

MEETING OF CULTURAL
MINISTERS

FINAL REPORT

**NATIONAL
PERFORMING ARTS
TOURING SCAN**

OCTOBER 2020

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**Culture
Counts**

FOREWORD

Australia Council for the Arts

I welcome this report of the National Performing Arts Touring Scan. The mobility of artists and their work is vital to the sustainability and vibrancy of the arts in Australia. Australians should be able to experience the inspiration, satisfaction and wellbeing that stems from the arts, no matter where they live.

Touring extends the life of a work beyond its original presentation, expands audience access, extends employment for artists and grows the reach of arts investment. For the 70% of Australians that live in a greater capital city, touring serves as a humble reminder of how awe-inspiring this country is, both in its landscape and its people. The benefits that touring provides in facilitating exchange between artists and communities is one of mutual benefit and a virtue that should remain at the heart of touring investment.

Support for a National Performing Arts Touring Scan was expressed through public consultations for the Major Performing Arts Framework in 2018, in which the need for better coordination and alignment of touring, both interstate and intrastate, was identified as an urgent priority. Other peak bodies also emphasised the need for an in-depth examination of touring. This Scan, for which stakeholder consultations spanned most of 2020, was managed by the Australia Council on behalf of the Meeting of Cultural Ministers.

This report forms one of the two outputs of the Scan, the second being an aggregation of national touring activity provided to Australia Council and distributed to state and territory jurisdictions. It details the touring activity of artists and companies that tour, audiences, communities, networks, presenters and state/territory and national funding mechanisms. As a whole it provides a picture of pre-COVID touring activity and outlines the scope of performing arts touring and associated engagement activities, but inevitably illustrates some of the early effects of the COVID-19 pandemic from March 2020 onwards.

I wish to express my personal thanks to all who gave their time to this project during such a difficult period. Reshaping and rebuilding touring activity will be a critical component of repairing the damage to the sector. These outputs have already been used to support touring investment decision-making as part of our industry response to COVID-19 and we expect them to be of immense value in future efforts as well.

I hope that the results of this scan inspire and inform a more strategic, cooperative, harmonised and holistic approach to investment in and support for national and regional touring.

Sincerely,



Adrian Collette AM

Chief Executive Officer,

Australia Council for the Arts

From the Authors

This report represents the final output of a year's worth of sector engagement and data analysis. 87 consultations with 141 individuals took place across all states and territories between January 14 and August 31, 2020. The acquittal data of 244,980 activities that took place between 2015 - 2019 was also analysed.

The Scan began from a place of optimism. Buoyed by the collaborative success of reinventing the Major Performing Arts Framework to create the new National Performing Arts Partnership Framework, the Meeting of Cultural Ministers turned its sights towards a new challenge: National Performing Arts Touring. The use of the term 'Scan' was deliberate. Unlike the new Partnership framework, there is no tripartite agreement for touring investment. The task was therefore not to review, but to explore. Where had the sector been and where did it want to go? This was no simple task.

In conducting the Scan, we split the process into two parts - a targeted first phase including a literature review, issues paper and consultation with key stakeholders, followed by a second phase of data analysis, wider sector consultation and follow-up. Both phases would be cap stoned with report updates; a methodology that proved fortuitous when COVID-19 intervened in all our lives.

Even after the unprecedented impacts of COVID-19 became clear, sector stakeholders remained overwhelmingly supportive of this work. While the impact of the pandemic demanded adjustments to the project, the requirements of the Scan were still able to be met within the original timeframe. This would not have been possible without the generous contributions of all stakeholders, despite the exceptional difficulty many of them were experiencing.

The challenging task of aggregating and analysing the wealth of data provided by Australia Council and state and territory jurisdictions has provided a much clearer picture of funded touring activity in Australia. The process has also established practical solutions that would support further data aggregation, if jurisdictions wish to continue this work into the future. Case studies were included during Phase Two to showcase positive initiatives that addressed key areas of opportunity referenced within the Scan.

This Scan is not the first time national performing arts touring has been explored and stakeholders were eager to see outcomes from this work. An emerging vision of increased harmonisation and cooperation between Australia Council, Commonwealth, state and territory jurisdictions in touring support and investment was welcomed by all. On request we explored the practicalities of harmonisation for jurisdictional bodies, noting the challenges associated.

The sector recognises that the complexities of the national touring ecology reflect the diversity and intricacies of Australia itself - its geography, governance, institutions and communities. Serving this multitude of needs requires an ongoing and flexible approach to investment from all parties.

We hope the breadth and depth of this scan supports the realisation of the opportunities identified.



Jordan Gibbs

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EXECUTIVE SUMMARY

This report represents one of the two key deliverables of the National Performing Arts Touring Scan (the Scan). The second deliverable is an interactive dashboard, which maps the footprint of national touring activity from data provided by the Meeting of Cultural Ministers (MCM) state and territory jurisdictions. The Scan consulted widely to develop an understanding of the national touring ecology and to report the issues and considerations raised. This report reflects the extensive commentary provided in those consultations.

The touring ecology comprises:

- those who **produce** touring work
- those who **present** touring work
- those who **support** touring work, and
- those who **experience** touring activity

Consultations revealed a highly networked and decentralised ecology that relies on few funding streams and knowledgeable personnel. Few in the sector have a full understanding of the ecology, with a wide range of anecdotal evidence of repercussions caused by decisions long forgotten.

Touring activity is heavily reliant on government investment from local, state and federal government (including Australia Council). For touring producers and presenters, the interdependence of these three main investors and their respective policy positions present strategic and operational risks that could be avoided or mitigated.

Stakeholders urge federal and state governments to consider harmonising or coordinating their support.

These investors are highly influential in the operation of the sector, which is evident in the concerns raised by stakeholders:

- Unlike other areas of arts investment, the substantial costs inherent to touring in Australia have not been met by the required level of financial diversity
- Corporate investors do support touring activity, but typically only in regions where they operate. Regional venues and audiences cannot afford the fees associated with touring activity if it is not subsidised.
- National touring would be significantly smaller without government investment. Australian Government investment through the Australia Council represents 60% of the total dedicated touring funds of all jurisdictions. Playing Australia and National Touring Status funds represent 35% of Australia Council's overall in-scope grants funding pool and up to 76% of this pool goes to supporting regional artists or regional arts activity¹.
- Touring activity is heavily influenced by government investment. Half of Playing Australia funding goes to organisations who receive no multiyear funding from Australia Council. Programming decisions are therefore influenced by the Playing Australia investment criteria.
- Harmonisation of federal and state tour funding (e.g. aligning application timelines, coordinating support, standardising desired outcomes etc.) would save considerable time and administrative effort for applicants and potentially allow more national tours to be realised.

¹ See Section 4, Table 1 for Jurisdiction Touring Investment, Table 3 for Australia Council grants funding and Table 5 for Regional Grants Funding. Scope Excludes Visual Arts, Literature, Exhibitions, Publications or Recording Activities. See Section 4.1 for details.

The touring sectors' capability and capacity is stretched thin and is unlikely to deliver the same level of touring activity post-COVID.

Prior to COVID-19, producer touring costs were growing, presenter fees were increasing and there were fewer financial incentives to tour widely. The complexity of touring funding was making forward planning more risky, so producers were less inclined to develop work for touring.

COVID-19 has accelerated these trends. To increase the resilience of the touring sector and secure its future, investors should consider how they support all four of its core components. Where investors focus too heavily on the supply-side of touring, program content is likely to be out of step with venues and audiences. Too broad a focus on the demand side risks further decreasing the variety of touring work available. Where the support functions are neglected, the sector struggles to adapt.

The role of local government as a cornerstone investor in national touring is not evident or is undervalued in the vast majority of the investment decisions of federal and state bodies.

Local government represents \$752m of annual recurrent expenditure into the cultural sector². Local government investment in programming touring work is required to make touring happen. Though the proportion of this investment is unknown, 68% of venues are local government entities and presenter fees (which do not represent the full cost of investment) can range from 50% to 100% of that of state and federal touring grants. Supporting presenter capacity is expected to aid audience development and community engagement in regional touring.

The vital roles that audiences, their development and community engagement play in the touring ecology is undervalued.

Investment systems focus on the supply side of touring (i.e. producers). Touring data on audience attendance or activity location in grant acquittals is inconsistent. Government cannot make strategically informed decisions about access if it does not know how and where the work it funds is being accessed. Consultations have revealed that presenters play a key role in building audiences and engaging their communities and that this remains a challenge for many regional venues.

First Nations touring is increasing, but structural challenges and inflexible processes are holding it back.

Support for the supply side of First Nations touring work seems to be improving, but perceived artform restrictions amongst producers (i.e. contemporary music and comedy considered as popular genres for First Nations artists, but perceived as ineligible) and inflexible funding and support structures may be preventing more artists from touring. Consultations made it clear many presenters feel they lack the capability and capacity to develop audiences for First Nations work. This is despite the recent National Arts Participation Survey showing a significant interest in First Nations work (40% of Australians). Local government presenters feel under-supported and under-resourced in developing relationships with their local Indigenous communities and few have done so. First Nations touring artists and organisations are often left to perform this work as a result. The Mission Songs case study (see Appendix 3) illustrates some of these challenges.

The benefits of multi-year funding for touring are evident from the success of National Touring Status.

Stakeholders believe the current funding model creates inefficiencies in touring operation and design. Recipients of National Touring Status understandably praise its flexibility, the certainty it provides for them and their presenting partners, and the benefits of increased efficiency and cost effectiveness. Most stakeholders acknowledge the importance of separate funding tranches and conditions for touring activity versus project grants or other types of arts funding.

² See Section 4.4 Local Government for further information on local government investment

Success in touring requires it to be considered during the creative development process – which typically requires longer lead times and greater upfront expenses. Companies that fail to consider the touring viability of a work when creating it are more likely to encounter difficulties getting it on the road and greater whole-of-project costs as a result. Companies that regularly tour appear to have integrated it into their business model and strategic thinking.

The touring role of National Performing Arts Partnerships Organisations’ is unique to their context.

Venues generally consider Partnership Organisations to add brand weight to venue programming (through their established names and reputations) that they are able to leverage with audiences. The sentiment that ‘all Australians should be able to see the national companies’ is shared by many, but the financial implications of delivering this ideal must be considered. The genesis of Playing Australia was in acknowledgement of Major Performing Arts Companies not being adequately resourced to tour and was originally an exclusive funding pool for them; having since evolved into an open grant round. Partnership Organisations that are mandated to tour believe they should not have to lodge separate funding applications for touring, while small-to-medium companies resent having to compete with larger organisations for tour funding. Stakeholders do not believe Playing Australia funding should be reduced or split to address these respective issues. Between 2015 - 2019 Partnership Organisations received 40% of Playing Australia investment and represented 60% of total audiences for national touring work supported by Australia Council. Small-to-medium companies supported by Australia Council investment represented 60% of audiences for regional touring work.

The role of marketplaces or ‘showcases’ has evolved and become more important within the cultural ecology as a whole.

Their unique blend of creative discussion, tour-ready work and professional development brings many parts of the ecology together in an essential networking event, particularly for regional venues and presenters. Tour development remains an important outcome, but sector networking is a primary benefit. Consultations reveal the sector-managed marketplaces feel uncertain about their future due to the lack of specific multi-year investment. Their value within the cultural sector may not be well enough understood or documented to make the case for investment – a situation that could be addressed by a coordinated approach to outcomes measurement involving all of the market managers.

Markets that have been able to specialise and adapt to the needs of their local cultural ecology have reported positive results and feedback from attendees.

COVID-19 will have significant long-term impacts on the national touring ecology. The effects on the wider national cultural ecology have been discussed vigorously by the sector and are still unfolding. Stakeholders had significant praise for Australia Council and Government funders that responded quickly and flexibly to the immediate effects of COVID-19 lockdowns and measures. The implications for the future of the national touring ecology are not yet known; all 2020 touring ceased, 2021 touring is likely to be heavily reduced and current planning for 2022 is impossible for most. The complexity of the touring ecology, and its dependence on government investment, suggests it is unlikely to emerge from this disruption in its previous form.

Although many touring arts organisations were able to access JobKeeper, many presenters were ineligible being local government entities (approximately 68% of venues). It is widely expected that local governments will downsize or withdraw their support for presenters and that touring organisations will prioritise destinations with commercial appeal at the expense of regional audiences.

COVID-19 has necessitated major rethinking of touring and its purpose within the broader cultural ecology for many stakeholders:

- The touring sector is re-thinking the approach, purpose and value of touring activity. This appears to be speeding up existing trends in touring, such as prioritising cultural exchange over traditional fly-in-fly-out touring models.
- Careful government consultation with and monitoring of the sector will be required to chart a path for whatever touring may look like, out of the lockdown.
- Due to lead times required for touring planning, a major reduction in arts activity and in the capacity of the cultural sector will likely have the longest effect on regional audiences' access to the arts.

OPPORTUNITIES AND CHALLENGES

Based on the work undertaken in Phase One and Two, and in regard to the scope of this Scan, the following is our summary of the immediate opportunities and challenges that have arisen from consultations with the sector.

Opportunities for Government Investment Models

- Increase the flexibility of Playing Australia criteria. This could provide more opportunities for touring to drive audience development for particular types of work (such as First Nations), and community engagement, by allowing for more flexibility from applicant types and eligible artforms. For example, consortia of presenters could apply and receive funding, with acquittals required to provide evidence of audience or community impact.
- Reinstate and expand National Touring Status collaboratively between Commonwealth, State and Territory governments. Multi-year funding for touring encourages a long-term approach to the development of outcomes and impacts, and more cost-effective touring (i.e. avoiding remount costs by enabling touring direct from home base seasons of the work) as demonstrated by the National Touring Status initiative. MCM Members could consider how their own touring funding could be pooled (similarly to the Partnership Framework approach) to increase the number and diversity (genre and location) of companies with National Touring Status.
- Harmonisation between States/Territories and the Federal Government (i.e. Office for the Arts (OFTA) and Australia Council) can be achieved through aligning Playing Australia with jurisdictions' grants programs and touring funds. If MCM jurisdictions want to continue providing individual support for the same touring work, then this alignment requires administrative configuration. Otherwise investment could be harmonised by MCM jurisdictions seeking to not fund the same tours; so that Playing Australia focuses on supporting the entirety of a national tour (i.e. not excluding the intrastate component) and that MCM state jurisdiction members focus on intrastate tours which are likely smaller in scale and scope.
- Guarantee and separate tour funding for Partnership Organisations who have a mandate to tour nationally in the Government Priorities attached to their 4+4 agreements. Partnership Organisations have historically received 40% of Playing Australia investment and 65% of National Touring Status investment (approx. total of \$15m over 5 years). 50% of Playing Australia investment also goes to organisations who receive no organisational funding from Australia Council. An increase of approximately \$3.5m per year to Partnership Organisations with a government mandate to tour nationally should alleviate their need for federal touring grants. Coupled with increased flexibility to Playing Australia criteria, this could provide an increase in access for regional audiences by 277k attendees per year, calculated at the Playing Australia subsidy average of \$10.80 per attendance.

- Create more initiatives to fund regional venues or presenters directly to leverage local government support. The Live Music Australia program is one example that provides grants for small to medium sized venues that supports original Australian live music³. Visual Arts touring funds are generally considered to improve local government investment in visual arts and empower presenters, because the money goes directly to Councils. Supporting regional venues, through direct funding initiatives or sector support organisations is believed to improve presenter relationships with local councils and support the wider touring ecology (see CircuitWest case study, Appendix 3). Creative Victoria reported positive outcomes from their experience directly funding some regional venues.

Opportunities for policy development

OFTA and the Australia Council in consultation with jurisdictions could jointly develop a policy framework for national touring, outlining the outcomes desired from touring, providing a context for funding investment programs, and guidance for applicants about the outcomes they should focus on when planning tours. This would require a cooperative understanding of how intrastate touring policy goals support national and regional touring objectives.

Challenges and opportunities to build sector capability and capacity

In order to improve touring outcomes (including building audiences for more First Nations and culturally and linguistically diverse (CALD) work), those consulted advocated for long term professional development needs to be more widely available, particularly for local presenters (in urban, suburban, outer metropolitan, regional and remote locations), and producers and touring support organisations (see Section 5.1.3 for a list of the areas for inclusion in this professional development).

CircuitWest's⁴ professional development programs provide a good example of what is required - presenter-focussed, issues-focussed, tailored, comprehensive and ongoing, with much delivered onsite locally (CircuitWest's programs are only available in WA, to CircuitWest members).

Ways to incentivise good practice in these areas, and to celebrate where it's being done well, could be explored and would help build a wider sector culture more supportive of these behaviours. Sector awards could be created for outstanding work in target areas, perhaps being added to existing awards programs which already engage presenters, such as the PAC Australia annual awards.

It is noted that local government plays a key role in managing presenter venues across Australia. Presenter peak bodies report that presenter venue managers often feel unsupported by their Council managers to program more diverse or adventurous work, and often don't have access to specialist marketing, audience development or community engagement staff. Partnerships with local governments and local government peak bodies could provide opportunities to develop and deliver appropriate professional development programs for venue staff and their managers (see examples in CircuitWest case study, Appendix 3).

³ Live Music Australia is a federal government contemporary music funding program and was excluded from the scope of this Scan.

⁴ CircuitWest is the service organisation for the performing arts in Western Australia and convenes WA Showcase, TechWest and provides Tour Coordination services for Western Australian artists and companies within Western Australia. CircuitWest represents Presenters, Producers and Artists and has strong ties with Local Government.

Opportunities for further insights from data analysis

Determining how the subsidised touring sector contributes to programming diversity will not be possible from analysing grant data alone. Partnership with Live Performance Australia (LPA) and their Ticket Attendance and Revenue data would offer investors a greater strategic understanding of the entire touring ecology and how its funding contributes to the government investment goals.

It is important to adopt a consistent data approach and continue monitoring the collective investment and acquittal information of MCM. Invariably, the funding ecology is split into the differing priorities of federal, state and local government. Promoting a consistent data collection process will ensure that it can be easily aggregated in the future. Australia Council multiyear funding statistical forms provide good examples.

There is value in continuing the data aggregation process of the BI Dashboard. Aggregating data gives investors the ability to appreciate the complexity of the funding ecology so that they can specialise their investment decisions. This will aid the efficiency and impact of government spending, so that it can be more than the sum of its parts.

Opportunities arising from the COVID-19

The present COVID-19 touring hiatus presents an opportunity to re-think the ways in which tours are funded, and to reimagine funding mechanisms to encourage a more adaptive approach suited to touring in the future. For example, there is a clear case for more intra-state touring while interstate mobility is affected, and more domestic touring while international touring is not possible.

Changes made to Playing Australia requirements, including funding for intrastate activity and remount costs, should be evaluated in terms of their ability to improve access for regional communities and support the sustainability of organisations. Many in the sector had called for these changes and they are detailed in this Scan as well. Understanding their effects and impacts will aid government in appreciating how to make its funding initiatives more effective in the long term.

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1 TERMS OF REFERENCE

The Terms of Reference for the National Performing Arts Touring Scan (the Scan) were agreed to at the October 2019 Meeting of Culture Ministers (MCM). Support for the Scan had been expressed through public consultations regarding the Major Performing Arts (MPA) Framework in 2018, in which the need for better coordination and alignment of touring, both interstate and intrastate, was identified as an urgent priority. This is a longstanding and consistent view and was notably raised during the National Opera Review, which recommended opportunities be considered to streamline and coordinate touring funds for MPA companies (now Partnership companies) which toured outside their resident states on a consistent basis, to deliver greater strategic opportunities for organisations, venues and audience development. Peak bodies had also emphasised the need for an in-depth examination of touring activity.

An objective of the Scan was to generate a clear view of the current touring environment including locations, costs, type and diversity of activity. This was to inform a more strategic and holistic approach to supporting national and regional touring, considering not only the range and diversity of companies that tour, but also to identify factors that might hinder access to performing arts and/or diverse performing arts offerings. The Scan sought to analyse key delivery gaps (including in geographic and art form spread of touring) and community developmental potential so that as many Australians as possible can benefit from live performing arts experiences.

The Scan included the work of Partnership companies and other publicly subsidised performing arts companies (including small to medium-sized performing arts companies, groups and independent producers) that were supported through core funding and/or specific touring funding.

The Scan sought to identify and track touring related-activity and funding programs over a five-year period of activity from 2015 – 2019. Specific activities of interest to the Scan were defined in the Terms of Reference.

Inclusions: Interstate and intrastate performing arts touring activity
Direct publicly funded performing arts touring activity

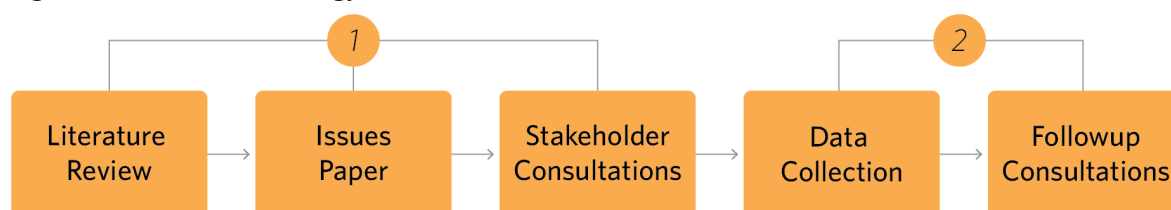
Exclusions: Commercial touring
Touring outside the performing arts
Contemporary Music Touring
International touring

The Scan considered three key areas:

1. Touring Activity
2. Touring Markets
3. Touring Support Mechanisms

The consultants proposed a two-stage methodology to meet the deliverables required of the brief.

Figure 1.1 Phased Methodology



Source: Culture Counts (2020)

The first phase of work undertook a review of literature provided in the brief and generated an issues paper for distribution to stakeholders. This paper served as a reference for discussion during stakeholder consultations. The literature review and discussion paper is available in Appendix 3. The final output of Phase One was a report delivered to MCM for its May meeting, summarising the issues raised in consultations in respect to the areas in the Terms of Reference.

The second phase of work collected data required of the Scan from MCM jurisdictions and performed follow-up consultations with selected stakeholders to fill knowledge gaps identified in Phase One. MCM members also provided feedback to the Phase One report. The output of Phase Two was a Final Report delivered to MCM for its November meeting and an accompanying BI dashboard shared with members, aggregating activity and acquittal data collected during Phase Two.

Commentary on the status of deliverables within the brief is detailed in Figure 1.2

1.1 About the Authors

Merryn Carter is an arts specialist consultant who provides research and strategic planning services, including audience research, program planning, marketing and audience development planning and ticketing system review. She has worked previously with PAC Australia, Circuit West, Country Arts WA, Country Arts South Australia, VAPAC, Regional Arts Victoria, the Australia Council for the Arts and the former Performing Arts Touring Alliance (PATA). She has a Bachelor of Music (Melbourne Conservatorium of Music, University of Melbourne) and an MBA (Melbourne Business School).

Jordan Gibbs is the Client Director of Culture Counts Australia. Culture Counts is a monitoring and evaluation solution that works to identify outcomes from cultural activities and what impact and value these outcomes have. Culture Counts' client team work with over 300 government and cultural organisations across Australia, with a public value database that as of September 2020 consists of 12.3m datapoints across 12,703 surveys and 640,109 survey respondents. Prior to Culture Counts, Jordan worked in theatrical and event technical production. His qualifications include a Master of Business Administration, a Master of Arts & Cultural Management and a Master of Fine Arts (Cultural Leadership).

Figure 1.2 Project Deliverables

Ref #	Description	Status
1	Mapping of the geographical spread and concentration of performing arts touring by: <ul style="list-style-type: none"> • art form • population density • State and Territory touring • engagement with Culturally and Linguistically Diverse (CALD) audiences 	The required definitions to map the performing arts touring ecology are provided in Section 2. Data is discussed in Section 10. A BI dashboard accompanies this report. Australia Council data established the primary data schema in which data provided by State and Territory members was formatted to fit. Activity level data was inconsistent within acquittal data. Data modelling approaches have been applied to generate an aggregate understanding of the requirements. We will update the BI dashboard at the end of 2020 if partners are able to provide additional data.
2	Identification of touring considerations of performing arts companies (such as funding, costs and revenue potential, planning trajectory, human resources, venue considerations, audience development); and of the shifting ecology of touring performing arts delivery (such as residencies, digital access).	The major concepts in touring considerations explored through consultations are detailed throughout this report. Considerations of capacity are detailed in Section 5, whereas policy considerations are detailed in Section 3. All sections concern elements of the shifting ecology, with four specific case studies generated and included within Appendix 3. Section 11 details impacts of COVID-19.
3	Analysis of financial support mechanisms by state and territory agencies, Australian government agencies including the Australia Council as well as support (financial and in-kind) provided by national and jurisdictions' peak bodies, including identification of funding opportunities and gaps.	Analysis of funding mechanisms is provided in Section 4. Funding data has been provided by all MCM members. Quantitative analysis of financial support for the touring sector is provided in Section 10.
4	Identification of gaps in the market including commentary on requirements to meet gaps (infrastructure, professional development, networks, support) identified in potential and under-served markets and communities across Australia. High level recommendations on the development of markets, especially in regional and remote markets.	An analysis of commentary on markets and the touring market is provided in Sections 6 and 8 respectively. CircuitWest case study in Appendix 3 provides examples for how state-based markets can be supported and the outcomes of the approach.
5	Identification of opportunities for improvements to the national and regional touring ecologies, including better coordination of touring timelines, diverse and balanced offerings, planning trajectories, outreach and educational offerings and opportunities to reach under-served areas.	Opportunities and challenges arising from consultations have been provided in the executive summary. The BI Dashboard provides information about touring activity and which areas are underserved or supported.
6	Identification of opportunities for greater representation of diversity and First Nations people in both touring offerings and community reach.	Commentary has been provided in Section 7. Mission Songs Project case study in Appendix 3 provides examples. A Cultural Safety checklist from Illbijerri Theatre is available in Appendix 5.
7	High level recommendations for touring data frameworks to improve and anticipate market demand and supply.	Live Performance Australia data was not available for analysis and does not accurately cover regional venues. Improved engagement with regional presenters is expected to improve the relevance of funding to market needs. Recommendations are provided in the executive summary and data frameworks are discussed in Section 10. The BI Dashboard shows touring work by genre where provided.
8	High level insights regarding the current extent to which performing arts organisations deliver touring digitally, or supplement physical tours with digital resources, along with an indication of future potential.	High level insights are provided in Section 9. At the request of stakeholders, we have also included commentary concerning sustainability here. For some stakeholders, their move to digital and other economically sustainable touring models has been partially motivated by their commitment to reducing their environmental footprint. The Country Arts SA case study in Appendix 3 provides information about digital engagement.

2 DEFINITIONS OF TOURING

IN THIS SECTION:

We categorise touring under different types - intrastate, interstate, national and international. These distinctions are required by the main investors of touring (local, state and federal government), but touring activity within these categories is generally interconnected.

The different players in the touring ecology (producers, presenters, venues etc.) receive varying levels of financial support from investors, with federal government support primarily focusing on the supply-side of touring and local government investing more on the demand-side via their provision of performance venues.

The project brief was to examine non-profit and government-subsidised performing arts touring at the national level. This includes intrastate touring but excludes international touring. Contemporary Music touring was considered out of scope within the brief. 'Touring' refers to activity taking place outside of the originators place of residence. Differences in terminology and context mean that definitions of touring activity can be ambiguous. This scan sought to pursue an inclusive set of definitions regarding touring due to the wide set of stakeholders it involved, and to meet the brief requirements of Reference #1. For the sake of clarity, we provide the following, non-mutually exclusive definitions of touring:

By **Intrastate Touring** we mean touring which does not cross any state/territory borders, being contained within the one state or territory⁵.

By **Interstate Touring** we mean touring which crosses state or territory borders.

By **National Touring** we mean touring which includes at least three state/territory locations, excluding a producer's home state (as per Playing Australia guidelines).

By **International Touring** we mean touring outside of Australia.

2.1 What is Touring?

In the broadest sense, touring occurs when a work or program⁶ is performed away from the producer's hometown or usual venue. Though generally touring refers to a performance, it can include other forms of engagement. Touring is usually defined as a series of international⁷, national, interstate, intrastate, city and or regional or remote performances, requiring the performers and crew to be away from home for a period of time. Activity that can be delivered from a central location to outer-metropolitan venues or closer regional centres can also be classified as touring, even though many of these tours do not require overnight stays by performers or crew. They are still taking their performances to an audience beyond their home base.

We note this definition of touring is entirely producer-centric. Presenters and audiences do not tour; only artists and crew travel (many audience members do also travel to performances outside their hometowns, but such experiences are not the subject of this report). For presenters, they are hosting a team of artists and crew, enabling a performance, and helping the artists engage with their communities. For audiences, they are gaining access to experiences that would not otherwise be available.

⁵Data analysis in the Scan defines activity that crosses SA3 regions as intrastate touring, outside of Greater Capital Cities.

⁶We note that while theatre and opera companies, for example, usually tour one single 'work', music organisations usually tour a program or programs containing multiple works.

⁷International touring is outside the scope of this scan.

2.2 Stakeholders and the National Touring Ecology

An investor view is used to describe the touring ecology. Investors are:

- Federal Government (including the Australia Council and Office for the Arts)
- State and Territory Governments
- Local Governments

These investors provide support for an overlapping series of stakeholders:

- Presenters
- Producers
- Audiences
- Venues (which can also be presenters)
- Support
- Creatives

Presenters represent those responsible for ‘presenting’ a work, which traditionally includes activities such as selling tickets, marketing, audience development, promotion and organising local resources. Presenters are usually the primary holders of the relationship with audiences. In the context of touring, venues generally operate as the presenter, however producers do sometimes self-present.

Producers are those that create and are responsible for the work itself. The touring and performing arts ecology is generally considered to primarily exist between Presenters and Producers, however the nature of these relationships is not fixed. It is therefore appropriate to define additional categories of stakeholders for the purpose of this scan.

Venues are the environments in which a work or program takes place. Often the terms presenter and venue are used interchangeably, but this can lead to confusion in situations when the producer is also the presenter. For producers that run their own venue, they can be the presenter, producer and venue.

The nature of the financial relationship between producers and presenters varies but can include:

- **Venue hire model** - where the producer bears all of the entrepreneurial risk, pays the venue a hire fee and takes all the ticketing revenue (minus any extra charges the venue might make to cover ticketing, marketing, crew and front of house costs).
- **Venue as presenter model** - where the venue bears all of the entrepreneurial risk, taking all the ticketing revenue, and the producer is paid a set fee for the performance.
- **Shared risk model** - where the producer and the presenter/venue share the entrepreneurial risk. This can include various proportions of producer fee and split ticketing revenue, for example sharing risk 50/50, 70/30, or whatever is mutually agreed.

Note that to the community or audience, the difference between these models is usually invisible – their perspective is commonly that all the performances are presented by the venue. From the marketing viewpoint, therefore, all performances (and other more participatory activities) at a venue contribute to the development of the venue’s brand.

Audiences are considered to be the consumers of a work and are mostly members of the general public. In the case of workshops, community engagement projects, or other participatory activities, the term participants can be used, denoting an active engagement experience as opposed to traditional more passive

forms of audience experience. For some forms of community engagement, the term ‘co-creators’ may be more appropriate.

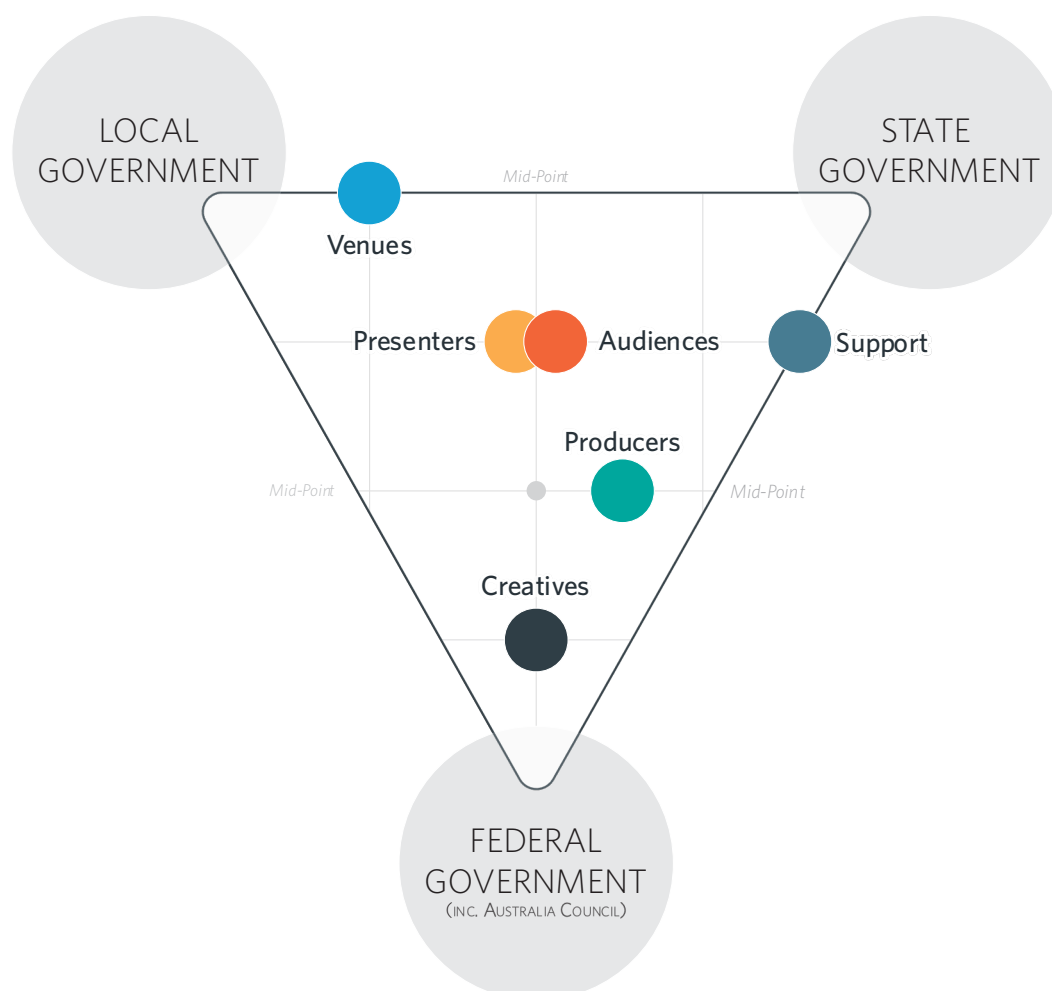
Creatives are those that conceive, create and stage the work. Creatives include artists and production and support staff. These are the individuals that are doing the touring. Creatives generally work for the producer. Their employment can be tied to the work itself. In some cases, the creatives are the same as the producer; this can depend upon the artform and scale of the work.

Support refers to third parties within the touring ecology that support the presentation and production of work, which are not presenters or producers. This includes peak bodies, tour managers or coordinators, markets, showcases and other ancillary roles.

The complexity of the touring ecology means that while a generalised model of touring can be described, there are inherent exceptions in all descriptions. Figure 2.1 represents the consultants’ perspective on the level of financial investment provided to each of the stakeholder categories by the three investor types, based on the information provided through consultations. For example, Venues (and therefore Presenters) are primarily funded by local government, Creatives primarily receive their funding from Federal sources and Support organisations are primarily financed by State Governments. These suppositions and their reasoning are expanded upon in Sections 4 and 10.

Figure 2.1. National Touring Ecology Investor Map

What are the sources of investment for each of the different stakeholder groups?



Source: Culture Counts (2020)

2.3 Size of the Touring Sector

There is an appetite to understand the size, geographical spread and concentration of the touring sector. The total live performing arts sector across Australia represents a considerable piece of the national economy. According to Live Performance Australia's (LPA) most recent 2018 Ticket Attendance and Revenue Report, in that year over 26 million tickets were issued to live performance events, generating total ticket sales revenue of almost \$2.2 billion - more than the combined attendances at Australian Football, Rugby League, Cricket, Soccer, Basketball, Rugby Union, Tennis, Netball and Baseball⁸.

Performing arts touring of all kinds sits within this total as a subsector, not identified separately in the LPA report. The touring activity which is the subject of this Scan - the subsidised performing arts touring sector - is a further subset (excluding all commercial and contemporary music touring) of that touring total.

In 2015-16, the former Performing Arts Touring Alliance (PATA), a national touring peak body, identified a methodology for quantifying touring activity in collaboration with LPA, as a sizable majority of all live performing arts touring data sits within the LPA report data set. PATA and the LPA (with their analysis partner EY) concluded that it should be possible to identify and tag all performances (whether commercial or subsidised) which were the result of touring activity and produce touring subset reports.

This process would provide a quantified map of the touring sector, and would enable detailed reporting by artform, genre and location of performance, with associated audience attendance and ticketing revenue information. It would then be possible to develop a detailed map of the subsidised sector within its whole touring sector context - and the role it plays in terms of encouraging artform and genre diversity, and regional and remote accessibility.

Any work with the LPA data set would constitute a separate specialised project in its own right, outside the scope of this Scan. It remains a possibility should governments see value in the information it would provide. It should be noted that current LPA ticketing data does not sufficiently represent the activities of regional venues; regional touring represents approximately 45% of all in-scope audiences for touring work supported by Australia Council (i.e. Partnership Orgs, Four Year Funding, Playing Australia and Other Grants)⁹.

PATA received pilot funding in 2016 to investigate with LPA and EY the feasibility of analysing the LPA ticketing and attendance data to provide information on the national touring market. The pilot process demonstrated that while the vast majority of government funded tours were found within the dataset, regional venues were under represented resulting in significant gaps in tour information. Submission to the LPA dataset by regional venues peaked briefly during the Australia Council's ADVICE project¹⁰ (2008 - 2012) through joint work with LPA and PAC Australia; a similar direct approach would be required to improve ongoing regional representation.

Acquittal data from the various MCM members is not easily aggregated. A lot of manual data cleaning needs to take place to understand what activities have been jointly funded by MCM members. Section 10 provides advice for data frameworks that would make aggregation and cooperation between MCM members easier.

⁸ Australian Sporting Attendances 2018, Stadiums Australia.

⁹ See Appendix 2. Excludes Visual Arts, Literature, Exhibitions, Publications or Recording Activities.

¹⁰ In the ADVICE project the Australia Council in partnership with state government arts departments worked directly with presenter venues around Australia, providing ticketing database analysis software and professional development support for marketing and audience development.

3 TOURING RATIONALE AND POLICY

IN THIS SECTION:

The policy imperative for national touring has become unclear, restrictive and in some cases dysfunctional. Many expect Australia Council to be responsible for developing policy to guide national touring programs.

Playing Australia is the main federal grant program for national touring, whereas state governments generally focus on intrastate touring activity and its role in their local cultural ecology. Most national touring includes and requires intrastate touring activity to be financially viable, but this was precluded in pre-COVID Playing Australia applications. Stakeholders describe the touring investor relationship as disjointed and one which negatively impacts producers and touring activity.

Producers tour because it is required by their business and operating model or because it relates to their strategic and creative intentions. Partnership Organisations with a remit to tour consider it to be an important part of their work. Venues and presenters are interested in touring as it provides programming opportunities to increase the diversity of experiences offered to their local community.

3.1 Rationale

For producers, touring is an effective way to extend their audience beyond the population of their hometown, provide more work for their artists, and to amortise the costs of making and producing work over a greater number of opportunities to earn ticketing revenue or fees.

Producing organisations tour for different reasons. For some, touring is an intrinsic part of their business model; without touring they would not earn enough ticketing or fee revenue to be financially viable. Some tour regularly but not that frequently – for example once every year or two. For others, it is a struggle to finance touring as much as they feel they should. Some organisations do not tour at all. Some organisations are required to tour nationally or intrastate as a condition of their government funding agreements.

3.1.1 Touring and the producers' business model

Artform affects touring viability. Companies with a full-time ensemble (such as most orchestras and many dance companies) generally have to consider the opportunity cost of regional touring versus performing in a major centre with larger audience potential. For companies with repertoire employing artists on a contract basis (such as most theatre companies), many think of touring as a way of expanding their reach with a comparatively smaller cost to their existing operation. A great advantage of touring classical music is a company's ability (subject to ensemble size or cost constraints) to shape the content for the tastes of the audience.

- Many producers whose business model relies on touring make work or design programs primarily for touring and tour at least one or more works or programs every year - sometimes for long periods. (Examples of this type of company include Monkey Baa Theatre, Sydney Dance Company, Australian Chamber Orchestra and Bangarra Dance Theatre).
- Other producers make work or programs primarily for their hometown seasons and may only tour once a year or less. Sometimes this will be determined by the demand for and touring suitability of a particular work, as well as their success in touring grant applications. These may include organisations who feel

the responsibility to share their work with audiences across their home state, but whose business model or size prevents more regular touring (e.g. some of the symphony orchestras and state opera and ballet companies, and some of the state theatre companies).

There are many ways to take work ‘on the road’:

- Some tours require touring-specific funding, like Playing Australia (which pays for the transport and accommodation costs) and/or state government funding, before they’re financially viable.
- Not all tours require or receive touring-specific funding. The Major Festivals Initiative (MFI), for example, requires producers to find a minimum of three presenters interested to co-commission and present their work – ensuring the work is then presented in at least three places. Some may refer to the seasons beyond the premier of MFI works as ‘transfers’ of the production, but when the performers are largely the same and the work is the same, it achieves the same outcomes as ‘touring’, with a commissioning process built-in
- Co-commissioning work specifically for tours or prolonged seasons in several places seems to be a growing trend outside the MFI too, amongst producers and presenters who have established closer relationships
- The Merrigong Theatre Company case study in Appendix 3 provides an example of how a presenter can create and support work for touring. Merrigong is an example of a theatre company and venue manager that runs independently of council and grew its production capacity through strategic seed funding

For presenters, touring provides opportunities to source experiences for their audiences that would not otherwise be available. Through developing closer, long-term relationships with producers, they are also able to align their programming with their audience development plans to build audiences for particular genres or types of work. Note that around 68% nationally¹¹ of city, suburban, outer metropolitan and regional performing arts centres are owned and managed by local governments¹². Most are valued for the ways in which their programs make the municipality a better place to live, work and visit, although there is a case to be made that many are under resourced. Producers consulted mentioned the difficulty many presenters have providing adequate marketing and audience development support for their performances.

For audiences, touring is a way of providing equality of access to experiences that would otherwise only be available to residents of the producers’ hometowns, or through audiences themselves travelling.

For tour destinations, touring can provide economic stimulation – the performances result in expenditure beyond ticket purchase including meals out, drinks, overnight stays, car hire, petrol purchase, and other related retail expenditure – and provide equality of access to arts experiences. Social impacts of shared arts experiences in communities include increases in personal wellbeing, connection to community, feelings of belonging, and civic pride¹³.

For investors/governments, touring can help achieve these outcomes for presenters, audiences and tour destination communities as well as for arts companies and artists – for example, expanding their capacity to earn ticketing or fee income and providing longer terms of employment for artists. We note that:

¹¹ as a percentage of PAC Australia presenter/venue members, figures provided by PAC Australia.

¹² either directly or through local government-controlled entities

¹³ Culture Counts, 2019. *A reminder on why the arts is important*.

- Without specific policy concerning touring, as is currently the case nationally, it is not clear for touring organisations which outcomes government is seeking through its investment in touring.
- The rationale for government investment in national touring is currently unclear.
- There is an opportunity to include these outcomes and impacts when considering the development of future policy to support national touring investment programs.

3.2 Policy

Policy influences the considerations of touring organisations. From the consultations, many in the sector perceive a lack of clear policy and strategic thinking concerning national touring. The 2005 CMC touring report¹⁴ called for a National Touring Plan and the 2012 Australia Council report¹⁵ called for a National Touring Framework, neither of which eventuated. Consultations suggested that there was not a clear outcome that would be derived from the development of such plans. The features and expectations of a national plan or framework varied within the consultations, though most stakeholders expect the Australia Council should be primarily responsible for any national touring policy.

3.2.1 Playing Australia

Commentary from touring organisations suggested that the national regional performing arts touring fund Playing Australia is perceived by the sector to have been operating in a largely policy-free zone. The varied explanations for the rationale and purpose of the fund from stakeholders supports this perspective, though it is noted the Federal Government disagrees with such an assessment. Historically, the aims of Playing Australia¹⁶ were to:

- encourage and increase opportunities for high-quality professionally produced performing arts to tour to regional and remote areas, by assisting venues, tour coordinators, producers and local communities
- distribute Australia’s performing arts more equitably and assist the Australia-wide delivery of high-quality performances
- expand audiences for quality, innovative and uniquely Australian productions by increasing the diversity and frequency of performing arts experiences available to Australians
- foster awareness of the performing arts and encourage cultural growth in the Australian community
- promote more viable touring circuits and assist the development of a national touring infrastructure, and
- increase opportunities for productions from regional areas to tour across State and Territory boundaries

We note that these aims are no longer listed as part of the Playing Australia information for applicants¹⁷, and the assessment criteria around the work or program itself (headed ‘Quality’) does not refer to ‘innovative or uniquely Australian productions’ or to diversity of experiences. Stakeholders say they do not understand the government agenda or priorities for touring outcomes. For example, is the development of audiences for innovative Australian work still an important aim of the fund, or what outcomes are being sought by funding producers to tour regionally, remotely and nationally?

¹⁴ Cultural Ministers Council, 2005. *National Review of Performing Arts Touring*.

¹⁵ Australia Council, 2012. *Are We There Yet? National Touring Framework*.

¹⁶ from *The Future of National Touring in Australia*, 2007, prepared by Jan Irvine, based on the deliberations of the National Touring Working Group. Re-drafted by Rob Robson for the National Touring Working Group, April 2008.

¹⁷ as listed on the Australia Council website, 30 April 2020.

3.2.2 Presenter-Driven

Playing Australia is described as a ‘presenter-driven model’. This description echoes the literature concerning the value of ‘demand driven’ funding in delivering better outcomes for government investment. Consultations made it clear that presenters feel Playing Australia is producer-driven. The funding is applied for by producers and given to producers.

Producers considered the ‘presenter confirmation forms’, that they were previously required to submit in Playing Australia applications, as a means of demonstrating presenter commitment and demand for the touring work. Producers and Presenters however did not consider these forms to be a suitable proxy for demand and caused difficulties for Producers due to the logistics of getting them signed. Requirement for this form was recently removed to make funding applications easier, however many producers indicated they continued to seek written presenter commitment to provide certainty for their tour planning.

Evaluation of tour outcomes from the presenter or audience perspective is not part of the acquittals process required by the Australia Council for Playing Australia grant recipients, nor supplied as part of the data analysis component for this brief. Not all acquittal data includes box office or attendance figures. This is the case for all grants data (i.e. not multiyear), including Playing Australia.

To investigate the impact of tours on communities and audiences would require impact measurement. Some presenters and producers do measure audience and community impact, but it is not standard practice across the sector. It is not clear that Playing Australia is therefore presenter-driven. Presenters would like a different form of engagement other than the process of signing ‘presenter confirmation forms’, with many saying the forms do not reflect what they actually think. Notably, one producer consulted sends a short survey to presenters after they leave, with a view to improve their service offering. Another producer holds workshops with presenters so they can ensure the content they are creating is desired by presenters. These examples are largely producer-led initiatives that have been born from presenter dissatisfaction with the current system.

3.2.3 Intrastate Touring

National touring often depends upon and affects interstate or intrastate touring. It is all part of the interconnected Australian touring ecology. Not all states have touring funds available for their home companies to tour intrastate. Not all states agree to fund the home state legs of tours that have received Playing Australia funding. Playing Australia currently does not fund home or intrastate touring. For companies based in geographically large or sparsely populated states, it can be impossible to make a national touring itinerary work without support for the home state leg. Many producers consulted in large or sparsely populated states made the case for Playing Australia funding to include their home state, to remove this impediment to national tour-making.

The Queensland, Victorian and Western Australian governments have specific touring investment programs, and guidelines that describe the aims of their programs. The other states and territories do not. Most do, however, include touring in their other grant categories. Some states have programs limited to supporting producers; others are more open, including to presenters. Most state touring investment programs are restricted to single programs, tours or years, as is Playing Australia; WA is the only state to have officially introduced a multi-year funding scheme specifically for touring. A more detailed description of touring support in each state is available in Appendix 1.

4 FUNDING

IN THIS SECTION:

Playing Australia is the main grant program for national touring. It funds touring costs such as travel, freight and accommodation. Unlike other funding, it is not redistributed within the arts sector. Some state governments operate similar specific grant programs for intrastate touring costs. Stakeholders consider ‘on road’ costs to be the biggest barrier to financially viable touring and believe that it should remain separate from other arts funding to avoid the danger of funds earmarked for touring being absorbed into other program costs.

The Australia Council’s historical implementation of National Touring Status has understandably been considered successful by recipients and stakeholders alike as it addresses structural problems inherent in touring funding. It increases flexibility for operators, allows for long term planning, supports relationship building with presenters and delivers successful touring content and outcomes. Many stakeholders want these qualities to be integrated into general touring funding.

4.1 National Funding

An analysis of financial support mechanisms provided within the touring ecology is required as per Reference #3 of the Brief. Given Australian geography, with a relatively small population spread across such a large area, it is inevitable that all but the most commercially popular performing arts will require subsidy to tour extensively, particularly to regional and remote regions. Among most of the organisations consulted, tour funding is considered complex and difficult to coordinate between state and federal deadlines and requirements. For many tours, both state and federal funding is required for more extensive or ‘national’ tours to proceed. The Australian Government through the Australia Council provided approximately 60% of the total dedicated touring funds of MCM jurisdictions. Table 1 summaries dedicated touring funding.

Table 1: Touring Investment Summary (2015 – 2019)

FUNDING SOURCE	FUNDING	# OF GRANTS	AVG. GRANT
PLAYING AUSTRALIA	\$26,960,445	132	\$204,246
NATIONAL TOURING STATUS	\$7,424,005	8	\$928,001
WA TOURING	\$5,327,578	60	\$88,793
VICTORIA TOURING	\$6,004,839	81	\$74,134
QLD TOURING	\$8,262,404	124	\$66,632
NSW TOURING	\$3,878,659	65	\$59,672
TOTAL	\$57,857,930	470	\$123,102

Note: National Touring Status supports multiple tours. Its average grant is therefore not appropriate to compare.

4.1.1 Playing Australia

The Playing Australia fund is designed to remove (at least part of) the ‘tyranny of distance’ when planning tours, by providing funding to cover producers’ travel and accommodation costs (i.e. ‘net touring’¹⁹). It does not contribute to salary or production costs, which must be covered by earned revenue or other investment types. In this sense, Playing Australia funds do not go to arts organisations or artists, but to the heart of touring costs such as airlines, vehicle hire companies, and accommodation providers

¹⁹ Australia Council for the Arts, 2019. ‘Playing Australia Guidelines’.

In discussing Playing Australia, small to medium arts organisations commented that their budgets can appear large in years when they receive Playing Australia grants. The average Playing Australia grant is \$204,246. Recipients wanted to stress that this funding does not stay with the company or flow to artists. Although valued in helping them reach wider audiences, and providing extended employment for contract artists and crew, they feel it does not contribute to the sustainability of their organisation in the same manner that traditional arts funding does. This perspective will vary based on an organisation's business model, as it can also be the only federal-based funding for some organisations (see commentary provided in Section 3.1.1 regarding opportunity cost and those that tour frequently). Touring funding primarily enables organisations to travel, without imposing the costs of travel on the presenters and audiences to whom they travel. It provides equity and access to arts experiences for regional and remote audiences.

Playing Australia funding was initially only available to Major Performing Arts (MPA) organisations from its inception in 1990, before opening up to all producers as part of 'presenter-driven' model changes to the program. Playing Australia included triennial funding for MPA companies between 2000-2009 as part of a recommendation of the Nugent report²⁰. It was made a full competitive project-based grant round prior to its administration being transferred to the Australia Council in 2012. The call for guaranteed tour funding for MPAs was made in the 2016 National Opera Review (rec. 6.17 and 6.18) and agreed to in principle.

Consultations in this Scan generally supported this finding, with Partnership Organisations believing they should not have to lodge separate funding applications for touring, while small to medium companies equally resent having to compete with larger organisations for tour funding. Given the perception that there are limited financial resources available to support touring activity, most stakeholders do not believe that current Playing Australia funding should be reduced or split to address these respective issues. This indicates a general belief that if Partnership Organisations are to receive guaranteed funding for touring, this should come from the addition of new investment into the ecology. Given the stakeholder perspective that touring investment is different to typical or traditional arts funding, stakeholders contend that greater touring investment would represent an increase in support towards regional communities and their local economies. Between 2015 – 2019, \$26.96 million was distributed through 132 Playing Australia grants²¹. Approximately 40% of Playing Australia investment went to Partnership Organisations, of which 95% of those recipients had a mandate to tour nationally²². State Theatre SA and Queensland Theatre were the only partnership organisations who received Playing Australia investment without a remit to tour nationally. Approximately 50% of Playing Australia recipients do not receive organisational funding from Australia Council.

Table 2: Playing Australia Distributions (2015 – 2019)

RECIPIENT ORGANISATION STATUS	FUNDING	# OF GRANTS	AVG. GRANT
PARTNERSHIP ORGANISATION	\$10,395,360	33	\$315,011
AUSTRALIA COUNCIL FOUR-YEAR-FUNDING	\$3,336,345	25	\$133,454
OTHER	\$13,228,740	74	\$178,767
TOTAL	\$26,960,445	132	\$204,246

²⁰ Department of Communications, Information Technology and the Arts, 1999. 'Securing the Future: Major Performing Arts'.

²¹ Figure excludes funding for National Touring Status, which is also funded through Playing Australia

²² Meeting of Cultural Ministers, 2018. 'Major Performing Arts Framework Consultation Paper.' Under the MPA Framework the following companies are expected to tour nationally: *Bangarra*, *Sydney Dance Company*, *The Australian Ballet*, *Australian Brandenburg Orchestra*, *Australian Chamber Orchestra*, *Musica Viva*, *Opera Australia*, *Bell Shakespeare*, *Circus Oz*.

Playing Australia and National Touring Status represents a significant portion of Australia Council’s historical grants funding: 34% of the total funding within the activity scope of the scan, or 27% and 7% respectively.

Table 3: Australia Council Grants Funding (2015 – 2019)

GRANTS FUNDING TYPES	FUNDING	# OF GRANTS	AVG. GRANT
ARTS PROJECTS FOR ORGANISATIONS	\$33,932,175	558	\$60,810
CONTEMPORARY MUSIC TOURING PROGRAM	\$1,749,253	107	\$16,348
ARTS PROJECTS FOR INDIVIDUALS AND GROUPS	\$24,428,033	946	\$25,822
CAREER GRANTS FOR INDIVIDUALS AND GROUPS	\$5,707,547	416	\$13,720
PLAYING AUSTRALIA	\$26,960,445	132	\$204,246
NATIONAL TOURING STATUS	\$7,424,005	8	
TOTAL	\$100,201,457	2,159	\$46,411

Note: Excludes Visual Arts and Literature funding categories. Known Exhibitions, Publications or Recording Activities removed. Where funding does not have activity data associated, filtering is based on funding category only. Funding may therefore include out-of-scope activities. Contemporary music included as it also includes First Nations artists.

The primary recipients of non-touring grants investment (for in-scope activities) are artists or organisations that do not receive multiyear funding from Australia Council.

Table 4: Australia Council Other Grant Funding Distributions (2015 – 2019)

RECIPIENT ORGANISATION STATUS	FUNDING	# OF GRANTS	AVG. GRANT
PARTNERSHIP ORGANISATION	-	-	-
AUSTRALIA COUNCIL FOUR-YEAR-FUNDING	\$5,222,960	75	\$69,639
OTHER	\$60,594,047	1,952	\$31,042
TOTAL	\$65,817,007	2,027	\$32,470

Note: Excluding National Touring Status and Playing Australia.

When looking at acquitted grant activity, the primary beneficiaries of grants may be regional artists or audiences. This definition of ‘regional’ considers activity taking place in a non-metropolitan ARIA code or grant recipients based outside Greater Capital City areas. Approximately up to 80% of acquitted grants funding and total audiences could be for regional activity or regional artists. The difficulty with this finding is due to how frequently acquitters select ‘other’ as their activity ARIA code. This cannot be reverse-engineered without the postcode information (see Section 10.2). Further information is available in the accompanying BI dashboard.

Table 5: Australia Council Acquitted Grants Distribution Summary (2015 – 2019)

		ALL ACTIVITIES			ALL REGIONAL		
		FUNDING	# ACTIVITIES	AUDIENCE	FUNDING	# ACTIVITIES	AUDIENCE
PLAYING AUSTRALIA	MPA	\$6,276,854	2,408	313,937	\$5,916,017	2,207	291,862
	FYF	\$2,202,628	16,285	104,644	\$1,531,638	16,215	89,515
	Non-MYF	\$8,224,722	5,705	1,104,220	\$7,447,655	18,422	381,377
OTHER GRANTS	MPA	-	-	-	-	-	-
	FYF	\$4,389,722	1,859	227,953	\$3,960,854	1,733	222,576
	Non-MYF	\$43,225,851	22,643	3,327,875	\$33,357,728	17,956	2,476,496
TOTAL		\$64,319,777	48,900	5,078,629	\$52,358,554	43,288	4,062,632

Note: Represents acquitted activity. Excludes National Touring Status. ‘Regional’ is defined as funded activity NOT in an ARIA Metropolitan code or Organisation recipient postcode not located in Greater Capital City. Inclusion of NULL ARIA codes may overstate regional data.

4.1.2 National Touring Status

In 2013 the Playing Australia National Touring Status (NTS) multi-year funding initiative was created by the Australia Council, based on consultation with the sector and the then federal Ministry for the Arts.

National Touring Status grants were introduced to support the 2015-2017 touring programs of performing arts companies with demonstrated national touring experience. These grants were designed to enhance the development and engagement of regional and remote audiences through longer-term partnerships with presenters, and enable the funded companies to plan and present a longer-term regional touring and engagement strategy. National Touring Status grant applicants were able to apply for up to \$400,000 per annum. To be eligible for National Touring Status, companies had to demonstrate a track record of - successful national touring. Successful applicants were not eligible to submit applications to the standard project funding rounds of Playing Australia for the duration of their National Touring Status funding. NTS was limited to four companies each funding period. The first recipients in 2015-2017 were Bell Shakespeare, Sydney Dance Company, Patch Theatre Company and Circa. The second set of recipients in 2018-2020 were Patch Theatre Company and Circa returning, and new recipients Critical Stages and Circus Oz. The continuation of National Touring Status in 2021 is being considered by Australia Council.

Comments from National Touring Status recipients during the consultations for this project indicate it solves some of their biggest problems in touring, i.e. the ability to plan further in advance, and commit to dates, venues and presenters without waiting for funding decisions. Touring is cheaper if producers can tour direct from a season (no re-mount or re-rehearsal costs), and book advance airfares. It also allows them to make multi-year commitments to presenters seeking to build regular audiences for particular producers' work. At least one organisation consulted, however, had not applied for National Touring Status because of the \$400,000 per annum cap; their success through annual Playing Australia rounds could often total a higher amount.

Of NTS recipients, Partnership Organisations received 68% (\$5.015m between 2015 - 2019). At the conclusion of the current NTS round, it is expected to be 65% (\$5.779m).

Table 6: National Touring Status (2015 - 2019)

RECIPIENT ORGANISATION	ORGANISATION TYPE	FUNDING
SYDNEY DANCE COMPANY	Partnership	\$1,200,000
PATCH THEATRE COMPANY	Four-Year-Funding	\$1,608,560
CIRCA	Partnership	\$1,815,999
BELL SHAKESPEARE	Partnership	\$1,200,000
CRITICAL STAGES	Other	\$799,582
CIRCUZ OZ	Partnership	\$799,864
TOTAL		\$7,424,005

Note: National Touring Status consists of a three year funding period. 2020 funding for Circus Oz, Critical Stages, Circa and Patch Theatre Company is excluded.

4.2 State Funding

As described in the 'State Policies' section and Appendix 1, each state has different priorities around touring which their approach to tour funding attempts to address. State funding is obviously affected by their budget capacity – the ACT, Northern Territory and Tasmanian arts budgets, for example, are smaller than other states so they have proportionately less funding potentially available for touring. None of these has a specific touring fund. As mentioned in the 'Intrastate Touring' section, the only states with dedicated tour funding programs are Queensland, Victoria and Western Australia. The situation appears fluid. State government commentary regarding their respective touring funds is summarised as followed:

- The Playing Queensland Fund has been so successful over recent years it has become very competitive; Arts Queensland has separate allocations in place to prevent the major companies from 'swallowing up' the fund
- Create NSW had a dedicated touring fund prior to 2019 when it restructured its funding scheme and rolled tour funding into other funding streams
- Creative Victoria was reviewing their support for intrastate touring and regional engagement; this process was interrupted by COVID-19. The process will be resumed as soon as possible. There is currently no specific touring funding available from the Creative Victoria
- The Western Australian Playing WA fund is allowing for multi-year applications, and for stakeholders other than producers to apply. Playing WA has been tweaked to increase effectiveness and ease of application over the years, which is much appreciated by applicants. It also has allocations in place to prevent the larger companies from 'swallowing up' too much of the fund

State funding for touring obviously affects the capacity for intrastate touring of each state's companies and artists, but it also impacts their ability to tour nationally. As referenced above under Touring Policy, especially for organisations and artists in larger or sparsely populated states, the ability to develop a viable national tour itinerary can be seriously hampered by lack of funding for the home state leg of a proposed tour. Many consultees would welcome a revised tour funding system which harmonised state based tour funding with national tour funding, and/or allows national tour funding (such as Playing Australia) to include home state or intrastate touring (beyond the current temporary COVID flexibility measures).

The present COVID-19 touring hiatus presents an opportunity to re-think the ways in which tours are supported and encouraged through the funding mechanisms (also to re-imagine those funding mechanisms to better address future needs), and to provide more support, for example, for intrastate touring while interstate mobility is still affected.

Providing **multi-year tour funding** would make long term planning and the development of more lasting presenter-producer relationships, and audience development, more possible. There are risks associated with locking into longer funding periods, however. Current multi-year touring funds still have requirements around what funding can be used for (such as the current 'net touring cost' definition used by Playing Australia), and guidelines about the types of work and audience experiences (including community engagement opportunities, and building audiences for First Nations work, for example) that will be prioritised for funding. Figures on tour funding by the state governments are included in Section 10.

Table 7: State Touring Funding Summary (2015 – 2019)

TOURING FUNDING	FUNDING	# OF GRANTS
WA TOURING	\$5,327,578	60
VICTORIA TOURING	\$6,004,839	81
QLD TOURING	\$8,262,404	124
NSW TOURING	\$3,878,659	65
TOTAL	\$23,473,480	330

Note: Dedicated tour funding only. Tours can also receive funding through other project grants. These are excluded here.

4.3 Creative Development

Consultations revealed producers' frustrations with the separation of funding for developing work, and the funding to tour it. Receiving both types of funding (touring and developing or creating) aligned to facilitate touring straight out from premier seasons is described as near impossible with current funding arrangements (with the exception of the Major Festivals Initiative fund). This has significant impacts on re-rehearsal and re-mount costs, performance fees, ticketing revenue, casting and tour personnel.

Re-mount or re-rehearsal costs make the touring product more expensive for presenters, as these costs are passed on to them. Producers are generally eager to keep their touring fees lower and more affordable for presenters.

Involving presenters in the commissioning and/or creative development process can result in tours going straight out from premier seasons (in addition to other benefits). See the Merrigong Theatre Case Study in Appendix 3 for examples of how an alternative producer-presenter business model can facilitate creative development of work for touring.

One funding initiative mentioned in the consultations as providing support for the creation of work that has gone on to tour was the 'MPA Collaborative Arts Projects – Organisations Program', which encouraged major organisations to work with the broader sector and community groups. Barking Gecko, for example, described the process of co-production on *Storm Boy* (Sydney Theatre Co) and *Fully Sikh* (Black Swan) as very successful; *Fully Sikh* was scheduled to tour this year.

The Rabbits (a Barking Gecko co-production with Opera Australia in association with the West Australian Opera), was commissioned by Perth Festival and Melbourne Festival through the Major Festivals Initiative, and was toured nationally.

There is an opportunity to improve coordination of the funding mechanisms for creating work, and for touring, alongside the possible 'harmonisation' process. The examples above show the importance of strategic initiative funding in creating and touring work; the challenge is to create ongoing funding streams which are perceived as more accessible than the Major Festivals Initiative, and available to organisations outside the Major Festivals context.

4.4 Local Government

Local government is a significant investor in national touring, particularly through the provision of regional, suburban and outer-metropolitan performance venues and programming funds. Sixty-eight percent of venues in the Performing Arts Connections (PAC) Australia network are owned and managed by local governments. The dispersed nature of local government makes it difficult to coordinate with them in a manner akin to the Meeting of Culture Ministers. Between 2013 – 2018, Australia Council funded the National Local Government Cultural Forum initiative, coordinated by the Cultural Development Network (CDN)²³. An output of the forum was a survey of local government’s investment in arts and culture.

CDN provided an extract of the work, shown in the following table. Excluding the investment of capital cities, CDN believes local government invests \$593m of annual recurrent expenditure into the arts and cultural sector. This represents approximately 79% of total annual local government investment in arts and culture, when capital city expenditure is included.

Much like the analysis of Australia Council investment, this funding covers many areas including visual arts, theatre maintenance, operational costs, festivals and contemporary music. Regional council and/or touring investment is included within these figures, but is not separately identifiable. Unlike Federal and State government funding, it is likely to feature the full cost of presenting events and activities and therefore also may include the income generated through these activities, such as ticket sales.

Presenters typically buy touring work for a fee. Fees will vary depending on the scope and type of work being performed. As a conservative estimate, we suggest that local government presenters’ fees represent approximately 50% of the touring grant, as a typical minimum. Note this fee does not represent the total cost of presenting a work and underestimates total local government touring investment. There is capacity to work with local government to generate a more complete understanding of their investment into the touring sector. Culture Counts partnered with the Municipal Association of Victoria²⁴ in 2020 to generate a BI dashboard that explored the survey data used by CDN to understand local government investment.

Table 8: Local Government Investment in Arts & Culture

TOTAL INPUTS (EXTRAPOLATED TO 564 LOCAL GOVERNMENTS)	% OF TOTAL	TOTAL
Subset: Total Inputs, Capital Cities Data Extracted		
Cultural Capital Assets	82%	\$5,832,708,971
Cultural Collection	86%	\$2,586,056,965
Recurrent Gross Expenditure	79%	\$593,287,000
Subset: Performances, Capital Cities Data Extracted		
Number of Activities		83,617
Number of Sessions		148,642
Number of Creative Participants		10,564
Number of Participants (Inc. Creative)		18,065,416
TOTAL INPUTS		
CULTURAL CAPITAL ASSETS		\$7,145,309,907
CULTURAL COLLECTION		\$3,004,450,786
RECURRENT GROSS EXPENDITURE		\$752,491,889

Source: Cultural Development Network (2020). Representative of the 2017-18 Financial Year.

²³ Cultural Development Network, 2018. ‘Final Report 2018’. *National Local Government Cultural Forum*.

²⁴ Municipal Association of Victoria, 2020. ‘Culture Counts Victorian Snapshot’.

5 TOURING SECTOR CAPACITY

IN THIS SECTION:

The touring sector is decentralised and highly networked. Both the demand and supply sides of the ecology, as well as the support functions that enable it, require support. Examples demonstrating positive outcomes have been observed where investment is made with a whole-of-sector approach.

Local governments appear to be broadly detached from state or federal government thinking around touring, despite the critical role they play in supporting touring activity. Both producers and presenters report difficulty in being able to maintain the current state of touring activity.

5.1 Context

The capacity of the touring sector influences the considerations of touring organisations. The arts and cultural sector is populated with talented, passionate and committed staff doing their very best with the skills and resources available to them. Many go above and beyond their role descriptions to provide high quality arts experiences with huge impact in their communities.

5.1.1 Resourcing, audience development and community engagement

Most arts organisations in Australia are under resourced; some are more stretched than others. Small to medium producers and individual artists are the least well resourced, and Partnership Organisations are under real pressure to earn an enormous percentage of their revenue at the box office.

In the current COVID-19 lockdown some of the largest organisations, those most dependent on ticketing revenue, are, perhaps surprisingly, some of the most vulnerable. Some producers are able to provide more support for marketing and audience development for their tours than others.

Producers who develop closer relationships with their presenters are generally in a better position to understand their audiences, and to work with them to build those audiences.

Touring First Nations producers and artists related experiences during the consultations which illustrate the varying levels of support offered by presenters. Some presenters are not able to supply culturally safe spaces for touring artists but expect these artists to do the work of building relationships with their local First Nations communities. While some First Nations touring producers have resourced themselves to build community relationships in advance of and during their touring, others do not have this capacity, and it should not be their responsibility. Presenters should develop their own capacity to build relationships with their local First Nations communities. Programming the work is only one component of the process required for audience development or community engagement. (See further detail in Section 7 and in the Mission Songs Case Study, in Appendix 3).

While presenters may express a desire to program more culturally diverse work, or stimulate community engaged cultural practice in their communities, sourcing the work or the artists can be difficult. Touring markets generally include a very small proportion of artists or producers offering CALD, First Nations or community engaged work. (See 6.1.5, Diversity of work presented at marketplaces).

CircuitWest offers a professional development Program Planning module²⁵ which encourages presenters to include more diverse work in their program plans, with associated strategies for audience development and community engagement (audience development and community engagement are also supported through CircuitWest’s professional development programs). The CircuitWest Case Study (see Appendix 3) illustrates some of the requirements for successful audience development, including state government investment in sector managed professional development.

Building regional touring audiences is not the same as building capital city audiences, but not every producer understands that this means they should tailor their marketing material. Some producers mentioned, during the consultations, that offers of community engagement activities associated with touring performances were not always accepted by presenters – usually because the presenter felt insufficiently resourced to support such work.

Addressing the supply side of touring (i.e. through funding the producers) without addressing the demand side (e.g. through providing support to presenters) will not necessarily result in better audience development or community engagement outcomes. If presenters do not have the capacity and capability to optimise audience demand for touring performances, the whole touring equation will not meet the sector’s expectations.

5.1.2 The role of local government is critical

Local government presenters face pressure to meet ticketing income targets, and to build audiences. Their staff represent the front line of responsibility for providing audiences for touring programs. The reality for many, however, is that they are severely under resourced, particularly when it comes to marketing and audience development capacity and capability.

Local government’s role in the touring ecology (as owners and managers of roughly 68% of presenter venues) is critical if the impact on audiences and communities is considered an important outcome: Key insights include:

- The more successfully they can build audiences for tours, the more tours will be viable financially.
- If touring and developing audiences for contemporary Australian work is considered a priority, then the role of local governments in appropriately resourcing and supporting their performing arts centres or smaller venues to enable successful audience development is vital.
- Many of the comments from the consultations centred on the need for increased professional development and improved resourcing in audience development and marketing, as well as programming and curation (including commissioning and producing), for both presenters and producers.
- See the Merrigong Theatre Case Study in Appendix 3 for an example of an alternative local government investment model which provides increased capacity for supporting creative development and local artists

²⁵ Disclosure: report consultant Merryn Carter has provided professional development programs for CircuitWest members.

5.1.3 Examples of professional development support and the investment required

While there are ongoing programs within the sector addressing professional development needs (for example the Australia Council’s leadership program and Creative Victoria’s ‘Creative Exchange’ series), there are few programs designed specifically to meet the needs associated with touring. Key programs include:

- Regional Arts Victoria and VAPAC have run a ‘Touring Workshop’ each year for some time, targeting producers who are new to or aspiring to tour.
- PAC Australia has long recognised the need for professional development and continues to address professional development for its members as hosts and programmers of touring content through keynote speakers and sessions at its annual conference, and through programs like PowerPAC ²⁶.
- CircuitWest (the WA presenters association) has more recently established a series of touring-related professional development programs and materials available to its members, which include program planning, marketing and audience development.²⁷ Showcase WA also includes a significant professional development component each year. This work probably represents one of the highest impact professional development programs currently available in the touring sector. We note that it is supported by sustained and considerable investment from the WA state government, and urge other government agencies to consider similar investment. (See CircuitWest case study, Appendix 3.)

The existing programs are no doubt having some effect on sector capacity and capability, but more work is required nationally and consistently over the longer term, in order to have a significant impact on audience development and community engagement outcomes. As mentioned repeatedly by those consulted for this report, touring-related professional development needs include:

- Curation, program development and program planning (which should include collaborative creative development, commissioning and production processes)
- Marketing
- Audience development
- Community engagement, particularly in developing relationships with First Nations and CALD communities
- Effective audience research

5.2 Diversity and Access

Diversity and access were of keen interest to many involved in the Scan. Diversity here speaks to ensuring that the touring sector is providing work that is relevant to all members in a community; specifically, culturally and linguistically diverse communities. Presenters and venues indicated that they wanted to improve their reach into different communities in their region and thereby increase the range of audiences with which they engaged.

There were three core issues underlying the success of diverse touring work that were continually raised in consultations. Generally speaking, these issues concerned:

²⁶ resources provided by PAC Australia available at <https://paca.org.au/resources/powerpac/>

²⁷ templates created by CircuitWest available at <https://www.circuitwest.com.au/templates/>

- Creating the work
- Touring the work
- Finding audiences for the work

Much of the federal and state support focuses on the supply-side of touring work. Organisational and grants funding typically promotes the creation or generation of work, while touring funding then supports this work in reaching regional communities. Consultations spoke of improving outcomes toward creating more diverse work. Organisations like Multicultural Arts Victoria and Diversity Arts Australia work with artists and organisations to support the creation of new work that is relevant to a wide range of communities. Tackling negative impressions towards presenting diverse work was also a point of contention, with consultations describing a fear that making a work relevant to culturally and linguistically diverse communities threatened success with established audiences. It should be noted that with appropriately targeted and segmented marketing and audience development strategies, it is possible to develop audiences for diverse work, without threatening existing audiences or a presenter's brand. Presenters' capacity for this marketing and audience development work could be improved through appropriately tailored professional development, as suggested above in Section 5.1, and a commitment from local governments to increase staff resources for their performing arts centres. The latter is the more challenging, and perhaps could be achieved through an investment partnership approach with state governments, using their investment to leverage increased local government commitment. It should also be noted that building new audiences takes time; three-to-five-year commitments with sustained effort and investment are often required.)

Despite this reluctance to program more diversely by some presenters, Australia Council research demonstrates that there is increasing acceptance of and participation in culturally diverse arts experiences:

“While we know there is still work to be done to ensure the arts fully reflect the diversity of Australia's people, an increasing proportion of Australians agree the arts in Australia reflect our cultural diversity (71%, up from 65% in 2016). In addition, more than one in three Australians connect with, and share, their cultural background through arts and creativity (36%) including more than half of CALD Australians (62%) and significant cross-cultural arts engagement. This is a positive indicator for social cohesion and intercultural empathy in Australia.”²⁸

This research should be distributed and discussed more widely amongst presenters, as part of any response to the professional development needs outlined in Section 5.1.

Creating work with the advance intention that it will tour beyond its initial presentation may sometimes mean that initial creative development costs are higher. The concept of greater upfront investment is driven by the potential of a better return on investment in the long run. Updating and upgrading a set, as well as remount costs, can be expensive when done in an ad hoc manner over the life of a tour. The reason this is important for considerations of access and diversity echoes the arguments of the Boots' Theory, i.e. that larger companies with more resourcing have greater capacity to make a more significant upfront investment than smaller ones. This is a reality that needs to be appreciated in investment decisions, when only one Partnership Organisation has a dedicated focus on First Nations work.

²⁸ *Creating Our Future, Results of the National Arts Participation Survey, August 2020, Australia Council for the Arts*

Cultural considerations concerning artists and their communities also affect touring decisions (see the *Fully Sikh* example in the CircuitWest case study, Appendix 3).

Finally, presenters' capacity to support and present the work needs to be considered. Presenters and venues are interested in diverse work because it can help attract new audiences, however not all presenters feel they have the capacity to support the marketing and engagement needs of promoting diverse works to different audiences. This can include engaging ambassadors from their local communities or changing the way a venue operates to make it more welcoming and culturally inclusive.

An important contribution to supporting diverse work is to ensure that decision makers, artists, administrators, crew and front of house staff are representative of their diverse communities as well. Embedding diversity at the core of an organisation creates a more inclusive and relevant organisation. Funders need to appreciate the complexity of supporting diversity initiatives in their investment decisions, so that ultimately the sector can better reflect the broad community of audiences.

Access to CALD and First Nations work available for touring, through the touring markets, needs to be improved to encourage more diverse programming. Tour markets currently generally offer only small proportions of this work, as illustrated in the following Section 6.1.5, Diversity of work presented at marketplaces. This could perhaps be achieved through a more strategic approach to state government investment in the touring markets, which rewards or incentivises increasing the diversity of work included in the markets.

6 TOURING MARKETS

IN THIS SECTION:

Markets (often called ‘Showcases’) are primarily valued by attendees for their unique networking opportunities, integrated with examples of work to be considered for programming. The diversity of touring funding requires producers to attend and pitch at several markets to develop tours. Some presenters still feel disempowered in their decision-making and wait for funding confirmation and final tour development. Where relationships break down, there is tension between producers and presenters concerning the work on offer at markets. Support organisations play a key role in facilitating stronger relationships in the sector.

Some within the sector have expressed concern that there are now too many touring markets; others feel this perception could be rectified by markets clearly identifying their purpose. Markets that have been able to specialise and adapt to the changing needs of the touring ecology report positive results. Some markets report difficulty securing ongoing financial support, which limits their potential to plan and adapt.

6.1 Context

Touring Markets are a unique element of the subsidised touring ecology and are a primary source for understanding the overall performing arts touring market. The network effects of markets play a major role in influencing the work that ultimately tours.

6.1.1 Market Definitions

The ‘touring market’ under consideration in this report may be broadly defined as comprising all performing arts **producers** – companies and artists – who wish to tour within Australia, all of the **presenters** or venues whose audiences they might wish to access, and all of the **tour managers** or coordinators who may help them with tour planning and logistics. A more detailed description of the nature and role of producers, presenters and tour managers is included in Appendix 2.

6.1.2 Producer-presenter relationships

Some of these producers and presenters, and tour managers, have well-established direct relationships with each other, resulting in ongoing business over the longer term. Many do attend sector conferences and showcases regularly, however, to build deeper connections face to face and to keep their networks current. Throughout the consultations, stakeholder comments reinforced the importance of relationships to successful touring – particularly relationships between presenters and producers.

How producers and their performances are curated or programmed within each presenter’s season – the context for the experience – plays an important role in shaping audience experience and impact. The degree to which the same producers are programmed longer-term, year on year or every two or three years regularly, plays a critical role in developing audience and community response to and understanding of their work. (Producers consulted for this project identified the need for further development of presenter skills and capacity in programming/curation, marketing and audience development.)

Audiences, audience development and community engagement, are perhaps the most important shared responsibilities in producer-presenter relationships.

6.1.3 Touring Marketplaces and Showcases

There are four established annual state-based touring marketplaces:

- **Showcase Victoria**, established 1992, managed by the Victorian Association of Performing Arts Centres (VAPAC) in association with Regional Arts Victoria (RAV). VAPAC is the peak body representing performing arts centres in Victoria, receiving membership fees and project investment from the Victorian government. RAV is an independent non-profit membership-based organisation and the peak body for regional artists and arts organisations, and regional creative practice, in Victoria. RAV is a member of Regional Arts Australia, receiving investment from Creative Victoria, Australia Council, Victorian local governments with whom it has partnerships, and Regional Arts Australia.
- **Showcase WA**, established 2013, managed by CircuitWest. CircuitWest is the service organisation for the performing arts in Western Australia, representing presenters, producers and artists, receiving membership fees and multi-year investment from the Western Australian government.
- **Queensland Touring Showcase**, established 2010, is now managed by arTour. (arTour won Arts Queensland’s competitive tender process to become the ‘official’ funded state touring organisation. The process requires a tender again at least every 6 years.) arTour supports performing artists and producers to tour work through regional Queensland and nationally, and assists Queensland presenters to program work for their local audiences. arTour is managed by Circa and supported by the Queensland government.
- **Showcase SA**, established 2014, is managed by the South Australian Presenters Association (SAPA). SAPA is a state association representing South Australian performing arts presenters. It does not appear to have attracted any government investment beyond membership fees.

Adelaide Fringe manages the well-established internationally focussed Honey Pot, which is designed to forge relationships between Fringe artists and arts delegates: presenters, programmers and producers of festivals and venues from around the world.

Arts on Tour, an independent non-profit organisation offering tour management and support services, is the peak body for performing arts touring in NSW. It receives investment from the NSW government and income from tour management fees. It has more recently developed the NSW based Salon, a meeting place for NSW-based artists, producers and presenters to connect and collaborate on the development and presentation of contemporary Australian work. It is designed to be intimate and ‘lo-fi’, with short pitches from both artists/producers and presenters to facilitate the process of finding collaboration opportunities.

There is one annual national touring marketplace called **APAX**, the Australian Performing Arts Exchange, which was established as PAX in 2015 by Performing Arts Connections Australia (PACA). PACA, formerly the Australian Performing Arts Centres Association, is the national membership-based peak body for performing arts centre presenters, producers and associated professionals. It receives membership fee income and project investment from Australia Council. APAX aims to present opportunities for networking, professional development, partnerships and conversations about work in development, as well as tour-ready work.

There has been one biennial internationally focussed marketplace that also interacts with national touring - the Australian Performing Arts Market (APAM), which focussed on international presenters and operated for 24 years as a biennial market event in Canberra (1994-1998), Adelaide (1998-2012), and Brisbane (2014-2018). For 2020-2024, it is based in Melbourne with a national remit; a small, dedicated staff of advocates ready to welcome, host and connect international artists, presenters, and partners with contemporary Australian performance. Now coordinated with Presenter events like festivals to support producers travelling to APAM, 'gatherings' have replaced the previous biennial market events. This has increased the number of APAM events and the diversity of contexts in which to visit performing arts communities around the country. The initiating investor in APAM is the Australia Council which issues a tender for APAM services every 6 years.

The Confederation of Australian International Arts Festivals (CAIAF) also holds a market-like event, every 12 to 18 months, known as the **Major Festivals Initiative (MFI) Commissioning Site (C-Site)**. The originating lead investor of CAIAF was the Australian Government through the Major Festivals Initiative, which is now managed by the Australia Council. Key features include:

- MFI C-Site provides an opportunity for potential co-commissioners (festival directors, programmers, venues and presenters) from Australia and abroad to see a selection of leading Australian companies and artists pitch new works.
- The curation model differs to a traditional market, where the MFI requires a producer to be sponsored by an MFI member in order to pitch. In that sense, those pitching at the commissioning site already have buy-in from a commissioning member.
- The MFI considers investment in three rounds: seed funding, creative development and pre-production. A seed funding proposal can be initiated by a single member to be decided by the Confederation. For a work to move on to the next stages, additional members and presenters are required to commit to presenting the work.
- Works that complete the MFI process to eventually be presented would be considered touring works by the definitions of this Scan.

6.1.4 'Marketplaces' financial security

From the consultations it appears there is general concern in the sector that many of the markets are not financially sustainable without subsidy, yet governments are perceived as reluctant to provide funding (apart from the Australia Council's multi-year support for APAM and the MFI). Some of the state-based Showcases find forward planning difficult when their state government support is only confirmed on a year by year basis. It appears none of the state-based markets receives specific funding from their state government on a multi-year basis, and some receive no specific state government support at all (apart from support for professional development activity which may take place as part of the marketplace program).

Coupled with the lack of multi-year government investment for most of the organisations which manage the state-based marketplaces, the result is insecurity. None of the markets is assured of its existence into the future; without government investment their managing organisations would be taking on significant entrepreneurial risk, which is impossible for most.

While local government employed presenters may be perceived as readily able to fund their travel, accommodation and registration fees to attend marketplaces, these funds often come from limited staff training budgets. If it can be difficult for presenters to afford marketplace attendance, small producers and independent artists find it incredibly challenging, and yet these marketplaces can provide them with some of the best opportunities to build their presenter relationships and secure tour bookings. Many feel torn between attending the national APAX/PAC market, and their own or closest state market, with pressure to attend both. These limitations on participants' ability to pay places a very real cap on the registration fees the marketplace managers can charge – hence the need for government support.

The role of touring marketplaces or showcases has changed over the past seven or so years, from a primary focus on transactions around tour-ready work, to most now also including discussion of work in development, co-commissioning opportunities, networking, and professional development opportunities (with some showcases providing more or less professional development content). Touring marketplaces remain a vitally important key support for the process of developing tours for producers, and program planning for presenters. Their lack of security into the future makes the touring development ecology feel rather precarious.

Are there ways in which state and federal governments could work with the sector to increase planning security around touring marketplaces, and the organisations which lead these marketplaces? The path to an answer is to establish consistent evaluation mechanisms to explore in more detail their role and impact on producer tour development and presenter programming.

6.1.5 Diversity of work presented at marketplaces

The type of work presented at showcases appears to be slowly diversifying; some may have always been more diverse than others. There are no uniformly kept records across marketplaces in terms of the artforms, genres or cultural backgrounds of work that is considered for inclusion or selected, so no accurate national comparisons are currently possible. From the information available, it appears the dominant artforms are theatre/drama, and work for children and families. First Nations work appears to be increasing but is still a fairly small minority (and not tracked at all by some markets), despite Australia Council research showing increasing audience interest.²⁹ CALD work has only recently been tracked by a few markets, and remains a small minority of works showcased. It is noted that most of the National Partnership Performing Arts companies consulted for this project don't usually present at marketplaces to arrange their tours, but rely on the already established direct relationships they have with presenters/venues.

In a 2015 survey of touring needs by PAC Australia of their members³⁰, the three least programmed categories of work were described as: majors/large scale work, specific artforms or genres (unfortunately not specified), and dance. The top three reasons given were cost, availability or willingness to program, and venue or technical requirements.

²⁹ In 2019, 6.5 million Australians attended First Nations arts or festivals, or 32% of the population aged 15 years and over – an increase from 26% in 2016. The data indicates that attendance was increasing across art form. *Creating Our Future, Results of the National Arts Participation Survey*, August 2020, Australia Council for the Arts

³⁰ APACA Touring Needs Survey, 2015

From the rough figures available from some of the Showcases in 2019 (artform classifications are not uniform across the marketplaces), the top three artforms or genres featured in pitches or presentations by producers were:

- **PAX** (PAC Australia) – Theatre 65%, Interdisciplinary/Hybrid 14%, Dance 12%
- **Showcase VIC** (VAPAC and RAV) – Children/Family 19%, Drama 17%, Live Music 17%
- **Showcase WA** (CircuitWest) – Theatre 36%, Cabaret 17%, Dance 14%
- **Queensland Touring Showcase** (arTour) – Children/Family 30%, and Circus/Physical Theatre, Dance, Drama and Live Music each at 13%

Of the markets measuring First Nations work as a proportion of presentations, Showcase WA reported it comprised 11% of work in 2019, Queensland Touring Showcase 2019 4% and PAX 2019 reported 26% of work had an Indigenous component. Showcase WA 2019 classified 3% of work as CALD.

A more detailed analysis of the trends in artforms and genres, including which dominate or are underrepresented at marketplaces, would require agreement between marketplace managers to collect, track and analyse data in consistent formats. This work could be facilitated through collaboration between the marketplace managers. After the Performing Arts Touring Alliance was discontinued in 2018, PAC Australia offered to take responsibility for arranging meetings between the market managers to pursue common interests. Two meetings have since been held in 2019. There may be an opportunity for PAC Australia or another entity to lead this future marketplace data collection, monitoring and reporting work.

6.1.6 Tour development from marketplaces

The ways in which tours are developed out of the marketplaces is also changing – when Long Paddock³¹ was the only national marketplace, the now defunct Blue Heeler network³² was the dominant tour coordinator, determining and managing the resulting tours. (Note that the terms tour coordinator and tour manager are used interchangeably.) There is no designated single national tour coordinator, neither is there a central national tour coordination mechanism. State-based tour coordinators may take on the development and management of national tours as the demand (from producers) and their capacity allows. Regional Arts Victoria used to manage more national tours than currently; it is now focussing on Victorian touring which delivers strategic outcomes. Other tour coordinators are stepping up to manage more national tours, as described below. It's not a regulated space. Some organisations support touring and manage markets, but don't manage tours themselves (for example most of the state presenter based peak bodies). Some also manage tours (e.g. CircuitWest). Some producers are deciding to try managing their own touring; others are deciding to outsource it to a tour coordinator. Some producers have always managed their own touring. Whichever way it's done, developing and managing tours involves a lot of work for the producer or artist, which either has to be resourced internally, or paid for externally.

³¹ Long Paddock, managed by Regional Arts Australia (RAA), evolved from informal gatherings and served as the national touring marketplace for around 15 years until 2014.

³² The Blue Heeler network was an informal but powerful network of RAA state-based staff

Consultations revealed the following shifting landscape at work in tour development:

- VAPAC reports that (former Blue Heeler) Regional Arts Victoria can no longer pick up all the tours its members want out of Showcase Victoria, and is seeking additional tour manager involvement. They are also watching the CircuitWest development below with interest and may seek to follow suit.
- RAV reports it can no longer meet all of the demand for touring in Victoria and would welcome another organisation working in this area
- CircuitWest is now receiving support to build their own tour coordination work, as a means to achieve impact in the communities the tours visit. This is a significant new development for CircuitWest.
- NSW based tour manager Arts on Tour has always leaned towards national rather than state-based tours, but in the last five years has increased the number of tours, and the number of touring weeks they develop and deliver; started working with non-NSW producers, where capacity allows, and increased the extent of their national reach in terms of the venues visited by the tours they manage.
- Another NSW-based tour manager, Critical Stages, has seen its role in managing national tours increase substantially over the past five years, on all measures – in terms of demand from artists, demand from presenters, their reach to more presenters, their state/geographic reach, and the number of weeks of touring. Critical Stages' National Touring Status has enabled them to plan more confidently over multiple years, which increases their capacity to develop and manage tours requiring long lead times.

7 FIRST NATIONS TOURING

“First Nations performing arts are diverse expressions of continuing living culture and of the narrative of Australia as a nation. They are a source of great pride to Aboriginal and Torres Strait Islander peoples and a reflection of cultural strength, resilience, innovation and artistic excellence.”³³

IN THIS SECTION:

Much like touring itself, the supply, demand and support of First Nations work on tour needs to be considered jointly if it is to prosper. Supply can be restricted by inflexible systems that do not consider the specific needs of Indigenous peoples. Demand is restricted by presenter perceptions of First Nations work or their own capacity to support audience development and Indigenous engagement appropriately. Support is restricted because Indigenous organisations that tour appear to be overly responsible for the engagement of local Indigenous communities on behalf of presenters.

Presenters need to increase their knowledge of First Nations people and culture, and develop local community relationships, to provide culturally safe spaces and further develop audiences for First Nations touring work.

NOTE: Consultations included Blakdance, Bangarra (inc. Libby Collins), Lydia Miller (Australia Council for the Arts), Cairns Indigenous Arts Fair, ILBIJERRI, Yirra Yaakin, Marrugeku and Jessie Lloyd. Tony Briggs was represented by Christine Harris.

Ensuring First Nations work is increasingly available and included in touring is a priority for most government jurisdictions. An analysis of First Nations engagement in the touring ecology is also required as agreed by officials. While the supply side of First Nations representation in touring works may now be receiving increased support³⁴, with more First Nations artists and organisations receiving funding, considering the role of the demand side is critically important to developing audiences for this important work.

Building audiences for First Nations work is perceived as challenging by some presenters, according to the consultations, who are looking for support to address what they see as barriers in their communities.

A quote from *Showcasing Creativity*³⁵ provides some insight into this presenters' perspective: *“I thought it was too hard hitting a work for this community. I didn't have the courage to do it. And I probably should have... It was such a strong, brave, fabulous work.”*

While Australia Council research on audience experience of First Nations arts shows an increase in participation³⁶, this does not mean most presenters are yet programming it confidently and attracting financially viable audiences. The report *Showcasing Creativity* showed that a small number of presenters were programming a disproportionately high number of First Nations works. Just 12 presenters (9%) were responsible for more than a third of all First Nations performing arts programming across Australia in 2015³⁷.

³³ Lydia Miller's foreword to 'Showcasing Creativity: programming and presenting first nations performing arts', Australia Council, 2016.

³⁴ 12% of Playing Australia funding supported First Nations artists or Indigenous Work.

³⁵ Showcasing Creativity, Australia Council, 2016

³⁶ One in three Australians were attending First Nations arts (32%, up from 26% in 2016) and four in ten were interested in First Nations arts (40%). Among those interested, nearly half reported a growing interest (45%). 'National Arts Participation Survey', Australia Council, 2020.

³⁷ Showcasing Creativity, Australia Council, 2016

It is important to acknowledge the differences between developing non-Indigenous audiences for First Nations work, and programming it with the expectation that local First Nations people will want to attend at a performing arts centre. Not all communities have made their First Nations people feel welcome in their arts centres, so in those cases there are real barriers to be overcome. Racism persists; relationships with elders and community must be established as a first step. For performing arts centre managers this can be very difficult when their local council is not supportive and not taking the lead. Attracting non-Indigenous audiences to First Nations performances can be more achievable, but still requires commitment and appropriate audience development strategies.

For example, Bangarra Dance Theatre works in two very different ways, tailored to the audience they are engaging. They present performances in mainstage capital city and regional performing arts centres, primarily to non-Indigenous audiences. In regional Australia they also work in First Nations communities, on country, often as part of the process of developing new work. They engage a specialist First Nations staff member to reach out and build relationships with First Nations stakeholders and audiences.

It's important to note that First Nations people increasingly want their work programmed and curated by First Nations people, to ensure it's given the right context, and because self-determination is their right. This could prove to be a challenge for under-resourced regional presenters, unless they develop ways of collaborating to share such a resource through their peak body, for example.

For First Nations organisations and artists to tour successfully, they need to be guaranteed a culturally safe space in every location. This responsibility lies primarily with presenters and tour managers (where engaged); again, resourcing will be an issue that could be addressed through collaborations between presenter peak bodies and state and federal governments.

More detailed work is required to provide a deeper understanding of the challenges facing presenters in successfully programming and developing audiences for First Nations work, and the capacity and capability building they will require. This will require engagement by and with local and state governments, and would benefit from support by federal agencies such as OFTA and the Australia Council.

The ability of a regional company or venue to provide a great creative environment for First Nations arts depends heavily on the extent to which the organisation is connected to the local First Nations community³⁸.

The Mission Songs Project Case Study (see Appendix 3) provides some examples showing some of the factors required for success and the challenges to be overcome, including establishing relationships with local First Nations communities, and ensuring presenters have the knowledge and capacity to provide culturally safe spaces.

ILBIJERRI Theatre Company provided their information and the checklists they have been developing to this Scan to help presenters provide their artists and crew with culturally safe spaces. They hope sharing these in the Scan can be used as a mechanism to help embed this practice nationally. We acknowledge ILBIJERRI's generosity in allowing these documents to be shared.

Further work can be done by state and federal governments in partnership with presenter peak bodies and First Nations people, to ensure culturally safe practice is embedded as part of all touring.

³⁸ Australia Council, 2020. 'Creating Art Part 1: The makers' view of pathways for First Nations theatre and dance'.

8 AUDIENCES

IN THIS SECTION:

Relationships with audiences are typically held by presenters. Producers tend to take a larger role in audience engagement where they have ongoing relationships with communities. Programming concerns tend to fall on audiences – whether they will be interested in the touring work available. Presenters that provide a consistent variety of arts activity engage a larger segment of their community. Examples of presenters with dedicated audience development strategies tend to be better served by the touring sector.

The touring sector primarily relies on anecdotal evidence and prior success to support their decision making. Presenter stakeholders suggest that in marketing to audiences, larger organisations can rely on the strength of their brand whereas smaller organisations are more dependent on each particular work. Specific research into audiences has shown that government funded touring delivers audience outcomes and experiences beyond that of commercial touring.

Audiences and their wider community contexts, like the local governments who manage most touring presenter venues, are key determinants on the demand side of touring. An understanding of audiences is critical for identifying gaps in the touring market, as per Reference #4 of the brief for this Scan. There would be little purpose in touring any performance work if there were no audiences to share the experience. Producers and presenters consulted for the Scan frequently mentioned the need for more serious, sustained and committed support for audience development work as one of their most urgent concerns.

8.1 Audience Research

Existing audiences, through audience research, express profound appreciation for the experiences provided by their local performing arts presenters and producers. Audience experiences, contexts and preferences vary widely across Australia. Some are frequent attenders across a wide range of arts experiences in their hometown, and when travelling interstate and internationally. Some are less experienced and less frequent attenders, with a narrower range of preferences.

- Audiences are thrilled when a major company comes to town but are not always able to distinguish national companies from state-based companies (for example in opera or ballet). Whether the ‘Russian ballet’ actually comes from Russia can be of lesser concern to them than their experience in the theatre.
- Adelaide Symphony Orchestra related two very different experiences in regional South Australia. One regional centre complained their program was too conservative (Rodrigo *Concierto de Aranjuez* and Beethoven) and wanted something more suited to their musically sophisticated audience; in another location their ‘top of the pops’ classical program drew their biggest ever audience in that town.

It is vitally important to include an understanding of the audience perspective while developing marketing and audience development strategies. There is a huge opportunity to improve the effectiveness of audience development – and community engagement work – through the support of increased audience research capacity for presenters and producers.³⁹ An example of the impact of audience research on audience development and marketing outcomes can be found in the CircuitWest Case Study, in Appendix 3.

³⁹ the authors acknowledge their conflict of interest in this assertion, as both provide audience research to the arts sector.

Regional presenters, through their programming over the longer term, shape their audiences' tastes, preferences and attitudes to what they experience, and also how they choose what to attend. A quote from an audience focus group for NORPA in Lismore, northern NSW,⁴⁰ illustrates how this can occur: *"I love being a subscriber, because you get to see things that you probably wouldn't have chosen ... and you get challenged, or excited, or stimulated."*

The impact of audience experiences can be profound and long lasting, as illustrated by another quote from the same research, about a contemporary theatre production: [So how did it make you feel?] *"Very very sad, and I know that I am meant to feel happy and feel that everything that was happening in the show was great and you should feel happy for everyone; it made me feel very sad and I cried and cried ..."* [.. very different to your expectation of the experience?] *"I loved it and I'm glad I had it, a great thing, it still affects me to this day ... I don't know if I will ever get over it, it was very hard – and why should I have to get over it!?"*

Audience research conducted by PAC Australia comparing the programming in three regional venues, found that:

- Government-funded touring activity generated stronger qualitative outcomes than commercial touring product⁴¹.
- Social outcomes measured in 235 surveys, such as respect or tolerance for different people and cultures, feelings of connection to people in their community, and a sense of inclusion, reveal that 72% of respondents reported higher outcomes for government-funded touring shows.
- In terms of the cultural outcomes measured – whether the experience was different to things audiences had experienced before, and if it was important for the cultural life of the region – 66% of respondents reported higher outcomes for government-funded touring shows.

Audience survey data from 2019 provided by the West Australian Opera⁴² and the West Australian Symphony Orchestra reveals their regional touring programs to be the most qualitatively successful of their entire seasons, according to audience responses. In the case of West Australian Opera, 50% of their regional audiences had never attended one of their performances before – a testament to just how important touring can be for regional audiences and their engagement.

Few presenters and producers engage in regular audience research of this nature however and are therefore missing one of the most valuable sources of understanding their audience, and of shaping more effective audience development strategies. Most of those consulted said they relied on anecdotal evidence, though noted the importance of having audience data if available.

8.1.1 Culture Counts' Aggregate Data

A number of performing arts organisations use the Culture Counts evaluation platform to capture audience feedback and assess the impact of their programs and activities⁴³. The Culture Counts system uses standardised question statements called 'dimensions' to aggregate responses across different activities, events and artforms. Developed and operated in Australia, the national Australian Culture Counts dataset is significant. As of September 2020, the dataset contains 12.3m datapoints across 12,703 surveys and

⁴⁰ from audience research conducted by Merryn Carter for NORPA, 2014

⁴¹ PAC Australia, 2019. *Outcomes & Impact Research Project*.

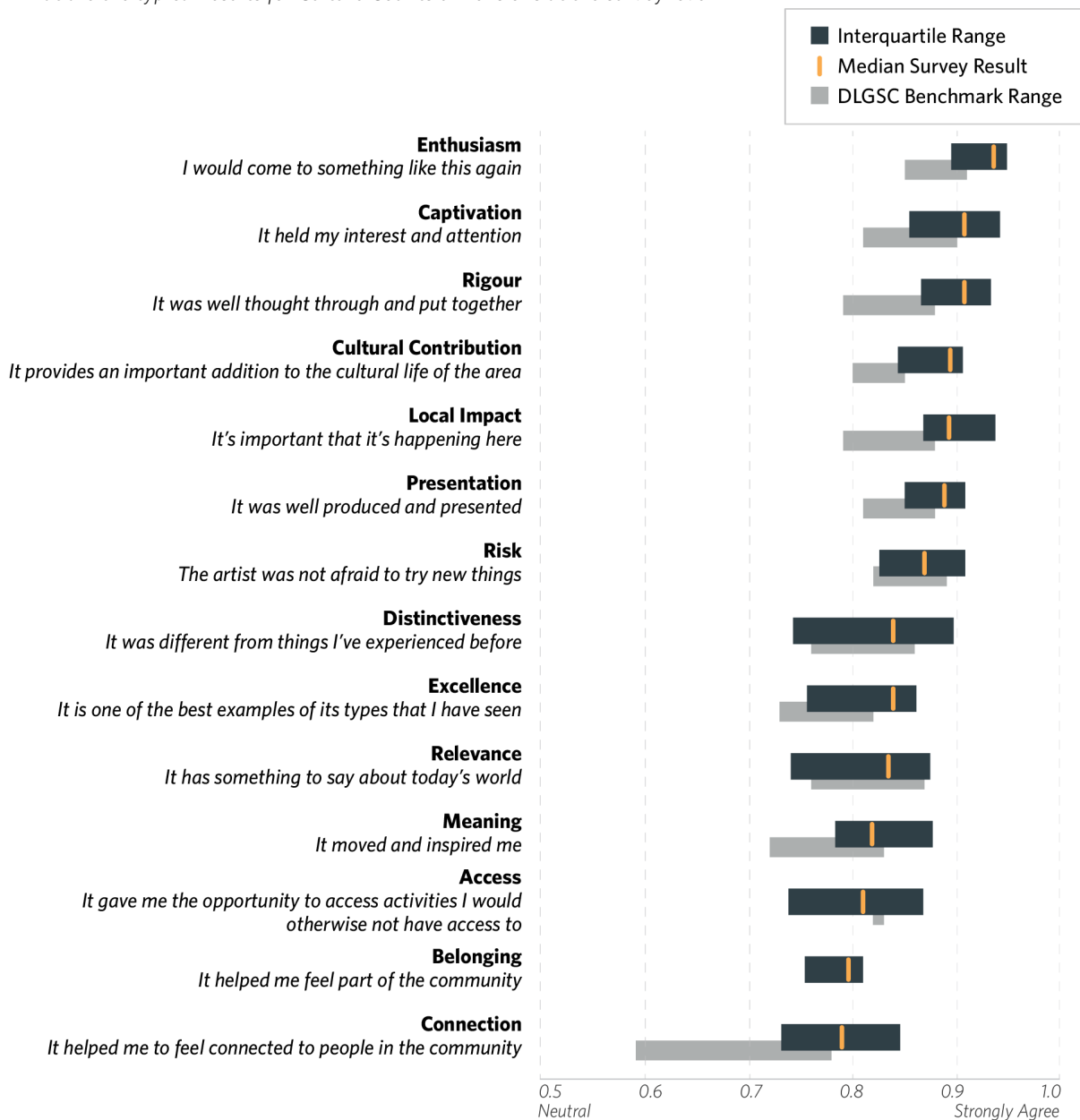
⁴² WA Opera, 2020. *Annual Report 2019*.

⁴³ Culture Counts is Software as a Service and Consultancy company. It is a co-author of this Scan. See Appendix 6 for more detail.

640,109 survey respondents. Culture Counts pulled data from its Australian dataset to see if it could represent the perspectives and outcomes of Australian audiences regarding the impact of regional and touring arts activity. Unlike touring activity in the UK Culture Counts dataset, which are specifically classified in partnership with Arts Council England, touring activity is not specifically classified in Australia. Instead a filtering mechanism was developed based on respondent postcodes and therefore the data is representative of touring activity and other regional arts activities. The interquartile range of dimension responses is represented below, matching the ‘Evaluation Snapshot 2016-19’ format released by the WA Government earlier in 2020⁴⁴. The WA dataset primarily represents respondents from the Perth metropolitan area.

Figure 8.1: Dimensions Results for Regional and Touring Activity

What are the typical results for Culture Counts dimensions at the survey level?



Source: Culture Counts, DLGSC (2020). Survey count (s) = 425; Response count (n) = 54,523. Count per dimension: 12 < s < 59; 757 < n < 7,439. Surveys with less than 20 responses removed. Surveys were included if distributor was a performing arts organisation receiving funding from state government or Australia Council. Surveys were assumed as regional or touring activity if over 50% of respondents had a postcode outside a Greater Capital City Area. Data tables and explanatory commentary provided in Appendix 6.

⁴⁴ Department of Local Government, Sport and Cultural Industries, 2020. ‘Evaluation Snapshot 2016-19’

These results represent the typical results for evaluated touring and regional arts activity in Australia, aggregating 54,523 responses across 425 surveys and 199 organisations in the Culture Counts platform. Larger ranges (i.e. 'Distinctiveness') indicate a higher variance in how regional arts activities achieve this outcome. Smaller ranges (i.e. 'Enthusiasm') indicate a stronger similarity in how this outcome is being achieved.

Enthusiasm is the strongest outcome in the dataset, indicating that audiences of regional arts activities believe they would attend similar activities again. The strength and consistency of this outcome suggests that many regional arts activities support, develop and grow desire for further participation in arts activities. Strong median results in 'Captivation' and 'Rigour' support the concept that regional arts activities are well thought through and are of interest to audiences.

'Distinctiveness' was the metric with the largest interquartile range. While achieving a strong median result, the larger range suggests that there was a wider spectrum of achievement regarding this dimension when compared to other dimensions. This understanding is of strategic importance to funders who are interested in supporting work that is different to other types of work that audiences may have experienced before.

The social dimensions 'Connection' and 'Belonging' had the weakest median results in the regional arts activity dataset. Of equal interest is that 'Connection' was the most frequently included dimension within surveys, featuring in approximately 50% of all evaluated activity. This suggests that for organisations evaluating their activity, promoting a sense of connection with community is a common desired outcome, but that it is also one of the most difficult to achieve. When compared to the DLGSC Culture Counts benchmarks, regional arts activity still achieves strong results for 'Connection', with the DGLSC median result of 63/100 compared to the regional result of 79/100.

The DLGSC benchmark dataset is the only publicly available outcome and impact benchmarks for Culture Counts data currently available, collating 37,972 public responses over four years between 2016 – 2019. While other benchmark datasets will facilitate more robust comparisons, such as ones expected to become available through Arts Council England and other MCM jurisdictions, the comparison between the DLGSC dataset and this regional dataset does promote an understanding of the different public values associated with arts activities and their audiences.

8.2 Audience Development

Audience development was mentioned many times during the consultations as one of the most important areas requiring further support. For the purposes of the Scan, we have defined audience development as:

- encouraging first-time attendance; either by artform type, genre, demographic or the performing arts in general (especially amongst groups in the community who are underrepresented),
- building audience frequency of attendance and depth of engagement and building audience attendance for particular types or genres of work – for example First Nations, or contemporary theatre or dance.

It is critical not only for ensuring continued demand for artists' work, but for building support at the local level for work that is touring. Consultations suggest that local governments and other investors are reluctant to support performances of work that attracts small audiences, though small audiences are often a necessary first step in audience development strategies.

Many venue managers program to balance popular work that earns positive box office returns, to help subsidise the programming of more adventurous or challenging work in the same financial year. This means their entire program can then provide a variety of work to their communities while being more likely to achieve a desired financial outcome.

Very few, however, have sufficient staff capacity and capability to plan and implement effective audience development strategies, so this form of programming can be ad-hoc and not lead to the kind of medium-term audience development outcomes that government investors expect. Long-term, consistent programming of the type of work for which you want to develop audiences is a requirement for success; the ability of producers to plan touring over the longer term (through multi-year touring support) works to support this long-term consistent programming. Touring producers do not feel the funding mechanisms adequately recognise their efforts to develop audiences in the long-term.

The CircuitWest Case Study on Audience Development in Appendix 3 explores the requirements for presenters and venues to develop audiences, increase engagement and deepen community impact, so that funders can see where and how best to invest for maximum audience development outcomes. It shows that sustained, strategically focussed and consistent investment is required for lasting impact across the sector.

8.3 Community Engagement

Community engagement has been discussed as a priority more often throughout the sector over the past five years and is seen by some as an extension or part of broader audience development. Offering a one-hour workshop prior to or after a performance may help deepen audience understanding of their experiences but should not really be considered community engagement. Community engagement usually requires first building trust with the people you wish to engage, learning about their cultural traditions and preferences, and coming to understand the ways in which you could work together. Community engagement happens over time as relationships are developed and you learn about each other. Artists experienced in community engaged arts practice should be employed where community engagement is a desired process or outcome. Artist residencies, or more frequent and regular visits, can be used to develop community engagement programs around touring, working with local artists and community members.

Effective community engagement projects may or may not build audiences for the art forms in which they work – some members of the community may prefer their arts experiences to be more participatory than passively watching as an audience member. Community engagement should be thought of as an end in itself, not just as another way to build audiences for more traditional work. For some members of a community, more participatory engagement may be the key to enticing them in for their first arts experience.

Gathering case studies of effective audience development strategies and community engagement projects may be one way to evaluate those methods that are working best. Investing more in capacity and capability development will also be required. The work of independent dance artist Annette Carmichael⁴⁵ is an example of community engagement strategies. Determining whether those communities are now more receptive to dance work on tour would provide valuable information on the potential role of community engagement in audience development for touring. The Mission Songs Project and CircuitWest Case Studies in Appendix 3 includes examples of community engagement activities and strategies.

⁴⁵ More information available at <http://annettecarmichael.com.au/>

9 SUSTAINABILITY & INNOVATION

IN THIS SECTION:

The touring sector is increasingly concerned about the environmental impacts of touring. Addressing these concerns requires a two-pronged approach from government – standardisation of environmental impact reporting, and increased flexibility in delivering touring outcomes to facilitate innovative approaches.

Considerations regarding innovation and delivering work digitally are a requirement of the terms of reference set for this Scan. At the request of stakeholders, we have also included commentary concerning sustainability in this section, though we note this complements considerations for touring organisations. For some stakeholders, their move to digital and other more economically sustainable touring models has been partially motivated by their commitment to reducing their environmental footprint.

9.1.1 Sustainability

Producers are concerned about how their activity contributes to carbon emissions and their overall environmental sustainability. Travel is at the core of touring activity. In the September 2019 update⁴⁶, the transport sector made up 18.9% of Australia's total emissions. Though the update reveals that the majority of Australia's aggregate emissions came from industrial process or electricity generation, in terms of individual choices, the decision not to travel can be one of the most effective ways to lower one's personal emissions contribution⁴⁷. This concern appears to be a significant one for those within the touring ecology.

Artforms that engage and require international artists, such as opera or classical music, expressed difficulties in contracting some performers, since they could not reduce the air travel required to tour within Australia. If global trends of environmental activism continued (as producers believed they would), many were concerned that their business models would become impossible to maintain. Producers and presenters were looking to government and Australia Council to establish plans and common requirements for the sector regarding environmental sustainability.

Arup Group were noted in consultations as developing an Australian alternative to tools provided by the UK charity *Julie's Bicycle*. The charity works with Arts Council England to support funded organisations to monitor and report their environmental impact; environmental reporting is a requirement of Arts Council England organisational funding. Regarding touring activity, Arts Council England requires environmental monitoring of four sources of emissions; show power, accommodation, personal travel, and freight. From the calculator template provided by Julie's Bicycle, funding recipients enter a range of inputs such as kilowatt hours, number of people travelling, distance travelled and vehicle type, to calculate their environmental impact as part of their acquittals. Stakeholders believe that the provision of tools to help monitor environmental impact would help lower the carbon impact of touring activity. For comparison, Julie's Bicycle claims the Art Council England funded portfolio have lowered emissions 35% since the inception of the program.⁴⁸

⁴⁶ Department of Industry, Science, Energy and Resources, 2020. *Quarterly Update of Australia's National Greenhouse Gas Inventory: September 2019*.

⁴⁷ Intergovernmental Panel on Climate Change, 2014. *Fifth Assessment Report: Transport*.

⁴⁸ Arts Council England, 2019. *Environmental Report 2018/19*

9.1.2 Alternative Touring Concepts

One stakeholder mentioned their commitment to carbon offsetting their entire touring program. Doing so wore into their own revenue, as cost-items that could be included within touring funding expenses did not include carbon offsets. A desire for general greater flexibility regarding tour funding expenses and other tour funding requirements was echoed in comments regarding sustainability. Some producers felt that if tour funding was more flexible in terms of coordinating a tour, producers, presenters and tour coordinators would be able to create more financially and environmentally sustainable tours.

Other innovative concepts of engagement, such as ‘slow-touring’ or digital experiences, were highlighted as potential mechanisms to reduce the environmental impact of touring activity. ‘Slow-touring’ has been referenced previously⁴⁹ as a mechanism to support the delivery of outcomes that some stakeholders in the sector are seeking to achieve. During consultations, the West Australian Symphony Orchestra indicated that they hoped the Playing WA fund would provide them with opportunity to leverage government funding by approaching sponsors to enable deeper engagement, with longer time in each place. (For example, in Albany there is established interest in instrumental and classical music with potential to do things like ‘side by sides’, where community members play in the orchestra beside orchestra members).

The move to digital for some producers has been necessitated from the perspective of financial sustainability, with emissions reduction as an ancillary outcome.

Many thought that support and understanding of how organisations can make their regional engagement activities better should be encouraged to reduce inefficiencies created by touring funding requirements.

9.1.3 Digital Engagement

Digital engagement methods for regional access appear to be used infrequently (before the COVID pandemic) across the sector and, although growing, have not become established or widespread. Their historical applications are primarily in ancillary or support roles; such as organisations running online workshops prior to their physical arrival. Some of the organisations consulted during Phase One had experiences of digital engagement to share; others did not. In Phase Two consultations, Country Arts SA’s experiences with digital screenings and streaming were discussed and developed into a Case Study exploring digital engagement possibilities. (See Country Arts SA Case Study in Appendix 3.) The role of government support appears to have influenced some organisational behaviour around digital applications. We also note that since the consultations, many organisations in their COVID-19 responses have adopted or expanded digital engagement strategies to replace live experiences not possible with social distancing.

The influence of government in encouraging digital engagement was evidenced in Western Australia, where the WA government had previously provided and supported the Westlink broadcast services, which allowed performing arts companies to live simulcast their performances to regional and remote audiences⁵⁰. When Westlink was discontinued in 2017, companies moved towards self-supporting their own livestreams instead, as they had already undertaken the organisational learning required to make the transition.

⁴⁹ Australia Council, 2012. Are We There Yet? National Touring Framework.

⁵⁰ Westlink was a free-to-view television channel broadcast to regional and remote areas in WA. Launched in 1992, it became redundant as more regional areas received internet connections and access to livestreaming video. The original website is available here: <https://web.archive.org/web/20171017215842/http://www.drd.wa.gov.au/about/What-We-Do/Pages/Westlink.aspx>

Reflecting on their experiences during consultations (in the pre-COVID-19 environment), staff from some of these organisations described digital engagement as primarily a supplement to, and not a substitute for, regional touring: *'Screen based experiences are not as engaging or impactful as live experiences'* was indicative of many of the comments. We note this comment does not appear to have been based on specific audience research but is consistent with other previous research⁵¹. Organisational learning implications for digital engagement in the performing arts is an important consideration⁵². Examples where digital engagement formed part of an organisation's overall strategy appear to be the most successful.

For the West Australian Symphony Orchestra, digital is part of their strategy to develop deeper, longer term relationships in regional WA communities. They described wanting to avoid the FIFO (fly-in-fly-out) dynamic by remaining in contact with audiences between tours, for example through providing instrumental lessons in regional communities via Skype and by live streaming open-air performances from Perth.

Westlink was used by West Australian Opera (WAO) to broadcast their Perth-based Opera in the Park to regional audiences. After Westlink was discontinued, WAO has been live streaming some of their events online, including regional events from the Pinnacles and Exmouth. Some of their tour presenters have used the WAO livestream to present local screen-based events in their own communities. WAO staff believe these digital engagement opportunities nurture relationships in between physical visits to the regions, which have only been possible every 2 to 5 years depending on the location. Feedback collected was positive. WAO is interested in nurturing audiences through innovative engagement means (like livestreaming) as they lack capacity for more frequent repeat visits. Livestreaming helped fulfil their mandate to engage with all communities in WA, within their financial capacity, pre-COVID-19, and may play an even greater role with a larger proportion of their audiences, post-COVID-19. We suspect organisations that had the organisational knowledge concerning digital engagement prior to COVID-19 may have been better placed in responding to the engagement challenges of social distancing.

See the Country Arts SA Case Study in Appendix 3 for a more detailed exploration of these issues, and examples of various approaches to digital screening and streaming.

⁵¹ For example, 'The Power of Live', Live Nation and Culture Co-Op, 2017.

⁵² For example, learnings from the 'Digital R&D Fund for the Arts: Evaluation', Arts Council England, Arts and Humanities Research Council and Nesta, 2016.

10 DATA

IN THIS SECTION:

Stakeholders were eager to see the data available for national touring; this information will help settle long posed questions such as which organisations tour the most, whether touring is increasing or decreasing, and which states receive or generate the most touring activity. A summary of data provided by MCM Members is detailed here, accompanying a BI Dashboard provided for jurisdictions to further investigate.

The sector is keen to see what the aggregate touring data can reveal about trends in touring, and differences between artforms, types of organisation, states of origin, receiving states, audiences, and associated education and engagement activity. The Australia Council and MCM jurisdictions provided access to their acquittal data for the purpose of the Scan.

10.1 Investment & Acquittals

Data collected sought to represent activity and investment from the years 2015 – 2019, inclusive. Not all years were available, as some acquittal data had not been collected at the time of writing. Only NSW, WA, VIC and QLD had dedicated touring funds within the Scan period. Where funding schemes may have changed name, they have been aggregated. There are explicit complications with aggregating touring data and funding (Section 10.2). With some significant assumptions and compromises, we have aggregated and analysed data provided by MCM members. We note that our analysis and assumptions may not align with the perceptions of individual jurisdictions, and therefore the following analysis is not complete or binding.

Funding and acquittal data was provided by MCM members. All data is unique to the different partners and has been standardised where possible. Australia Council funding represents 60% of total dedicated touring funding of MCM jurisdictions.

Table 9: Touring Investment Summary (2015 – 2019)

FUNDING SOURCE	FUNDING	# GRANTS	AVG. GRANT
PLAYING AUSTRALIA	\$26,698,352	130	\$205,372
NATIONAL TOURING STATUS	\$7,424,005	8	\$928,001
WA TOURING	\$5,327,578	60	\$88,793
VICTORIA TOURING	\$6,004,839	81	\$74,134
QLD TOURING	\$8,262,404	124	\$66,632
NSW TOURING	\$3,878,659	65	\$59,672
TOTAL	\$57,595,837	468	\$123,068

Note: Includes dedicated touring funding only. Funding for touring activity through other grant categories is excluded.

Table 10: Australia Council Funding (Excludes Multiyear) (2015 – 2019)

FUNDING SCHEME	FUNDING	# GRANTS	AVG. GRANT
ARTS PROJECTS FOR ORGANISATIONS	\$31,681,974	519	\$61,044
CONTEMPORARY MUSIC TOURING PROGRAM	\$1,723,003	105	\$16,410
ARTS PROJECTS FOR INDIVIDUALS AND GROUPS	\$23,447,244	912	\$25,710
CAREER DEVELOPMENT GRANTS FOR INDIVIDUALS AND GROUPS	\$5,499,154	397	\$13,852
PLAYING AUSTRALIA	\$26,698,352	130	\$205,372
TOTAL	\$89,049,726	2,063	\$322,387

Note: Not all funding requires acquittal data. Activities and Audiences excluded to accurately represent total funding in the Scan period.

Table 11: Victoria Regional Funding (2015 – 2019)

FUNDING SCHEME	GRANT TOTAL	GRANTS	AVERAGE	# ACTIVITIES	AUDIENCE
TOURING VICTORIA	\$4,158,528	65	\$63,977	2,149	522,995
SMALL REGIONAL PRESENTERS	\$687,221	106	\$6,483	539	76,395
MAJOR TOURING	\$1,251,382	7	\$178,769	172	46,668
ENGAGING AUDIENCES	\$687,001	25	\$27,480	1,761	148,489
REGIONAL VENUES	\$4,315,000	46	\$93,804	-	-
TOTAL	\$11,099,132	249	\$44,575	4,621	794,547

Funding represents the Regional Partnerships and Regional Development funds only. Funding excludes Visual Arts and Literature. Venues do not acquit activities or attendance.

Table 12: South Australia Touring Funding (2015 – 2019)

FUNDING SCHEME	GRANT TOTAL	GRANTS	AVERAGE	# ACTIVITIES	AUDIENCE
MPA	-			101	115,306
ARTS ORGS (MULTI-YEAR)	-			124	45,820
ARTS ORGS (ANNUAL)	-			199	74,360
COUNTRY ARTS SA	\$991,825	90	\$11,020	489	76,791
TOTAL	\$992,295	90	\$11,025	913	312,277

Organisations that tour in South Australia do so through their organisational funding. Acquitted activity from organisational funding represents all touring activity, including interstate touring. Country Arts SA funding represents project-based touring funding in SA.

Table 13: Queensland 'Playing Queensland' Funding (2015 – 2019)

FUNDING SCHEME	GRANT TOTAL	GRANTS	AVERAGE	# ACTIVITIES	AUDIENCE
PLAYING QUEENSLAND	\$8,262,404	124	\$66,632	1,946	293,597
TOTAL	\$8,262,404	124	\$66,632	1,946	293,597

Funding only represents specific touring funding through Playing Queensland.

Table 14: Western Australia Regional and Touring Funding (2015 – 2019)

FUNDING SCHEME	GRANT TOTAL	GRANTS	AVERAGE	# ACTIVITIES	AUDIENCE
CONTEMPORARY MUSIC	\$406,945	53	\$7,678	963	
GRANTS	\$281,797	13	\$21,677	147	
OTHER	\$162,478	9	\$18,053	18	
TOURING WA	\$5,327,578	60	\$88,793	1,035	
STRATEGIC	\$286,622	7	\$40,946	51	
ABORIGINAL ARTS	\$88,245	7	\$12,606	88	
TOTAL	\$6,553,665	149	\$189,753	2,302	-

Funding represents regional and touring investment. Attendance data was only available from Statistical Reports and has been excluded.

Table 15: New South Wales Arts Funding (2015 – 2019)

FUNDING SCHEME	GRANT TOTAL	GRANTS	AVERAGE	# ACTIVITIES	AUDIENCE
ABORIGINAL ARTS	\$2,636,781	122	\$21,613	1,038	1,644,442
ANNUAL FUNDING	\$44,627,271	313	\$142,579	16,069	11,564,257
GRANTS & PROJECTS	\$7,746,419	161	\$48,114	393	571,060
TOURING	\$3,760,681	62	\$60,656	952	280,408
OTHER	\$59,189,006	398	\$148,716	1,809	8,145,264
OTHER - REGIONAL	\$13,601,692	159	\$85,545	1,327	929,634
TOTAL	\$131,561,850	1,215	\$403,646	21,588	23,135,065

Funding excludes Literature, Visual Arts, Design, Screen, History, Collections, Digital Arts and Service Organisations. Miscellaneous regional funding has been separated and includes Regional Arts Boards, Partnerships and Regional Artist Grant Rounds.

Table 16: Tasmania Organisational Funding (2015 – 2019)

FUNDING SCHEME	GRANT TOTAL	GRANTS	AVERAGE	# ACTIVITIES	AUDIENCE
ORGANISATIONS	\$3,177,427	27	\$117,682	136	
YOUTH ARTS	\$669,872	19	\$35,256	65	
NORTHERN TASMANIA	\$182,142	11	\$16,558	17	
TASMANIAN THEATRE	\$400,000	2	\$200,000	17	
ORGANISATIONS INVESTMENT PROGRAM	\$4,914,165	40	\$122,854	178	
TOTAL	\$9,343,606	99	\$94,380	414	-

Represents organisational funding only. Excludes Literature, Visual Arts, Writing & Design. Activities represent number of activity locations, rather than number of activities and can be used as a proxy for understanding touring. Touring activity is not acquitted separately. Attendance data was not available.

Table 17: Australian Capital Territory Tour Funding (2015 – 2019)

FUNDING SCHEME	GRANT TOTAL	GRANTS	AVERAGE	# ACTIVITIES	AUDIENCE
PROJECT FUNDING	\$47,537	4	\$11,884	7	
KEY ARTS ORGANISATION FUNDING	\$172,000	10	\$17,200	10	
ARTS ACTIVITIES FUNDING	\$36,146	3	\$12,049	3	
TOTAL	\$255,683	17	\$41,133	20	-

Represents funding for touring activity only. Attendance data was not available.

Table 18: Northern Territory Arts Funding (2015 – 2019)

FUNDING SCHEME	GRANT TOTAL	GRANTS	AVERAGE	# ACTIVITIES	AUDIENCE
ORGANISATIONAL	\$15,700,298	52	\$301,929	-	944,604
SPECIFIC PROJECTS	\$586,612	39	\$150,401	217	31,769
COMMUNITY FESTIVALS	\$982,856	52	\$18,901	1,287	153,360
TOTAL	\$17,269,766	143	\$120,768	1,504	1,129,733

Represents organisational and project funding. Community Festivals in remote communities often include sports and arts activities. Data was cleaned to separate and only include arts-related data where possible. Organisational funding does not report number of activities. Number of grants includes individual years of multiyear funding as separate grants.

10.2 Data Schema and Harmonisation

As evidenced above, the interaction of ambiguous definitions, differing data structures and changes of government make the aggregate data immensely complex. Some of this complexity is inherent to the sector whereas some is caused by trivial inaccuracies that require extensive work to unpick when they compound and aggregate.

For example, it is understandable that definitions of 'touring' will differ between jurisdictions; ABS data structures include the Mornington Peninsula within the Melbourne Capital City Area, whereas Geelong (a similar distance) is considered outside this area but is coded as a Major City in terms of its remoteness. Comparatively, Hobart is coded as Regional Australia while clearly being a major capital city. Wollongong is coded as a Capital City in terms of remoteness, but is outside the Sydney Capital City Area, while Mandurah is considered within the Perth Capital City Area despite its similar distance. The ARIA index (used by the ABS in calculating Remoteness Area) was frequently raised in consultations as being an inadequate instrument for understanding regional touring and engagement, yet in the absence of alternative standardised options, was commonly employed and is a staple of Playing Australia funding.

An example of a trivial inaccuracy is naming conventions between the different jurisdictions. Australia Council fund an organisation by the name of 'Patch Theatre Company Inc' whereas South Australia funds an organisation called 'Patch Theatre Company'. Due to the different names, the aggregate dataset classifies these as two different companies; therefore the number of companies receiving organisational funding is overstated unless adequate data cleaning takes place. This is also a problem where an applicant's name is the individual submitting the grant application, rather than the organisation who is the intended recipient of the grant. This problem can be fixed by aggregating data with a unique standard identifier rather than by name (i.e. Australian Business Number), but the problem is more difficult when it comes to understanding the number of activities or tours funded.

Many national tours receive funding from multiple sources and there is no standardised method of aggregating this other than 'activity name'. The Australian String Quartet has multiple national tours per year, commonly named 'National Tour'. The complexity of funding complicates the issue, as it cannot be assumed that State jurisdiction funding does not interact with federal funding. States may not only fund the interstate touring component of a national tour, as is the case with South Australia for example, whose current funding ambitions include promoting the national footprint of their state-based organisations. Nor is touring funding explicitly for 'touring', as many touring activities are covered within the scope of organisational funding or project-based funding.

In this case, there appear to be two options; either ensure the naming of projects is consistent across different MCM bodies and their acquittal processes, or assume that the acquittal of activities by jointly funded multiyear organisations is duplicated between jurisdictions and then remove one set. We have elected for the latter. For example, the West Australian Ballet reports all its annual activity to Australia Council. It also reports the same information to its other major investor, the West Australian Government. There will be reasons why they may provide more information to one party or the other, but generally companies are expected to acquit on all their activity so that their investors can report on all of it. It can be argued that government funding only supports a portion of a company's total activities and therefore governments should be concerned with acquitting the activities or impact they directly fund.

Canada Council for the Arts is an example of an arts council pursuing this approach⁵³, however this concept was not raised during consultations.

It is therefore pertinent to ask what role does having an organisation acquit its activity twice serve? In the interest of harmonisation and recognising the benefits of digital systems and shared database, as well as the ongoing efforts of MCM members to better understand the shared role of their Partnership funding, is there potential for Australia Council to become the party responsible for multiyear funding acquittals?

10.2.1 Data Fields

Based on the data aggregation work as part of the Scan, we have provided a list of fields that would be appropriate to collect as part of the acquittal process that would aid the ongoing data ambitions of the partners. The Australia Council currently uses a Statistical Reporting Template⁵⁴ for multiyear funding acquittal. These templates are not currently used for Playing Australia acquittal. We recommend they be considered for Playing Australia funding acquittal and other major funding initiatives.

Considering the data collected, Full Address or Postcode are the most appropriate field to capture for consistent funded activity analysis. ARIA+ and/or Remoteness Area are inappropriate fields at the data collection stage because they change over time. Analysing data using these structures is appropriate, but these can be inferred or converted from a Full Address or Postcode. This process does not work in reverse. Full Address or Postcode is not available for Playing Australia funding and should be collected.

Activity level data should be consistently captured across all funding activity. Funding frequently supports the supply of activity in a local area, yet these areas appear to be inconsistently captured by MCM members.

Common inputs and outputs that should be collected include:

- Applicant ABN
- Applicant Name
- Applicant Address
- Funding Name
- Funding Period
- Funding Amount (if specific or tied to an activity)
- Activity Address
- Activity Type
- Activity Date(s)
- Activity Attendance (Paid/Unpaid)
- Revenue (Tickets/Charges)
- Number of Activities

10.2.2 Acquittal Data

Data fields for multiyear funding and project funding were frequently found to be inconsistent, thus making aggregation difficult. As an example of the problem, recipients of multiyear funding typically include all their activity within their annual acquittal reports. If these organisations receive funding in addition to their multiyear funding (e.g. touring funding) these activities tend to be acquitted separately as well. This means that an organisation may report 300,000 attendees as part of their \$1m multiyear funding acquittal, and 50,000 attendees as part of their \$500k tour, but from a perspective of \$1.5m of total investment the attendance is still 300,00, not 350,000. Data needs to be acquitted consistently across project/touring funding and multiyear funding so that the sum of total investment does not double count attendance.

⁵³ Canada Council, 2019. Quality Impact Framework Report.

⁵⁴ Australia Council, n.d. 'Multi-Year Funded Organisations - Statistical Reporting Templates'

10.3 Ticketing

As discussed in Section 2.3, the Scan consulted with Live Performance Australia (LPA) to understand whether their collected ticketing data could be used to estimate the size of the touring sector. While LPA produces an annual national ticketing and revenue report, its underlying data and analysis is based on presenters and venues providing their data to LPA. There were 18 supplementary data providers in the 2018 ticketing report, 16 of which were outside of a Greater Capital City area.⁵⁵

LPA indicated their interest in collaborating with MCM in the future to better understand the ongoing nature of national touring, however the current nature of their data would not support additional analysis unless completed in conjunction with their analyst partners Ernst & Young (EY). It should be noted that LPA is a membership organisation and does not receive government funding for the collection, analysis and provision of ticketing data. We believe work on broadening the regional dataset, and further analysis of this data would provide strategic insight into investment decisions for governments and therefore may be worth MCM exploring further.

⁵⁵ Live Performance Australia, 2018. 'Ticket Attendance and Review Report; Appendix – Survey Participants'.

11 COVID-19 & CASE STUDIES

IN THIS SECTION:

COVID-19 has caused touring activity to cease, and significantly threatens the current touring ecology. Sector uncertainty is expected to result in significantly reduced touring activity in 2021; many feel planning for touring in 2022, normally underway, is currently not feasible. Traditional touring funding timelines, requirements and restrictions are now unworkable. A major reduction in arts activity and in the capacity of the sector will likely affect regional audiences the most.

11.1 COVID-19 Impact

11.1.1 Short Term Impact

The coronavirus pandemic and subsequent lockdowns have had an immediate and dramatic effect on touring activity – it has completely stopped. The implications of the pandemic to the wider national cultural ecology are being discussed vigorously by the sector, and still unfolding. The implications for the future of the national touring ecology are not yet known. The complexity of the national touring ecology suggests that it is unlikely to be very resilient. Early discussions with stakeholders into the pandemic's effects were generally discouraged, as it was felt much still needed to be understood as impacts continued and response measures were being implemented. Broadly speaking, some general discussion about the impacts of COVID-19 did occur in the consultations and have been included in this report. We note that the length of the pandemic and any subsequent developments in its management will affect its potential eventual impact on the sector. Reading of this section should therefore be considered in the context of time.

A number of factors and outcomes are likely to be seen in the short term:

- Intrastate touring is likely to become a greater focus for investors, if Interstate border restrictions continue.
- Traditional (larger) performance spaces may be unavailable for some time, which will mean traditional touring product will not be appropriate.
- Touring decisions and planning would normally be made now for activity in 2022. Lack of confidence in the ability to plan confidently for the future will prevent decisions being made, and reduce touring activity for at least 24 months, based on previous funding timelines.
- Creative development for creating work specifically to tour will freeze because the future of touring is unclear. This will reduce the variety of touring work available to presenters and audiences.
- Local governments (that run the majority of suburban and regional venues) may alter their support for venues that present touring productions and opt for increased support for local community activity. Many venues could increase their so-called 'hall for hire' mentality, to reduce their entrepreneurial risk and because they may lack confidence in predicting what audiences will want to do/see after restrictions are lifted.

These circumstances will likely reinforce each other and result in an immediate short-term contraction in touring, reducing work for creative professionals. If the short-term contraction is not alleviated through investor initiatives, it will likely continue into a contraction of touring activity in the medium-term.

This will reduce touring activity and could see some regional venues close permanently, reducing access for regional audiences.

11.1.2 Long Term Responses

Though COVID-19 is outside of the brief of the Scan, those consulted suggested it would be valuable to include some of their expectations for a response, based on the topics discussed within the Scan.

Generally, stakeholders suggested:

- Greater flexibility regarding the application of touring funding. The limits of what touring funding can be spent on may not be a focus for the sector if supply or demand changes.
- Greater flexibility regarding the content applicable for touring funding. This could include a focus on community engagement activities if this form of touring is appropriate for presenters and venues. It was also suggested that comedy may be very appealing for presenters and audiences after the pandemic.
- Engagement with local government as a significant investor to help support the sustainability of the touring ecology throughout the pandemic and recovery periods.

11.2 Case Study Summaries

Four case studies have been developed from consultations and further desktop research in the Scan. A summary of their key findings is listed below; the full text of each case study can be found in Appendix 3.

Missions Songs Project Case Study - First Nations Touring and Community Engagement

First Nations musician Jessie Lloyd was consulted in Phase Two and provided information on her Missions Songs Project, resulting in a case study which provides lessons about the additional outcomes to be gained from linking community engagement and creative development with touring, so that funders can understand how they can increase the impact of their investments and add value to communities through touring. It also illustrates the critical role venues/presenters play in making touring culturally safe for First Nations artists.

Merrigong Theatre Case Study - Presenter and Producer

Simon Hinton, Artistic Director/CEO of Merrigong Theatre, has been vocal within the sector for many years about the need for new approaches to the creation and presentation of work and was consulted in Phase Two. This case study illustrates how the dual role of producer and presenter can work in a local regional environment, so that government can understand how its funding (either ongoing or through seed investment), coupled with the presenter business model, influences audience development strategies, producing capacity, sustainability and the development of new touring work.

Country Arts SA Case Study - Exploring Digital Futures

This case study examines the potential to supplement and augment live presentation with digital experiences, so that funders can understand the role that digital mechanisms and works could play in widening access to more diverse arts and cultural experiences via digital screenings, especially for geographically distant and financially challenged communities. It also illustrates the vital role partnerships can play in enabling the exploration of new opportunities, and in the co-commissioning of new works of

scale. Responding to the impact of COVID lockdowns on companies and audiences, it suggests government investment opportunities for growing revenue streams, and audience development, through digital engagement.

CircuitWest Case Study - Audience Development

Based on consultations with CircuitWest Executive Director Ryan Taaffe and (then) Perth Festival Executive Producer Anna Reece, this case study includes examples of outcomes from CircuitWest audience research and audience development work. Programming, audience research, marketing, and community engagement were found to be the four key elements for success. It explores the requirements for presenters and venues to develop audiences, increase engagement and deepen community impact, so that funders can see where and how best to invest for maximum audience development outcomes. It shows that sustained, strategically focussed and consistent investment is required for lasting impact across the sector.

12 APPENDIX 1 – STATE TOURING SUPPORT

The **New South Wales government** through Create NSW introduced new funding structures in 2019 rolling touring funding into other forms of funding, then introduced a temporary supplementary Touring round for performing arts organisations to facilitate alignment with national dates. While not specifically mentioned in the new project guidelines, touring is implied under the priority area headed ‘Strengthen NSW arts and cultural activity that drives community and social benefits’ when it mentions support for ‘arts and cultural activity that benefits the many in NSW, inclusive of the wide variety of communities and the diverse creative ecology across the State’. Create NSW therefore expects touring activity to apply for funding under their current artform funding structures.

The **South Australian government** does not have a specific touring investment category, but Arts SA will fund producer companies to tour intra/interstate, nationally and internationally. Organisations can apply for ‘performing and presenting’ as part of a project grant. Support for touring is referenced under “access” in the Arts and Culture Plan South Australia 2019-2024. Those consulted in SA commented that with small audiences, and a small regional population, it’s hard to support touring within SA and that SA-based companies primarily rely on interstate touring for touring activity to be viable.

The **Victorian government** Regional Development: Touring Victoria grant category through Creative Victoria is under review but paused during COVID, the process to resume as soon as possible. These grants supported arts and cultural organisations or professional creative practitioners touring a professional production, performance, exhibition or program to regional and outer-metropolitan Victoria. Its objectives were to ensure that Victorians in regional Victoria and outer metropolitan Melbourne have access to a wide range of professional arts experiences, to support professional Victorian-based presenters, galleries, arts companies, and creative practitioners to deliver quality touring shows in regional Victoria and outer metropolitan Melbourne, to support new and existing touring circuits throughout the State and sustain main-stage Victorian touring activity, and to enhance the quality, quantity and diversity of touring activity throughout Victoria. Creative Victoria also provides a separate small amount of investment in programming for professional presenter venues, to help ensure professional standards are maintained and provide some leverage in discussions on what is programmed.

The **Western Australian government’s** Playing WA program is open to WA performing arts groups, organisations or individual artists for touring WA-produced performing arts shows to regional and remote towns and communities in Western Australia. Its objectives are to increase the number and variety of performances touring to regional WA, contribute to the development of sustainable performing arts touring circuits in regional WA, provide employment opportunities in regional WA, provide opportunities for regional and remote communities to attend performing arts shows in their towns and communities, and to enable local communities to make decisions about their performing arts needs. It is recommended the application is prepared and submitted by the party taking the lead coordinating the tour; this can include presenters and presenter peak bodies. There is a multi-year funding category within the Playing WA program that considers two tours over three years. The multi-year application includes a criterion referred to as a ‘strong track record’ in assessing applications.

The **Queensland government's** Playing Queensland fund has two separate performing arts categories, one for individuals and small to medium organisations, and one for major organisations. Its stated objectives are to ensure all Queenslanders have access to the arts by supporting high quality performing and visual arts tours taking place in communities across Queensland, to increase the number and reach of touring activities, to support tours with a strong demonstration of demand, and to create employment and training opportunities for Queensland artists and arts workers.

The **Tasmanian government** through Arts Tasmania provides total program funding to organisations, with no separate touring fund. There is some regular intrastate touring by local organisations (for example Terrapin Puppet Theatre and the Tasmanian Symphony Orchestra) but more during the Ten Days on the Island festival which has in recent years developed a more local, whole of island focus. It was noted that Tasmanian audiences do not like to travel, thus local governments have invested in arts centres quite close together. They look to Arts Tasmania to provide program funding. There is a sense of frustration that many national tours do not cross Bass Strait and that Tasmania misses out on touring activity. The Tasmanian Cultural and Creative Industries Strategy focuses on sector growth, but does not specifically mention touring. Under 'Industry Development' it aims to support businesses to build and meet national and international export demand for Tasmanian cultural and creative goods and services, and under 'Place and Participation' it commits to encourage and support regional events.

The **Northern Territory government** does not have a specific touring fund, but funds the work of Artback NT. Artback NT focuses on touring in the Northern Territory. There is a long history of cultural exchange between the NT and the rest of Australia, and South East Asia. There is no real professional touring circuit in the territory; there are three major presenter venues in Darwin, Alice Springs and Katherine, and then there are community venues. First Nations performances are more embedded in everyday life in communities, on country. NT First Nations art can also be very outward facing, keen to tour Australia and the world. There is interest in the possibility of establishing an 'Across the Top' touring circuit which would link the NT with northern WA and northern Qld.

The **Australian Capital Territory government's** Arts Policy focuses on the development of ACT based artists, arts organisations and facilities, the achievements of ACT artists interstate and overseas, and participation and engagement opportunities for local residents. It does not have a specific touring fund. Touring represents opportunities for ACT artists nationally, and also for growing the range of productions available to Canberra Theatre Centre. During the consultations, particular interest was expressed in having more major companies perform in Canberra, alongside a desire to better understand why they do not currently include Canberra more often in their touring itineraries.

13 APPENDIX 2 – MARKET PARTICIPANTS

13.1.1 Producers (the ‘supply’ side)

The market includes commercial⁵⁶ and subsidised producers (large, medium and small organisations and individual artists) – the ‘suppliers’ – offering work to potential presenters in a range of genres including performances for children and teens, families and adults; theatre, physical theatre and circus, puppetry, dance, ballet, music⁵⁷, opera, musical theatre, spoken word, mime and illusion.

Although western cultural traditions currently dominate these genres, Australian First Nations performing arts productions and programs appear to be increasing. Performances and programs from other cultures may also be more available than previously, but lack of diversity remains an issue.

Producer size, resourcing and capacity varies widely (speaking only of the subsidised sector), from the relatively stable and well-resourced major organisations of the National Partnerships Framework, through four-year funded small to medium organisations, and project funded organisations, to individual artists. Some receive both state and federal funding investment (and occasionally support from local government); some receive government investment from only one source. Some receive support from trusts and foundations, and individual donors. Some rely more heavily on ticketing revenue or performances fees than others.

There is confusion in the sector regarding what types of organisations tour the most. Acquittal data shows Partnership companies represent approximately 60% of all audiences in national touring funded by Australia Council. This drops to 40% when only considering regional touring audiences.

Table 19: Australia Council Acquitted Funded Touring Activity (2015 – 2019)

	ALL ACTIVITIES			ALL TOURING		REGIONAL TOURING	
	Funding	Activities	Audience	Activities	Audience	Activities	Audience
PARTNERSHIP ORGS	\$433,373,148	73,461	16,320,511	18,284	4,249,189	10,561	1,245,525
<i>(Australia Council Majority Funded)</i>	\$384,155,031	55,464	14,067,489	15,835	3,823,531	8,633	1,078,046
<i>(Majority Funded, Ex. State Orchestras)</i>	\$158,669,321	39,269	8,838,050	12,467	2,737,793	6,549	761,937
<i>(State Majority Funded)</i>	\$24,646,546	17,052	2,233,018	2,153	414,270	1,627	151,886
<i>(Touring Orgs)</i>	\$155,067,951	32,218	7,105,185	13,849	3,414,513	7,136	825,619
FOUR YEAR FUNDING	\$65,271,563	110,150	6,944,443	17,583	1,257,626	12,837	635,354
PLAYING AUSTRALIA <i>(Multiyear Funded)</i>	\$8,479,482	18,693	418,581	16,296	359,624	16,081	330,674
PLAYING AUSTRALIA <i>(Non-Multiyear Funded)</i>	\$8,224,722	5,705	1,104,220	5,135	1,014,184	4,800	927,329
OTHER GRANTS <i>(Multiyear Funded)</i>	\$4,389,722	1,859	227,953	522	15,215	522	15,215
OTHER GRANTS <i>(Non-Multiyear Funded)</i>	\$43,225,851	22,643	3,327,875	3,828	382,405	3,189	279,579
TOTAL	\$562,964,488	211,959	27,697,049	44,830	6,903,404	31,387	3,087,787

Note: Funding cannot be separated for Multiyear Funded Organisations. Includes acquitted funding only. Regional touring is defined as Intrastate or Interstate Touring Activity happening in an area outside of a Greater Capital City. Intrastate touring for Grants is defined as activity not in Metropolitan ARIA and recipient based in Greater Capital City. Multiyear Intrastate Touring includes region-to-region touring by comparing SA3 locations outside of Greater Capital Cities.

⁵⁶ Commercial touring is outside the scope of this report

⁵⁷ ‘Contemporary music’ is outside the scope of this report

Subsidy per audience member can be calculated from these figures. Comparison between subsidy levels can be misleading; they do not consider the overall cost in delivering a work. For example, the overall subsidy per attendee for Partnership Organisations is exaggerated due to the different funding levels of different companies. Orchestras receive more of their overall government funding from the federal government because of the context of their history and their organisational type. Four Year Funded organisations may receive a significant portion of their funding from state governments.

Table 20: Australia Council Subsidy Per Attendee (2015 – 2019)

	FEDERAL INVESTMENT	ATTENDEES	SUBSIDY PER ATTENDEE
PARNTERSHP ORGANISATIONS	\$433,373,148	16,320,511	\$26.55
(Australia Council Majority Funded)	\$384,155,031	14,067,489	\$27.31
(Majority Funded, Ex. State Orchestras)	\$158,669,321	8,838,050	\$17.95
(State Majority Funded)	\$24,646,546	2,233,018	\$11.04
(Mandated Touring Organisations)	\$155,067,951	7,105,185	\$21.82
FOUR YEAR FUNDING	\$65,271,563	6,944,443	\$9.40
PLAYING AUSTRALIA (Multiyear Funded)	\$8,479,482	418,581	\$20.26
PLAYING AUSTRALIA (Non-Multiyear Funded)	\$8,224,722	1,104,220	\$7.45
OTHER GRANTS (Multiyear Funded)	\$4,389,722	227,953	\$19.26
OTHER GRANTS (Non-Multiyear Funded)	\$43,225,851	3,327,875	\$12.99
TOTAL	\$562,964,488	27,697,049	\$20.33

Note: Partnership Organisations categories are non-exclusive and do not sum together (i.e. organisations that receive the majority of their government investment from Australia Council and those that have mandates to tour are typically the same organisations). Excludes Visual Arts organisations.

13.1.2 Presenters (the 'demand' side)

Presenters and venues - the 'purchasers' on behalf of their audiences and communities - include major capital city performing arts centres, major festivals, suburban and outer-metropolitan performing arts centres, university-based venues, regional performing arts centres, regional arts festivals, participatory arts programs and community cultural development programs, town halls, community halls, schools and school-based halls, and range from professionally staffed and equipped, well-resourced designed-for-purpose buildings and arts programs, to volunteer-managed community presentations in small regional and remote community halls, multipurpose community facilities both indoor and outdoor, and even temporarily repurposed winery barrel rooms and farm sheds.

Many of the suburban, outer-metropolitan and regional performing arts centre and community facility presenters are owned and managed by local governments. In suburbs, towns and cities all over Australia, local governments play an enormously valuable role as presenter of arts experiences for their communities.

13.1.3 Tour managers (providing tour-related support services)

The role of tour managers or tour coordinators has changed as more presenters have taken a more proactive role in programming or curating what they present, and their peak bodies have taken in developing marketplaces or showcases. Presenters are now less likely to be passive 'receiving houses', merely saying 'yes' or 'no' to what is offered to them, or as they attend a showcase. Presenters are now more likely to be actively looking for particular experiences to offer their communities, to develop audiences for particular genres or producers over the longer term. Some producers prefer (and have the resources) to manage their own touring; others prefer to use the services of a tour manager.

14 APPENDIX 3 – CASE STUDIES

14.1 Mission Songs Project - First Nations Touring

Mission Songs Project (Mission Songs) is a research project and associated touring performance by Jessie Lloyd. The project and work have received funding from various sources including Australia Council for the Arts and Creative Victoria.

This case study provides lessons about the additional outcomes to be gained from linking community engagement and creative development with touring, so that funders can understand how they can increase the impact of their investments and add value to communities through touring. It also illustrates the critical role venues/presenters play in making touring culturally safe for First Nations artists.

Thanks to Jessie Lloyd for allowing her own words to be used in the description of this project.

Background – historical and cultural context

A *Mission Song* is a song that was performed or composed on an Aboriginal mission, settlement or reserve during the Missions Era (approx. 1901 until the 1967 referendum). Throughout this period, Aboriginal people were forcibly removed from their traditional lands, children were separated from their families and the practice of traditional culture or language was restricted. Cultural knowledge and practices were vilified, and Aboriginal people suffered institutionalised oppression and disadvantage.

The Mission Songs are filled with stories of struggle and hope, reflecting the strength and resilience of the people, where innovation, courage and faith kept families alive.

Mission Songs include church hymns, as well as new songs about daily life. They include songs of farewell as families were divided or working away from home on stock routes or pearl luggers.

Church was one of the only places Aboriginal people were encouraged to sing and it was often missionaries who introduced Western instruments (although Western music could also be heard on the wireless and jukeboxes). Many took advantage of this by learning to play Western style music and adapting it to their own purposes. They would sing their own tunes, which often told stories of their lives, or cover popular songs that echoed their experiences.

NOTE: the word Mission is used here as it's used in Aboriginal English, which is a recognised dialect in Australia. Its translation means "from a time or lifestyle during the mission days" or "on the mish".

Creation of the "Mission Songs Project"

Artist Jessie Lloyd first became curious about the songs from the mission days when she heard her Aunties singing an old tune from Palm Island (Qld), 'The Irex'. The Irex was the boat that transported stolen generation children and others removed under the Aborigines Protection Act in the early to mid 20th century. This song was what the families used to sing as they didn't know if they would see their loved ones again.

Jessie approached Songman Archie Roach and Professor Marcia Langton for direction and advice on how to begin the historic task of collecting Mission Songs. Now, after about five years of traveling, research and consulting, Jessie has gathered a significant collection of around 40 to 50 'mission songs', which has barely scratched the surface of songs of this type that exist.

The primary approach in researching and reviving the songs has been consultation with senior Indigenous songmen and songwomen. Jessie travelled Australia visiting communities and elders, seeking their stories and advice about the music and life of the old days. Jessie received the State Library of Victoria – Creative Fellowship Award 2016 and the National Library of Australia – Folk Fellowship Award 2017, providing valuable access to archives and resources.

This research, a very organic process, requires patience and respect.

Mission Songs on Tour

Mission Songs has toured the country as an acoustic trio or quartet led by Jessie Lloyd who takes audiences on a musical journey across Australia. She engages the audience through intimate storytelling, moving harmonies and historical insights, using humour and truth to share the voices of elders as they would around a warm campfire or kitchen table.

The group features a rotation of some of Australia’s finest Indigenous vocalists, all of whom contribute their own personal family connections and histories in the songs, presenting an authentic narrative of Aboriginal Australia.

“Islander rhythms, campfire country and defiant humour celebrate simple joys. Melancholy ballads chart a journey of blood, sweat and tears... you’ll almost hear the kettle boil as a closing home recording of the elders invites us to sit down with these unsung survivors.”—4.5 stars, Fairfax Media

Jessie is also committed to providing workshops tailored to each community’s needs. “Touring in South Australia for Country Arts SA, I was able to go out to communities before the performance dates, to work with communities, learn their songs. This is great because I meet more elders, and in many places get more material for the project.”

Touring coordination and support

Mission Songs Australian touring has been funded by Playing Australia and Creative Victoria, supported and managed by Regional Arts Victoria, Musica Viva, Queensland Music Festival, and most recently Performing Lines, to places including:

NSW: Sydney, Bermagui, Gunnedah, Grafton, Nowra, Campbelltown, Bathurst, Yarrahapinni, Illawarra, Katoomba, Barragga Bay, Eden, Wallaga Lake, Moree

ACT: Canberra

VIC: Portland Arts Centre, Lake Bolac Eel Festival, Yarra Ranges Regional Museum Lilydale, Rumbalara Football Netball Club Shepparton, Sacred Edge Music Festival, Ramahyuck Aboriginal Corporation Morwell, Wyndham Cultural Centre, Bluestone Theatre Kyneton, Anglesea Memorial Hall, Red Rock Regional Theatre & Gallery, Frankston Arts Centre, The Memo Healesville, Williamstown Town Hall, Ulumbarra Theatre Bendigo, Knox Community Arts Centre, Scarsdale Hall, Bruthen Blues Festival, Kernot Hall, Tylden Hall, Wangaratta PACC, Myrree Soldiers Memorial Hall, Nathalia Recreation Reserve, Bunjil Place Theatre Narre Warren, Lakes Entrance Mechanics Hall, Mallacoota Mudbrick Pavilion

TAS: Cape Barron Hall Flinders Island, Flinders Island Entertainment Centre, Smithton Library, Gallery 9 Deloraine, Burnie Theatre, Cygnet, Hobart

QLD: Queensland Music Festival, Gympie, Longreach, Palm Island, Cairns, Yarrabah, Mackay, Redlands, Thursday Island, Townsville, Brisbane

SA: Adelaide Festival Centre, Whyalla, Port Augusta, WOMAD, Adelaide Cabaret Festival

WA: Fremantle, Moora, Perth, Mandurah

NT: Darwin, Garma, Numbulwar

In addition to touring established 'performing arts' circuits, Jessie has sourced contemporary music funding and also taken Mission Songs to Woodford Folk Festival, Byron Bay Bluesfest and Womadelaide, and internationally to Calgary Folk Festival, Canada and Festival de Mayo, Mexico.

Issues and lessons learned on tour

The significant learnings from this case study are:

- Local presenters play a critical role in providing culturally safe spaces for First Nations artists performing on tour
- Local presenters need to increase their knowledge of First Nations culture and practices to enable them to provide culturally safe spaces
- Community engagement activities also require cultural protocols and cultural safety
- Local presenters need to take responsibility for building their own relationships with their First Nations communities

Cultural safety, cultural protocols and self-determination can be difficult on tour. Jessie recalls "Some venues have a certain idea of what they think aboriginal content should be. They dictate the engagement and what it should be. I ended up being stuck in a not good position - not culturally safe. If venues want to engage more with their Indigenous community, they have to increase their knowledge. With Mission Songs Project, you have to know the local history to make it work - was there a mission? who still knows the songs?"

"Cultural protocols need to be worked into the community engagement activities as well. When I go, I'm not going as one person, an artist. When I go, I represent my family - who's your mob, who's your family. Social protocols. Then when they know who I am, I have more access and a better relationship. Better access to the songs than an academic would have, too."

"Venues should be building the relationships themselves, not expecting the blackfellas on tour to start to build their relationships with their local community."

Perhaps having First Nations people on staff could help? "Having someone part time, a local, artistically minded, involved in programming, would help things be culturally safe, and that the right shows are being toured to those communities," says Jessie. "Presenters need to start small and start local, look for their local experts. Mission Songs Project is always public, everyone can sing the songs, but you always need to seek local advice. Not just from the elders, but from Indigenous people who are musically minded as well."

Observing changes over the years she's been touring, Jessie notes "there are good intentions, there are growing pains. It's progressing, the venues are a big part of that. It's way better than the festival and music scene. I generally get looked after as an artist in the 'performing arts' but the music industry is a bit behind, I could be sleeping on someone's couch!"

Self-determination and creative control are important for all artists, and for Jessie with this project there's an added dimension: "These are not my songs, these are other people's, and I have the responsibility to see they're told properly, appropriately."

Conclusion

Governments investing in First Nations performing arts touring should require presenters and tour managers to show evidence of their commitment to providing culturally safe spaces on the tour, and how that will be achieved for each tour. A checklist could be developed, to be completed as part of the funding application (like the checklist ILBIJERRI has provided after their Black Ties tour experiences; see Appendix 5).

14.2 Merrigong Theatre Company (Regional Presenters)

Background

Merrigong Theatre Company is an independent not-for-profit company that operates Wollongong's premier performing arts venue, Illawarra Performing Arts Centre (IPAC) and the city's key civic and community venue, Wollongong Town Hall. Merrigong is also a vibrant theatre company in its own right – producing, presenting and touring exciting contemporary theatre and supporting the development of a wide range of theatre makers.

Presenters are an essential part of the touring ecology and play a critical role in building audiences for work that tours. This case study illustrates how the dual role of producer and presenter can work in a local regional environment, so that government can understand how its funding (either ongoing or through seed investment), coupled with the presenter business model, influences audience development strategies, producing capacity, sustainability and the development of new touring work.

Merrigong presents a diverse annual season of theatre, dance and children's programming, including work sourced from Australia's leading performing arts companies, self-produced work, acclaimed international productions, and contemporary work from new companies. Outside its annual artistic program, Merrigong partners with and programs a range of commercial events across its venues and in the wider Wollongong Arts Precinct, including festivals, pop/rock concerts, cabaret and stand-up comedy.

The name 'Merrigong' reflects the Dharawal word for the Illawarra region's distinctive escarpment, a landmark of supreme cultural importance.

Merrigong describes its **Artistic Rationale** as follows:

"We will make exceptional theatre that tells stories of local relevance, but universal resonance. The theatre we produce and present will not be ordinary. It will be special. It will transport, thrill, amuse and open minds, strengthening our community and filling our stages with diverse voices."

Merrigong – Presenter and Producer

As well as presenting the work of other companies, Merrigong produces full-scale productions in-house for presentation in their theatre subscription season and for domestic and international touring. Much of the work is commissioned and developed at Merrigong, but new work is also developed in collaboration with other companies.

Recent Merrigong mainstage productions include: *Lost Boys* by Lachlan Philpott, *Trash Talk* (The Strangeways Ensemble, Merrigong's professional ensemble of actors perceived to have disability, in partnership with The Disability Trust), *Letters to Lindy* by Alana Valentine, *Landscape with Monsters* (a co-production with Circa), *A Sri Lankan Tamil Asylum Seeker's Story as Performed by Australian Actors Under the Guidance of a Sinhalese Director* by Dhananjaya Karunarathne, Van Badham's *The Bull*, *The Moon and the Coronet of Stars* (co-produced with Griffin Theatre Company and HotHouse Theatre), *The Table of Knowledge*

(co-produced with version 1.0), Mary Rachel Brown's *The Dapto Chaser* and The Q Brothers' *Funk it up About Nothin'* (co-produced with Chicago Shakespeare Theater and UK-based Richard Jordan Productions).

Through the MERRIGONGX program, local independent artists are also supported in all stages of their work, from development to production and presentation, giving birth to unique stories from and for the region.

Touring – Merrigong's contribution

Merrigong regularly tours, both their own work and international theatre, to other venues around Australia. In 2018, Merrigong's production of *Letters to Lindy* by Alana Valentine toured to 21 venues across 4 states and territories of Australia.

Recent tours of international work include: from Ireland, *Fishamble's The Humours of Bandon* (4 venues) and *Swing* (10 venues); from the United Kingdom, *Dylan Thomas: Return Journey* (17 venues); from the United States, Baba Brinkman and Jamie Simmonds' *The Rap Guide to Evolution* (9 venues); Kahlil Ashanti's *Basic Training* (13 venues); The Q Brothers' *Funk it up About Nothin'* (7 venues); Canadian Rick Miller's *MacHomer* (4 venues); and Scotland's Traverse Theatre's *Midsummer* (a play with songs) (4 venues).

The journey from presenter to producer/presenter

"It took a long time for us to develop serious capability as a producing company," says Simon Hinton, Merrigong's Artistic Director/CEO. "Merrigong was mostly a venue manager, up until 2006 -7, when we got state and federal money to become a producing company. We think of ourselves as a theatre company that runs venues, not the other way around. We've matured into that. It's probably only in the last two to three years there's been an industry wide understanding of that; Councils don't see it's their role to fund production."

How does Merrigong manage to sustain its producing capacity, now? "Revenue from the more commercial work we present (e.g. rock concerts) has really grown in the last few years. We take the risk, but it's not under the Merrigong brand. We do this to make money from these shows, to help fund our artistic and community programs. It's very deliberate. We feel a clear responsibility to exploit the commercial possibilities of the venues we manage, to generate money for our production activities, the creation of new work. Our own investment in our artistic program is around \$350k per year; it's funded by the other (commercial) side of the business."

Government investment and its role in organisational transformation

Merrigong is not currently funded through the Australia Council, although they were previously a multi-year client. "Arts NSW (as it was then) de-funded a number of NSW regional theatre companies some years ago, and they wanted some of the money left over to still go to regional theatre making. So we benefited. We had seed money from NSW and the Australia Council for a few years, and then a Program Presenter grant from the Australia Council for a few years after that. I think it took the Australia Council longer than Create NSW to recognise that this (our producer-presenter status) was a new model emerging."

"Australia Council seed funding helped us established this model. We're now more locally focussed. It gave us breathing space to make producing our core business, which over time changed the make up of the board and the staff. We now have directors and producers on staff - which took some years. That funding assisted in that transition. After 15 years in my role, I have now developed a perspective on what change and development looks like in a community over time."

Merrigong's history of growth from presenter-only, to producer-presenter, illustrates the key role government investment can play in supporting organisations who have the potential to transform, while they build more resilient business models. This would not be possible, of course, for organisations without significant alternative revenue potential (like the venues Merrigong manages). And it would not be possible for Merrigong without the long-term service agreement with Wollongong City Council.

The key role of local government

Local government is still playing a key role in the performing arts in Wollongong, through its engagement of Merrigong as manager of its venues, rather than managing those venues directly, itself. It could be argued that the financial outcome for the City is not much different, although Simon points out that attempts over the years to calculate the costs to Council have indicated it would be considerably more expensive to deliver the same level of service and programs to the community if the venues were directly managed by Council. The artistic and community outcomes, however, are very different. Merrigong is making work locally, telling local stories, working with local artists, touring some of those shows to other venues. Local government managed venues (about 68% of regional and suburban performing arts centres nationally) have generally not been able to transform themselves into producer-presenters. Because of Merrigong's independence, it has become a producer-presenter and secured its production capacity through earned revenue from commercial events.

Could more local governments be encouraged to try this independent non-profit model? There are other successful examples, such as the celebrated and long-established NORPA in Lismore and more recently, The Art House in Wyong.

Developing philanthropic income streams

Independence from local government also brings the possibility of building philanthropic revenue streams, a long-term process which Merrigong has also started recently. "We are a registered charity," says Simon. "We already have a small donor program, which has grown enormously in the last six months in response to the company being under threat because of COVID. General donations since March 2020 are up 10-fold, and our Inner Circle donations have seen significant growth. We only have ongoing support from one trust at present – the Thyne Reid Foundation, supporting our Disability Ensemble. We think that Private Philanthropic Trusts are the main growth area for us in the future." It should be noted that developing and building donor programs and relationships with trusts and foundations requires a longer-term focus – it's not a quick fix. The establishment phase can take at least 3 to 5 years, with consolidation (when revenue begins to become significant) from 6 to 10 years. It's no coincidence that the Australian performing arts company with the most impressive track record in private philanthropic income generation (The Australian Ballet) has also been doing it for the longest time.

The 'independent' business model – upside and downside

The downside to being an independent non-profit is the bad years. "No-one picks that (loss) up. There's no Council safety net," says Simon, but he believes it's the right model. "It takes a lot of management; we have governance links to Council through our board. We have a service level agreement in place with Council which pays us a fee for managing the venues; the assets belong to them. It's a dynamic relationship with Council, it has ups and downs."

So, the downside includes having no local council obliged to pick up losses in years where revenue falls or there are unexpected costs. What does the 'upside' of being an independent non-profit include?

One benefit is not being very dependent on government grants, of being able to continue producing whether grant applications are successful, or not. "We now have a \$6 million annual budget, so small grant funding is not significant. There's no question of us stopping producing now. Our Create NSW funding has only been \$81.5k per year for the last 5 years (\$125k per year 2021-4). We like that we're not very dependent upon funding. We're dependent on Wollongong City Council, but they don't want to do it (manage the venues) themselves. We earn about 80% of our revenue in the marketplace – which was great until COVID-19!"

Another very tangible benefit of the independent company business model is that not-for-profit arts organisations have access to GST concessions that Local Government does not, meaning that in most cases no GST is remitted on the Box Office revenue of Merrigong's artistic programs – this alone is a greater annual financial benefit to the company than the Create NSW annual grant.

Audience Development

Merrigong's successful audience development strategies have combined the programming of diverse work (from commercial to adventurous new works) with changing the structure of their 'seasons'. "About 13 -14 years ago we changed the way we thought about our programming, our season," recalls Simon. "We decided to do longer seasons, basically buy a week of touring works, whether it made sense financially or not. If it's in our season, it has a minimum of five performances. It's a kind of commitment to the community - you hear about the show from a neighbour, you can see it later in the week. Our catchment is broader than just Wollongong."

Over time, this strategy has built larger audiences and enabled Merrigong to negotiate direct transfer deals with larger producers (thus avoiding the re-mount costs associated with many tours). "As we've got bigger audiences, through buying in our shows by the week, we've become an anchor for a lot of tours. We've slightly disengaged from Playing Australia; we only take two to three works per year now that are part of big national tours. We present STC and Belvoir - it's us, Canberra, Riverside, sometimes Glen St, sometimes Geelong. We're also increasingly just doing a one week transfer out of Sydney, or the Adelaide Festival, a show which is going nowhere else. This has now become part of our brand with our audience, and what they expect from us."

COVID Impact

The pandemic has revealed another downside of independent non-profit status: being reliant on the market for such a high proportion of your income, you're vulnerable to market disruption and downturns. The higher your ticketing income as a proportion of your total, in this pandemic climate, the more you feel the impact of its loss.

Re-imagining the future

Simon is confident Merrigong will survive and sees opportunities for the sector to re-think its future⁵⁸.

"Faced with this current crisis, in the short term, working with the limitations of the structures we have (both as companies, and in terms of funding) we desperately need moral leadership to guide our crucial decision-

⁵⁸ Artshub, 2020. 'Why we must put people before companies'.

making. And as the immediate crisis passes, in the longer term, we are going to require the imagination to envisage a future industry not weighed down by archaic structures and outmoded models that are failing us.” Perhaps one of these opportunities is to encourage local governments to explore transitioning, over time and where appropriate, to alternative independent non-profit models for the management of performing arts centres, which make expenditure predictable through service level agreements, while providing increased opportunities for production capacity, creation of new work (including for touring), and engagement with local artists.

One of the lessons from this case study, however, is that transitioning to an independent non-profit producer-presenter model requires:

- long time frames for transition, to build non-profit organisational capacity
- strategic investment from state and federal levels of government
- ongoing potential for significant independent (commercial and philanthropic) income streams
- a long-term commitment from local government (such as a service level agreement for venue management, and for asset maintenance)

14.3 CircuitWest (Audience Development)

With thanks to CircuitWest for permission to quote from their resources, and to Executive Director Ryan Taaffe and Executive Producer Perth Festival Anna Reece for their words.

CircuitWest is the service organisation for the performing arts in Western Australia and amongst many roles convenes WA Showcase (the state performing arts market and conference), TechWest (a network of technical staff) and provides Tour Coordination services for artists and companies within Western Australia. CircuitWest represents Presenters, Producers and Artists and has strong ties with local governments.

CircuitWest brings together a sector that builds and reflects community and cultural life. First and foremost, CircuitWest stands for inclusive, thriving communities, enlivened with rich cultural expression and engagement. CircuitWest articulates the value of the performing arts and its role in increasing wellbeing at individual, local, regional and State levels.

In Australia’s touring ecology, presenters are the primary holders of relationships with audiences, with around 68% of venue presenters being local government owned and/or managed venues. Festivals also act as presenters of touring work.

This case study explores the requirements for presenters and venues to develop audiences, increase engagement and deepen community impact, so that funders can see where and how best to invest for maximum audience development outcomes. It shows that sustained, strategically focussed and consistent investment is required for lasting impact across the sector.

What do we mean by Audience Development?

For the purposes of the National Performing Arts Touring Scan, Audience Development is defined as:

- encouraging first-time attendance; either by artform type, genre, demographic or the performing arts in general (especially amongst groups in the community who are underrepresented),

- building audience frequency of attendance and depth of engagement and building audience attendance for particular types or genres of work – for example First Nations work, CALD work, or contemporary theatre or dance.

Audience Development requires sustained, long term commitment for success. It also requires integrated planning between marketing and programming to ensure the type of work programmed is relevant to target audiences, developing an understanding of audience and community attitudes and perceptions, and sufficient staff resources and skills, especially in marketing, to enable implementation. Community engagement strategies are sometimes also required for reaching particular groups within the community, as part of audience development. This case study will examine each of these four elements of audience development - programming, audience research, marketing, and community engagement - to illustrate how each contributes to successful outcomes.

Programming and audience development

“Presenters are programming because of the outcomes arts activity delivers” says Ryan Taaffe, Executive Director of CircuitWest. Local governments are realising that arts programs are investments in community connection and wellbeing. Presenters are realising that programming is key to developing their audiences. Choosing programs relevant to the audiences they want to attract is essential for successful audience development. It’s a skill and requires knowledge of the audience and community you’re programming for, as well as knowledge of available or potential events. CircuitWest hosts an annual Showcase WA which provides opportunities for presenters and producers to come together to discuss programming, network and participate in professional development sessions. “Showcase WA has banned pitches about tech specs and money,” notes Ryan. “This means producers have to talk about their work and encourages presenters to discuss the work with producers.” The focus is increasingly on programming work which is relevant to each presenter’s community. One of the ways in which programming options are being explored more widely within the CircuitWest network is through an innovative, informal partnership with Perth Festival.

Perth Festival and CircuitWest venues’ programming

“We work closely with CircuitWest,” says Perth Festival’s Executive Producer, Anna Reece. “Lindy Hume introduced the model of Perth Festival regional programming hubs years ago. The only one that remained was in the Great Southern. In 2016 after considerable review we determined it was best not to continue with a commitment to a Great Southern-only festival ‘module’ but build more of a network with regional presenters throughout our state. Through our relationship with CircuitWest, that’s been happening in an organic way with presenters in Albany, Karratha, and Mandurah.” Perth Festival covered the costs of bringing international acts to Perth, and these venues who were interested in programming those acts just had to cover the costs of touring from Perth. These acts were then presented locally, in association with Perth Festival. Local audiences like the festival brand. Anna is on the board of CircuitWest and is now trying to formalise the relationship. They’ve brought regional venue managers to Perth during the festival in 2019 and 2020, exposing them to different kinds of programs. “It’s almost like a Go See Fund,” says Anna. “We meet and talk about collaborations.” There has been staff turnover in the venues in the regions though, which slows down the relationship building. CircuitWest has sourced some funding to pay for venues’ accommodation and travel, Perth Festival covered the ticket costs, catering, and ground travel. There’s also a “Made in WA focus” Anna points out. “We wanted them to see the local work too.”

Have any regional venues programmed work from this initiative yet? (Programming can have long lead times, so it may be too soon.) “I don't think any of them have taken anything, yet, but it's opened up more of a conversation, as well as developing an appetite for programming more diverse or 'risky' work.” says Anna. “We're building networks; it's had really good feedback. It's good for us to understand the venues' interests, and critically to develop direct relationships with them.”

Examples of CircuitWest presenter programming responses to audience development requirements include:

Moora Performing Arts centre programmed Jessie Lloyd's Mission Songs Project to reach their First Nations community that previously did not feel welcome in the venue.

Cummins Theatre programmed popular children's theatre and worked with 15 schools from as far as 90 minutes away, resulting in two sold out shows; children's work had not always featured well at the venue.

Ravensthorpe Regional Arts Council changed its programming for an entire season to comedy, and changed the location, bringing in audiences who had not previously been to any shows in its previous 30 years of programming.

Marketing and audience development

CircuitWest's research in 2019 showed that less than half of the people in regional Western Australia who showed that they are interested in seeing theatre, actually bought a ticket. Addressing this finding through developing their extensive audience development and marketing resources, available online and supplemented with one-on-one conversations and workshops, CircuitWest has helped member venues with their approach to marketing and audience development. The following examples from around WA illustrate the diversity and complexity of the marketing and audience development task, and the individual tailored responses required for success in each community⁵⁹:

Ravensthorpe Regional Arts Council: Importance of the whole customer experience

Ravensthorpe Regional Arts Council (RRAC) is the leading arts and cultural body within the Shire of Ravensthorpe, responsible for delivering a diverse and full annual program of activities. It is a volunteer-based organisation providing a diverse and adventurous artistic program including the presentation of professional performing arts events. The team at Ravensthorpe have 30-years of experience in presenting diverse experiences and have learnt about bringing people to art.

“We don't just put on a show,” said RRAC's Ainsley Foulds, “we put on a gathering for our community that includes an important performing arts experience.” RRAC often programs work around community needs and gaps and listens hard to what the people of the region are saying. One of the things RRAC stresses in communications is all the things that are important in the night out. This means people, food, drinks, as well as a great arts experience. “We provide a range of important components of the experience with the art sitting at the top. It might take some people an hour just to drive to see an RRAC show, so we think it's worth making a night of it and giving people many reasons to come.”

RRAC's recent attendance at the touring *52 Hertz* show saw 5% of the entire region attend. This is amazing if you think that would equate to 2,500 people in a bigger regional town. “We are really focussed on getting the people of our towns to see great performing arts, and to do that, we remove all the barriers we can.”

⁵⁹ While not all examples are CircuitWest members, they are used as examples within CircuitWest marketing and audience development materials.

Barking Gecko: Don't expect your old channels to work for new audiences.

Fully Sikh took Barking Gecko Theatre Company and Black Swan State Theatre Company in a whole new direction for age and culture. Funded through an Australia Council collaborative project fund, as part of the then Major Performing Arts (MPA) Framework, the show is a very rich celebration of family and Sikh culture. “We brought in specialist consultant advice with some specific understanding of the culture we wanted to engage,” says Aimee Hughes, Barking Gecko’s Marketing and Communications Manager. “The artists were heavily engaged in helping our cultural understanding and reaching out to their community. We had moved forward from marketing we had always done, and listened to the needs of the community we wanted to engage. This meant looking to culturally specific channels that worked, finding ambassadors from the community, adding social media channel WhatsApp, engaging with the community directly in their cultural environment and comfort zones and even changing from online to face-to-face ticket sales to meet their buying needs. Taking the time to hear and connect with the community meant 30% of our audiences who came to this work had never come before.”

Bunbury Regional Entertainment Centre (BREC): email marketing is really important

“We find that email is a really important channel for us, but we have to work on getting the campaign right,” says BREC Marketing Manager, Jo Semmens. “That means a great subject line and copy, which makes us split test different concepts to see which gets the highest engagement. It’s too important a channel to just cut and paste text. Open and click through rates are critically important. We monitor how a campaign went and decide what we need to improve. We look to making sure everything that can affect the open rate, which involves making quality templates with clean code, maximise everything for deliverability and ensuring optimisation for mobiles. It is also important that the final email has visually-strong imagery; video links and text should all be part of engaging the customer in the work.

It’s essential to segment our data. We don’t send everything to everyone as that is risky for data (it risks people unsubscribing); we target the audiences appropriate for each genre, right down to the type of work being presented.”

Audience Research and audience development

CircuitWest has enabled access to audience research for its members, which has resulted in many venues deepening their understanding of what is important to their audiences, and how they are perceived. Dr Bob Harlow, research consultant, says the research showed “one of the key issues with our marketing was that most of our effort was put into images of performers, or images of stages and seating, which is great for audiences who love performing arts. What does that say about the experience they will have for their night out? Are we demonstrating the whole picture of a great experience? Are we showing people actually having a good time?”

Ryan Taaffe agrees. “Appropriate marketing material for regional audiences is still an issue; producers don’t always respond well to being asked for different marketing that appeals to diverse markets.” Ryan and his colleagues’ work is slowly changing this response.

In one example from 2018, research with the people of Narrogin recommended a number of changes to how performing arts experiences were delivered by Arts Narrogin. Although 75% of the respondents supported performing arts, the overall experience was as big a consideration as the art form.

While Arts Narrogin had worked hard to create a positive environment in its regular performing space, perceptions remained it was uncomfortable and uninteresting. Arts Narrogin had some concerns about audience sizes and the impact the space was having; there were also challenges to improving the experience due to catering limitations.

Since its own soul searching, and the research, Arts Narrogin has turned these perceptions around considerably, building audiences with a range of great ideas, including:

- Programming theatre matched with a ‘foody’ experience in a shared community space outdoors
- Increasing the ability to cater at events by activating other spaces in the region including the aptly renamed ‘The Narrogin Opera House’
- Being active on social media and showing Arts Narrogin as vibrant and diverse and most of all, fun
- Introducing a formal ticketing system allowing for more positive information about the venue
- Programming once in a decade experiences that attract a packed house
- Programming high engagement ‘fun’ events that improve the perception of attending a performing arts event

(Note that three of these ideas involved programming, highlighting the importance of programming to audience development). The turnaround has been impressive. Arts Narrogin has improved both its reputation and its attendance with a highly flexible and creative approach to showing people performing arts is far from dull.

Community Engagement

Engaging with broader community needs can demonstrate how the arts can be relevant to people’s lives in ways they hadn’t realised. Relevant programming can directly contribute to increased community wellbeing, as well as help to raise the profile of the local arts program.

When David Marshall and his Cultural Centre Crew booked the work *52 Hertz* to play the Harvey Recreation and Cultural Centre (HRCC), part of the motivation was to help people in their town through some of their own challenges. The play by Terence Smith deals with the theme of disconnection amongst young people in the modern world around an underlying theme of the loneliest whale in the world. It was written with the isolated town experience in mind and has a very strong connection for regional youth. Regional areas have had higher than average mental health issues in recent years and *52 Hertz* was very relevant to many in the region, especially young people.

The Harvey team delivered a significant engagement strategy with relevant markets in the lead up to the tour. This had to take into account that the performing space they use does not have a notable youth audience for performing arts.

Initially, they installed a “Blue” Tree in the foyer of the very high traffic community venue to help people connect with each other – the tree carried this messaging: *“We all feel alone at times, but when you’re experiencing loneliness it can feel like you’re the only one. 52 Hertz is a play that seeks to reassure us that we are not alone. Fill the tree with positive thoughts and let people know they are not alone and that there is help out there. REACH OUT.”*

HRCC developed a partnership with the Harvey College of Agriculture and had the *52 Hertz* crew engage on-site with students via a “taster” performance and sharing a meal with them. The college pre-purchased tickets and encouraged all staff, students (and parents) to attend. The students and the town were invited to a ‘get-together’ sausage sizzle and soup at the venue prior to the performance, provided by the College and HRCC. This event helped bring people of all ages together and included live music from local performers.

One of the Harvey team also attended a seminar at the national youth mental health provider Headspace in Bunbury. After hearing about *52 Hertz*, Headspace was very keen to send some of their staff to Harvey for the performance and bring others from around the region. Headspace promoted the show to their clients and, as a result of the discussions and attending the *52 Hertz* event, are now working on building stronger links for the future with the Harvey community.

Conclusion: sustained investment is producing results

CircuitWest recognised that many of their member venue presenters found meeting the requirements for successful audience development challenging. Since 2014 it has been developing and offering a program of online resources with participatory professional development activities.

This sustained support for audience development across WA would not have been possible without investment in CircuitWest by the WA State Government, which has totalled around \$350,000 (just for audience development related activity) since 2014.

Imagine the impact nationally if each state and territory government similarly invested, coordinated with federal government investment and support, and linked into local governments - perhaps to incentivise local investment in marketing staff - in a long-term tripartite strategy.

14.4 Country Arts SA – Exploring Digital Futures

Country Arts SA is an agency of the South Australian government and responsible for the delivery of the *South Australian Country Arts Trust Act 1992*. Country Arts SA seeks to bring the arts to life in regional South Australia, working with regional artists, communities and partners to create opportunities for artists at every level, and to provide regional audiences with the best possible arts experiences. Country Arts SA supports artists to develop their practice, and produces art that shares the stories of regional South Australia.

Unlike its other counterparts within the Regional Arts Australia national membership, Country Arts SA is also a presenter, managing shows and workshops for people of all ages at five arts centres in Whyalla, Port Pirie, Renmark, Mount Gambier and Noarlunga as well as community owned venues in other centres.

Country Arts also provides grants and professional advice to regionally based artists and communities enabling them to realise their artistic and cultural aspirations. Over 60% of Country Arts SA’s workforce lives and works in regional South Australia.

Since 2014-2015, Country Arts SA has been exploring the potential of digital opportunities to help service wider audiences with more international and large-scale work, and local stories and content.

This case study examines the potential to supplement and augment live presentation with digital experiences, so that funders can understand the role that digital could play in widening access to more diverse arts and cultural experiences via digital screenings, especially for geographically distant and financially challenged communities, those with access needs. It also illustrates the vital role partnerships can play in enabling the exploration of new opportunities, and in the co-commissioning of new works of scale.

Responding to the impact of COVID lockdowns on companies and audiences, it suggests government investment opportunities for growing revenue streams, and audience development, through digital engagement.

The Potential Role of Digital

All five Country Arts SA venues have screening ability; some are thought of by their communities more as cinemas than performing arts centres. Some are more popular, first-run release cinemas, while others are more art house. This provides Country Arts SA with the capacity to use their screens, as Executive Programmer Louisa Norman says, “to level the playing field a bit, to help get Australian content out”.

“Presenting digital screenings of filmed live work helps break down geographical access barriers and also financial barriers,” says Louisa. “Cinema tickets are much cheaper than live event tickets. People also feel more comfortable going to the cinema than the theatre; there are socio-economic factors, especially in places like Whyalla. Cinema presentations can act as an ‘entry drug’, they’re more accessible.”

Finding the Right Distributor, and the Right Content

Louisa explains that some filmed live theatre distributors specify you have to take the whole season, for example the Metropolitan Opera in New York. “That was prohibitive, so doesn’t work for us. We had to find distributors where we could choose the content we wanted. At the moment, big players are dominating these mechanisms (like the Met and the National Theatre UK), so having Australian content is super important, to help get audiences for our own work, here and abroad.”

Country Arts SA established a relationship with Windmill Theatre Co and State Theatre Company of SA (STCSA)’s production of *Rumpelstiltskin*, through a broader partnership with Australian Theatre Live (ATL). “ATL are aiming for high quality multi-camera shoots, which we think is essential,” says Louisa. “We established a partnership with them in 2014-15, Arts on Screen, to expand our cinema program to include filmed live theatre events. We saw this initiative as a really positive thing, given the challenges for regional audiences and the costs involved in touring. This partnership really worked for us. It opened us up to screening in small halls, because ATL also had it on BluRay. (Most distributors only send content in secure file format for cinemas.) In our smaller venues we did a pop-up screen, added a few elements, did a raffle, and a post-show talk.”

Audience Response – Audience Development Potential

These experiences worked very well for audiences, many of whom hadn’t seen any work live by STCSA or Windmill. These screenings were in towns two to three hours drive from Adelaide.

“These are under-exposed audiences, the previous/current touring ecology hadn’t reached them,” observes Louisa. “It’s not my experience that screened theatre is competition for live events – it’s filling a gap. It’s complementary to other activity. Since these first experiences, we’ve simulcast State Opera of South Australia (SOSA), live streamed. We’re in early negotiations with Adelaide Festival too. For me this digital work is a no brainer and should be explored more.”

COVID Intervenes... and Provides Alternative Opportunity

More recently, in 2018 *The Gods of Strangers*, a large-scale co-commission between Country Arts SA and STCSA premiered in Port Pirie where the play is set, before an Adelaide season, which was filmed. Country Arts SA and STCSA paid for a multi-camera shoot to ensure production quality.

Inspired by the oral histories of Greek, Cypriot and Italian migrants to regional South Australia, *The Gods of Strangers* explores the untold struggles of belonging, identity and family in post-World War II Australia. Featuring Dina Panozzo, Renato Musolino (1984, *Othello*) and Eugenia Fragos (*Things I Know To Be True*), this multicultural and multilingual drama (performed in English with Greek and Italian sections) was commissioned from STCSA Resident Artist and Greek Cypriot descendant, Elena Carapetis.

“Now we’re in lockdown, we’ve been able to use that shoot in a different way,” says Louisa. “Our original intention was to screen it in cinemas on a paid ticket basis, but because of COVID we decided to do it online and ask for donations. It reached over 1600 people in a week, comparable to the size of live audiences, but more cost effective.” *The Gods of Strangers* was expensive to produce, and not easily tourable. Seizing the opportunity to show the filmed version has given this work an unexpected life beyond the live season, and helped Country Arts SA reach out to audiences during this difficult time.

“We’re keen to ensure that production mechanisms are controlled by local/regional producers too, not just the big established UK and US producers,” adds Louisa. “Our aim is to develop a suite of available content.” This program could be really valuable for First Nations content, local and regional stories, that would otherwise be limited to smaller audiences.

Challenges and Improvements

There’s work to be done in the area of artists royalties and copyright for digital rights. “With STCSA we had to negotiate with the Media Entertainment and Arts Alliance (MEAA, the sector union) to agree a fee and royalties for the artists,” remembers Louisa. “Australian Theatre Live have to do that too. There’s a lot of work to be done in that space - updating the awards, developing a simpler model that can serve the artist but isn’t admin heavy. We would love each state to have access to funding for high quality multi-camera work, to help get further work digitised.” This suggestion presents an opportunity for government investors to respond to a sector-identified need that has potential to increase access and develop future audiences, as well as addressing alternative audience pathways out of COVID lockdowns. Not all audiences will be keen to get straight back into attending live performance in person.

High quality filming of work not only provides material for digital screening or streaming, which can also be used for educational programs, it provides useful archive material for the producing companies and performers which can help secure further work including international tours.

Could Digital Become a Substitute for Live?

Some actors and artists are wary that increasing digital screening or streaming will result in less live work. “Could digital act as a substitute for touring? Could it provide a revenue source too?” muses Louisa. “Of course, producers need to be paid well for global distribution of their content, and artists need to get their share too. I don’t think live stuff will disappear - there’s still an appetite for live performance.”

“In the UK when NT Live came out (National Theatre Live), actors were up in arms - now they’re getting huge audiences. But the artists need to get their fair share. Maybe we need a centralised royalty system? Artists need to feel confident (they’ll be fairly paid) before they’ll make their work available for digital distribution. We need to work with the MEAA, on how to monetise streaming so the artist feels comfortable - we don’t want too many middlemen taking cuts and making people feel nervous.”

Cinema vs Lounge Room

The Country Arts SA Arts on Screen program requires audiences to visit their local cinema, or pop-up screening in a local hall, and pay a cost equivalent to a cinema ticket. This is a very different experience from sitting in your own lounge room watching on your TV, or on your computer or tablet. Cinema screenings have start and finish times; you have to commit and show up at the appointed time. Much content available during COVID lockdowns for home viewing has been free and available on demand, which means you can watch it whenever you like - or never get around to it. The psychology is different; there's no commitment required and therefore nothing external encouraging you to do it. The challenge of developing revenue streams from at-home viewing means exploring different models of distribution especially now that many events have been available for free during Covid-19.

Free vs Paid; On Demand vs Scheduled

For all the content available on streaming services Netflix, Stan and Amazon Prime, there's no real presence of filmed live arts experiences, and certainly no commitment to Australian content. ABC iView Arts and Culture offers quite an extensive range of Australian arts performances and documentaries, free and on demand. Foxtel Arts channel offers mostly international (non-Australian) arts experiences and documentaries on a paid scheduled subscription basis. The dominant model pursued by major international performing arts companies seems to be to create their own distribution systems, for example New York's Metropolitan Opera offers paid HD streaming experiences in cinemas, as well as a paid subscription On Demand service available on your own devices. Berlin Philharmonic has a paid Digital Concert Hall service and app which offers 50 live broadcasts per year, plus documentaries and interviews with conductors and soloists. Registration is free and offers access to educational and some documentary and interview content; paid subscriptions offer access to all content. The National Theatre Live (UK) launched in 2009 and now broadcasts in 2,500 venues across 65 different territories globally, using the ticketed cinema model. Their biggest broadcast to date is Hamlet, with Benedict Cumberbatch in the title role. Broadcast live from the Barbican in 2015, this broadcast has now been seen by over one million people around the world.

Developing Digital Revenue Streams in Australia

There doesn't seem to be much work happening on monetising the streaming of filmed live performance in Australia at the moment; the sector is currently probably too concerned with just surviving through the COVID lockdowns. If there are opportunities for building significant revenue streams for Australian artists and producing companies, though, as some of the larger early adopters in the UK and the US have demonstrated, they should be explored and supported by strategic government investment where required. "Digital - could you get a subsidised rate for someone to film your show, then when you're happy with it, join a cooperative scheme for distribution?" wonders Louisa Norman. "There's a skills gap, at the presenting end, in small halls - they need equipment and capacity building. AT Live toured with 'film in a box', it unpacks, and you just put it up. We'd need training in projection, if going very remotely. I guess there's potential for partnerships with Regional Arts Victoria, the Victorian Association of Performing Arts Centres, kind of like a hybrid touring scheme. Maybe Regional Arts Australia could pull everyone together for this work."

Some of the larger WA performing companies consulted for the National Touring Scan had used digital screenings, supported by the WA government, pre-COVID, to supplement their touring activity. When it's not possible to return to communities each year, digital streaming or screening can be used as a way of

staying in touch, of maintaining the relationship with audiences. Most established non-profit Australian arts organisations using digital before and during COVID aren't using it to build a new revenue stream. It's used as a way of encouraging people to stay in touch, perhaps even of enticing people to try new arts and cultural experiences. Most aren't yet treating it as a potential for significant revenue.

Melbourne Digital Concert Hall is one example of a local ticketed, paid approach to digital distribution, created by musicians, for musicians as a response to the first COVID lockdown. It's a social enterprise, with the \$20 ticket price all going to the performers and the \$4 booking fee paying for a piano tuner, technician and transaction costs. Between March 27 and October 2020 around \$600,000 had been earned by more than 300 musicians in over 140 recitals.

Future Audiences

The Australian Audience Outlook Monitor (Australia Council working with Patternmakers and WolfBrown) has measured audience attitudes to returning to live performance, and also gathered information about their engagement with digital arts and cultural experiences during COVID lockdowns.

Some audiences have expressed their desire for continued access to digital experiences even when live performances return, for reasons including COVID wariness amongst the vulnerable, mobility or distance challenges, financial challenges and personal convenience.

Relevant key findings from the July 2020 snapshot of this research include:

- Four in ten people would prefer a digital program rather than attending in person right now (39%).
- Some audiences are feeling more pessimistic about returning to events long-term, with almost a quarter saying their future attendance will be negatively affected (22%, up from 15% in May).
- Three in four are participating in online cultural experiences (73%) consistent with findings in May.
- Slightly more people are paying for online experiences (36%, up from 34% in May), and they are spending more with almost two in five having spent more than \$50 in the past fortnight.

These figures indicate there will be long term potential for increasing audiences for paid digital content.

Many arts organisations have depleted their reserves to survive through the pandemic lockdowns and won't have the funds to invest in the high-quality multi-camera digital filming required to convert their live performances to saleable digital content.

Governments should respond with strategic investment funds to enable the development of digital capability and the building of digital revenue streams, leveraging current investment in live performances and building audiences who can't or prefer not to attend live events.

15 APPENDIX 4 – DISCUSSION PAPER

Draft Agenda for Discussion

Scope and Purpose of the Scan

The Australia Council is undertaking a National Touring Scan with the assistance of Jordan Gibbs from Culture Counts and independent consultant Merryn Carter. This project encompasses a national scan of Australian publicly subsidised performing arts touring activity, including companies that tour, audiences, communities, networks, presenters and state/territory and national funding mechanisms. The purpose of the scan is to develop a clear understanding of the scope of professional performing arts (non-commercial) touring in Australia, associated engagement activities and to provide a clear picture of the current performing arts touring networks.

Discussion Questions

- Touring requires relationships between producers, presenters, tour coordinators (sometimes), investors (usually governments) and audiences/communities. In your opinion, how could these relationships be strengthened? Can you identify any factors that are currently limiting the development of these relationships? How could the roles of each be strengthened, in your opinion?
- What support mechanisms for touring do you feel work and do not work on an intra-state and national basis?
- Which art forms or types of productions do you think currently tour most successfully? Are there any art forms, genres, or types of performance that could tour more successfully? What would need to change, to enable that?
- Do you think there are opportunities or barriers to touring specific art forms or types of performance? For example, First Nations performances? Smaller scale, contemporary and more challenging work?
- What, in your opinion, are the biggest current challenges for touring? How has this changed over the last 5-10 years? How will this change over the next 5-10 years?
- What, in your opinion, are the biggest current opportunities for touring? How has this changed over the last 5-10 years? How will this change over the next 5-10 years?

Issues arising from the literature reviewed

Literature for review was determined by Australia Council. Issues for discussion concern the following areas:

- Policy
- Coordination
- Planning Horizons
- Funding Levels and Program Structure
- Market/Audience Development
- Access & Equity
- Diversity
- First Nations Performing Arts
- Touring markets and supply
- Data

Policy – the literature seeks to define each stakeholder’s understanding of the reasons for touring. The varied explanations demonstrate that there is not one shared understanding for ‘why’ touring is important, simply that it ‘is’ important. Examples of arguments concern; access for regional audiences for arts experience they would not receive otherwise (i.e. market failure); promoting a vibrant national arts ecology (see Australia Council documentation for definitions on vibrancy); promoting the instrumental value of the arts (education, wellbeing etc.); audience development (growing audiences to promote resilience and self-sufficiency of the arts sector); driving social and cultural change (e.g. promoting diverse and first nations work) – the list goes on. While the value and importance of touring may be subjective, and the motivations varied, the fact that a shared understanding of why touring is important is not apparent in the literature is of note for sector consultation. This lack of shared understanding may contribute to comments regarding disunity within the sector and calls for better coordination, that are apparent in the literature.

Coordination – much of the literature references the sector calling for increased support and coordination regarding touring. The forms of support requested are varied. The 2005 CMC review recommends better policy coordination between federal and state governments, to assist organisations in meeting the (sometimes divergent) needs of multiple stakeholders. Some stakeholders in the literature argue for a formalised central body to be responsible for national touring. Some stakeholders have undertaken work to understand what a contemporary touring support organisation would look like. It would be beneficial to further understand what form and role the sector imagines ‘coordinated support’ could take, and why it should exist (e.g. what problems it would fix, how it could improve touring etc.). It would also be useful to understand the reasons why there has been no national broad based tour coordination support mechanism established previously.

Planning horizons – successful touring planning requires at least 3 to 5 years for most organisations. Funding, programming and audience development for shorter periods prevents confident and effective planning and compromises outcomes.

Funding levels and program structure – lack of coordination between federal and state touring funding can negatively impact successful tour planning and implementation. Much of the literature references difficulties for organisations incurred between meeting federal and state funding criteria, as it is acknowledging the most tours require support from both sources to be successful. Other significant policy reviews, such as the *Major Performing Arts Framework* and *National Opera Review* also have implications for touring program and funding structures that need to be considered within the scan⁶⁰. Submissions in the literature consistently mention funding, the costs involved in touring and the flexibility of funding structures in addressing those costs. It is also noted that responsibility for cultural expenditure is now split more evenly between the levels of government than it was a decade ago. As a proportion of the total funding pool, the federal government now contribute 39%, down from 45.7%, state and territory governments contribute 34.8%, up from 31.9%, and local governments contribute 26.2%, up from 22.4%⁶¹.

⁶⁰ The *National Opera Review* (NOR) noted that regional touring is an important activity that needs to be actively supported by relevant Governments and that engagement with the arts, has significant benefits for regional communities. Further the NOR recommended that, with reference to Opera Australia (the only opera company which tours nationally) that project funding currently allocated to Opera Australian through Playing Australia should be direct line funded to Opera Australia, thereby providing greater certainty of funding (Recommendation 6.17). This recommendation affected other MPA companies which were not included with the NOR’s Terms of Reference (National Partnership Organisations where Governments prioritise National Touring). Whilst not implemented in response to the NOR, it is expected to form part of the National Touring Scan’s analysis.

⁶¹ The Big Picture: Public Expenditure on Artistic, Cultural and Creative Activity in Australia, Insight Report One, A New Approach 2019

Marketing/audience development – the literature suggests presenters (particularly regional and remote presenters) can lack adequate marketing and audience development capacity. As ‘primary holders’ of the audience/community relationship, the majority of the responsibility for audience development usually falls to them. Some producers also lack the capacity to provide marketing materials appropriate for the audiences their presenters are trying to develop. There are few examples of sustained, strategically focused, comprehensive professional development offerings in this area in the sector – Circuit West’s work in audience development, marketing, community engagement and programming, and PAC Australia’s opportunities within its annual conference/PAX are two examples worth noting.

Access and Equity – the distribution of quality performing arts programs to metropolitan, regional and remote communities provide all Australians with equal access to an enriched cultural life⁶². While Playing Australia seems to have been built on this principle, stakeholders have requested a review of the program and its aims as its role in achieving this goal has become less clear over time.

Diversity – this relates to access and equity: touring funding, production and presentation should result in a diversity of experiences for audiences across Australia. Diverse communities need to see and hear themselves and their stories if audience development is to be successful. Enabling independent artists and small organizations to tour is required to deliver on diversity goals. The literature notes that current complexities around touring funding, development and markets can prevent new entrants from engaging in touring work which may be best suited towards driving more diverse audiences.

First Nations performing arts are diverse expressions of continuing living culture and of the narrative of Australia as a nation. They are a source of great pride to Aboriginal and Torres Strait Islander peoples and a reflection of cultural strength, resilience, innovation and artistic excellence. The Australia Council’s national Arts Participation Survey found that nine in ten Australians (92%) believe that First Nations arts are an important part of Australia’s culture, and 64% have a strong or growing interest in First Nations arts. Yet only one in four (24%) attend, and less than half (46%) agree that First Nations arts are well represented in Australia. These findings highlight an opportunity to further develop audiences for First Nations arts in Australia, including through ensuring that Australians have access to a variety of high quality First Nations arts experiences.⁶³

Sector capability and capacity; health and wellbeing on tour – the need for an agreed set of standards which identify ‘best touring practice’ to ensure tours are well managed and supported, tech support is reliable, and employment and travel conditions support health and wellbeing for artists and tour staff. The literature suggests this is required to support a sustainable touring ecology.

Touring markets and supply – the proliferation of state-based tour markets, while beneficial to local presenters and producers in each state, has resulted in some stakeholders who ‘pitch’ work feeling pressured to attend multiple state markets, in addition to the national market (currently PAX). While larger presenters and producers with sufficient travel budgets can take advantage of what looks like a wider range of offerings, those on smaller budgets must choose which market/s to attend. (Whether the increase in the number of

⁶² Among the historical stated aims of the Playing Australia program are: to distribute Australia’s performing arts more equitably and assist the Australia-wide delivery of high quality performances; to expand audiences for quality, innovative and uniquely Australian productions by increasing the diversity and frequency of performing arts experiences available to Australians; to promote more viable touring circuits; to increase opportunities for productions from regional areas to tour across State and Territory boundaries” - The Future of National Touring in Australia, April 2008.

⁶³ from Showcasing Creativity – Programming and Presenting First Nations Performing Arts, Australia Council 2016

markets has resulted in a greater diversity of work to choose from is debatable. Stakeholders attending multiple markets observe quite a few repeat pitches.) Alongside this development, there seems to be a trend towards producers and presenters developing direct, longer-term relationships to ‘guarantee’ supply (for the presenter) and a consistent network of tour receivers (for the producer). In these cases, markets function more as opportunities to meet up and further develop the relationship than as pitch/purchase events.

Data – stakeholders have requested and presented a range of data regarding national touring in the literature. The 2005 Touring Review for CMC provided data between 1999-2003 based on surveys and information provided by state and territory funding agencies:

- Numbers of tour grants: 731 (between 132-161 annually)
- Number of distinct tours: 658
- Number of multi-funded tours: 73
- Tours funded by jurisdiction (approx. 260 from Federal)
- Number of touring performances: 10,506
- Number of touring visits: 6,355 (average of 834 visits across 753 unique towns)
- Number of visits by location (top location was Greater Sydney)
- Visits by genre
- Funding breakdowns
- Total attendance: 1,634,924 (*incomplete*)

Data quality gaps were identified in tours with no recorded destinations, attendance, box office or funding. A data quality review will be conducted in comparison to the 2005 report. Stakeholder documents provide guidance on the data-types they believe would be valuable to inform touring development, much of which the 2005 review collected (with the exception of CALD or Indigenous works & audiences).

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16 APPENDIX 5 – CULTURAL SAFETY CHECKLIST

The following protocol information and checklist was created by ILBIJERRI Theatre Company and generously shared with the National Performing Arts Touring Scan.

Cultural Protocols and Indigenous Cultural Intellectual Property (ICIP) For Presenters

INTRODUCTION

ILBIJERRI Theatre Company is committed to celebrating and generating greater understanding of Aboriginal and Torres Strait Islander peoples. Our Cultural Protocols document is made in collaboration with the Sydney Opera House and the Australian Human Rights Commission and is designed to support our presenters to engage with our artists and their local Aboriginal and Torres Strait Islander communities in a respectful, harmonious way and in the spirit of reconciliation.

The document is based on the following core values. These values are central to our company and the way we make and present work. We encourage our presenters to take these on board too.

Power of Aboriginal and Torres Strait Islander voices: We work with Aboriginal and Torres Strait Islander storytellers (writers, directors, actors, key creatives, theatre practitioners) to tell our stories through theatre. No voice is too small.

Indigenous protocols and ways of working: We respect our people, community and storytellers by working in accordance with the Australia Council’s Indigenous Arts Protocols. We will encourage other theatre practitioners to work in accordance with these protocols.

Self-determination: We encourage Aboriginal and Torres Strait Islander people to be involved in key decision making processes within ILBIJERRI Theatre Company including creative and administrative.

Respect: We always give our fullest respect to our people, our Elders, our culture and country and to all peoples who share this land of ours.

Aboriginal and Torres Strait Islander diversity: We respect, celebrate, and embrace the cultural diversity of Aboriginal and Torres Strait Islander peoples, our stories, our culture and our experiences

Indigenous Cultural Intellectual Property (ICIP): ICIP as identified in the 2017 Cultural Heritage act acknowledges the ownership and custodianship of both tangible and intangible forms of cultural property. ILBIJERRI recognises that traditional owners and carriers of cultural knowledge retain ownership of their story and that appropriate consultation and consent is to be gained for the use of but is not limited to:

- Language
- Song
- Story
- Designs
- Customs
- Dance
- Ceremony
- Cultural Knowledge

And that all work will be correctly acknowledged and attributed.

Facts and Figures

Population: It is estimated that Aboriginal and Torres Strait Islander people represent 3.3% of the Australian resident population. As at 30 June 2016, the 2018 Census estimated this to be 798,400 people.

Urban Vs Remote: Over a third (37.4%) of Aboriginal and Torres Strait Islander people live in major cities such as Sydney, Brisbane and Melbourne. Of the 62.6% of Aboriginal and Torres Strait Islander peoples who live outside major cities, 44% live in regional areas, 6.7% in remote areas, and 11.9% in very remote areas (like Tenant Creek or discrete Aboriginal communities). By comparison, the majority of non-Indigenous people live in major cities (72.7%) and less than 2% in remote and very remote Australia.

Languages: Prior to colonisation, there were an estimated 250 distinct Aboriginal and Torres Strait Islander people's languages (incorporating 600 dialects). Today only 18 Aboriginal and Torres Strait Islander languages are spoken by all generations of people within a given language group. In 2016, 5% of Aboriginal and Torres Strait Islander peoples living in an urban area spoke an Aboriginal and Torres Strait Islander language as their main language at home. In non-urban and remote areas this figure rose to 29%.

Cultural Diversity: It is important to recognise that there are many Aboriginal and Torres Strait Islander nations and groups with a diversity of cultural traditions and beliefs. Many Aboriginal and Torres Strait Islander people may identify themselves by their nation, which is based on a common (familial) descent, land area, language and history. A person may identify themselves by more than one nation, as they may be able to trace their descent through various familial lineages and songlines across the country, for example because their parents or grandparents are from different nations or they have lived in two places and identify with each.

Key Terms

'Indigenous' or 'Aboriginal and Torres Strait Islander'?

Generally, Aboriginal and Torres Strait Islander is the preferred collective term. Another key term we at ILBIJERRI use and strongly support the use of is 'First Nations'.

The terms 'Aboriginal', 'Torres Strait Islander' and 'Indigenous' came about as a result of colonisation and do not reflect the traditional way communities identified themselves. While these terms are used extensively today, some people or communities do not agree with using the more collective term 'Indigenous'. The terms 'First Peoples', 'First Australians' and 'First Nations' are collective names for the original people of Australia and their descendants and are acceptable for general use.

- Use of 'Aboriginal' and 'Torres Islander' is preferred to 'Indigenous' where possible
- The terms 'Aboriginal' and 'Torres Strait Islander' should always be written in full. They should not be abbreviated or appear as an acronym – ATSI is not appropriate.
- In written documents always capitalise the 'A' in 'Aboriginal' and 'T', 'S' and 'I' in 'Torres Strait Islander'.
- Always write Aboriginal and Torres Strait Islander as an adjective not a noun: e.g., 'This program will support education for Aboriginal people' not 'The program will support Aboriginals'.
- Where possible, First Nations people will be referred to as the Nation/Peoples in which they identify: e.g, 'Boon Wurrung artist...will be working with...'

Terms associated with Aboriginal community and culture

Below are some terms associated with Aboriginal communities and culture.

Aunty & Uncle	These are Aboriginal English terms often used to describe older people or Elders as a sign of respect. It does not necessarily mean they are a blood relative, although two First Nations people may be connected through kinship lines, and will consequently use either of these terms as a sign of respect and connection.
Community	For Aboriginal people, community is not limited to a geographic area. Community is about inter-relatedness of country, family, location and shared experience. A person may belong to more than one community.
Country	Describes an area of land that is traditionally associated with a particular language group, community or nation.
Elder	An Elder is someone who is recognised and highly respected within their community as a keeper of knowledge and lore, and who is permitted to disclose certain knowledge and beliefs.
Kinship	This is a key element in Aboriginal cultures. Kinship includes all relationships, and of being related to, and belonging to the land.
Mob	This is an Aboriginal English term used to refer to a particular group of people associated with a certain country or place. This term is generally used by Aboriginal people and between Aboriginal people. It may not be appropriate for use by non-Aboriginal people unless accepted by the community.
Nation	Refers to a group of people having common descent, language and history. Each nation has defined geographical boundaries and language that is tied to that nation. This term should be used to refer to a culturally distinct group.

Welcome to Country

A crucial part of effectively engaging Aboriginal and Torres Strait Islander communities is respecting country, and the strong connection Aboriginal and Torres Strait Islander peoples have to their traditional land. It is therefore important to ensure that a 'Welcome to Country' or 'Acknowledgement of Country' is arranged when the company arrives and prior to each public presentation.

What is a Welcome to Country ceremony? A Welcome to Country ceremony is performed by the Traditional Custodians of the Land or a senior representative of the local First Nations community to welcome visitors onto their traditional land, where an event is taking place.

When should a Welcome to Country ceremony be performed? A Welcome to Country ceremony should be performed either at the commencement of rehearsals and/or prior to the first public showing in each location the work is presented.

Who should be invited to perform the Welcome to Country ceremony? The presenter should invite the Traditional Custodians of the Land, usually a senior representative of the local Aboriginal or Torres Strait

Islander community, to do the Welcome to Country Ceremony. However, this is dependent upon the location of the event and the practice of the community.

Acknowledgement of Country

What is an Acknowledgement of Country ceremony? An Acknowledgement of Country is a way that an Aboriginal and Torres Strait Islander person who is not a traditional owner or custodian of the land where the event is being held, or a non-Indigenous person, can show respect for Aboriginal and Torres Strait Islander culture and heritage and the ongoing relationship the Traditional Custodians have with the Land.

In what circumstances must an Acknowledgement of Country be performed? An Acknowledgement of Country is to be performed prior to each subsequent public presentation. An Acknowledgement can only be held instead of a Welcome to Country where no traditional owner or custodian is available to do so and all avenues to locate one within the community have been undertaken and it is not possible to perform a Welcome to Country ceremony.

Images of The Deceased

In many Aboriginal and Torres Strait Islander communities the reproduction of names or images of deceased people is restricted during the period of mourning. For this reason, ILBIJERRI always consults with the person's family or community to ensure proper permissions are obtained and protocols are observed for events, publications, visual arts or other media concerning a deceased person or their work. Where obtained, permissions should be formally acknowledged. It is important to discuss with us about the appropriate usage of our materials.

We also recommend placing warnings in the form of signage at the venue, on the website and/or in the program to provide cultural warnings to avoid causing offense to families and communities of deceased people.

Other Practical Tips

Below are some useful tips when engaging and consulting with your local Aboriginal and Torres Strait Islander communities and audiences.

In the Workplace

- Be aware of differences in communication patterns and potential language barriers. If you need clarification, ask for confirmation or rephrase a question.
- Be sensitive in approaching young people who may need assistance so as not to embarrass them in front of peers or a large group.
- Be aware that body language and non-verbal cues are used and may have different meanings to those you associate with them.
- Demonstrate respect by checking with the person you are working with that you have the right form of address or acknowledgement for them.
- Be sensitive and respectful toward extended family and kinship systems and customs. These may impact on how you interact with people and groups and the involvement of extended family as part of consultation and communication.

Events and Projects

- Cultural heritage, customs and traditions should always be respected and acknowledged where appropriate.
- Respect for traditional custodians of the land should be demonstrated through an appropriate Welcome to Country or Acknowledgement of Country.
- Consultation and collaboration with communities in the use of any cultural material and production of events is essential to ensure respectful and appropriate use of material and proper representation of culture and traditions.

Media and Publications

- Ensure the accurate and correct use of language, symbols, motifs and other designs.
- If appropriate, and with permission from the relevant community, consider using traditional Aboriginal or Torres Strait Islander names and language. Ensure appropriate acknowledgement of ownership or custodianship.
- Proper consultation with communities and Elders should be undertaken to identify secret and sacred material or other sensitivities that may impact access to and use of cultural material. Please note that consultation may take some time.
- Be aware of copyright requirements and that in some instances ownership of works or cultural material may be shared by groups or communities.

Checklist for Venues

To ensure the cultural safety of Aboriginal and Torres Strait Islander artists we recommend the following:

- Meet and greet for company upon arrival with representatives of local community
- Introduce company to Traditional Owner prior to Welcome to Country
- Welcome to Country prior to first performance in each venue (if your first performance is a matinee and you would prefer to do the Welcome at the first evening show, this is acceptable, but the matinee must be preceded by an Acknowledgement to Country)
- Acknowledgement of Country prior to subsequent performances
- Invite Community to the performance: free ticket allocation, discount rate or VIP invites.
- Opportunity for local community to engage with the company post-performance

Questions for Presenters as Hosts of First Nations Visitors

We're keen to get an idea of the land we're going to and how the process and protocols go for welcoming our company to the event/festival as well as when and where this will be held.

We also have a few questions that we're hoping you help us with, with the support of your elders associated with the event/festival as we prepare to travel to the lands there,

- Is it appropriate for us to bring a gift to lay down for the person who will welcome us to country? Please advise how many elders will probably be present?
- Is it appropriate for our company to respond at the welcome? If so, is it more appropriate for either males or females to respond?
- Can you please let us know before we arrive if there have been any significant events (other than the fires) in the community, particularly any recent deaths or illnesses of elders in the community that we can acknowledge in our time there
- Based on both the land where the welcome is to be held and where the performance venue is:
 - Who are the peoples we can acknowledge as traditional owners, other than the (Gadigal) people?
 - Are there any significant spiritual or historically important places in the area that we can acknowledge, and know where to and not to go?
 - Who are the important atua, spiritual entities/gods/beings that we can acknowledge on this land?
 - What is the language name/s of the closest significant river/body of water?
 - Are there any significant burial grounds close by?

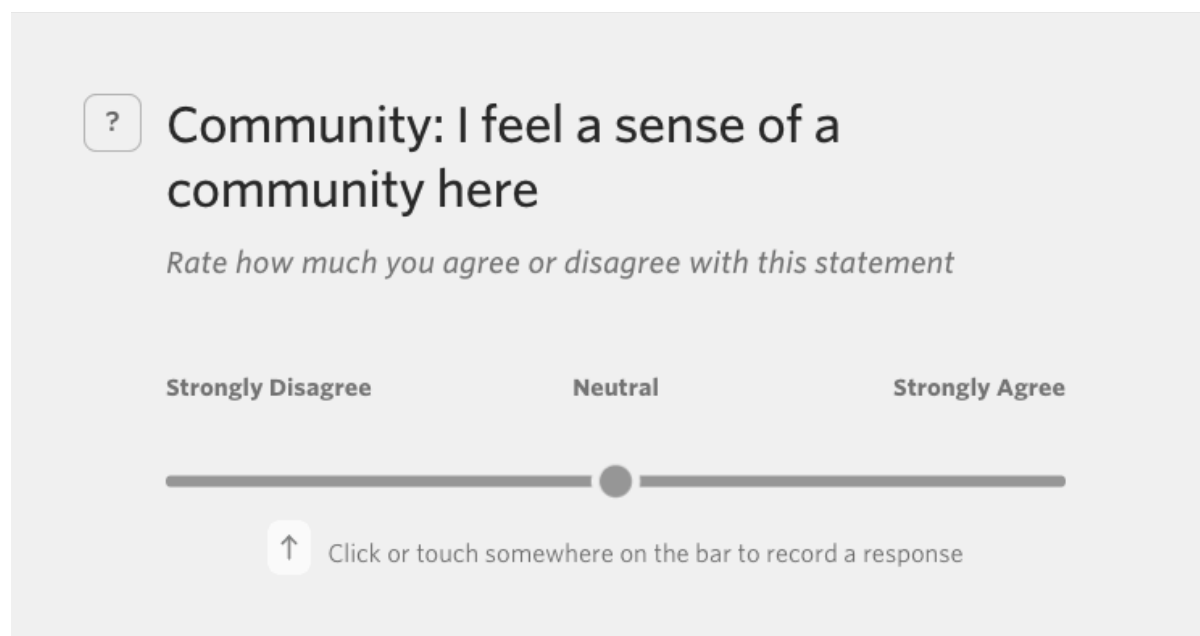
17 APPENDIX 6 – CULTURE COUNTS

Culture Counts Pty Ltd are the providers of a software-as-a-service tool, also known as Culture Counts. Culture Counts was established in 2013 after the West Australian Department of Culture and Arts finalised a three-year project developing what was known as the Public Value Measurement Framework (PVMF). As part of the third phase of PVMF development, a prototype software tool was developed that could be used to implement a component of the PVMF; that being a standardised feedback collection system that could be used to collect data in a consistent, and therefore, comparable manner. Culture Counts Pty Ltd was established to continue the development and commercialisation of this software (now known as Culture Counts) and maintains its intellectual property rights, with a license granted to the Department.

Culture Counts is used by over 800 organisations across in Australia, the UK and New Zealand. As of September 2020, the Australian dataset contains 12.3m datapoints across 12,703 surveys and 640,109 survey respondents.

As part of the evaluation platform, a survey instrument that was designed to collect responses using standardised question statements, referred to as ‘dimension’s. Organisations are responsible for the delivery of surveys to respondents. Organisations could choose to select the dimensions they wished to include in their own survey. The survey instrument for the dimension statements used a 101-point continuous slider on a Likert scale. The attached figure illustrates how respondents were asked to respond to the dimension statements.

Example Dimension Survey Tool



? **Community: I feel a sense of a community here**

Rate how much you agree or disagree with this statement

Strongly Disagree **Neutral** **Strongly Agree**

↑ Click or touch somewhere on the bar to record a response

A series of benchmarks was generated for the National Performing Arts Touring. Benchmarks were generated at the survey level for regional arts activity evaluated using the Culture Counts platform within Australia.

Culture Counts Benchmarks – National Performing Arts Touring Scan

DIMENSION	25 TH %	MEDIAN	75 TH %	# OF SURVEYS	# OF RESPONSES
CONNECTION <i>It helped me to feel connected to people in the community</i>	0.73	0.79	0.85	59	7,439
BELONGING <i>It helped me feel part of the community</i>	0.75	0.79	0.81	18	1,694
ACCESS <i>It gave me the opportunity to access activities I would otherwise not have access to</i>	0.74	0.81	0.87	13	1,210
MEANING <i>It moved and inspired me</i>	0.78	0.82	0.88	38	5,577
RELEVANCE <i>It had something to say about today's world</i>	0.74	0.83	0.87	13	1,893
EXCELLENCE <i>It is one of the best examples of its type that I have seen</i>	0.76	0.84	0.86	23	1,441
DISTINCTIVENESS <i>It was different from things I've experienced before</i>	0.74	0.84	0.90	36	3,772
RISK <i>The artist was not afraid to try new things</i>	0.82	0.87	0.91	13	825
PRESENTATION <i>It was well produced and presented</i>	0.85	0.89	0.91	16	1,510
LOCAL IMPACT <i>It's important that it's happening here</i>	0.87	0.89	0.94	37	4,350
CULTURAL CONTRIBUTION <i>It provides an important addition to the cultural life of the area</i>	0.84	0.89	0.91	12	757
RIGOUR <i>It was well thought through and put together</i>	0.87	0.90	0.93	46	5,639
CAPTIVATION <i>It held my interest and attention</i>	0.86	0.90	0.94	57	6,842
ENTHUSIAM <i>I would come to something like this again</i>	0.90	0.93	0.95	52	5,540

Note: Surveys with less than 20 responses removed from dataset. Surveys were assumed to concern regional or touring activity if > 50% of respondents had a postcode outside of a Greater Capital City Area. 25th and 75th percentiles represent the interquartile range of survey average results.

18 APPENDIX 7 – CONSULTATION SCHEDULE

PLACE	CONSULTATIONS	
MELBOURNE	Creative Victoria	Sue Doyle, Stuart Koop, Debra Jeffries, Karen, Tegan Lang, Kristabell
28/29-JAN	Theatre Network Australia	Nicole Beyer
	Regional Arts Victoria	Joe Toohey, Rosie Dwyer
	VAPAC	Jenny Ryssenbeek
	Regional Arts Australia	Ros Abercrombie
	Australian Ballet	Libby Christie, Chris Yates
	Melbourne Symphony Orchestra	Sophie Galaise
	Victorian Opera	Elizabeth Hill-Cooper
	Circus Oz	Penny Miles, Matt Hughes, Thalia Azaria
4-AUG	Multicultural Arts Victoria	Veronica Pardo, Andy Miller
19-AUG	Mission Songs Project	Jessie Lloyd
25-AUG	Hit Productions	Christine Harris
	ILBIJERRI Theatre Company	Rachael Maza
SYDNEY	Create NSW	Chris Keely, Kate Hickey, Sam Wild
11/14-FEB	AMPAG	Bethwyn Serow
11/12-MAR	Regional Arts NSW	Patrick Healey
	Arts on Tour	Antonia Seymour
	NAPACA	Michelle Pearce and Anne-Marie Heath
	Critical Stages	Chris Bendall
	Monkey Baa	Jeremy Miller, Sandra Eldridge, Eva Di Cesare, Laura Watson
	Shaun Parker + Company	Beverly Growden
	Sydney Dance Company	Anne Dunn
	Musica Viva	Katherine Kemp, Paul Stuart
	Opera Australia	Rory Jeffes, Lyndon Terracini, Ashlee Hints
	Sydney Symphony Orchestra	David Harris, Kerry-Anne Cook, Aernout Kerbert
	Bell Shakespeare	John Henderson
	Performing Lines	Marion Potts
	Australia Council	Dayo Awode
	Australia Council	Adrian Burnett
	Australia Council staff	Lissa Twomey, Andrew Donovan
	Bangarra Dance Theatre	Tony Grybowski, Claudia Elder
26-MAR	Australia Chamber Orchestra	Alexandra Cameron-Fraser
5-AUG	Merrigong Theatre Company	Simon Hinton
6-AUG	OzAsia Festival / Contemporary Australian Performance	Annette Shun Wah
11-AUG	Diversity Arts Australia	Lena Nahlous
25-AUG	Australia Council	Lydia Miller
26-AUG	Australia Council	Sandy Collins, Alice Nash, Jade Lillie
	Australia Council	Andrew Donovan, Patricia Adjel

31-AUG	Australia Council	Adrian Collette
BRISBANE	Arts Queensland	Kirsten Herring, Tania Hall
27/28-FEB	Stage Queensland	Suzan Williams
	Queensland Symphony Orchestra	Craig Whitehead
	Queensland Ballet	Craig Cathcart, Jean Attwater, Erin Core, Lisa Summer-Hayes, Sarah Boom, Genevieve Dunn, Cameron Goerg
	Opera Queensland	Sandra Willis, Mark Taylor
	Confederation of Australian International Arts Festivals	Julia Herne
	arTour and Circa	Jo Currey, Tanya Malouf
23-MAR	Queensland Theatre Company	Sophia Hall
26-MAR	BlakDance	Merindah Donnelly
CAIRNS	Cairns Indigenous Arts Fair	Renee Harris, Janina Harding
26-FEB	JUTE Theatre Company	Suellen Maunder
DARWIN	Arts NT	Angela Hill, Kieren Grassmayr
18/19-MAR	Artback NT	Louise Partos, Liz Rogers
	Chamber of Commerce NT, Creative Industries	Angela O'Donnell
	Bangarra Dance Theatre	Libby Collins
ALICE SPRINGS		
19-FEB	Araluen Arts Centre	Felicity Green
PERTH	DLGSC	Duncan Ord
19/21-FEB	DLGSC	Paul Caulfield, Kate Bird,
	PAC Australia	Rick Heath, Katherine Connor
	Regional Arts WA	Paul MacPhail, Philippa Maughan
	CircuitWest	Ryan Taaffe
	WA Opera	Terasa Letizia
	WA Ballet	Jessica Machin
	Spare Parts Puppet Theatre	Natalie Bell
	Barking Gecko	Helen Hristofski
	Black Swan Theatre Company	Rick Heath, Jessica Knight
	West Australian Symphony Orchestra	Keith McGowan, Brad Martin, Cassandra Lake
3-AUG	Yirra Yaakin	Peter Kift, Eva Mullaley
5-AUG	Perth Festival	Anna Reece
26-AUG	Marrugeku	Robina Burton, Justin Macdonnell
27-AUG	APAN	Catherine Jones
ADELAIDE	<i>(January scheduled and completed prior to approval for Phase Two consultations)</i>	
14-JAN	DPC (SA)	Jennifer Layther
	Country Arts SA	Anthony Peluso
	National Touring Selector	Sarah Knight
	SA Presenters Association	Sussan Baldwin, Chair

14-APR	Patch Theatre	Teena Munn, Penny Camens
	State Theatre South Australia	Shelley Lush
20-APR	Windwill Theatre	Rosemary Myers, Kaye Weeks
21-APR	Australian Dance Theatre	Garry Stewart, Nick Hays, Lucie Balsamo
22-APR	Adelaide Symphony	Vincent Ciccarello
	State Opera South Australia	Yarmila Alfonzetti
10-AUG	Country Arts SA	Louisa Norman
HOBART	Arts Tasmania	David Sudmalis
30-JAN	Dept State Growth	Jacqui Allen
	Theatre Royal	Tim Munro
	Tasmanian Symphony Orchestra	Caroline Sharpen
CANBERRA	Arts ACT	Deb Burkevics, Robert Piani, Sam Tyler, Alex Budd
10-MAR	Office of the Arts	Sylvia Spaseski, Alison Todd