



# Social and Economic Value of the Cairns Indigenous Art Fair

**CAIRNS  
INDIGENOUS  
ART FAIR**  
AUSTRALIA'S PREMIER INDIGENOUS ART FAIR



FOCUSED THINKING



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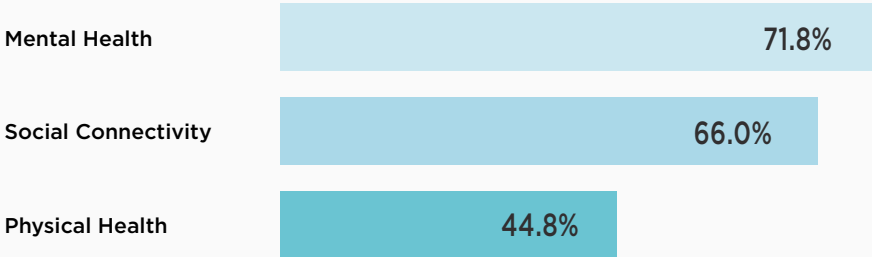


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# Key Findings

## POSITIVE HEALTH BENEFITS



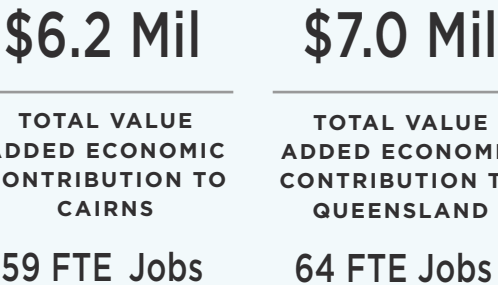
Those who engage with CIAF strongly identify with the Mental (72%) and Social (66%) health benefits through attending and participating in the event

## IN-SCOPE DIRECT EXPENDITURE (\$ MIL)



Overall, CIAF generates total in-scope spending of \$6.3 mil annually for Cairns and \$5.9 mil for Queensland. This measure includes in-scope expenditure by attendees, volunteers, artists, performers, exhibitors, sponsors and CIAF.

## IN-SCOPE ECONOMIC CONTRIBUTION



The total in-scope expenditure generated by CIAF is responsible for creating a value-added economic contribution of \$6.2 mil for Cairns and \$7.0 mil for Queensland. Overall, the expenditure generated by CIAF results in a total full time equivalent (FTE) employment impact of 59 jobs in Cairns and 64 jobs in Queensland.

## BENEFIT ANALYSIS



The estimated broader annual in-scope benefits delivered by CIAF including both economic and social value amounts to \$8.3 mil for Cairns and \$10.9 mil for Queensland.





# Introduction

IER was engaged by Cairns Indigenous Art Fair (CIAF) to undertake an evaluation of the economic and social value generated by the event. Previous studies undertaken by IER have sought to determine the tourism value of events like CIAF – however this study goes a step further in investigating the impacts associated with the social and cultural value related to the event.

## PURPOSE OF THE STUDY

The purpose of this study was to determine the economic, social and cultural contribution made by CIAF. The study also aims to determine the overall benefit of the event through a Benefit Analysis. This measures the total in-scope benefits which flow through to the broader communities in which CIAF exists.

Specifically, the study aims to deliver the following outcomes:

- ✦ Measure the annual level of participation in CIAF (physical attendance, online participation, volunteers, artists, performers etc.)
- ✦ Calculate the estimated in-scope economic & social value of CIAF to the broader community
- ✦ Develop a Benefit Analysis measure of the value of CIAF to the broader community

In order to deliver this study, IER have projected the costs and benefits for the 2021 CIAF due to COVID-19 interrupting the event in 2020. This takes into consideration economic impact studies undertaken by IER 2015 - 2019, and projections for 2021, including any uplifts relating to the delivery of CIAF at the new event precinct at the Cairns Convention Centre.

## STUDY METHODOLOGY

The preparation of this report was underpinned by a detailed methodological approach.

1. The development of an attendee (physical and online) and stakeholder survey was aimed at understanding the level of engagement with the event as well as the benefits generated as a result (e.g. physical and mental health, social connectivity etc. ). Overall, 554 respondents completed this survey.

In addition to this, IER assessed the data collected (406 respondents) for Tourism and Events Queensland at CIAF in 2019 to assess the tourism impacts for the broader community and for this study the total spending (gross economic benefit).

2. Direct data requests were made of CIAF which related to a post online survey of the 2020 virtual events (99 respondents) and marketing reports. CIAF was also asked to provide data related to their expenditure and funding sources as part of the development of the Benefit Analysis model (audited annual financial reports).
3. Desktop research was undertaken to gather various data points such as the Australian Bureau of Statistics (ABS) etc.

## ECONOMIC CONTRIBUTION

This study looks at the in-scope contribution that CIAF makes to the Queensland economy. The economic impact of an industry is understood to be the contribution the event makes in terms of generating gross state product, of household income and the employment these income measures support.

Major events do this in two ways: -

- + by the employment and activity it supports directly, and
- + in the industries that depend on it as a customer; and the flow on effects of that which filters through the economy.

The importance of the expenditures generated by a major event in the production process is that they will sustain turnover in local industry, and specifically this will support local jobs and incomes. It is the jobs and incomes that are taken to be the measure of economic impact or benefit, netting out expenditure on imports etc.

It is also generally acknowledged that, in addition to the jobs in direct suppliers of services to the production processes, that the production expenditure has a flow-on effect within the community, extending the spend effect and the impact through the expenditure of wages and purchases of the direct suppliers. The use of multipliers derived from input output-tables has been a prominent process for translating direct created expenditure (a final demand stimulus) of major events or projects into jobs and incomes, and for establishing the extent of the flow-on impact. The use of these input-output based multipliers allow for reporting with respect to the estimated outcomes of the industry in terms of the effect of expenditure or turnover on value added across a regional economy and in terms of job creation - which is consistent with national accounting frameworks.

It should be emphasised that this methodology - of identifying the in-scope expenditure associated with production by the major event and tracing the expenditure through the rest of the economy - can be interpreted as concluding that Gross Domestic Product or employment would fall by this amount if the event somehow did not exist. In the first instance local people would spend their money on other activities and the contribution of those other sectors would go up and replace that of the major event. The total direct in-scope expenditure is new money which has entered the Cairns and Queensland economies - that is, this expenditure would not have flowed into these regions had CIAF not been staged.

The objective of the economic modelling is to identify the way in which the identified major event expenditure translates into jobs and generates incomes. In this way, it is possible to determine the in-scope economic impact of CIAF to the underlying economy. This is done by tracing the expenditure through a whole of economy model - in this case an input-output model, and identifying the direct and first round impacts (employment and incomes generated in the industry itself, and in direct suppliers to the industry) as well as the flow through effects (as those suppliers purchase inputs and the wages are spent).

## BENEFIT ANALYSIS

A Benefit study aims to estimate of the broader annual benefits delivered by CIAF.

The first step in the methodology is to clearly define the benefits of the activities involved from both an economic, social and cultural context. There are a number of ways of undertaking this, however this study uses the following:

### Defining Benefits

The benefits of participating in CIAF has been assessed in this study as follows:

**Current Use Value** – includes the value achieved from attendance and participation in the event, over and above the cost involved in participation. Value is created in terms of:

- + Enjoyment and entertainment of the event
- + Personal benefits including:
  - + Physical health benefits (general wellness, extension of life)
  - + Mental health benefits (through creativity, emotional release, self-esteem, stress relief etc.)
  - + Social networking opportunities provided (meeting of like-minded artistic people in pursuing activity that provides benefits in other ways (friendships, work connections etc.)

**Value of Volunteer Time** – volunteers create value in supporting events such as CIAF by providing their time to improve the attendee and stakeholder experience - while also reducing costs in the delivery of the overall event. Both the financial value of engaging volunteers and the social value built-in to recognise reduced health costs and community outcomes is identified within the study.

**Value of sponsor time** – sponsors support the event both financially and in-kind and in return leverage off the event to create further value. The activities of sponsors improve the attendee and stakeholder experience while reducing event operational costs of CIAF. The financial value of sponsors was estimated by using average hours engaged in the event and average hourly earnings (ABS).

**Value of artist/performer time** – Artists and performers spend significant amounts of time preparing their work/performance for CIAF and in many cases put considerably more value on participation in CIAF than they expect to earn in sales. This additional effort can be considered created value in preparing for CIAF which provides well-being benefits for artists well beyond their expected financial return – they also value the opportunity to share their

story and creativity. The Australian Bureau of Statistics (ABS) was used to estimate average weekly earnings and social value was built-in to recognise reduced health costs and community outcomes (including heritage value, community pride, social benefit including reduced health system costs due to the physical and mental health outcomes generated for the artist themselves).

### STUDY LIMITATIONS

The major events industry, and therefore CIAF, does not operate as a silo - a fact which makes a study such as this challenging. Whilst it is relatively easy to determine the consumer spend and activity the event generates in Government support, it is inherently more difficult to determine social and cultural impact benefits.

### ABOUT CAIRNS INDIGENOUS ART FAIR

CIAF was established by the Queensland Government in 2009 as a strategic initiative under the Backing Indigenous Arts program. In 2013, CIAF transitioned to independent status, establishing a corporate entity to develop and reach its full potential to deliver benefits to Indigenous artists, the broader community, visitors and key stakeholders.

CIAF provides a platform for cultural exchange and economic opportunity for the many Queensland Indigenous artists. The event is committed to strengthening and celebrating culture, creating professional development opportunities for artists, and cultural connection between Aboriginal and Torres Strait Islanders and visitors.

CIAF is focused on offering an ethical art marketplace, attracting national and international collectors and curators, commissioning new work and providing pathways for emerging visual and performance artists.

### ACKNOWLEDGEMENTS

The development of this assessment was built on a variety of data sources. A number of organisations provided valuable input into this study, including:

- + Australian Bureau of Statistics
- + Cairns Indigenous Art Fair
- + Tourism and Events Queensland

To all these organisations, we extend our gratitude for their contribution and support for this project.

### DISCLAIMER

This report has been prepared in line with the terms of reference developed in consultation with the Cairns Indigenous Art Fair. The estimates presented in this report have been entirely derived from the aforementioned sources and, therefore, their accuracy is dependent on the extent to which these sources are truly representative of the event. IER has not audited data received from CIAF and has accepted it in good faith.

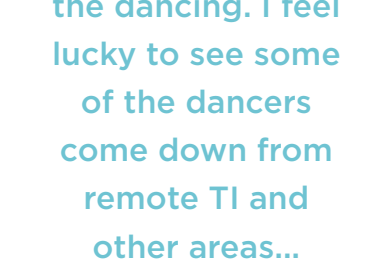
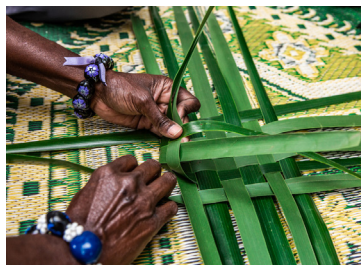
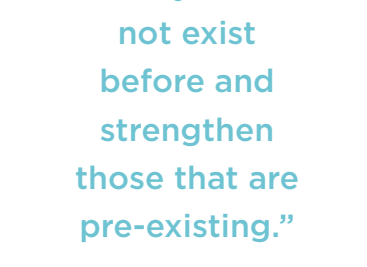
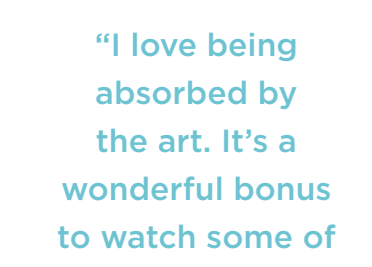
Neither CIAF, nor its consultants IER Pty. Ltd., accept any responsibility for the accuracy of information provided or estimates presented, or for decisions taken as a result of material in this report.



“The positivity the fair creates; takes you to other places and gives hopeful experiences...come away feeling uplifted.”



“It helps create relationships where perhaps they did not exist before and strengthen those that are pre-existing.”



“Being able to engage with art of our First Nations People is always nourishing for my soul. It inspires my own creative practice.”



“I love being absorbed by the art. It’s a wonderful bonus to watch some of the dancers come down from remote TI and other areas... CIAF gives me exposure to so much culture, (the kind I want to know about!!).”

# Engagement with Cairns Indigenous Art Fair

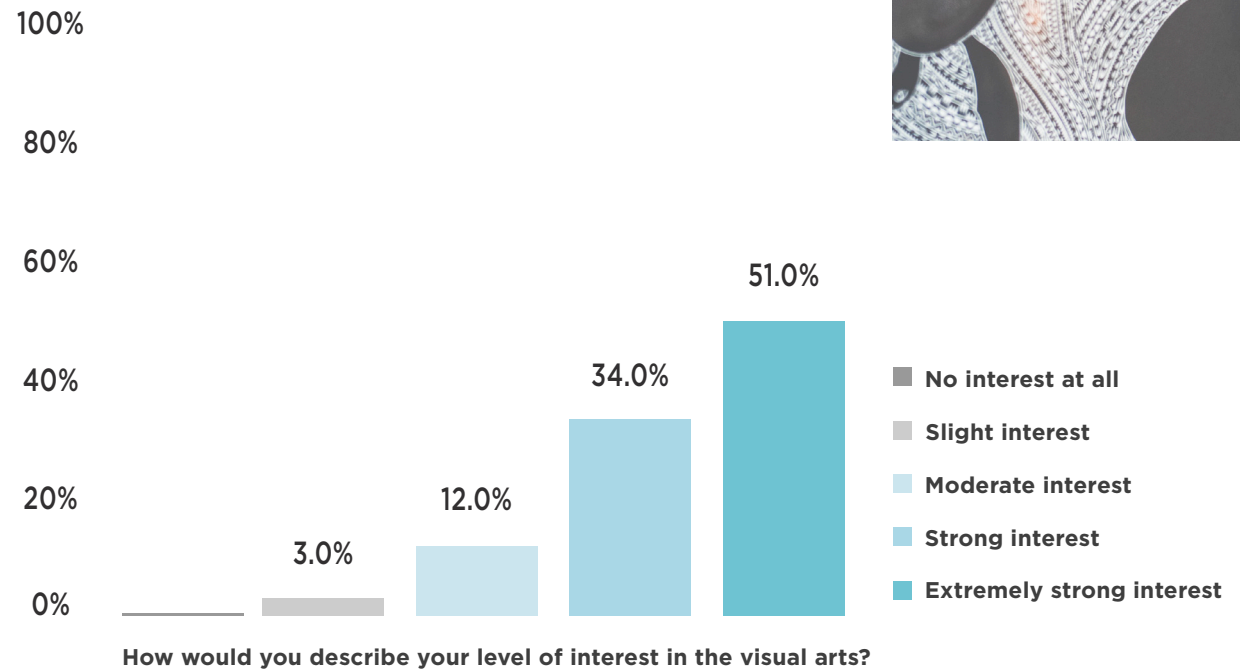
Eighty-five percent of respondents hold a strong to extremely strong interest in the visual arts

CIAF engages with a broad range of consumers and stakeholders both domestically and internationally. What is common to both these groups is their engagement with both indigenous artworks and performances and more broadly the visual arts.

These consumers and stakeholders include those who attend CIAF in person, online attendees, artists, exhibitors, sponsors, fashion designers, performers and volunteers - totalling 45,794 individuals. The largest two groups being events attendees (25,477 individuals) and online attendees (19,798 individuals).

Figure 1 illustrates the level of interest in the visual arts, with eighty-five percent of respondents interviewed indicating a strong to extremely strong interest in the visual arts.

FIGURE 1 - LEVEL OF ENGAGEMENT WITH THE VISUAL ARTS



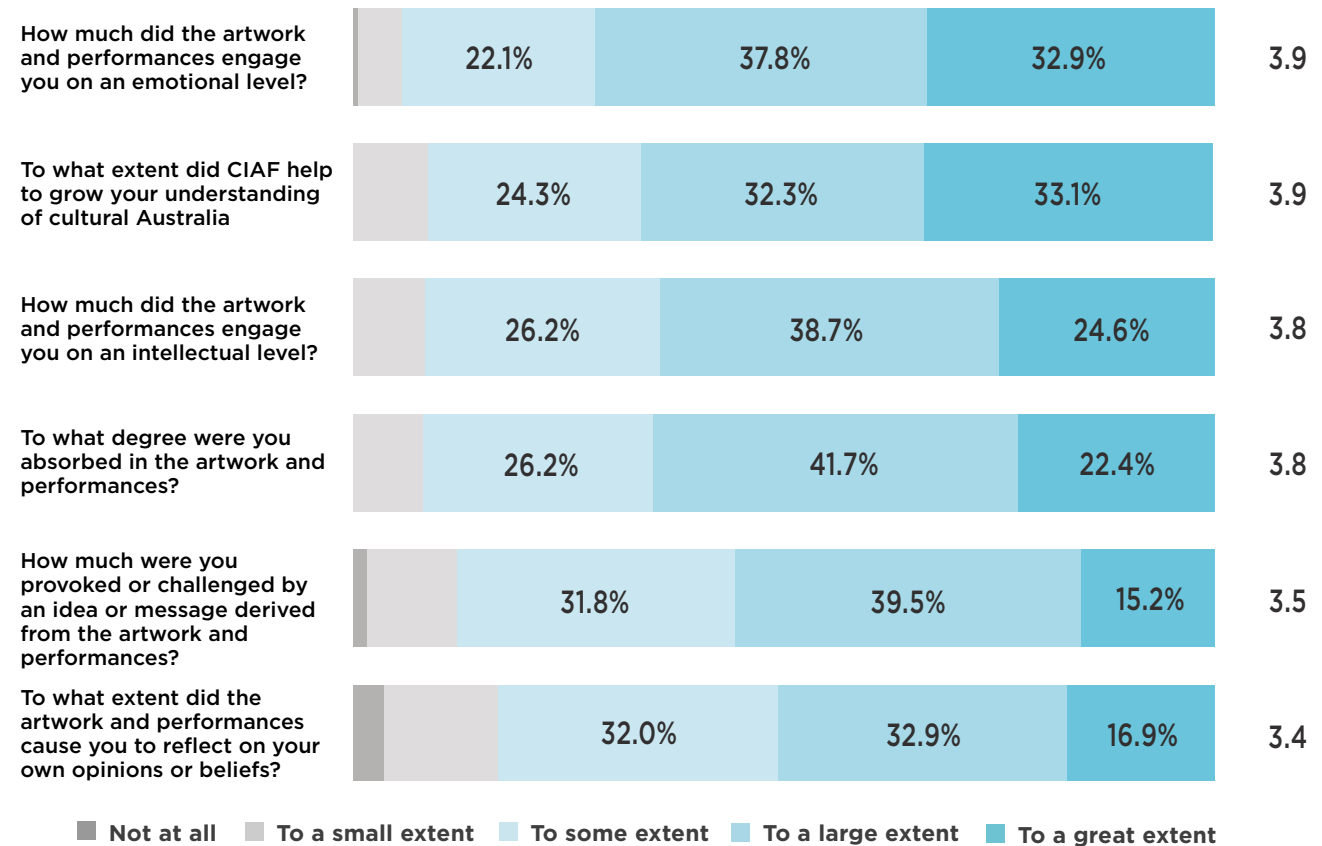


CIAF's connection to culture and country is demonstrated through the strong psychological connection attendees and stakeholders have with the event. The artworks and performances at CIAF were most likely to engage on an emotional level (71% large/great extent) and an intellectual level (63% large/great extent).

Over 65% of attendees and stakeholders indicated that CIAF enhanced their understanding of cultural Australia to a large/great extent.

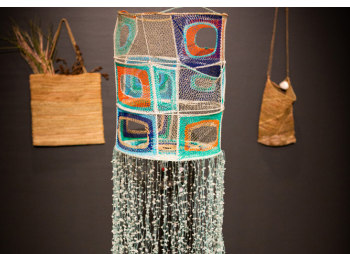
**FIGURE 2 - LEVEL OF ENGAGEMENT WITH THE CIAF**

**AVERAGE**





“Experiencing artwork makes me feel inspired and fresh. The positive vibe at the event helps keep me in a positive frame of mind.”



“All cultures coming together as one.”



“It elevated my enthusiasm and generally feelings of wellbeing considerably, and excited me enormously.”



“The diversity within cultures is a beautiful element. The beauty of the visuals, seeing people whose work might not otherwise be seen by the wider community is very positive.”



# Health & Wellbeing Benefits

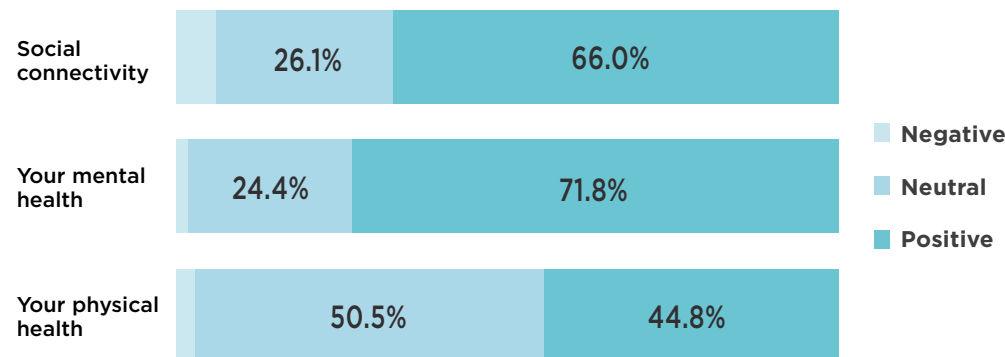
Broader studies about community benefits of the arts sector have identified the positive impact that participation in the creative arts has on individual health and wellbeing - in particular, significant decreases in stress, anxiety and depression.

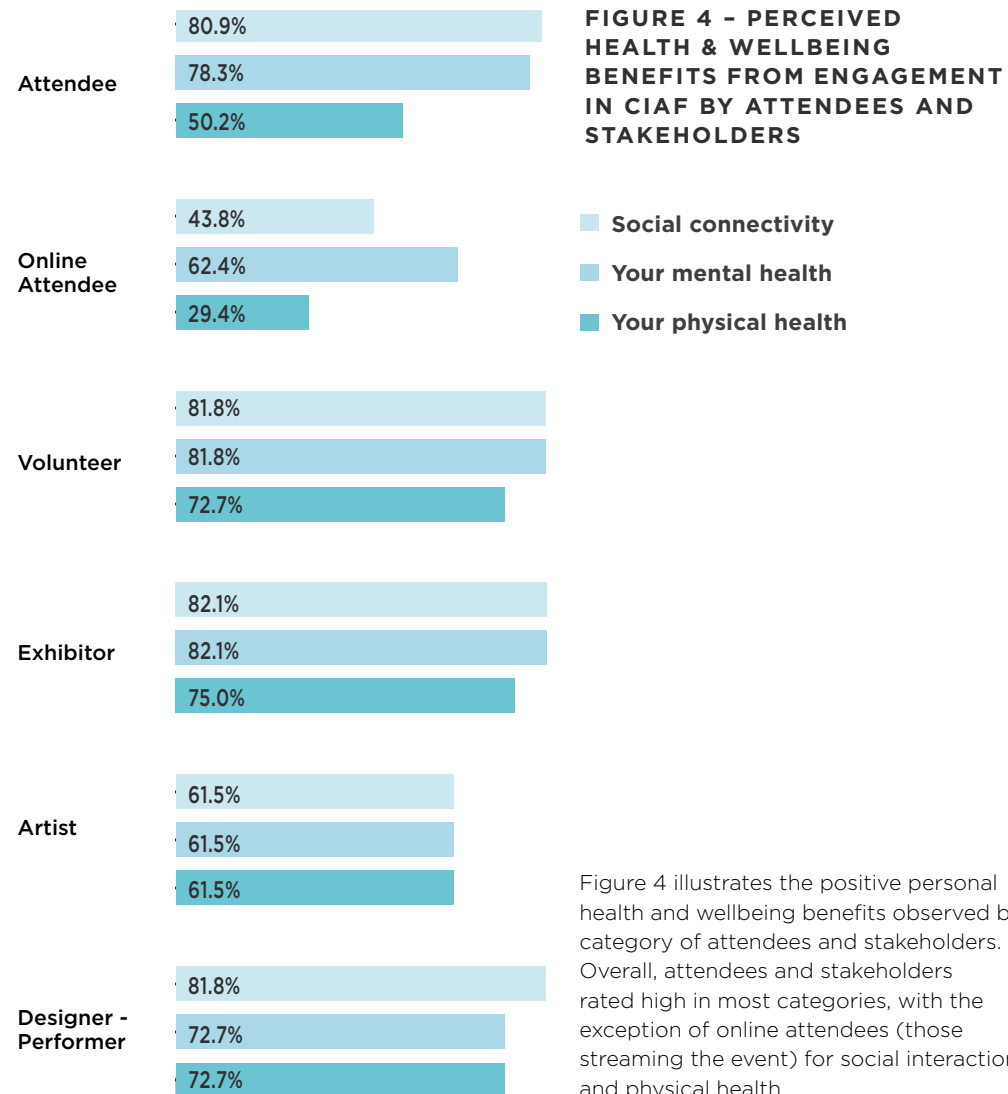
In addition to the economic benefits accruing from CIAF, there are also significant personal health and wellbeing benefits observed by those who engage as an attendee, artist, volunteer etc. Personal benefits occur across a variety of areas including physical health, mental health and social connectivity.

Figure 3 illustrates the perceived personal health and wellbeing benefits amongst those who engage with CIAF from a sample of 554 respondents:

Those who engaged with CIAF activities strongly identify with mental (71.8%) and social connectivity (66.0%) health benefits they gain from engaging with the event. Physical benefits (47.8%) are also important, albeit to a lesser extent.

**FIGURE 3 - PERCEIVED HEALTH & WELLBEING BENEFITS FROM ENGAGEMENT IN CIAF OVERALL**



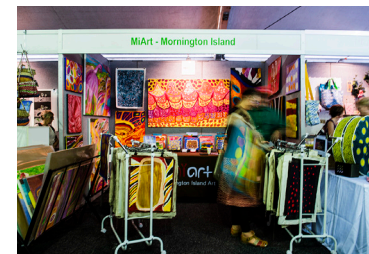




“I think any activity that is interesting and thought provoking is positive for mental health. Just the physical act of walking around the event is a positive experience for mental health.”



“Being educated and learning all the cultural diversity expressed through art is a very informative and rich experience.”



“CIAF gives me the opportunity of interacting and participating with indigenous artists and audiences...I come to Cairns each year with a group of friends to immerse ourselves in our indigenous culture and celebrate their achievements. It is such a positive experience.”



“So much pleasure from seeing the artworks being produced by such talented artists...”



# Economic Impacts

## DIRECT IN-SCOPE EXPENDITURE

The total direct in-scope expenditure is new money which has entered the Cairns and Queensland economies – that is, this expenditure would not have flowed into these regions had CIAF not been staged. The majority of in-scope expenditure is attributed to visitors who visit Cairns and/or Queensland for the purpose of attending CIAF – spends on accommodation, art works, hospitality, transport and tourism activities. Overall, in-scope expenditure contributes more than 70% of all expenditures generated by CIAF. The adjacent table reveals that CIAF was responsible for bringing \$6.26 million in direct in-scope expenditure into the Cairns economy and \$5.92 million in direct in-scope expenditure into the Queensland economy.

## TOTAL EXPENDITURE - GROSS ECONOMIC BENEFIT

Expenditures related to attendees who reside in Cairns and non-primary purpose visitors to Cairns and Queensland, contribute to the overall gross economic benefit. Expenditures such as meals, food and beverages, transport and tickets (related to the event they attended) are all considered to for part of the overall economic stimulus created by the event.

Figure 5 reveals that CIAF was responsible for generating \$8.91 million in direct in-scope expenditure for the Cairns regional economy and \$8.02 million in direct in-scope expenditure for the Queensland economy.

**FIGURE 5 - FINAL EXPENDITURES (INSOPE AND TOTAL FOR CAIRNS AND QUEENSLAND)**

FINAL EXPENDITURES	IN-SCOPE CAIRNS	TOTAL CAIRNS	IN-SCOPE QLD	TOTAL QLD
<b>Spend in Attendance</b>				
Accommodation (\$m)	\$1.86	\$1.96	\$1.50	\$1.58
Food and Beverage (\$m)	\$1.16	\$1.76	\$0.94	\$1.56
Transport (\$m)	\$0.61	\$0.75	\$0.49	\$0.63
Retail (\$m)	\$0.54	\$0.66	\$0.43	\$0.56
Tourism (\$m)	\$0.45	\$0.56	\$0.37	\$0.47
<b>Total Attendee Spend (exc. Tickets)</b>	<b>\$4.63</b>	<b>\$5.69</b>	<b>\$3.73</b>	<b>\$4.79</b>
<b>Other Expenditure</b>				
Administration (\$m)	\$1.06	\$2.09	\$1.06	\$2.09
Art and Tickets Sales during the Event (\$m)	\$0.41	\$0.81	\$0.81	\$0.81
Annualised Value of future Art Sales (\$m)	\$0.16	\$0.32	\$0.32	\$0.32
<b>Total Other Expenditure (\$m)</b>	<b>\$1.63</b>	<b>\$3.22</b>	<b>\$2.19</b>	<b>\$3.22</b>
<b>TOTAL (\$M)</b>	<b>\$6.26</b>	<b>\$8.91</b>	<b>\$5.92</b>	<b>\$8.02</b>

CIAF is responsible for contributing close to \$9.0 million in direct expenditure for the Cairns regional economy

### ECONOMIC CONTRIBUTION

This study looks at the contribution that CIAF makes to the Cairns and Queensland economies. The expenditure generated by the event is responsible for creating a total value-added economic contribution of just under \$9.0 million for the Cairns region and \$9.6 million for Queensland. This contribution is the result of a process whereby the expenditure creates direct and first round effects and then generates a flow-on effect as that expenditure extends its impact through the broader economy.

The direct and first-round economic contribution generated by CIAF was \$6.3 million for Cairns and \$5.9 million for Queensland. This represents value-added impact that is related to expenditures by the consumers of CIAF (initial) and also the wages, salaries and gross operating surplus of the businesses that supply goods and services to the industry (first-round).

### EMPLOYMENT

The economic activity generated by CIAF supports employment across

various sectors – including the creative arts, hospitality and tourism industries to name just a few. In total, there are 87 full-time equivalent jobs supported by the economic activity created by CIAF in Queensland – and a total of 86 full-time equivalent jobs are supported in the Cairns region.

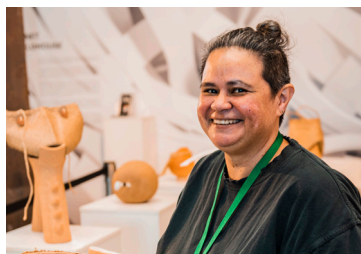
**CIAF is responsible for contributing close to \$10 million in value added economic activity to the Queensland Economy**

**FIGURE 6 - VALUE ADDED ECONOMIC VALUE (INSCOPE AND TOTAL FOR CAIRNS AND QUEENSLAND)**

CATEGORY	NET IMPACTS				GROSS IMPACTS			
REGION	DIRECT CONTRIBUTION	PRODUCTION INDUCED CONTRIBUTION	CONSUMPTION INDUCED CONTRIBUTION	TOTAL CONTRIBUTION	DIRECT CONTRIBUTION	PRODUCTION INDUCED CONTRIBUTION	CONSUMPTION INDUCED CONTRIBUTION	TOTAL CONTRIBUTION
<b>Cairns Region Impact</b>								
Created Spend (\$m)	\$6.26				\$8.91			
Value added (\$m) - Gross Regional Product	\$2.84	\$1.59	\$1.75	\$6.17	\$4.07	\$2.28	\$2.49	\$8.83
Household Incomes (\$m)	\$1.58	\$0.85	\$0.76	\$3.19	\$2.24	\$1.22	\$1.08	\$4.54
Employment (FTE's)	37	11	11	59	55	15	16	86
<b>Queensland Impact</b>								
Created Spend (\$m)	\$5.92				\$8.02			
Value added (\$m) - Gross Regional Product	\$2.71	\$2.02	\$2.30	\$7.03	\$3.67	\$2.74	\$3.19	\$9.60
Household Incomes (\$m)	\$1.43	\$1.06	\$1.00	\$3.49	\$2.01	\$1.43	\$1.38	\$4.83
Employment (FTE's)	37	13	14	64	50	18	20	87



"I felt very comfortable and connected to country. I was mesmerised by the different cultures coming together and how stories are told."



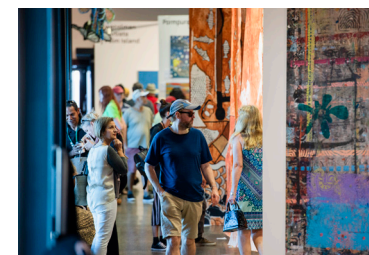
"I feel stimulated and inspired by all the shapes, sounds, colours, designs, and lines around me. I also feel greatly connected with this country and its people."



"Very grateful to be immersed in indigenous culture and be surrounded by community members and like-minded people."



"Art and culture is vital to our being."





# Benefit Analysis

## INTRODUCTION

In addition to the economic contribution analysis, the study also comprises an estimation of the broader annual benefits delivered by CIAF.

This stage of the analysis involves estimating the social value of the activities featured at CIAF which enrich both attendee and stakeholder health and wellbeing. The event also creates significant health and wellbeing benefits for a range of artists and performers in their pursuits to express their art form at the event. Social value is the value created outside of the formal operations of the economy - put another way, it represents the impact that the event has on the welfare of the CIAF community.

Overall, it is estimated that CIAF generates total benefits of \$8.3 million for the Cairns region and \$10.85 million for broader Queensland economy. This is made up of the following components:

## ESTIMATING BENEFITS

- + **Current Use Value** – this has been estimated using an assessment of willingness to pay data from the attendee and stakeholder survey. This has been undertaken as follows:
  - + For activities that are generally free to access (e.g. free activities at the event, online streaming etc.) the calculations of value

is calculated as the average willingness to pay from the survey multiplied by the number of people participating in that activity.

- + For activities where there is an entry price (e.g. ticketed events at CIAF), the proportion of people who indicate that their willingness to pay would be in excess of the average paid price are multiplied by the difference between the value (midpoint of the range) less the actual price (representing consumer surplus).

The consumer surplus estimated, as above, is taken as a reflection of all perceived personal benefit (e.g. enjoyment value, health benefit, impact on employment and productivity) less perceived personal cost (e.g. cost of attending etc).

This analysis does rely on personal perception, and it is possible that people do not always understand or perceive all the value - leading to under or overstating the value. The valuation is supported (and perhaps suggested as conservative) in the Likert scale analysis of engagement benefits – where 72% suggest that engagement is good for mental health, 66% for social connectivity and 45% for physical health.

**+ Value of Volunteer Time** – volunteers create value in supporting events such as CIAF by providing their time to improve the attendee and stakeholder experience - while also reducing costs in the delivery of the overall event. Volunteer value supporting CIAF was estimated by extrapolating the average number of hours in which volunteers spent supporting the event (13.7 hours) with a nominal wage rate. The Australian Bureau of Statistics (ABS) was used to estimate average weekly earnings (at a reduced rate) and social value built-in to recognise reduced health costs and community outcomes.

**+ Value of sponsor time** – sponsors support the event both financially and in-kind and in return leverage off the event to create further value. The activities of sponsors improve the attendee and stakeholder experience while reducing event operational costs of CIAF. An estimate of sponsor employee value was estimated by extrapolating the average number of hours they spend on those activities (5.5 days) with average hourly earnings as estimated from ABS average weekly earnings survey. Wages are estimated to be one third of the costs of service delivery (labour on costs, office and admin support costs etc).

**+ Value of artist/performer time** – Artists and performers indicated in the survey that they spend an average of 72.2 days and 21 days respectively to prepare their work/performance for CIAF (an estimate supported by exhibitors). It is clear that artists put considerably more value on participation in CIAF than they expect to earn in sales. This additional effort can be considered created value in preparing for CIAF which provides well-being benefits for artists well beyond their expected financial return – they also value the opportunity to share their story and creativity. The Australian Bureau of Statistics (ABS) was used to estimate average weekly earnings and social value was built-in to recognise reduced health costs and community outcomes (including heritage value, community pride, social benefit including reduced health system costs due to the physical and mental health outcomes generated for the artist themselves).

**The estimated broader annual in-scope benefits delivered by CIAF including both economic and social value amounts to \$8.3 mil for Cairns and \$10.9 mil for Queensland**

**FIGURE 7 – TOTAL BENEFIT ANALYSIS**

CATEGORY	CAIRNS REGION IMPACT	QUEENSLAND IMPACT
<b>Economic benefits (\$mil)</b>		
Incomes and Employment Creation	\$6.17	\$7.03
<b>Other benefits (\$mil)</b>		
Willingness to pay for free events	\$0.63	\$0.90
Consumer surplus for ticketed events	\$0.07	\$0.11
Value of volunteer time	\$0.02	\$0.02
Value of sponsor time	\$0.03	\$0.04
Value of artist/performer time	\$1.38	\$2.76
<b>Social benefits (non economic)</b>	<b>\$2.12</b>	<b>\$3.82</b>
<b>TOTAL (\$MIL)</b>	<b>\$8.30</b>	<b>\$10.85</b>

**FIGURE 8 - FIVE YEAR PROJECTION OF CIAF BENEFITS**



The chart adjacent illustrates the growth in expenditure impacts for both the economic and social benefits of CIAF. Overall by year 5, it is modelled that CIAF will be generating benefits of \$9.4 million per annum for Cairns and \$12.0 million for Queensland – or a gross \$44.3 million benefit over the five years for Cairns and \$56.9 million for Queensland.

\*Some numbers may not add due to rounding

“Regular yearly engagement with TNQ first people artists and their work and ideas stimulate my mental wellbeing for months and provides positive mental messages about the potential of artists from this corner of Australia.”

“Just being there and absorbing the Indigenous cultural environment expressed in visual arts improves my mood and outlook.”

“(CIAF) Provides greater understanding of first nation cultures so I am better able to understand my reactions and just makes my involvement with my brothers and sisters so much greater in spirit and understanding. Plus, I really admire the artwork and the differences.”

“Gratitude and realisation - CIAF triggers me to appreciate our unique region with amazing and growing histories, creativity and talents.”

“I am inspired by such incredible talent, and it helps me to face everyday issues.”

“Large groups of indigenous folk feeling proud of their achievements definitely makes me feel happy.”

“It provides me with a happy space to explore, and provides an escape to the daily grind.”

“The event was something to look forward to and work towards.”

“Enthusiasm and passion of upcoming artists uplifts and bodes well for the future.”

“Looking at artwork and watching performances/imagery engages with the pleasure centres in my brain to produce serotonin and dopamine, in other words, it makes me feel happy!”

“The pleasure of seeing so many people share their art.”



FOCUSED THINKING



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