy toward developing better indicators.

### *Cultural indicators literature*

The bibliography for this report contains a list of references on cultural indicators and related topics. This is just a selection of a much larger literature; the list could be easily expanded by including more country-specific sources and sources in other languages. As the Spanish language references in this paper and in Bonet (2004) suggest, adding Spanish-language resources alone would expand the bibliography significantly. French language sources on cultural indicators are also numerous, especially as a result of the long-running cultural statistics program of the French Ministry of Culture and Communication (see, for example, the description in Schuster, 2002b). The papers presented at the International Symposium on Culture Statistics, Montréal, October 2002, are also available in French (*Les papiers qui ont été présentés au colloque international sur les statistiques culturelles, Montréal,*

2002, sont disponibles en français:

[http://www.colloque2002symposium.gouv.qc.ca/h4v\\_page\\_accueil\\_fr.htm](http://www.colloque2002symposium.gouv.qc.ca/h4v_page_accueil_fr.htm)).

The sources in the bibliography have been used to develop the overview of the cultural indicators literature in appendix 2.

#### *International seminars on cultural indicators*

There have recently been a number of significant international meetings on cultural statistics and cultural indicators:

- *Taking the Measure of Culture*, Princeton University, New Jersey, June 7-8, 2002, <http://www.princeton.edu/culturalpolicy/moc.html> .
- *International Symposium on Culture Statistics*, Montreal, October 2002 [http://www.colloque2002symposium.gouv.qc.ca/h4v\\_page\\_accueil\\_an.htm](http://www.colloque2002symposium.gouv.qc.ca/h4v_page_accueil_an.htm).
- UNESCO/CONACULTA *International Seminar on Cultural Indicators*, Centro Nacional de las Artes, Mexico, DF, Mexico, 7-9 May 2003, <http://sic.conaculta.gob.mx/seminario/menu.html>
- *Experts' meeting on cultural indicators*, Interarts, Barcelona, 20-21 November 2003.
- *International Seminar on Cultural Indicators of Human Development in Africa*, Maputo, Mozambique, 2-5 March, 2004, organised by Interarts, UNESCO, and OCPA (Baltà, 2004).

Cultural statistics and indicators have also been on the agenda of broader conferences, such as:

- *Congress on Cultural Rights and Human Development* for the Barcelona Universal Forum of Cultures on 23–27 August 2004 ([http://www.interarts.net/eng/2.3.1\\_cooperacio\\_item.php?cooperationId=7](http://www.interarts.net/eng/2.3.1_cooperacio_item.php?cooperationId=7)).
- *Third International Conference on Cultural Policy Research*, Montréal August 2004, had implications for the cultural indicators agenda (<http://www.hec.ca/iccpr/program.html>)
- *Transformations: Culture and the Environment in Human Development*, 7-9 February 2005, Canberra, Australia (<http://www.fecca.org.au/transformations/>); national cultural indicators workshop on day 3
- *Third Global Forum on Human Development*, 17 – 19 January, Paris, (<http://hdr.undp.org/events/forum2005/>); workshop on defining and measuring cultural exclusion.

#### *Current work on cultural indicators*

Agencies and individuals in a number of countries are currently working on improving cultural indicators. Appendix 1 contains a list of those that the IFACCA secretariat is aware of. Countries include Canada, New Zealand, Belgium, China (Hong Kong), England, Spain, Mexico, Colombia, as well as international projects in the Pacific, the USA and through UNESCO's Institute of Statistics in Canada. This is by no means an exhaustive survey, and IFACCA invites others working on indicators to contact the secretariat at [info@ifacca.org](mailto:info@ifacca.org).

#### *Related areas of work*

There are other strands of work and research that relate to and influence the cultural indicator agenda. Of particular importance are:

### 1) Social impacts of the arts

There is ongoing work on understanding better the various effects – or impacts – of art and artistic activities. Research in this area can go under a wide variety of headings: social impacts, social effects, value, benefits, participation, social cohesion, social capital, social exclusion or inclusion, community development, quality of life, and well-being. There are two main discernable approaches in this research. Some tackle the issues ‘top-down’, by exploring the social impacts of the arts, where ‘social’ means non-economic impacts, or impacts that relate to social policies. Others, and in the USA in particular, approach effects from the ‘bottom up’, by exploring individual motivations for and experiences of arts participation, and evaluating the impacts of particular arts programs. Regardless of approach, as our understanding of arts activities develops, so do the measures (indicators) by which we aim to monitor and evaluate those activities.<sup>1</sup>

### 2) Cultural statistics programs

Work on improving cultural data and statistics, particularly the international standardisation of cultural statistics, alters the data architectures and statistical frameworks that form the foundations of cultural indicators: for example, the culture statistics programs of UNESCO (Lievesley, 2001 and 2002) and Eurostat (European Commission, 2000). See also IFACCA (2002 and 2004), DCMS (2004), Allin (2000), Glade (2003), Schuster (2002a), and Manninen (2002).

### 3) Indicator theory in general

Cultural indicator methods will clearly be influenced by developments in statistical indicator theory. They will also be influenced by developments in indicator methods used in other policy spheres, such as social, economic, quality of life, and well-being indicators, many of which contain a cultural element. Examples are the statistical indicators used by the World Bank (<http://www.worldbank.org/data/wdi2004/index.htm>) and the United Nations (<http://unstats.un.org/unsd/demographic/social/default.htm>), and in the social indicator movement generally.<sup>2</sup>

Other strands of literature that are also relevant to the production and use of cultural indicators, and which have been used in this review, are: evaluation methodology (eg. Callahan, 2005; DeVita, 2005; Gilhespy, 2005; York, 2003; Keating, 2002; Mott, 2003; Wyszomirski, 1998; Chelimsky and Shadish, 1997); and issues surrounding evidence-based policy (eg. Edwards, 2004; Tenbensel, 2004; Sanderson, 2002; Black, 2001; Sherman, 2003, Spring, 1997).

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<sup>1</sup> Selected references: AEGIS (forthcoming), Oakley (2004), Arts Council England (2004), Balfe (2003), Canadian Journal of Communication (2002), Ellis (2003), Evans & Shaw (2004), Geursen & Rentschler (2003), Guetzkow (2002), Jackson et al (2003), Jeannotte (2000), Jermyn (2001), McCarthy & Jinnat (2001), McCarthy et al (2001), Matarasso (1996, 1997, 2001, 2003), Merli (2002), Reeves (2002), Robinson (2003), Ruiz (2004), Selwood (2003), Outspan Group (1999), Walker et al (2002), Williams (1996).

<sup>2</sup> For a limited selection see Dhakal and Imura (2003), Sawicki (2002), Noll (2002), de Haan et al (2002), Belgian Government (2001), Innes and Booher (2000), Berger-Schmitt (1999), Sharpe (1999), Gasteyer and Flora (1999), Cobb and Rixford (1998), and Brown and Corbett, 1997.

## Key issues

In his landmark overview, Gouiedo (1993) suggests that the literature on cultural indicators can be traced at least as far back as the early 1970s. Since then indicator development has been an active part of cultural policy research, with the result that thinking on cultural indicators is now well-developed, even if indicators are not in widespread use in cultural policy. As the review in appendix 2 indicates, the cultural indicators literature raises a variety of analytical and theoretical issues. But it also raises issues about how to coordinate development work better. Some of the major points from a reading of the literature are considered below.

### *1. Analytical issues*

Concern has been expressed about the quality of current cultural statistics and cultural indicators, and in particular the relevance of indicators to cultural policies and programs. Matarasso (2001; 2) states that ‘most of the current work on [cultural] indicators is notable for what it doesn’t say,’ and that ‘[t]he missing element is...what it is they are supposed to measure.’ The review of existing cultural indicator frameworks undertaken for Ministry for Culture and Heritage (unpublished) did not locate a ‘usable’ framework.

The problem is hardly confined to culture. Most community indicator systems, Sawicki (2002; 13-14) suggests, ‘are unfocussed, pregnant with unrealistic expectations, poorly developed and designed, and doomed to be ignored.’ Innes and Booher (2000; 6) find that ‘millions of dollars and much time of many talented people [have] been wasted on preparing national, state and local indicator reports that remain on the shelf gathering dust.’ Even less sceptical commentators admit to major practical limitations. Noll (2002; 28), for example, suggests that despite social indicators having been used successfully as descriptive monitoring tools ‘their application and use for purposes like setting goals and priorities, or the choice and evaluation of political programs, still seems to be problematic and questionable.’

Cultural indicators, as with other social indicators, are still largely under development, particularly in their relevance to policymaking and program delivery. There are therefore reasons to be wary of cultural indicator frameworks that have been developed to date. Common analytical problems include:

**Confusion about what indicators are and how they should be used.** Developers of cultural indicators rarely devote sufficient time to exploring indicator theory or articulating clearly the interrelationships between indicators, data, and statistics, and between indicators, policy evaluation and cultural analysis. Ministry for Culture and Heritage (unpublished), for example, finds confusion in the cultural indicator literature over the difference between a statistic and an indicator. Duxbury (2003; 9) finds a ‘conflation’ between indicators and statistics.

**Lack of quality data.** The quality of indicators relies on the quality – or even the existence – of underlying data. The call for improved cultural data is a familiar ‘catch-cry’ of cultural policy analysts, although others have suggested that the problem is less in the lack of data and more in the lack of proper use of existing data (see the review in IFACCA, 2004).

**Frameworks are unwieldy.** Many of the cultural indicator frameworks that have been developed are ‘wish lists’ containing a large number and a wide variety of proposed indicators: many are matrices that integrate different policy foci, statistical variables and stages in the cultural ‘value chain’ (see for example Gouiedo, 1993, which contains 70 proposed cultural indicators). These large matrix-based frameworks are difficult to adapt for specific policy purposes, as the sheer number of proposed indicators precludes the development of any to an operational level. The large number of potential indicators restricts testing of the efficacy of particular indicators and hinders more detailed consideration of how specific indicators might inform policy, or what changes in any particular indicator might actually mean. These complex issues are often beyond the scale, budget and time frame of a typical cultural indicator project. Yet, as Cobb and Rixford (1998; 18) suggest, ‘[a] narrow range of indicators is more powerful than a laundry list.’

The need to focus indicator development on a limited number of key indicators was a strong theme of discussions both at IFACCA board meetings and at the meeting of IFACCA researchers in Montréal in August 2004 (summarised in appendix 4).

**Policy objectives are vague.** Cultural policy objectives tend to be couched in broad, abstract, or even vague terms. Some analysts put this down to a ‘weak theory base’ in cultural policy (Baeker, 2002). Hugoson (1997), however, argues that such abstraction is a *necessary* condition for cultural policies. Whatever the reason, abstraction or vagueness in cultural policy will hamper the development of clear policy indicators.

## 2. *Coordination issues*

There appears to be little contact between agencies that are currently developing cultural indicators. Two key problems that might be mitigated by better sharing and coordination are:

**Multiplicity of work.** Development work is being replicated worldwide. For example, literature reviews are being repeated and similar theoretical frameworks are being developed. This represents a ‘doubling up’ of cultural policy research expenditure that could be reduced by better sharing of information between developers.

**Differences in approach.** Although there are broad similarities in cultural indicators produced independently, different indicator developers adopt different approaches, frameworks and develop slightly different types of indicators. While it is appropriate that different countries will have different indicator priorities, as they have different cultural policy priorities, greater coordination and sharing of work could lead to better solutions for common, or ‘generic’ problems. The likely outcome would be twofold: the cultural indicators research agenda would be expedited; and international standardisation of a core set of cultural indicators could be promoted.

Recent reports have called for greater coordination of cultural policy research and data gathering (for example Schuster, 2002b; and Kleberg, 2003). Cultural indicators work seems to be a case-in-point of the benefits that might be achieved from a more coordinated inter-country approach. The economies that would be achieved in the cultural policy research agenda are substantial, especially as it is likely that statistical

indicators will be increasingly applied to the evaluation and monitoring of cultural policies.

### What makes a good indicator?

The literature review in Appendix 2 documents views and opinions in the literature about what cultural indicators are, how they are used, and good practice in the design and development of cultural indicators. A number of commentators provide 'checklists' about the attributes of a good indicator. Figure 1 summarises and ranks the main attributes according to the number of times they appear in the literature consulted. The attributes are not necessarily mutually exclusive, and some rudimentary interpretation and grouping has been undertaken. As a result, the list cannot be taken as a scientific survey of opinion, but it does provide a quick summary of recommendations made by indicator developers, and the rankings may be interesting in highlighting the priorities perceived by developers.

**Figure 1: Attributes of a good indicator**

| <b>Attribute</b>  | <b>No. of citations</b> |
|---|-------------------------|
| Grounded in theory  | 9                       |
| Relevant (serve a practical or valued purpose)                    | 6                       |
| Grounded in and/or linked to policy practice                      | 5                       |
| Comparable across regions   | 5                       |
| Comparable across time periods                                    | 5                       |
| Measurable (able to be measured, and data available)              | 4                       |
| Easily understood   | 4                       |
| Unambiguous/clear   | 4                       |
| Able to be disaggregated by population subgroups                  | 4                       |
| Consistent with purpose   | 4                       |
| Timely (up-to-date)   | 3                       |
| Measurable over time  | 3                       |
| Universal   | 2                       |
| Able to be benchmarked  | 2                       |
| Contextualised (presented with additional contextual information) | 2                       |
| Revisable   | 2                       |
| Methodologically defensible ('valid')                             | 2                       |
| Reliable  | 1                       |
| Sensitive to cultural diversity                                   | 1                       |
| Realistic   | 1                       |
| Capture the essence of an issue                                   | 1                       |
| Designed through consultation                                     | 1                       |
| Trusted   | 1                       |

*Sources: Belgian Government (2001), Brown and Corbett (1997), Chapman (2000;1), Cobb and Rixford (1998), Duxbury (2003; 8-9), Fukuda-Parr (2001; 2-3), Innes and Booher (2000), Lievesley (2001; 377), Mercer (2004), Morton (1996; 120), Pfenniger (2004; 4), Pignataro (2003), Sawicki (2002; 25), Schuster (2001; 15), Sharpe (1999; 44), UNRISD and UNESCO (1997; 8).*

## 'How to' develop indicators

The literature review in appendix 2 also indicates that there are at least five distinct stages of indicator development:

1. Conceptualisation – consideration of the theoretical foundations and institutional context of the proposed indicators.
2. Selection – exploration of possible indicators and delineation of key indicators.
3. Definition – definition and description of the indicators chosen at (2).
4. Collection – collection of data and 'population' of indicators.
5. Ongoing management and evaluation – implementation of an information management system to collect data over time and to evaluate and re-evaluate the indicator system within the policy or program cycle.

Stages 1, 2 and 3 are covered in more detail below. These are relatively standard stages in the indicator development process. Stages 4 and 5 depend on the aims and the institutional arrangements associated with particular indicator projects, and will therefore not be explored in detail here.

### 1. Conceptualisation

To encourage clarity in the conceptual basis of indicators, commentators pose the following suggestions and questions:

- Why are indicators being developed? What are the aims and objectives of the indicators?
- Why are indicators needed?
- What is the reality being measured? Beware of conflating indicators with that reality.
- What conceptual frameworks, administrative processes, and governance realities should be considered?
- Indicators should be firmly related to or embedded in a policy framework or strategy from which they gain meaning and currency, and they should be integrated and share a plausible common currency with other policy domains.

Similarly, the literature illustrates the importance of anticipating how the indicators will be received and considering the strategic implications of indicator development:

- How should the indicators be interpreted?
- How will others interpret the indicators?
- How might the indicators be used and possibly misused by others?
- How might the indicators influence behaviours?
- How could the act of measurement influence behaviours?

### 2. Selection

Selecting the best indicators can be considered in two parts. First, determine what factors are important in the selection process:

- How should indicators be chosen?
- Can what is trying to be measured be broken down into key dimensions?
- What level of information can usefully and sustainably be collected?
- What is it important to measure?

Second, consider possible variables and measures:

- What types of indicators are sought?
- Can the variables actually be measured?

- If a variable cannot be measured, do adequate proxies exist? If not, acknowledge that only partial indicators can be developed.
- Is an indicator really an indicator, or just a statistic?
- Indicators are not value-free. What values underlie the indicators?
- What do the indicators symbolize? The symbolic value of an indicator may outweigh its value as a literal measure.
- Is a 'composite index' (one indicator that purports to measure an index of overall performance) desirable, or multiple indicators reflecting various aspects of the phenomena being measured? If a composite index is chosen, what should be the methodology for aggregation and weighting?
- Do the indicators measure inputs, outputs, or outcomes? Be sure that there is appropriate emphasis placed on outcomes. Look for indicators that reveal causes, not symptoms.

### 3. Indicator definition and description

Figure 2 contains a proposed minimum set of fields required for the construction, interpretation and presentation an indicator, with a brief description of each field. Appendix 3 provides an indication of how the fields might apply to arts participation rates, an indicator commonly found in cultural policy.

Figure 2: Indicator fields

| Indicator field        | Description  |
|------------------------|--|
| Objective              | The indicator's outcome or objective, as defined by the policy or program that gives it 'meaning or currency'.   |
| Measure                | A succinct name, or 'label' for the indicator.   |
| Aim                    | A description of how the indicator informs the objective.  |
| Definition             | A definition of the statistical variable.  |
| Technical information  | The 'metadata' (methodologies, survey instruments etc.) that underpin the indicator (including metadata for comparative variables if required).  |
| Comparative context    | The comparative information used to give the indicator meaning.  |
| Direction              | Describes what a change/difference in the indicator means.   |
| Sensitivity            | Defines how much change/difference in the indicator is 'significant'.  |
| External influences    | The external or 'exogenous' influences that might cause a change/difference in the indicator (including, where possible, data for each exogenous factor and an analysis of its impact on the indicator). |
| Structure              | Analysis of any of the indicator's interesting sub-components.<br>Analysis of the variable by sub-populations.   |
| Issues and limitations | A description of the limitations of the indicator in measuring the objective/outcome. A description of what the indicator does not measure.  |
| Data presentation      | Presentation of data in a clear format, along with metadata, assumptions and caveats.  |
| Interpretation         | What does the indicator say?   |

## Summary

The development of reliable, timely and robust cultural indicators is essential for formulating effective arts policies, as well as for consolidating the position of arts support agencies in the face of greater accountability to government and the public. This discussion paper suggests that despite a long history of theory and commentary on cultural indicators, the practical implementation of cultural indicators in arts policy remains uneven. This is as true in developed countries, where there is now a steady supply of cultural data, as it is in developing countries, where data is sparse.

Improving cultural indicators is not simply about supplying better statistics and undertaking statistical development work: it is also about understanding better the nature of arts activities, improving the articulation of arts policies, and being aware of the interrelationships between data and policy analysis and the impacts that measurement can have on the arts and cultural sectors.

This D'Art report provides a background to the 'state-of-play' on cultural indicators. The review of the literature on cultural indicators raises a number of issues for future development work. In particular, future development work would benefit from:

- greater clarity about the nature of artistic activities (why people undertake arts activities and their public and private benefits)
- greater clarity in the articulation of objectives for cultural policies and in determining the appropriate indicators for measuring performance against objectives
- more strategic targeting of development work on cultural indicators, especially the prioritising of a limited number of indicators
- greater communication – and even coordination – between researchers and policymakers involved in developing indicators.

Respondents to the discussion paper sent in a number of ideas for achieving better coordination and development of cultural indicators:

- Organising an online forum for people that are working with indicators.
- Putting the frameworks and indicators of various institutions online.
- Developing 'FAQs' concerning indicator development and the development of indicator frameworks.
- An online indicator database: comprising, for every indicator, an index card that contains the definition of the data, unit of measurement, data sources etc.
- Seminars on cultural statistics, particularly for developing countries.

We welcome any further ideas at [info@ifacca.org](mailto:info@ifacca.org).

## Appendix 1: Agencies and individuals working on cultural indicators

NB: this table lists work being undertaken of which IFACCA is aware. The focus is also on work that relates to arts policy. Broader work that has cultural components, such as social, community, and creative industries indicators, may not be included.

| Country/region    | Agency  | Notes and references  |
|-------------------|---|---|
| International     | UNESCO Institute of Statistics  | Lievesley (2002)  |
| Africa            | OCPA, Interarts and UNESCO  | Propose establishing a task force to draft matrix of cultural indicators of human development. (OCPA, 2005; OCPA, Interarts and UNESCO, 2004) |
| Argentina         | Instituto de Políticas Culturales de la Universidad Nacional de Tres de Febrero                               |   |
| Australia         | Queensland (state) government   | Reviewing its indicators for the arts portfolio   |
| Belgium, Flanders | Culture policy centre (Re-creatief Vlaanderen), University of Ghent, researcher Frank Stroobandt.             | Published and unpublished materials in Dutch.   |
| Belgium           | Robert Palmer and Charles Landry  | Focussed on cities  |
| Canada            | Department of Canadian Heritage, Statistics Canada (statistics framework) and Observatoire culturel du Quebec | Stanley (2002), others unpublished.   |
| Chile             | Consejo Nacional de la Cultural y las Artes   |   |
| China, Hong Kong  | International Intelligence on Culture for Hong Kong Arts Development Council                                  |   |
| Colombia          | Ministry of Culture, Colombia   |   |
| England           | Arts Council England  | Ongoing indicator development work, including local performance indicators (Audit Commission et al, 2003)                                     |
|                   | Department for Culture, Media and Sport (DCMS)  | DCMS (2002a; 2004)  |
| Europe            | European Commission, Eurostat<br>LEG  | European Commission (2000)  |

| Country/region | Agency  | Notes and references  |
|----------------|---|---|
| Europe         | Eurocult21 (network focussing on cultural issues of cities)   | Eurocult21 on indicators will focus on cultural participation<br><a href="http://www.eurocult21.org/">http://www.eurocult21.org/</a> .                                |
| Europe         | Council of Europe and ERICArts, with Canadian Cultural Observatory  | As part of the Compendium project, developing indicators on: cultural diversity, social cohesion, inter-cultural dialogue and prices for cultural goods and services. |
| Mexico         | Fondo Nacional para la Cultura y las Artes (CONACULTA)  | Held a seminar on cultural indicators (URL in paper text). Information is in Spanish.   |
| Mexico         | Mexico City Ministry of Culture   | Email contact with IFACCA   |
| New Zealand    | Ministry for Culture and Heritage and Statistics NZ   | Aiming to develop comprehensive set of indicators for monitoring and evaluation of NZ's cultural sector. IFACCA involved in an advisory capacity.                     |
| Pacific        | Secretariat of the Pacific Community  | CulturalMARC and McDermott Miller (2004)  |
| Scotland       | Centre for Cultural Policy Research, University of Glasgow  | The Centre has an ongoing project aiming to improve cultural data in Scotland.  |
| Slovenia       | Ministry for Culture and Statistical Office of Republic of Slovenia   | Establishing a system of statistical for the needs of the Ministry for Culture  |
| Spain          | Interarts   | Baltà (2004)  |
| USA            | Americans for the Arts  | Looking to develop a 'national arts index measuring the cultural health and vitality of the arts' (Americans for the Arts, 2004; 3)                                   |
| USA            | The Urban Institute   | Arts and culture indicators in community building project:<br><a href="http://www.urban.org/nnip/acip.html">www.urban.org/nnip/acip.html</a>                          |
| USA            | Helmut Anheier, UCLA School of Public Policy and Social Research, with Raj Isar, American University Paris. | Have proposed a 'World Cultures Report' containing cultural indicators. Anheier (2004)  |
| Venezuela      | Observatorio de Políticas Culturales Innovarium   |   |

## Appendix 2: Cultural indicators – review of current literature

This appendix sets out some general issues taken from a brief review of the literature on cultural indicators. The following topics are explored:

- What are cultural indicators?
- Relationships between data, indicators, and analysis/evaluation
  - Data, statistics and indicators
  - Indicators and analysis/evaluation
- What are cultural indicators used for?
- Use of indicators by arts support agencies
- Types of indicators
- Culture or arts indicators?
- What makes a good indicator?
- Prioritising indicators
- How to develop indicators
- Lessons learned from the history of social indicators
- Cultural indicators: examples

### What are cultural indicators?

It is not easy to define what an ‘indicator’ is in simple terms. Some conceptual elements are set out here, and a practical example is described at the end of the appendix.

Indicators may be *quantitative* as well as *qualitative*. Quantitative indicators are statistical measures based on ‘numerical or statistical facts’ (Chapman, 2000; 2). Qualitative indicators are language-based descriptions of cultural phenomenon. This review concentrates on quantitative indicators only. This does not mean to imply that qualitative indicators are inferior or less useful in arts policy. Indeed, qualitative indicators may be *more* effective at making sense of, or communicating the outcomes of, arts and cultural policies.

An indicator is generally portrayed as special type of statistic; it is a statistic with ‘higher meaning’. Whereas a statistic *describes* a phenomenon, an indicator *implies* something about that phenomenon:

Indicators...must contain evaluative, and not only descriptive, information.  
(Fukuda-Parr, 2001; 278).

Distinguishing an indicator from a statistic is, however, not always easy, as the definition in Glade (2003) suggests:

What an indicator indicates, so to speak, is generally a measurement that, taken in relation to other variables, facilitates comparative study of the behavior of one or more variables, either cross-sectionally or longitudinally (or both). In relation to other variables, taken singly or in compound form, it can also be used to profile a system’s structure and analyze its performance... Alternatively, an indicator can be incorporated, along with one or more other variables, into a model for stochastic purposes as in the macroeconomic analytical use of leading, lagging, and coincident indicators to forecast aggregate levels of business activity. In this latter connection, which has distinct implications for the cultural-indicator enterprise, the indicators become a basis for policy formation.’

(Glade 2003)

In short, a generally accepted yardstick is that quantitative indicators are statistics that can be used to make sense of, monitor, or evaluate some phenomenon:

An indicator is an instrument or tool for evaluation, a yardstick to measure results and to assess realization of desired levels of performance in a sustained and objective way. Chapman (2000)

And a *cultural* indicator is a statistic that can be used to make sense of, monitor, or evaluate some aspect of culture, such as the arts, or cultural policies, programs and activities (although, as will be highlighted later, this is a rather simple view, as indicators usually also influence behaviour and have strategic effects beyond mere measurement). NASAA (1996) contains a set of definitions of cultural indicators and other related concepts (reproduced in Baeker (2002)).

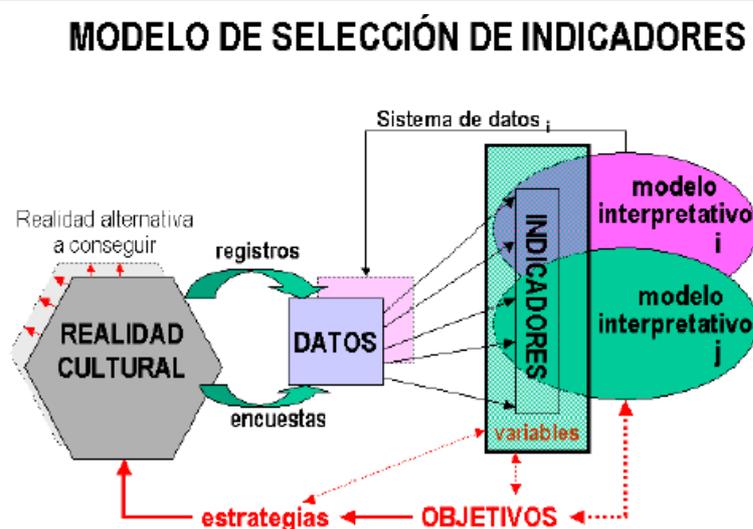
### Relationships between data, indicators, and analysis

Indicators lie at the nexus between *production* of data on cultural phenomena, and the *analysis* of those phenomena; between the supply of cultural statistics (data quality, data architectures, statistical frameworks etc.) and the demand for meaningful statistics (for use in analysis, evaluation and policymaking). The discussions below explore each of these linkages in turn. Duxbury (2003), Baeker (2002) and Innes and Booher (2000) contain good general discussions about the complex interrelationships.

#### *Data, statistics and indicators*

Figure 3, reproduced from Bonet (2004), maps the relationship between data and the interpretive or conceptual models that drive the design of indicators. As the figure indicates, data are designed to approximate a cultural ‘reality’. Indicators utilise data to understand this reality, albeit in a necessarily ‘flawed’ way (Cobb and Rixford, 1998; 20). Data architectures and indicator design are the ‘lens’ through which we measure culture, and these are influenced by changes in the way we conceptualise culture.

Figure 3



Source: Bonet (2004)

*Indicators and analysis*

As Mercer (2004; 3) notes, statistics become indicators ‘only...when transformed - or when value is added - through a route map of policy’. Figure 4 from Bonet (2004) provides a ‘map’ of the use of indicators in policymaking and program delivery.

The common view is that indicators should meet some specific policy or analytical information need:

Statistics and data refer to ‘multi-purpose’ quantitative information; in the case of indicators, the information has been processed to correspond to the specific needs of the users.

European Taskforce on Culture and Development (1997)

Commentators stress that the view of indicators as a tool of policymaking, analysis and evaluation should recognise that indicators are ‘non-neutral’, that the simple act of measurement can itself influence the system being measured. As Schuster (1997; 255) notes:

[M]ost considerations of cultural indicators, particularly government-sponsored conferences and seminars on this topic, focus on their descriptive abilities and view them as measuring, but not contaminating, the actual conduct of artistic and cultural life. The extent to which it is possible to achieve this idealized, value-free arm’s length relationship is rather limited if the actors in the cultural policy system have any identifiable interest in the numerical value of an indicator. Conversely, one could ask, if there is no interest in knowing the numerical value for that indicator, why would it be collected and documented in the first place?’

Bonet’s models in figures 3 and 4 suggest that the causal relationship between indicator production and indicator use is complex, with feedback mechanisms *from* data production *to* interpretation and policy analysis. The position of indicator development within the policy development cycle is therefore a crucial consideration (DCMS, 2002b), as the perception of culture and cultural policy inevitably changes as data reveal new insights and new challenges. Baeker (2002; 23) notes that this extends beyond government policy to the whole cultural sector: ‘forcing the cultural sector to confront which measures and indicators to use can act to drive a clarification of ideas and values in the sector.’ Innes and Booher (2000) argue that sustainable community indicators should be viewed as part of an adaptive learning system, and similar cases for an organic, holistic, participatory, or systems approaches can be found in the cultural indicators literature (for example Cliche, 2003; Duxbury, 2003; Baeker, 2002; and Mitchell, 1996).

Figure 4: Indicators in policymaking and program delivery



Source: Bonet (2004)

What are cultural indicators used for?

The previous discussion has highlighted the multiple uses to which cultural indicators can be put. Four general uses are explored in more detail below. Different uses may be better served by different types of indicators.

#### *Monitoring and evaluation*

Most commentators recognise at least two main types of uses for cultural indicators: monitoring (observing cultural phenomena, their changes and trends) and evaluation (measuring the efficacy of policies and programs aimed at impacting on cultural phenomena). For example, the European Taskforce on Culture and Development (1997; 299) distinguishes between ‘indicators ...for specific evaluative or policy planning purposes’ and ‘systems of indicators used for continuous monitoring of development in a given policy area.’

Brown and Corbett (1997; iii) expand this further into a five-part typology of ‘basic’ uses of social indicators in policy:

1. **Description**, for the sake of knowledge about society;
2. **Monitoring**, to track outcomes that may require policy intervention;
3. **Setting goals**, to establish quantifiable thresholds to be met within specific timeframes;
4. **Outcomes-based accountability**, to hold managers, agencies, government, and communities responsible for improving social well-being and for meeting established goals; and
5. **Evaluation**, to determine which programs and policies are effective (or destructive) and why.

Brown and Corbett (1997; iii) go on to suggest that ‘the technical and political challenges...generally [become] more formidable as one moves closer to the core of the typology’ (ie from 1 to 5 above).

At the very least, the basic distinction should be made between indicators for monitoring and indicators for evaluation, as indicators developed for each purpose will differ. As D’Art respondent, Frank Stroobandt, noted ‘[indicator] frameworks developed for the evaluation of a specific policy will differ from those developed for monitoring: a framework for policy evaluation is organised around the (specific) goals of a policy plan; a framework for monitoring will be more abstract, since monitoring is a continuous activity for different policy periods. A monitoring framework cannot be developed using specific goals, but rather general policy themes such as participation, distribution of cultural opportunities, etc.’

The use of indicators in evaluation also requires a higher level of sophistication than more simple uses, such as monitoring. To evaluate a particular activity, such as an arts policy or program, requires at least two additional considerations:

- 1) The attribution of causality. Evaluation usually attempts to establish whether some activity A *caused* some outcome B. Attributing such ‘cause and effect’ is difficult to do statistically. Most statistical evaluations measure *correlation* rather than causation. Establishing causation is complicated, expensive and often impossible.
- 2) The isolation of effects. Evaluation requires that a measured effect be attributed to the activity being evaluated. To what extent could other ‘exogenous’ factors have caused the effect? For example, two years after implementing an audience development program, data might indicate that arts attendance rates have risen. But how much of the increase can be attributed to the program itself, and how much to other factors such as an increase in disposable incomes, or a reduction in the relative price of arts performances?

Evaluation is therefore a much more complicated proposition than simple monitoring, requiring a deeper understanding of what it is that an indicator signals, and what other, ‘exogenous’, influences might produce a change in an indicator. Matarasso (1996) has a more detailed discussion.

### *Learning*

In the framework above, the use of indicators moves from a passive, neutral, role (describing, monitoring) to a more active, non-neutral role (goal-setting, evaluating). ‘Learning’ is another active use identified in the literature, and by the IFACCA board (appendix 3), in which indicators are viewed as a tool for learning, adapting and changing. Statistical indicators are, for example, an integral component of York’s (2003) ‘evaluative learning’ process. Innes and Booher (2000; 10) go as far to suggest that ‘indicators influence *most* through a collaborative learning process [emphasis added].’

### *Influencing behaviour and attitudes: ‘strategic’ effects*

Another active use of indicators identified in the literature is the influencing of behaviours and attitudes – what will be called here ‘strategic effects’. For example, Pignataro (2003; 371) notes that indicators ‘tend to affect the behaviour of institutions

according to the incentives arising from the prediction about their possible utilization.’ Schuster (1997) provides examples taken from arts policy in the USA.

Wider strategic effects have been identified by Roemer and Castellanos (2002), who suggest that cultural indicators can be useful in building public confidence in cultural institutions, and by Fukuda-Parr (2001), who suggests that indicators can stimulate policy dialogue. Innes and Booher (2000; 10) argue that strategic benefits such as these can be primarily gained during the course of indicator development, rather than upon the publication of indicators.

Concerns are also expressed in the literature that indicators can influence behaviours in undesirable or unintended ways. Schuster (1997; 257) for example argues:

‘one has to be very careful in thinking about counterproductive behavior as actors in the system adjust their behavior to take account of what they each perceive as their own best interests. In the respect, even the simplest indicators might turn out to have undesirable properties.’

A variety of similar undesirable strategic effects – or ‘strategic hazards’ – are noted in Duxbury (2003; 12), Dhakal and Imura (2003), Brown and Corbett (1997; vi), and IFACCA (2004).

#### *Advocacy*

Cultural indicators are frequently used for advocacy, including the justification of cultural policies (Poirier, 2003). This use raises issues similar to the strategic issues outlined above, although advocacy might be viewed as a ‘special case’. Discussions about cultural indicators at the IFACCA board meeting in April 2004, and at the IFACCA researchers’ meeting in August 2004 (appendix 3), identified tensions between the research and policymaking, and between analysis and advocacy. Though it is still unclear how best to ease the tensions between research and advocacy, it is worthwhile simply identifying that indicators developed for advocacy purposes may differ from indicators developed for analytical and evaluation purposes. Indicators developed solely for advocacy will, for example, account for benefits of culture but rarely for costs. Accounting for costs is crucial for good evaluation, as the arguments surrounding Matarasso (1997) indicate (see Oakley, 2004; Matarasso, 2003; and Merli, 2002). It has also been argued that indicators developed for advocacy may be ‘unscientifically’ exaggerated to support the advocacy case (Schuster, 2002; Madden, 2001). As Stake (1997; 475) comments ‘we evaluators are caught in the web of advocacy and have become unwittingly, sometimes willingly, simply a party to promotionalism.’

#### Use of indicators by arts support agencies

Arts support agencies might use a variety of indicators for a variety of purposes. Some examples are:

- monitoring and evaluating arts policies
- monitoring change in the arts and cultural sectors
- evaluating program delivery
- grants acquittal processes
- advocating the arts to government, other government agencies, the public, and businesses
- providing expert advice on the arts to government, other government agencies, the public, and businesses

- reporting on ‘whole-of-government’ policies
- monitoring and evaluating performance agreements with contracted cultural organisations and institutions (such as major performing arts organisations with multi-year funding)
- strategic development and forward planning

Examples of how some of these indicators are used in practice can be found in published performance reports of arts agencies (for example, Canada Council, 2002; and Arts Victoria, 2003).

### Types of indicators

At an even high level, there are many ways of thinking about different types of indicators. Some examples are:

- 1) Matarasso (2001) distinguishes between
  - cultural indicators, such as ‘quality of life’ indicators; and
  - performance indicators for the cultural sector, such as financial indicators for the cultural industries and cultural institutions.
- 2) At a meeting in August 2004, IFACCA researchers emphasised the distinction between
  - cultural indicators; and
  - cultural *policy* indicators.
- 3) Researchers also suggested that a distinction can be made between
  - indicators about culture *per se* (eg. cultural audiences, health of cultural organisations); and
  - cultural components of other indicators (eg. neighbourhood vibrancy indicators).
- 4) A similar distinction was noted by the IFACCA board between
  - *intrinsic* indicators; and
  - *instrumental* indicators.
- 5) The board also discussed the difference between
  - arts indicators; and
  - cultural indicators (discussed in more detail later).

Other high-level distinctions are evident in the literature on social indicators. Sawicki (2002), for example, distinguishes between ‘quality of life’ and ‘quality of place’ indicators. Noll (2002) contrasts ‘objective’ and ‘subjective’ indicators. Even others are discussed in Dhakal and Imura (2003).

### *Indicator hierarchies*

Different types of indicators may also be applied at different levels. In any policy arena, certain unifying themes will be replicated across hierarchies, but different objectives and methods may need to be applied at different levels of the hierarchy for indicators to be effective (Dhakal and Imura, 2003). For example, the types of cultural indicators used at a national level are likely to differ from the types of cultural indicators applied at the level of a community arts program. Some analysts adopt hierarchical frameworks to strike a balance between similarities and differences across hierarchies. An example of a three-tiered hierarchy is:

- *Macro* indicators for sector-wide monitoring and evaluation, eg. cultural indicators of development, and indicators of cultural rights.

- *Meso* indicators for regional or cross-agency policy monitoring and evaluation, eg. indicators that measure outcomes of an arts council policy, such as a disability policy.
- *Micro* indicators for agency program monitoring and evaluation, eg. indicators that measure outcomes of an arts event.

Figure 5 provides a hierarchical view of indicators with some examples. The indicators at the various levels of a hierarchy will have a number of similarities, but they will also have a number of differences. For example, indicators of the ‘social’ impacts of the arts are used at both a micro and a macro level, but the indicators often differ in the way that they are constructed and the uses to which they are put.

**Figure 5: Indicator hierarchies**

| Indicator type | Focus    | Culture examples                                   | Selected references                                  |
|----------------|----------|--|--|
| Macro          | Generic  | Cultural indicators for development                | Baltà (2004)<br>Mercer (2002)                        |
|                |          | Indicators for evaluating national cultural policy | Nylöf (1997)<br>Matarasso (1997)                     |
| Meso           |          | Indicators for evaluating arts policies            | van der Ploeg (2004)<br>Joy et al (2004)             |
|                |          | Performance indicators for cultural institutions   | South West Arts Marketing (2000)<br>Pignataro (2003) |
| Micro          | Specific | Indicators for evaluating community arts programs  | Keating (2002)                                       |

### Culture or arts indicators?

In discussions of cultural policy, the arts are commonly viewed as a subset of culture. It might be expected, then, that arts indicators would be included as part of any suite of cultural policy indicators. Many indicator sets do indeed include arts indicators (for example, Mercer, 2000; and Carrasco, 1999). But this is not always the case, especially when culture is viewed as primarily a social phenomenon (as in sociological and anthropological concepts of culture), where the more personal and individual aspects of artistic activity, such as the exploring of emotions and the enjoyment of aesthetic experience, can be overlooked. For example, the cultural indicators for development in UNESCO (1998 and 2000) focus on broader cultural phenomena and are clearly not detailed enough to serve as a set of indicators for arts policy. Similarly, the indicators for cultural consumption discussed in Katz-Gerro (2004), since they focus on social aspects of culture only, do not measure artistic experiences in sufficient depth to serve all the purposes of arts policy.

### What makes a good indicator?

This section sets out some lists, taken from the literature, about what makes a good indicator. A number of the criteria recur regularly. As Dhakal and Imura (2003) suggest, not all criteria can be met. Indicator development is, then, a matter of deciding which criteria to prioritise.

Pfenniger (2004; 4) states that at the very least, an indicator should be:<sup>3</sup>

- reliable
- up-to-date
- clear
- intertemporally and geographically comparable
- accessible and relevant for cultural policy.

Lievesley (2001; 377) lists a set of questions for statisticians to ask about the goals set for indicators:

- a) Are they realistic?
- b) Can they be measured?
- c) Will they show enough change over time to be valuable as yardsticks?
- d) Are relevant benchmarks in place?
- e) Are they universal and so they make sense in different parts of the world?
- f) Are they coherent with what has been used before?

UNRISD and UNESCO (1997; 8) propose that cultural indicators of development should:

- a) not be dependent on market performance, as are GDP data;
- b) avoid measures that assume that all countries will inevitably develop along the same lines (sensitive to cultural diversity);
- c) avoid measures that are excessively ethnocentric, eg the concept of cultural heritage should encompass criteria used to define it in different terms;
- d) probably not be based on absolute minima, eg nutrition;
- e) be sensitive to distribution by groups, gender, ethnicity, and so on (unlike average per capita GDP);
- f) lend themselves to international comparison; and
- g) be simple and readily understandable. In some cases, giving ranges and/or degrees of confidence may be required to provide a measure of their reliability.

Morton (1996; 120) states that the process of selecting specific measures of performance should be guided by three key criteria:

1. Relevance
2. Measurability
3. Availability.

Pignataro's (2003) summary of performance indicators suggests that:

- There needs to be consistency between the purpose of measurement and the choice of indicator.
- An appropriate benchmark needs to be chosen.

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<sup>3</sup> Translated from Spanish.

- Indicators provide only one piece of information – they should be accompanied by other relevant information in order to make proper judgments or interpretations.

Criteria for good indicators taken from the non-cultural indicator literature are also relevant to cultural indicators. Some examples are listed below.

Brown and Corbett (1997). Aspects of a good indicator:

- Groundedness: it is grounded in a comprehensive model/theory
- Validity: it reflects the concept it is intended to represent
- Reliability: it measures the same thing over time and for different population subgroups
- Clarity: it is easily and immediately understood by users
- Regularity: it is measured regularly
- Timeliness: it is up-to-date
- Disaggregable: it is able to be disaggregated across social and geographic subgroups.

Belgian Government (2001). An indicator should:

- capture the essence of an issue
- have a clear and accepted normative interpretation;
- be robust and statistically validated;
- be responsive to policy interventions
- not be subject to manipulation;
- be measurable in a sufficiently comparable way
- be timely and susceptible to revision;
- be transparent.

Adams et al (2004; 43) argue that arts policy indicators should be

- Simple
- Unambiguous
- Capable of being measured
- Neutral ('evaluation processes must not threaten the autonomy of artistic decisions nor compartmentalise the arts to such a degree that they become entirely subservient to inappropriate utilitarian ambitions').
- They also argue that *qualitative* indicators need to be sensitive to the nature of the artistic and creative process, including a recognition that artists will not always succeed. The same might be argued for quantitative evaluative measures.

Innes and Booher (2000):

- Indicators must measure something publicly valued
- Users must be involved in their design
- Their meaning must be understood and shared among those to whom they are relevant
- They must stand up to expert critique
- They must be trusted by all players.
- They must be linked conceptually and practically to actual policies or potential actions

- There must be a place in the decision/action process where they are to be discussed and linked to action.

Sawicki (2002; 25). Indicator systems should be:

- Focussed: an indicator system should be focussed on a specific policy area
- Valid (external and internal): indicator systems should withstand the scrutiny of experts judging whether the indicators and the goals of the project are consistent and have meaningful connections to policy
- Relevant: indicators should ‘pass the market test. If citizens and public officials use the indicators on websites, in campaign debates and in forming policy, and governments, foundations and corporations provide funding to maintain them, they are demonstrating value by definition.’

Sharpe (1999; 44) goes as far as ranking a number of indicators of economic and social well-being according to certain criteria, including:

- Clear, practical purpose
- Grounded in well-established theory
- Possibility of disaggregation
- Availability of consistent time series
- Usefulness to policy makers.

### Prioritising indicators

There is an almost limitless variety of indicators that can be applied to the cultural sphere. Commentators argue the need to focus on essential indicators. Matarasso (2001; 6) notes, ‘[o]ne of the problems with asking questions about cultural activity...is that there is almost no end to the interesting things one would like to know’ and therefore ‘it is essential to decide what level of information about the cultural sector can usefully and sustainably be collected.’

Nylöf (1997; 367) concurs: ‘Indicators must be chosen with care; not too numerous, enough to represent the whole spectrum to be evaluated, sensitive to changes. It is also advantageous if they are relatively simple to register regularly, so that temporal series may be compiled. Choosing indicators entails compromising between the ideal and the possible.’

### How to develop cultural indicators

Chapman (2000; 1) offers five ‘methodological preconditions’ for monitoring human rights that stand as an exemplar for any indicator system:

1. Conceptualization: understanding and articulating what is to be measured by indicators.
2. Delineation of performance standards: definition of indicators and benchmarks.
3. Collection of relevant, reliable and valid data.
4. Development of an information management system (particularly so that trends can be analysed).
5. Ability to analyse/interpret indicators.

Fukuda-Parr (2001; 2-3) presents a step-by-step procedure for indicator development:

‘First, we need to define what we are trying to capture:

- What is precisely the reality that we want to measure?... How should we evaluate progress?
- What are the key dimensions? Most social and economic realities are complex and multi-dimensional. No single indicator can reflect such a reality. Culture is no exception. It is a complex reality that needs to be 'unpacked' into key dimensions.

Next, to select indicators, we need to ask:

- Are these components quantifiable? Most development goals are complex and may well not be quantifiable. If not, it is important to acknowledge that only partial indicators can be developed.
- If so, do measures exist, and if not, do adequate proxies exist?
- What is the data availability for the indicators selected?

Finally, we need to consider developing a composite index:

- Is it desirable?
- If so, what should be the methodology for aggregation and weighting?’

Schuster (2001; 15) highlights some overriding considerations for performance indicator developers:

‘The literature on performance indicators is a rich one, pointing to a number of aspects that one would want to consider. I mention here just a few:

- One should distinguish between measuring inputs, outputs, and outcomes and be sure that there is appropriate emphasis placed on outcomes;
- One should be wary of total performance indicators (one indicator that purports to measure an index of overall performance) as opposed to multiple indicators reflecting various aspects of policy management;
- One needs to carefully consider what conceptual variable it is that one wishes to measure, what variable can actually be measured, and how it is to be measured;
- One might distinguish, as Weil suggests, between red flags, effectiveness measures, integrity measures (which ask, how well do its activities match what the institution says it is doing?), and efficiency measures;
- One might distinguish, as I have suggested, between performance indicators to affect behavior, performance indicators to evaluate behavior, performance indicators to monitor behavior, and performance indicators to infer behavior; and
- One should be sure to collect longitudinal data as well as cross-sectional data so that one can make both types of comparisons.’

Duxbury (2003; 8-9) discusses a number of high-level and conceptual considerations that are particularly relevant in cultural indicator development. She argues that questions of intent and meaningfulness must permeate indicator development, including due consideration of the following:

- Why are indicators being developed?
- Why are indicators needed?
- What is it important to measure?
- What is being indicated?
- How should indicators be chosen?
- What conceptual frameworks, administrative processes, and governance realities should be considered?

- Can what we want to measure be measured?
- Is an indicator really an indicator, or just a statistic?

She suggests that questions such as these are often neglected in the rush for results.

Mercer (2004) outlines similarly high-level, conceptual considerations, including:

- Indicators need to rest on a robust knowledge base, both quantitative and qualitative, which is constantly refreshed by research, both pure and applied.
- Indicators should be firmly related to or embedded in a policy framework or strategy from which they gain meaning and currency.
- Indicators or suites of indicators should be integrated and share a plausible common currency with other policy domains.

### Lessons learned from the history of social indicators

Finally, Cobb and Rixford (1998) extract twelve lessons from the history of social indicators:

1. Having a number does not necessarily mean that you have a good indicator
2. Effective indicators require a clear conceptual basis.
3. There's no such thing as a value-free indicator.
4. Comprehensiveness may be the enemy of effectiveness.
5. The symbolic value of an indicator may outweigh its value as a literal measure.
6. Don't conflate indicators with reality.
7. A democratic indicators program requires more than good public participation processes.
8. Measurement does not necessarily induce appropriate action.
9. Better information may lead to better decisions and improved outcomes, but not as easily as it might seem.
10. Challenging prevailing wisdom about what causes a problem is often the first step to fixing it.
11. To take action, look for indicators that reveal causes, not symptoms.
12. You are more likely to move from indicators to outcomes if you have control over resources.

### Cultural indicators: examples

As mentioned at the beginning of this appendix, it is difficult to describe in principle what an indicator is, or to describe in theory how an indicator differs from a simple statistic. Illustrating the difference with an example is also not simple, as the context and intended use of a statistic or indicator are important considerations. South West Arts Marketing (2000) contains a number of examples of how to construct various indicators for marketing and advocacy in arts companies. An example for arts policy is attempted here for arts employment. In this example, figures for New Zealand and the UK are taken from, respectively, Statistics New Zealand and Ministry of Cultural Affairs (1998) and Creigh-Tyte and Thomas (2001).

#### *Developing an indicator for employment in cultural occupations*

The number of people employed in cultural occupations is a statistic commonly used in cultural policy. In New Zealand in 1996, for example, it was estimated that 45,549 people were employed in cultural occupations.

This figure is clearly a statistic. It *describes* the number of people employed in culture. But the figure is not an indicator of employment, as it does not *imply* whether the number of people employed is high, low, or just right. Further contextual information is required to be able to make such an interpretation. Possible contextual information might be:

- 1) Compare the statistic with other countries: New Zealand cultural employment of 45,549 in 1996 compares with 392,000 people employed in cultural occupations in the UK in 1995. But this is clearly not a valid comparison, as the populations of these countries differ substantially (New Zealand around 4 million and the UK around 60 million).<sup>4</sup> The ‘raw’ comparison does not contain enough meaning upon which to draw inferences – the data do not imply that more people are employed in cultural occupations in the UK than in New Zealand.
- 2) Compare the statistic with historical data from New Zealand, to obtain an idea of how 1996 levels compare to past employment levels. New Zealand employment in cultural occupations increased from 35,748 in 1991 to 45,549 in 1996, an increase of 27 percent. But again, this does not provide context, because it does not suggest whether this is a large or small increase – is it more or less than the rate of general employment growth in New Zealand over the same period?

There are a number of ways that a comparison with broader employment trends could be achieved. Growth rates could simply be compared between cultural occupations and all occupations. Another method, and one that makes it easier to undertake cross-country comparisons, is to convert the number of people employed in cultural occupations into a *ratio* of total employment. In 1996, 2.8 percent of people employed in New Zealand were in cultural occupations. By itself, this percentage is not an indicator, because we cannot tell if it is high or low. But we can now obtain a context with comparative data:

- 1) In 1996, 2.8 percent of all employed people in New Zealand were employed in a cultural occupation. In the UK in 1995, 1.5 percent of all employed people were employed in a cultural occupation.
- 2) Between 1991 and 1996, employment in cultural occupations in New Zealand grew from 2.6 percent to 2.8 percent of total employment.

In both cases, inferences can begin to be made about employment in cultural occupations in New Zealand. First, that in 1996, cultural occupations in New Zealand made up a larger proportion of total employment than in the UK.<sup>5</sup> Second, that employment in cultural occupations in New Zealand grew faster than total employment between 1991 and 1996.

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<sup>4</sup> Population estimates taken from *The World Factbook*  
<http://www.odci.gov/cia/publications/factbook/index.html>.

<sup>5</sup> Making this comparison involves a number of assumptions, most of which are likely to be unrealistic, about similarities in the frameworks and methodologies used in the data from the two countries. For a full discussion, see IFACCA (2004).

Similarly:

- Many analysts present statistics on the proportion of people working part-time in culture. This is not an indicator until it is known what proportion of people work part-time in a comparative sample of workers (eg. total employment).
- Many present statistics on the median income of artists: this is not an indicator without comparison with the median incomes of some other group workers (eg. all workers, workers educated to a tertiary level, workers employed in comparable of occupations).
- Many present data on cultural attendances, such as attendances at an art gallery. Art gallery attendance is not an indicator until attendance rates per head of population is calculated and some appropriate comparison population found (eg. previous attendances, attendances in other countries, attendances at other venues).

The practical issues can, however, become exceedingly complex. Take the last example above of attendances at art galleries. Assume that data indicate an increase in attendance rates. From simple door counts alone, there is often no way of telling who these people are, how long they stayed at the gallery, what they did there, how satisfying their gallery experience was, or how their experience impacted on their lives. A measured increase in art gallery attendances per population may simply represent the same people attending more often (ie. audience diversity has remained the same). Or these same people may even be spending less time at each visit, so the total time that they are experiencing art remains the same (ie. cultural ‘consumption’ remains constant). And if, on the other hand, gallery attendance rates are declining, why are people not going? Indicators based on door counts do not answer this question.

Developers need to be clear about what it is they want to measure: audience numbers, or artistic experiences? Are indicators outputs, outcomes or impacts? Much of the cultural indicator literature presents data on outputs (such as participation rates), but not indicators of outcomes or impacts. For discussions of the distinction, see Selwood (2003) and York (2003; 8).

All quantitative measures involve assumptions and caveats if they are to be used as indicators of the ‘real world’. Many of the assumptions and caveats need to be dealt with on a case-by-case basis and cannot be predetermined by statistical rules or principles. The examples discussed here are simply intended to provide some insight into the type of analysis that needs to be undertaken in developing an effective indicator.

## Appendix 3: Indicator fields for arts participation rates

| Indicator field        | Description  | Example   |
|------------------------|--|---|
| Objective              | The indicator's outcome or objective, as defined by the policy or program that gives it 'meaning or currency'.   | A nation's citizens appreciate the arts.  |
| Measure                | A succinct name, or 'label' for the indicator.   | Arts participation rate.  |
| Aim                    | A description of how the indicator informs the objective.  | Arts participation is a proxy for arts appreciation, as the more people appreciate the arts, the more they are likely to participate in the arts. (theoretical assumptions and caveats can be detailed in 'issues and limitations' below)   |
| Definition             | A definition of the statistical variable.  | Number of people participating in the arts at least once in the previous 12 months as percent of total population.  |
| Technical information  | The 'metadata' (methodologies, survey instruments etc.) that underpin the indicator (including metadata for comparative variables if required).  | Variable range: 0 to 100<br>Sample: People 15 years and older<br>Survey: Annual survey of leisure participation, 1980 to 2005, etc.   |
| Comparative context    | The comparative information used to give the indicator meaning.  | Compared with rates from previous years.  |
| Direction              | Describes what a change/difference in the indicator means.   | A higher rate from previous years implies an increase in appreciation, and vice versa.  |
| Sensitivity            | Defines how much change/difference in the indicator is 'significant'.  | A range of expected variation calculated from:<br>1) Variation across all leisure activities in survey;<br>2) Mean variation from previous years' arts participation. A result on or outside either of these ranges will be considered 'significant'.   |
| External influences    | The external or 'exogenous' influences that might cause a change/difference in the indicator (including, where possible, data for each exogenous factor and an analysis of its impact on the indicator). | - Changes in disposable incomes (positive correlation). Possible impact assessed by calculating the income 'elasticity' of arts participation from previous years and applying this to change in disposable income in current year. Examples of others:<br>- Changes in price of arts goods and services relative to other goods and services.<br>- Demographic changes, eg. change in age distribution of population.  |
| Structure              | Analysis of any of the indicator's interesting sub-components. Analysis of the variable by sub-populations.  | - Break participation into (a) creating arts and (b) viewing or listening to arts.<br>- Report arts participation by age, sex, location, income, etc.   |
| Issues and limitations | A description of the limitations of the indicator in measuring the objective/outcome. A description of what the indicator does not measure.  | - Discussion of why participation does not necessarily mean appreciation.<br>- Indicator does not measure changes in quality of arts participation experience, or the frequency of participation (an increase in frequency would imply greater appreciation).<br>- Boundary issues: are all arts included in the definition? If not, could a redrawing of the boundary alter the interpretation?<br>Other indicators in the suite that the indicator should be interpreted in conjunction with, eg: frequency of participation; satisfaction with arts participation. |
| Data presentation      | Clear presentation of data along with metadata, assumptions and caveats.   |   |
| Interpretation         | What does the indicator say?   | Provide an interpretation of the indicator values based on all caveats and assumptions.   |

## Appendix 4: IFACCA's involvement in work on statistics and indicators

IFACCA is the first global network of national arts funding bodies. Founded in 2001, IFACCA has 47 national members and 35 affiliates in 50 countries. Our mission is to create an international resource and meeting ground for all those whose public responsibility it is to support excellence and diversity in artistic endeavour.

The IFACCA secretariat has undertaken a number of tasks relating to cultural statistics and cultural indicators:

- 1) *D'Art report*. In November 2002 we completed a D'art report on international comparisons of arts participations data. (<http://www.ifacca.org/files/participationstatsanalysis.pdf>).
- 2) *Ask IFACCA*. We have responded to two 'Ask IFACCA' questions sent by people looking for studies and information on cultural indicators. Each was sent a list of selected references and web resources. These are included in the bibliography to this paper.
- 3) *Data analysis*. IFACCA is undertaking the data analysis for an Australia Council project to make international data comparisons of cultural sectors (IFACCA, 2004).
- 4) *Project advice*. IFACCA is advising the New Zealand Ministry for Culture and Heritage on a project to develop cultural indicators for New Zealand.
- 5) *Researchers' meeting*. The Canada Council for the Arts hosted a meeting of researchers in Montréal, Canada, 24 August 2004 ([http://www.ifacca.org/ifacca2/en/organisation/page04\\_miniView.asp?summitId=1](http://www.ifacca.org/ifacca2/en/organisation/page04_miniView.asp?summitId=1)). At the meeting, research managers from IFACCA's member agencies and other researchers discussed this paper and the issues surrounding the development of cultural indicators generally. A summary of the discussion is reproduced below.
- 6) *Board meetings*. The IFACCA board considered the discussion paper at its meeting in Washington DC, USA, in April 2004 (comments summarised below).
- 7) *World Summits*. Evaluation of arts policy was discussed at the first and second World Summits on the Arts and Culture (see [www.artsummit.org](http://www.artsummit.org)) and is likely to be on the agenda for the third Summit.
- 8) *Liaison and contact*. The IFACCA secretariat is in frequent contact with national arts funding agencies that are working on cultural indicators.

### IFACCA board meeting Washington DC, USA, April 2004

The IFACCA board discussed the issue of cultural indicators at its meeting in Washington DC, USA, in April 2004. Board members and observers (listed in appendix 4) made a number of comments in addition to the background paper that formed the basis of this D'Art report:

- It is important to develop indicators of *intrinsic* artistic and cultural values in addition to indicators of *instrumental* values such as economic and social impacts. It was agreed that such intrinsic arts indicators are already in use by

arts practitioners, although that these are not necessarily called ‘indicators’ or recognised as indicators.

- There is a need in arts policy to concentrate on developing a limited set of key indicators, and to measure what makes sense to measure.
- Performance indicators are a tool for learning as well as a tool for measuring.
- IFACCA’s primary objective should be to advance thinking on indicators relevant to contemporary arts practice and be clear about differentiating these from the broader cultural indicators (eg. cultural indicators that have been designed for development).
- Indicators should be developed from the ‘ground up’ to account for issues that might not be obvious at a more general level, such as the long ‘gestation’ of ideas preceding the creation of an artistic ‘moment’.
- Artistic indicators need to measure the ‘deep’ and peculiar aspects of art.
- There is a need to be clear about which definitions and frameworks are to be used in which contexts. Indicators can serve different objectives, and sometimes these objectives may not be complementary (as when advocacy clashes with policy development and evaluation).
- Finally, the board reinforced the need for *qualitative* indicators in arts policy. Illustrating the impacts of arts policy by using case studies and ‘telling stories’ and is as valuable an evaluation tool as ‘hard’ statistical information.

#### IFACCA researchers’ meeting, Montréal, Canada, August 2004

Workshop participants discussed statistics and indicators in general, and heard updates on the work of EUROSTAT and UNESCO’s Institute for Statistics.

Discussions focussed on a number of crucial points:

- tensions between research and policymaking in how statistics are developed and used
- the need to be clear about what is meant when using the term ‘cultural indicators’
- the need to focus indicator development on essential statistics and indicators
- the need to clarify the purpose and objectives of indicators.

It was agreed that the IFACCA secretariat would finalise the discussion paper *Statistical Indicators for Arts Policy* based on comments made at the workshop and through feedback from others, and that the secretariat should investigate how to encourage information exchange on indicators, such as through a dedicated web-based forum.

## Appendix 5: Respondents

Comments and input on the previous discussion paper were received from:

- . Hatto Fischer, Coordinator, Poiein Kai Prattein, Greece
- . Sue George, Arts Queensland, Australia
- . Joe Jobling, Scottish Executive
- . Professor Benjamin Juarez, Director, CIGCEA, Mexico
- . Clare Keating, Director, Effective Change Pty Ltd, Australia
- . Annamari Laaksonen, Interarts, Spain
- . Brigita Lipovšek, Undersecretary, Ministry for Culture, Slovenia
- . Robert Palmer, Palmer/Rae Associates, Belgium
- . Frank Stroobandt, Culture policy centre (Re-creatief Vlaanderen), University of Ghent, Belgium
- . Professor Andreas Wiesand, Director Zentrum für Kulturforschung, and Secretary General ERICarts-Institute, Germany

IFACCA board meeting

- . Risto Ruohonen, Director of Arts and Cultural Heritage and Special Government Advisor, Ministry of Education, Finland
- . Lee Suan Hiang, Chief Executive Officer, National Arts Council, Singapore
- . Kim Evans, Executive Director of Arts, Arts Council England
- . Nguyen Van Tinh, Deputy Director General of the International Cooperation Department at the Ministry of Culture and Information, Vietnam
- . John Hobday, Director, Canada Council for the Arts
- . Sarah Gardner, Executive Director, IFACCA
- . Jonathan Katz, Director, National Assembly of State Arts Agencies, USA

IFACCA researchers meeting

- . Keith Kelly, Canada Council for the Arts
- . Claire McCaughey, Canada Council for the Arts
- . Lisa Roberts, Canada Council for the Arts
- . André Courchesne, Canada Council for the Arts
- . Ann Bridgwood, Arts Council England
- . Merja Heikkinen, Arts Council of Finland
- . Ann Kellaway, Arts Council of Wales
- . Lisa Colley, Australia Council
- . Sarah Barns, Australia Council
- . Yuen Kum Cheong, National Arts Council Singapore
- . Caroline Docherty, Scottish Arts Council
- . Tanya Hutchinson, Scottish Arts Council
- . Mark Schuster, Massachusetts Institute of Technology, USA
- . Margaret Wyszomirski, Ohio State University, USA
- . Diane Dodd, Boekman Institute and CIRCLE, Spain
- . Jim McKenzie, Ministry for Culture and Heritage, New Zealand
- . Diane Stukel, UNESCO Institute of Statistics, Canada
- . Lidia Varbanova, European Cultural Foundation, Netherlands, and the Center for Intercultural and Social Development, Canada
- . Tim Jones, Toronto Artscape Inc., Canada
- . Pat Bradley, Ontario Arts Council, Canada
- . Murray Krantz, independent researcher, Canada
- . Christopher Madden, IFACCA

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