
2004

**WHO
GOES
THERE?**

NATIONAL
MULTICULTURAL
ARTS
AUDIENCE
CASE
STUDIES

WHO GOES THERE?

NATIONAL MULTICULTURAL ARTS AUDIENCE CASE STUDIES



Australian Government



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372 Elizabeth St, Surry Hills, NSW 2010
PO BOX 788 Strawberry Hills, NSW 2012
Telephone 02 9215 9000
Toll Free 1800 226 912
Fax 02 9215 9111
Email: mail@ozco.gov.au
<http://www.ozco.gov.au>

Researched and written by Fotis Kapetopoulos, Consultant, Kape Communications
Studio 10/60 Langridge St, Collingwood, VIC 3066
PO BOX 1646 Collingwood, VIC 3066
Telephone 03 9486 0017
Fax 03 9486 0016
Email kape@iinet.net.au
<http://www.strategicqualities.com>
Design by dk visual communications

FOREWORD

BY DONNA WALKER-KUHNE

Who Goes There? by Fotis Kapetopoulos shows us that arts audiences want to see more diversity, including diversity in who they are sitting next to at performances. It follows a survey of audiences at three key Australian arts companies: Carnivale Multicultural Arts Festival NSW, para//elo contemporary performance group, and the kultour network.

There is a thirst in Australia for multiculturalism and diversity and a long-term effort is needed in both arts management and marketing to fuel this thirst. The vast range of products presented to consumers means that all businesses, including those whose business is the arts, struggle with maintaining customer loyalty and that branding has less impact in the competitive marketplace.

Analysis of the three arts organisations in this report reveal that their programs attract similar audiences. The competition for audiences is therefore not amongst arts organisations and arts product, but with other forms of entertainment, a shrinking arts economy.

It is not surprising that children of non-English speaking background migrant audiences have a strong desire to see multicultural performances incorporating authentic traditions and other contemporary popular art forms. Interestingly though, *all* respondents surveyed in this report indicated that they want to see more authentic and contemporary culturally diverse programming.

Arts organisations need to create a diverse offering and make the arts experience one that

is more reflective of society. The more creative we are with presenting arts and culture, the more consumers want to try different experiences.

In order for the arts and audiences to reflect the world in which we live and continue to evolve, there must be a concerted and highly developed plan to incorporate multiculturalism in 'broad strokes' with the arts and to target ethnic communities that are presently not represented. The three focus organisations surveyed have met with varying degrees of success because of their varying efforts to create and promote diversity.

Kapetopoulos rightly observes that traditional marketing has changed in response to changes in our society, work, careers, lack of time, and family dynamics. The present efforts for promoting diversity are in their infancy in Australia, and Kapetopoulos argues that without a fundamental, institutional change in values, culture and philosophy it will not grow or become long-lasting. He offers strategies based on research for developing a significant impact in this area.

Long-term success will only improve as the efforts become organic and consistent.

Donna Walker-Kuhne visited Australia as a guest of the Australia Council in October 2003. Walker-Kuhne, a leading audience development specialist, heads Walker International Communications Group in New York.

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ABOUT THE AUTHOR

Fotis Kapetopoulos heads research and communications consultancy Kape Communications. He was the director of Multicultural Arts Victoria (MAV) between 1992 and 2001. At MAV he assisted and marketed artists, festivals and events on a state-wide, national and international level. Mr Kapetopoulos developed policies and strategies for increasing multicultural audiences to the mainstream arts, while assisting artists to secure funding and develop marketing strategies. After leaving MAV, Mr Kapetopoulos became senior policy consultant for the Italian Assistance Association (Vic) (2001–2003) where he secured funding and designed Alzheimer's and Diabetes prevention campaigns for older Italians.

Mr Kapetopoulos heads Multicultural Arts Professional Development (MAPD), an initiative of the Australia Council. MAPD is accredited at Graduate Certificate level in Organisational Leadership at RMIT University. Mr Kapetopoulos recently completed research for the Australia Council on culturally diverse audiences titled *Who Goes There?* In 2003 he was responsible for managing a national lecture tour by Donna Walker-Kuhne, America's leading audience specialist. In 2004 through Kape Communications, he will host a lecture series by Dr Richard Kurin from the Smithsonian Institution Washington DC.

Some of Mr Kapetopoulos' highlights include management and marketing of the Multicultural Arts Marketing Ambassadors Strategy (MAMAS), contemporary dancers Tina Yong and Sun Ping, Latin dance and music concert Duende-Latin Groove at the Arts Centre, contemporary flamenco ensemble Arte Kanela and flamenco theatre House of Bernarda Alba, Bhutto dancer Yumi Umiumare, visual artists Fassih Keisso, Sandor Matos and Frank Grauso, photographer Emmanuel Santos and world music orchestra Grand Union Orchestra (UK). His work has resulted in exchanges with Singapore, Kuala Lumpur, Budapest and Athens.

Mr Kapetopoulos secured an internship at the Smithsonian Institution, Washington DC and an Asialink Management Residency at the Singapore National Arts Council. He initiated

a Memorandum of Understanding between Arts Victoria and the National Arts Council of Singapore.

He holds a Bachelor of Arts with Honours in Politics, a Graduate Diploma in Tourism and a Masters (research and course work) in Tourism from Monash University, Melbourne. Mr Kapetopoulos writes both fiction and non-fiction for various publications.

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I am indebted to Ms Cecelia Cmielewski, Senior Policy Officer for the Australia Council. She was instrumental in initiating this research. Her priceless guidance and tremendous patience with my ever-extending deadlines assured the final completion of this research.

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Finally, I would like to thank Ms Donna Walker-Kuhne, America's leading culturally diverse audience development expert, for providing me with ideas and inspiration during her Australian lecture tour.



WHO GOES THERE?

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Overview

Who Goes There? is a qualitative analysis commissioned by the Australia Council for the Arts which examines patterns emerging from audience surveys, focus groups, observation and key stakeholder interviews between June 2002 and April 2003

The three programs examined over 2002 and 2003 were:

- kultour—a national multicultural art touring network initiated by the Australia Council
- para//elo—a contemporary performance group, South Australia
- Carnivale Multicultural Arts Festival NSW.

In the Australian arts scene cultural diversity, while valued, is under-utilised in aspects of presentation and promotion. Australian audiences, as this report and other studies reveal, demonstrate a keen interest in multicultural arts. *Australians and the Arts* by Saatchi & Saatchi revealed a thirst by audiences for multicultural arts and a largely untapped potential for major arts agencies to communicate to culturally diverse audiences.¹

‘Survey participants of non-English speaking origin were more likely to place a high value on the arts than those who do not have such background. A non-English speaking origin was also related to other characteristics associated with placing a high value on the arts, including higher educational qualifications and a tendency to live closer to the centre of capital cities.’²

Our cultural diversity has gained increasing relevance for arts and cultural organisations both as a management and marketing issue. Programs such as the Multicultural Arts Marketing Ambassadors Strategy (MAMAS) and the Multicultural Arts Professional Development (MAPD)³, and overseas examples such as *Embracing Diversity*, by the San Diego Contemporary Arts Centre⁴, reveal that mainstream arts organisations need to develop long-term strategies which enhance culturally diverse audience development.

The patterns emerging in the case studies suggest that like all arts and entertainment programs multicultural ones are dependent on relevance, skill and production values. Cultural diversity adds value in a world of product and brand clutter. Regardless of profile and assurances of quality, there is no guarantee consumers will be

compelled to support the arts. As in every other service and retail industry, producers are being confronted with tremendous product diversity and consumer awareness. As *The Economist* writes:

‘Consumers are now commercial veterans, inundated with up to 1500 pitches a day. Far from being gullible and easily manipulated, they are cynical about marketing and less responsive to entreaties to buy.’⁵

We are witnessing the decline of traditional brand power. Faster global economic cycles, rapid communications and media convergence, a global sense of political uncertainty, the growth of large new markets in the developing world and greater lifestyle choices for those in the developed world, have created greater cynicism among consumers. Consumers, especially the young, are less loyal to traditional brands and that lack of loyalty impacts on arts, culture and entertainment.

‘Nearly half of all American college students have taken marketing courses and “know the enemy”. For them, “shooting down advertising has become a kind of sport”’.⁶

Mass marketing has given way to direct one-to-one marketing, SMS and email marketing, the growth of non-profit marketing techniques and the global power of word-of-mouth. Brand giants, once impenetrable have to create new products for a more cynical consumer. Not since the 1970s has societal marketing become so important. The societal marketing concept calls on marketers to balance three considerations in setting their communications policies: profits, consumer wants and society’s interests.⁷

Large corporations are now emulating the strategies developed in the non-profit and non-mainstream sector to secure an advantage over competitors. Alliance networks have overtaken traditional hierarchical structures. Powerful companies of the 1980s and 1990s including BHP, General Motors, IBM, Ericsson and McDonalds, are now in the process of reinventing themselves.⁸

These trends are reflected in the arts, entertainment, cultural and tourism industries. Major music recording companies do not yield the power they once did. Web-based share ware, low cost recording technology and the ability to market music at low cost by the artists themselves, have destabilised major recording labels. Recently it was announced that EMI will be reducing the price of CDs in order to compete more effectively with these new developments.⁹

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Consumers are harder to reach, they are busier, their lives are cluttered, and they suffer from a deficit of time. Add to these facts a new cynicism, especially amongst the young, and one is confronted with a new dynamic in the precinct of marketing, promotions and general communication.

Cultural and lifestyle issues have become major determinants of consumer wants and needs. Financial institutions to fast food retailers are now creating products to suit culture, language, sexual orientation and lifestyle choice.¹⁰ These changes guarantee that no longer is the core consumer of laundry detergent a white suburban housewife.¹¹

There are Australian major arts companies and venues that are now targeting culturally diverse segments, for example The Australian Ballet, the National Gallery of Victoria, and the Sydney and Melbourne Symphony Orchestras. However, the shift towards new marketing and promotional strategies is still embryonic in terms of core values in management thinking within many mainstream arts organisations.

Research here and overseas suggests that new products married to new marketing strategies and culturally diverse management practices yield new audiences, patrons, funding and sponsors.

Embracing Diversity, by the San Diego Museum of Contemporary Art, has a long term strategy aimed at increasing access to culturally diverse residents, then extending that access to patronage and ultimately sponsorship and benefaction. The museum is acutely aware of the increasing Latin American, Asian and other culturally diverse middle classes emerging in the San Diego area. Their strategy includes a focus on culturally diverse staffing and management, and second language learning for staff of the museum.¹²

In 2003 Donna Walker-Kuhne, America's leading audience development expert, presented a range of case studies in Australia of her work at the New York-based Joseph Papp Public Theatre, where her mandate was to transform the Public Theatre foyer into 'something reflecting Central Station'.¹³ Ms Walker-Kuhne provided numerous instances where one-to-one communications, research and staff training in cultural awareness, along with flexibility and long-term vision, and relevant program development did transform the theatre into a reflection of New York's Central Station in terms of the representation of cultural diversity among audiences and patrons.¹⁴

Who Goes There? attempts to determine the nature and profile of audiences for multicultural

arts product. This is the first time a dedicated qualitative study has been conducted on a range of multicultural arts programs, in a number of states in Australia.

Psychographics in audience research— a brief introduction

Psychographics in market research play an important role in determining the type of audiences or customers attending events and purchasing products or services. Examining people's demographic, cultural and economic position, their education, age and sex, helps marketers in determining appropriate communication and advertising strategies. There are various market psychographic terms used by researchers but a commonly used approach in Australian tourism and arts marketing is the Roy Morgan/Ogilvy & Mather Values Segments®.¹⁵ It is mainly these Values Segments that *Who Goes There?* relies on in identifying the various audiences.

These Values Segments define Australia's society for market use. They include, Basic Needs which define those who hold traditional views of life and are generally satisfied with their lives such as pensioners, widowers and people with low incomes. The A Fairer Deal segment represents people dissatisfied with their lives and include a higher level of unskilled workers and unemployed who have a predisposition towards cynicism and insecurity.

There is the Conventional Family segment which reflects those whose lives revolve around home and children and place a high value on family and friends and financial security. The Traditional Family Life segment are people over their 50s with a commitment to family values and are interested in extended family and grandchildren. The Look at Me segment are young and peer-driven, always looking for fun, are single with no children, fashion conscious and socially active.

The Something Better segment are generally well educated, hold responsible job, feel confident, are ambitious and see themselves as progressive. The Real Conservatives are conservative in most things, asset rich and income poor with strong religious, social and moral values.

The Young Optimists are optimistic about the future and are generally students and young professionals with a focus on career and travel. The Visible Achievers tend to be in their 30s and enjoy above average incomes and seek personal

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recognition of their success. They are interested in gathering around them the signs of success and have a keen interest in politics and public affairs. The Socially Aware are socially responsible, community minded and are likely to be involved in social issue-based activities, the arts and travel, like the Something Better segment.

One can add two sub-segments; non-English speaking background 1 (NESB1), representing Australians born overseas of non-Anglo-Celtic background and non-English speaking background 2 (NESB2), representing those of non-Anglo-Celtic background born in Australia. Children born of culturally diverse migrants are 'influencers' who will make an effort to introduce their parents to new products and services.¹⁶ These segments are important in researching culturally diverse audiences, yet the term NESB is clumsy, thus culturally diverse will be used instead when discussing people of non-English speaking background.

Executive summary

Who Goes There? examines three programs over the period 2002 to 2003:

- kultour—a national multicultural art touring network initiated by the Australia Council
- para/elo—a contemporary performance group in South Australia
- Carnivale Multicultural Arts Festival NSW.

This study found that the selected programs tended to attract similar audiences. The differences among audiences were mainly determined by the nature of program, the type of branding and communication strategies adopted by the presenters.

The audience represented mainly the Socially Aware segment followed by the Something Better and Visible Achievers value segments. There was limited representation of Basic Needs and Traditional Family Value segments.¹⁷

The study suggests there was a tendency for audiences to be tertiary educated, working as professionals in the arts and non-governmental organisation (NGO) sector, education and government sectors.

The surveys, focus groups and interviews revealed a high proportion of artists—between 45%–65%

of audiences attending these multicultural arts performances.

There was a higher representation of women among audiences, 51% at the lower end and 74% at the higher end.

The majority of audiences were born in Australia and about 20% were born outside Australia.

Those of culturally diverse background, and/or those who spoke a language other than English constituted approximately 40% of total survey and focus group respondents.

NESB audiences born in Australia, between 15 and 25 years of age were not a key focus for presenters, except in the case of Carnivale NSW which made youth of culturally diverse background a desired market segment.

There was strong representation of Baby Boomers. Those born before 1955 represented 26% of the respondents, followed by 20% of those born between 1955 and 1964, and 26% of those born between 1965 and 1975. Approximately 20% of the respondents did not reveal their date of birth.

Carnivale was the only organisation which tailored its programming, branding and communications to suit the needs of culturally diverse youth between the ages of 16 and 25 years.

There was a desire by culturally diverse youth to see more contemporary multicultural performances incorporating authentic traditions and other contemporary and/or popular art forms. There was a strong desire by all respondents to see more authentic and contemporary culturally diverse programming. This represents a worldwide trend towards authentic music and performance melded with contemporary artforms.

Direct, network and one-to-one marketing, followed by media liaison was the most evident form of communications employed by the presenters. There was little above-the-line advertising, and what little there was made no significant difference to audiences' psychographic profile. In most cases, lack of promotional and marketing resources limited the scope for advertising. Most advertising was carried out in industry-based publications, community and local press and free youth print media.

Word-of-mouth, email and mail, brochure and flyer distribution, posters, public relations and media liaison were predominant in communication. Between 20% and 30% of

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all survey respondents highlighted a mix of the above as key sources of information, with word-of-mouth hovering around 25%, print media 20%, email at 30% and ordinary mail at 20%.

para//elo integrated product and audience development as part of the production process of the 1900 Project. They were adept at incorporating multi-level marketing techniques in a long-term strategy of audience development.

Audiences for multicultural arts are sophisticated and have a high expectation for quality. This became evident in focus group discussions and survey returns.

Audiences for multicultural arts have a low threshold of tolerance for average presentation and average artistic skills, regardless of their Socially Aware background and their commitment to multicultural arts.

Loyalty to company and event was a major motivator in audience attendance. Audiences trust presenters, but that trust is easily eroded if the art form or presentation does not meet the audiences' expectations.

Conclusions from research such as *Australians and the Arts*, by Saatchi & Saatchi, revealing a desire by audiences to see more culturally diverse arts, were reaffirmed.

kultour

Trust in the presenter and artists were key factors motivating audiences attending kultour programs.

kultour is in an embryonic phase and has yet to establish a strong brand profile nationally.

Vagaries in presentation and artistic skills were evident in kultour 2002 and if not attended to may impact on brand health and audience loyalty for kultour product in the future.

kultour is an interesting play on words between culture and tour but suffers from recognition clutter on the Internet; whenever a search is carried out, references to the German word kultur come up first.

Ethnic media as a source of information rated low among survey respondents and focus group participants. This may reflect that those with low English competency did not respond to the survey in large numbers, or that programs attracted, in the main, people who regardless of cultural background are competent English

speakers and/or are born in Australia of culturally diverse parents.

para//elo

para//elo takes audiences through a process from the initiation of a program to development and final presentation, thus securing loyalty and new audiences ahead of any marketing.

para//elo's historic understanding of its core audience base and its unique position assists in targeting specific audience segments well in advance of the presentation of any program.

para//elo's branding may suffer slightly from the association by traditional followers and arts industry with Doppio Teatro the original company name. The confusion is minor and does not create serious problems.

para//elo's 1900 Project community showcase at the Maritime Museum of South Australia integrated food, a historic walking tour and readings, thus becoming an ideal public relations and audience development strategy.

The partnerships with arts and non-arts sectors aids para//elo's success in broadening the portfolio of work which seeks new audiences while not losing traditional ones.

The integration of community, art and real life in product development is a foundation in para//elo's operating rationale.

Carnivale Multicultural Arts Festival NSW

Re-branding Carnivale Multicultural Arts Festival NSW was a major strategy for 2002 and 2003, succeeding in attracting a larger share of culturally diverse youth audiences.

Carnivale developed a harmonised brand identity complemented by a comprehensive segmented communications, media liaison and marketing campaign.

Programming and communications indicated a desire by culturally diverse audiences between 16 and 35 years, within the Socially Aware, Young Optimists and Visible Achievers segments to see traditional cultural art-forms incorporating contemporary approaches.

Carnivale's programming and communications tailored to culturally diverse youth segments was balanced by free community arts events and more

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traditional arts programs, thus not alienating traditional audiences.

Partnership with venues, media and other arts institutions was a key feature aimed at specific suburban and locality-based markets.

Methodology

The methodology used in *Who Goes There?* examines three distinctly different and separate programming styles of multicultural arts. The study focuses on communication strategies, branding and audience profiling for the following programs:

- kultour—the development of audiences by an embryonic national multicultural arts touring initiative in 2002 and 2003.
- para//elo—development of a long-term audience strategy by one of the leading cross-cultural contemporary performance company, for the 1900 Project.
- Carnivale Multicultural Arts Festival NSW—the re-branding of a hallmark multicultural festival with an established history. (Carnivale was cancelled by the NSW State Government on the 9 April 2004.)

Primary research took the form of surveys, interviews and focus groups. Secondary research consisted of literature reviews, Australian Bureau of Statistics (ABS) data and articles, Australia Council resources, event programs, articles, media articles and websites.

The data collected from surveys, interviews and focus groups is supported by data from secondary research. Thus a complete picture emerges of the selected multicultural arts audience and presenters.

As the sampling size is small, interviews and focus groups are important in establishing key patterns. Jeff Jarvis in his study on backpackers in Australia suggests 'sampling size in a qualitative case study analysis is not in itself important, the core objective being the establishment of observable patterns in the data.'¹⁸

Interviews

Through a general discussion guide, questions were contained within the boundaries of the issues needing investigation. It was possible to keep a check on all subjects requiring discussion. The interview approach was casual and allowed flexibility to explore issues particular to the organisations and regional and demographic background of the subject at any particular time.

Surveys

There were three audience surveys, in Hobart, Sydney and Melbourne, as part of the kultour case study. The kultour surveys had general profile questions which gauged gender and age distribution, place of birth, languages spoken other than English and residence. More specific profile questions sought to gauge the rate of visitation to music programs, festivals and live events, rate of return visitation to presenters' events, brand recognition and the types of communication approaches of which they were most aware.

There was a small sample survey carried out on the workshop participants of the para//elo 1900 Project. There were no new surveys for Carnivale as the research and audience surveys carried out by Hans Guldberg of Economic Strategies Pty Ltd in 2001 were available for analysis. These findings, when compared to those from a similar sample size in the kultour surveys, have sufficient relevance on audience make-up for Carnivale.

Focus groups

The focus group guides were planned out in three sections to promote a fluid conversation and discussion and to take account of question sequence:

- The first part of the discussion guide was formed by General Profiling Questions that consisted of questions, such as name, age and other general demographic data.
- The second focused on the Key Research Topics, consisting of questions relating to choice, perceptions prior to and after performance, expectations, met and unmet, sources of information and related matters.



- The third and final part of the questionnaire, under the heading of Additional Questions, sought information on knowledge about presenters, the Australia Council and what impressed participants most.

Desk research

Desk research took on the form of specific and broad research aiding in analyses and the deriving of conclusions from the primary research. Desk research consisted of the examination of published government and other research reports; Australian and international studies; published statistics, essays in relevant journals and periodicals; organisations' annual reports, arts funding and development policies from the Australia Council and other relevant sources; Internet research of relevant sites, books and media.

Organising data

The raw data was assembled incorporating information collected from surveys, interviews, and focus groups. The raw data was then analysed using desk research. The case studies provide an outline of each subject in an accessible format. It is a narrative of the information necessary to understand the programming and communication approaches used by the organisations and resulting audience profiles.

Report presentation

The report is available in HTML and PDF formats. There are links to video excerpts of selected artists' work on the HTML version.

All three case studies focus on different areas:

- kultour examines the audience make-up of its initial 2002 program.
- para//elo discusses the holistic approach taken at developing product and audiences.
- Carnivale NSW looks at the re-branding process undertaken in 2002 and 2003.

Setting the scene

Given the numerous debates over meaning when discussing multicultural art, excellence and innovation, *Who Goes There?* audience case studies will adhere to the definition used in the Australia Council for the Arts', *Arts in a Multicultural Australia* (AMA) policy document.

'Excellence and innovation are both abstract notions. The Australia Council's Multicultural Advisory Committee (ACMAC) acknowledges that there is no simple definition of excellence and that different cultures hold different interpretations. As an aspiration however, excellence remains a valuable objective encouraging artists to strive for work of the highest skill and quality. ACMAC welcomes debate on the definition of excellence and recognises that such debate must be broad and inclusive allowing for a diversity of perspectives and practice.'¹⁹

AMA policy points out that innovation is not mutually exclusive or oppositional to tradition. In fact, innovation can only be measured in relation to tradition.²⁰ The case studies are examples which reflect the relation between tradition, innovation and arts presentation.

The industry—arts and audiences

The Australia Council places Australian production of goods and services by the arts and cultural industry at around \$26 billion. This represented 3% of the total production of goods and services in Australia in 1997.²¹ This includes film, radio and television, advertising, performing arts, zoos and parks, sound recording, photography services, music and theatre, publishing and printing.

Artists create and artswomen work for less income than many of their middle class counterparts in other industries, particularly the commercial sectors.

Dr Richard Kurin, director of the Centre of Folklife and Cultural Studies at the Smithsonian Institution, records that if tourism, art, media and entertainment meld—'then culture is the largest industry in the world. Several trillion dollars a year are spent selling culture. At issue is who does the representing to who, who makes money from it, and at what cost? ...cultural products are going to be marketed for profit, and distributed beyond their traditional audiences. Some of this may

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occur under the control of the very communities that produce that culture, if the technology, knowledge and networks are available.²²

If culture is the largest industry in the world, then multiculturalism is Australia's most under-utilised brand. Multiculturalism is an expanding industry brand in Europe and developed parts of Asia such as Singapore.

A globalising economy and its discontents equally have increased interest in multiculturalism. If this interest is harnessed it may allow us to penetrate new markets in developed Europe, North America and Asia.²³ The Australia Council and state and territory art ministries have in their charters the promotion of cultural diversity internationally. Culturally diverse Australians, especially artists and arts administrators, can be effective conduits to new international markets.

Opportunity exists to develop promotional strategies for multicultural Australia, through low cost cultural and art exchanges. Importantly, backpackers tend not to be influenced as much by international events such as 9/11 and SARS when selecting Australia as a destination. They are also a key source of Australia's tourism income.

A full-page advertisement in the *LA Times Sunday* section may cost US\$ 61,000²⁴ yet a cultural and arts exchange, as a strategic exercise supported by tourism, arts and multicultural agencies for a similar cost could yield long-term direct outcomes. More extensive use of the Visiting Journalist Program and/or a segment of the communications budget by arts organisations and funding bodies dedicated to overseas arts journalists, may generate interest in key target markets sought for Australia's cultural and arts products.

In Europe, festivals and organisations such as The European Forum of Worldwide Music Festivals and its annual showcase WOMEX and others like Mundial, added to international debates about immigration and global diversity, have impacted on once peripheral arts centres such as Hungary, Portugal, Turkey and Greece creating fertile ground for the export of quality market-tested multicultural arts product from Australia.²⁵

Multiculturalism as policy

It is important to provide a brief background on multiculturalism, as Australia developed a unique strand of multicultural policy in the 1970s. Multiculturalism is subject to various interpretations and philosophical values.

The concept of multiculturalism consistently faced challenges such as political reaction from the far right, media criticism, popular opinion and internal disputes over meaning and objective.²⁶ The greatest outside criticism came from those who tend to view the prevailing culture as complete, whole and unchanging.²⁷

Dr Kurin questions the critics of North America's multiculturalism: '...what is the homogenous way of life that cultural diversity threatens? Americans, for example, might legitimately ask whether it is American pop culture? Biblical culture? Greco-Roman culture? Anglo culture?'²⁸

This is not the forum to debate multiculturalism in full, but it is important to point to the key positions defined by Mark Lopez in *The Origins of Multiculturalism 1945–75*:

- Cultural pluralism—concerned with government recognition and support for the preservation and development of migrant/ethnic groups and cultures
- Welfare multiculturalism—conceptualises migrant/ethnic groups as vulnerable and afflicted by a range of welfare problems, for example in income, health, housing, and opportunities for cultural expression and leisure activities
- Ethnic structural pluralism—depicts society in pluralistic terms defining migrants as belonging to ethnic groups, and as the victims of socio-economic inequalities and institutional practices that threaten their sense of identity
- Ethnic rights multiculturalism—conceptualises the migrant/ethnic population as predominantly working class and structurally disadvantaged by the capitalist division of labour and institutionalised racism.²⁹

The Australian Government's *The National Agenda for Multicultural Australia* positions multiculturalism within the tradition of cultural pluralism.³⁰ Multicultural arts organisations tend to balance between cultural pluralism and ethnic rights multiculturalism.

The Australian Centre for International Business research revealed that 68% of Australian business managers ranked managing diversity for complexity in international cultural environments as of moderate-high importance.³¹

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Only 20% indicated that cultural diversity was of importance for growth in culturally complex markets.³² There has been some debate about the low participation of culturally diverse arts managers, artistic directors and marketing specialists in major arts organisations.

The 1996 ABS statistics reveal that only 3% of artistic jobs in theatre were held by people born in Other Europe (excluding the UK) and ex-Soviet Union, compared to 6.1% holding jobs in the workforce.³³

Essential to new audiences and extending Australia's position as a producer of arts is the inclusion of culturally diverse Australians as managers, producers and employees, not only as artists or consumers.

Organisations that employ and manage employees from diverse national backgrounds have greater propensity to internationalise than organisations with relatively homogenous workforces.³⁴

Our unique position of promoting Australia to the world is our cultural diversity in food, urban enclaves, industries, arts events and festivals. Yet arts and cultural tourism authorities have not vigorously pursued multicultural human resources management and marketing strategies.

kultour 2002 CASE STUDY 1

Overview

Summary of findings

kultour background

kultour network

A knowledge network

kultour members

Research approach

A new product

kultour programs 2002

General audience responses in 2002

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kultour audiences

kultour communication approaches

Conclusion

Overview

'kultour is a national network dedicated to the touring of innovative and unique Australian multicultural arts.' (*kultour: 2002*)

kultour is a strategic initiative of the Australia Council's *Arts in a Multicultural Australia* (AMA) policy. kultour is dedicated to national touring of multicultural artists. The Australia Council supports capacity building for the touring network.

The Australia Council supported the program with a budget of \$160,000 for 2002 and 2003 towards artists' fees and travel costs. The budget assists with administration, printing of promotional collateral and digital communications.

Summary of findings

kultour offered presenters the capacity to target new audiences for new product. In many instances that opportunity was not fully exploited by some presenters in 2002, but was addressed by 2003.

The diversity of members from larger organisations such as Northern Rivers Performing Arts (NORPA)³⁵ or Carnivale Multicultural Arts Festival to artform organisations such as IHOS Contemporary Music Theatre and membership based ones such as, Multicultural Arts Victoria (MAV) and KULCHA (WA), results in varying marketing capacities and approaches for kultour products.

The kultour brand logo is an interesting interplay between culture and tour, but when searching for kultour on the Internet one finds a predominance of kultur, the German equivalent of culture, or the German mix of culture and touring mainly in the context of tourism. This is of relevance when kultour seeks penetration of international markets and sponsorship support.³⁶

kultour is in its infancy and has yet to establish a stable brand position. At the current rate of development and given the more substantial programming effort in 2003 in comparison to 2002, kultour can mature effectively as a brand.

The kultour members' individual profile and local market awareness impact on audience reach and development. kultour products when matched appropriately with the presenters, or when the product is used to penetrate new market segments, add value to the presenters brand and audience development strategies.

kultour had a more evident impact in the smaller cities such as Hobart, where audiences have limited access to the breadth of cultural product in Melbourne and Sydney.

kultour is successful in facilitating the introduction of new product by facilitating the touring of programs which may not otherwise have the chance to tour.

kultour's success is reliant on the capacities and abilities of the member organisations to propose programs, presentation and communications.

kultour programs, which enjoy limited competition from local product, such as Fronteras Americanas, or Latin Gypsy, are successful in developing new audiences for producers and presenters.

The level of current support for kultour is sufficient for smaller programs and emerging artists but may not meet audience expectations when presenting established artists or larger groups.

kultour has sufficient scope to generate income and new audiences here and overseas given the appropriate program selection, presentation and communications strategies by members.

kultour background

The kultour members represent a range of not-for-profit multicultural arts agencies and producers across Australia. The initiative is a response to needs highlighted by such agencies for touring opportunities for culturally diverse artists. The members represent the small to medium arts sector, with which at least one government arts agency has a regular funding relationship; and organisations where government has a strategic interest in its position in the sector, and with a minimum turnover of \$50,000 per annum.³⁷

kultour network

kultour as a network structure represents advocacy, multi-artform service providers and production organisations. kultour's network structure increases capacity for organisations of varying resource base and size. As Chris Pascoe the executive officer of MAV at the time said:

'kultour provides a base upon which to make the argument that cultural diversity provides

opportunities and access to good artistic products, it diversifies the general arts sector and extends the reach beyond the Sydney and Melbourne centres. kultour also builds capacity in organisations and it allows the promoter to strengthen their hand through the support of Australia Council funding. kultour is tangible and real support.³⁸

Opportunities to present works across Australia may not otherwise be available for the smaller member organisations. For larger organisations, such as Carnivale and NORPA, the program increases the range of content and products for presentation without impacting dramatically on their existing budgets. Moreover, kultour provides opportunities for all the members to work in partnership with mainstream arts institutions and festivals when presenting new work developed by multicultural artists and groups.

‘As a touring network it is a good thing—I was surprised when the Australia Council initiated it. Playing Australia has gone down a mainstream path and we need a touring network which can present quality work of a culturally diverse nature.’³⁹

The notion of quality work is something which has particular resonance to organisations such as NORPA whose core mission is to present high quality work to all audience while at the same time encouraging and assisting with the development of local multicultural work and audiences.⁴⁰

‘NORPA have a wider base than many of the other kultour groups, we are not strictly multicultural—we cover a wider range of activities and arts and attempt to appeal to the broad community.’⁴¹

The members in kultour have flexibility, which assists in the creative processes, and are multi-skilled. They find it easier that larger organisations and institutions to adapt to environmental changes such as policy shifts and new approaches by funding bodies (*Small to Medium Performing Arts Sector Report: 2002*). At the same time, they can suffer from limited fiscal and human resources and have limited capacity to take financial risks on new projects. kultour adds value to their existing operations and assists by providing for costs associated with touring, thus freeing up members to concentrate on venue, presentation and promotions.

A knowledge network

Significant industry knowledge coalesces in kultour and opens paths for culturally diverse Australian artists seeking touring experience. kultour is a complex organisation, bringing together agencies from different states, with differing approaches. kultour members produce and present the products in their respective states. Trust is critical in the selection process.

The network is held together with trust and knowledge. Regardless of the selection process, trust of each other as leaders in the field is the platform on which programming decisions rest.⁴² As a knowledge network, kultour members exhibit convergent mental models, adept at working in culturally complex environments.⁴³ This is an attribute because culturally diverse structures become a reality in a globalised economy.

kultour members have significant reserves of knowledge and skills in cross-cultural communication but lack the resources on an individual level to amass ongoing touring and international exchange programs. kultour is an additional conduit for members to mount and brand multicultural arts exchanges or enhance existing networks.

kultour represents some of the more experienced multicultural arts managers, producers and advocates in Australia. Culturally diverse themselves, they have knowledge of operating and the ethos in South and North Asia, Latin and Central America, Central and Southern Europe, Western and Northern Europe and the Pacific Region. Many have built networks through years of personal international exchange and professional development opportunities overseas. Over time with trust and an adequate period of support from the Australia Council, kultour has the capacity to penetrate new national and international markets.

Regardless of approaches, all members share common cultural understandings and visions—the development and presentation of quality, contemporary and heritage-based programs representing multicultural Australia.

kultour members

At the time of the research the kultour network consisted of the following multicultural arts organisations:

- **Multicultural Arts Victoria (MAV)**
MAV is Victoria's peak multicultural arts service organisation that presents, markets and at times produces programs which include local communities and artists, national initiatives and international exchanges.
- **Nexus Multicultural Arts Centre, SA**
Nexus is South Australia's main multicultural arts service and production organisation which also has a venue for visual and performing arts. Nexus has a strong commitment to contemporary visual arts which reflect diversity.
- **KULCHA Multicultural Arts of Western Australia**
KULCHA is Western Australia's peak multicultural arts organisation and like Nexus in SA, KULCHA also has a performance venue. KULCHA has a strong reputation for performance-based work which represents Western Australia's cultural diversity.
- **IHOS Opera, Tasmania**
IHOS is one of Australia's most contemporary music producers that also holds a significant position in Tasmania's arts sector as advocate and presenter of multicultural music and performances.
- **Brisbane Ethnic Music and Arts Centre (BEMAC), Queensland**
BEMAC is Brisbane's peak multicultural arts agency and it has like NEXUS and KULCHA also a performance space.
- **Carnivale, NSW**
Carnivale is Sydney's and to a degree Australia's peak multicultural arts festival. Carnivale have a strong reputation for presenting contemporary and traditional programming which reflects cultural diversity.
- **Northern Rivers Performing Arts (NORPA), Lismore, NSW**
NORPA is Australia's leading regional performing arts organisation based in Lismore, NSW. It is responsible for the provision of mainstream, contemporary, multicultural and all other performing arts

to the communities in the Northern Rivers region of NSW.

- **Footscray Community Arts Centre, VIC**
Footscray Community Arts Centre has a range of community and multicultural arts programs which to a large degree represent and service the needs of Melbourne's western suburbs. It also has a range of venues for performance and visual arts.
- **Casula Powerhouse Arts Centre, NSW**
Casula Powerhouse Arts Centre is a significant arts complex which incorporates visual, theatre and music arts. Its main focus is the western regions of Sydney.
- **Browns Mart, NT**
Browns Mart is Darwin's key community and multicultural arts centre. It is responsible for the production and presentation of culturally diverse and community arts which reflect Darwin's diverse communities.
- **The Australian Asian Artists Association (4A), NSW**
4A is primarily responsible for the presentation and production of visual arts projects which reflect contemporary Asian culture and artists.

Research approach

Research sought audience perceptions on two programs and general comments on the type of communications and branding awareness. The findings represent pattern matches from surveys, interviews and desk research.

Interviewed kultour members

- Chris Pascoe—past director of MAV⁴⁴
- Jacqui Geia—tour coordinator, for kultour in Victoria⁴⁵
- Jorge Menidis—director of Carnivale, NSW⁴⁶
- Walter Gomez—past director of KULCHA Multicultural Arts of Western Australia
- Constantine Koukias—artistic director of IHOS Opera, Tasmania
- Con Gouriotis—project manager of Casula Powerhouse Arts Centre, NSW
- Liz Terracini—project coordinator of NORPA, Lismore, NSW
- Mirna Heruc—director of Nexus Multicultural Arts Centre of South Australia.

Surveys

Surveys were distributed at each performance and 158 were returned from a total of 520 surveys distributed in Sydney, Hobart and Melbourne. This is a 23% return rate and 3% of the total 1602 audience members across the selected programs. There were 79 surveys returned in Melbourne, 57 in Hobart and 22 in Sydney.

Focus groups

Focus groups sought responses to programs, collateral and branding. Participants were selected from the returned surveys. Focus groups were organised in Sydney and in Hobart.

Observations and desk research

The Hobart presentation of Blue Boy by IHOS; and Blue Boy and Fouad Harraka's Middle Eastern Knights with Claire Naffah in Melbourne for Frontiers 3 (presented by MAV in the Melbourne Festival for the Arts) were observed.⁴⁷ Desk research consisted of industry reports, essays, articles, ABS and other relevant data, media reports and promotional collateral.

A new product

kultour as a product in the first phase of its life cycle in 2002 sought to develop simple processes, clarity over roles and responsibilities between presenters and producers, initiate some branding and promotional strategies.⁴⁸ By 2003 the selection process was refined and a stronger understanding of kultour's capacities was gained.

As Gouriotis from Casula Powerhouse said, 'kultour is an excellent program and I do not mean that in a flippant way, it is a program which can redress some of the problems of the past in the areas of multicultural arts. When I think of kultour I visualise quality multicultural arts'.

In 2002, kultour toured a total of six programs, utilised twelve venues across Australia, and secured up to 5000 paid audience members in Brisbane, Adelaide, Fremantle, Melbourne, Hobart and Sydney. Approximately 20,000 flyers and posters were printed and the kultour program and its products secured profile in all the key mainstream print and ethnic media, radio and television and the Web. Presenters meetings were held and administration was adequately

handled across all states, and all within a very limited budget.

The 2002 program, like all arts programs exposed some vagaries in program selection and presentation approaches, which were mostly addressed by 2003. At meetings members negotiate between style and genre; contemporary and traditional artforms and hybrids; their understanding of audiences and constituents; communication strategies; timing; presentation modes and most importantly budget. The Australia Council acts as facilitator and steers the process where appropriate to secure reasonable outcomes.

kultour programs 2002

- Latin Gypsy Experiment
Eastern European Gypsy and South American fusion musicians—by KULCHA Multicultural Arts, presented in Adelaide by Nexus, in Melbourne by MAV and Tasmania by IHOS.
- Story of Soil
New theatre by playwright Chi Vu, about a young Vietnamese-Australian woman caught between two cultures—produced by Footscray Community Arts Centre and presented in Sydney by Carnivale Multicultural Arts Festival.
- Fouad Harraka's Middle Eastern Knights with Claire Naffah
Arabic music, featuring dancer Claire Naffah—produced by MAV and presented in Western Australia by KULCHA, in Brisbane by BEMAC, in Sydney by Carnivale and in Melbourne by MAV.
- Blue Boy
Contemporary dance by Kamal Krishna with live music produced by BEMAC and presented in Tasmania by IHOS, in Adelaide by Nexus and in Melbourne by MAV.
- How could you begin to understand
Contemporary dance by Butoh dancers Yumi Umiumare and Tony Yap exploring personal and cultural relationships produced by MAV and presented in Brisbane by BEMAC and in NSW by Carnivale.



Figure 1 Blue Boy toured NSW, Hobart and Melbourne
Photo Suzon Fuks

excellent media profile and positive audience responses. More importantly it paved the way for *Blue Boy*, a more difficult contemporary dance program and augmented the IHOS brand for the presenter. *Blue Boy* also provided the imaging for kultour, used on all collateral and media.⁴⁹

Fouad Harraka's *Middle Eastern Knights with Claire Naffah* was an untested program. The musicians and dancer are respected for their work independently but had not worked together on the program. The product reached a level of maturation by the time it was presented in *Frontiers 3* in Melbourne. The significant difference in audience responses is evident in *Chart 1*.

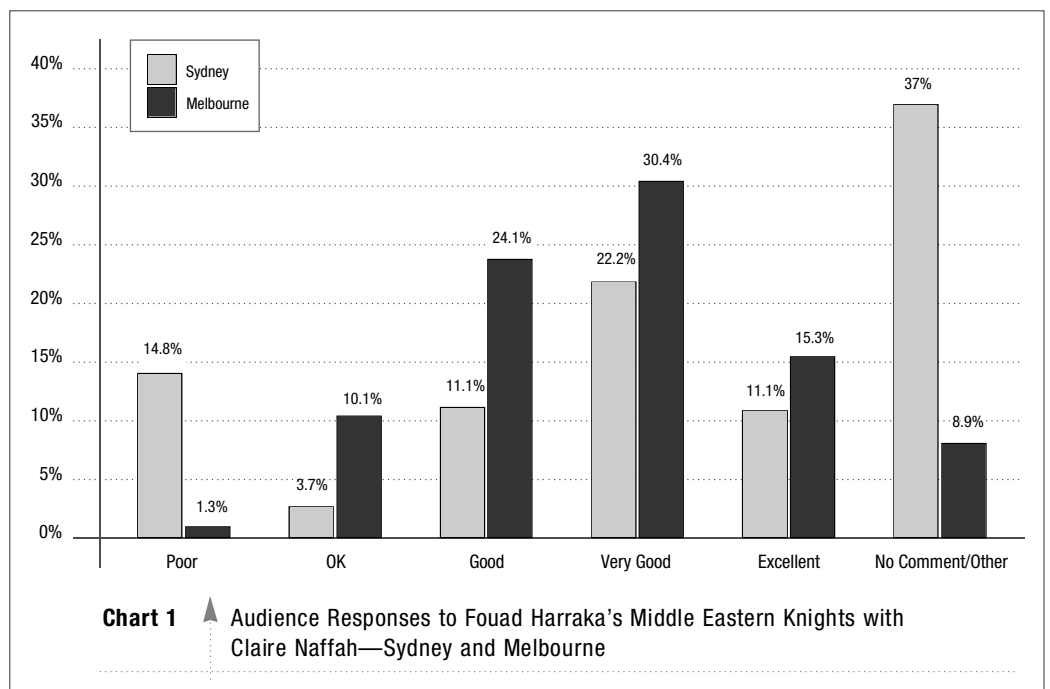
- *Between Beauty and Theory*
Contemporary installation by Lee Salomone exploring Australian-Italian family history and the human condition—produced by Nexus Multicultural Arts Centre and presented in Sydney by Gallery 4A and in Melbourne by the Footscray Community Arts Centre.

Chart 1 indicates a difference among audience responses to Fouad Harraka's *Middle Eastern Knights with Claire Naffah* between Sydney and Melbourne. Whereas 25% of the respondents in Melbourne felt it was excellent, 11.1% regarded the program as excellent in the *Carnivale* presentation.

General audience responses in 2002

The majority of the 2002 kultour programs were well received. *Latin Gypsy* from Western Australia was particularly successful in Hobart, securing

Members felt there was sufficient room in kultour for emerging and established artists.⁵⁰ Some felt a need to resource emerging programs but presenters had to be aware in order to appropriately market and present emerging product.⁵¹ All members interviewed felt quality



was the key to kultour’s success. As Walter Gomez, the then director of KULCHA WA said, ‘The products should be top shelf, tested and money should be spent on them touring, so they can increase opportunities for themselves nationally and internationally’.⁵²

Presentation approaches need to be addressed by the members. Artists presenting at Frontiers 3 ranged from competent to excellent, but poor production values generated overwhelming negative responses among audiences and poor media reviews. Customers purchasing a new product or shifting brand alliances feel cognitive dissonance caused by post-purchase conflict.⁵³ When the brand attributes promoted are met there is less chance of customers feeling what Kotler terms cognitive dissonance.

Presented as a Global Music and Dance Explosion, based on a history of successful Frontiers programs promoting refugee artists, this program had an established and loyal following. In 2002 Frontiers featured eight acts ranging from Latin music and dance, Blue Boy, Fouad Harraka’s Middle Eastern Knights with Claire Naffah, Flamenco, and Chinese contemporary dance. Frontiers 3 caught the imagination of the target market segments but failed to add value to their heightened expectation.

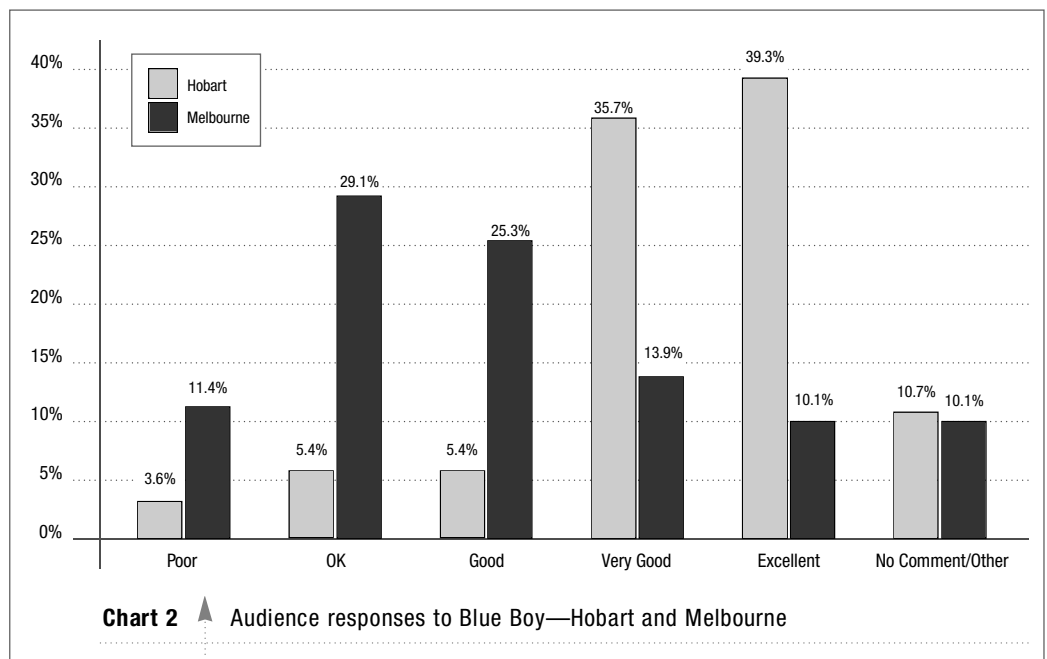
As *Chart 2* suggests, IHOS in Hobart was adept at positioning the product. Harmony between place, price, people, position and packaging was created. IHOS provided Latin Gypsy from KULCHA (WA), and Blue Boy from BEMAC (Qld), with significant presentational support. The approach

adopted by Constantine Koukias, the director of IHOS, in venue selection and marketing suited the style and genre of Blue Boy and Latin Gypsy. Approximately 35.7% of the Hobart respondents felt Blue Boy was excellent whereas only 10.1% from Frontiers 3 program rated Blue Boy as excellent. Blue Boy, an intimate and contemplative work, was lost in Frontiers 3. More than 40% of the survey respondents could not see the performance.

Frontiers 3 fit Dr Kurin’s notion of the flea market model of cultural representation where little consideration is given to authenticated contextualised presentation.

Basically, anyone who is in some way qualified as being from or of the culture gets a table, stage, room, lectern, gallery or home page, into or onto which he or she can put out the stuff of the culture. Representation is a matter of showing up, and it can run the gamut in style from romantic nonsense to sophisticated propaganda.⁵⁴

Melbourne audiences may be more sanguine about contemporary dance and cultural diversity than Hobart audiences, which tend to have less access to mainland and overseas contemporary work. Hobart Blue Boy focus group participants acknowledged a dearth of innovative artistic programs in comparison to Sydney and Melbourne.⁵⁵ The presentation approach by IHOS to Blue Boy, preceded by a successful Latin Gypsy presentation, generated audience goodwill and positive media reviews for the artists, presenter and kultour.



A more balanced kultour 2003 included TokyoDASshoku Girl, Fronteras Americanas and Indo-Jazz—artistic programs with established credentials. TokyoDASshoku Girl, promoted by MAV, has a cache of profile developed from 1999 when it won a Green Room Award. Fronteras Americanas won the South Australian Theatre Critics Award for best emerging theatre company in 2001 and Indo-Jazz have toured internationally, produced CDs and their music has been played on the ABC and a range of public radio programs. They are audience tested products with positive reviews and strong profile among targeted segments.

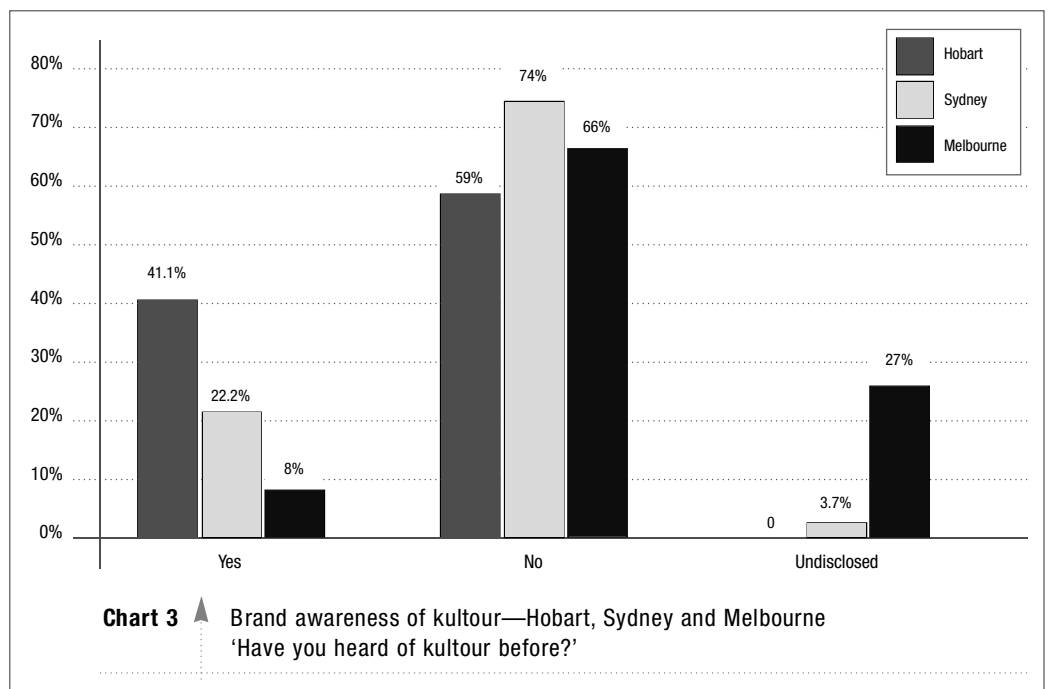
Fronteras Americanas from Nexus Multicultural Arts Centre (SA) was presented by MAV in Melbourne at the Black Box, an experimental space at the Victorian Arts Centre, as part of a pilot initiative, Theatre from the Box, dealing with cross-cultural small theatre. Assisted by skilled segmented promotional and public relations strategies, Fronteras Americanas secured mainstream, ethnic and alternative media, positive reviews and strong audience numbers. Audiences consisted of artists, mainstream theatre patrons, media and a significant number of Spanish speaking audiences in the 25 to 45 year old professionals, academics, artists and youth in the Visible Achievers, Young Optimists, Socially Aware and Something Better segments.⁵⁶

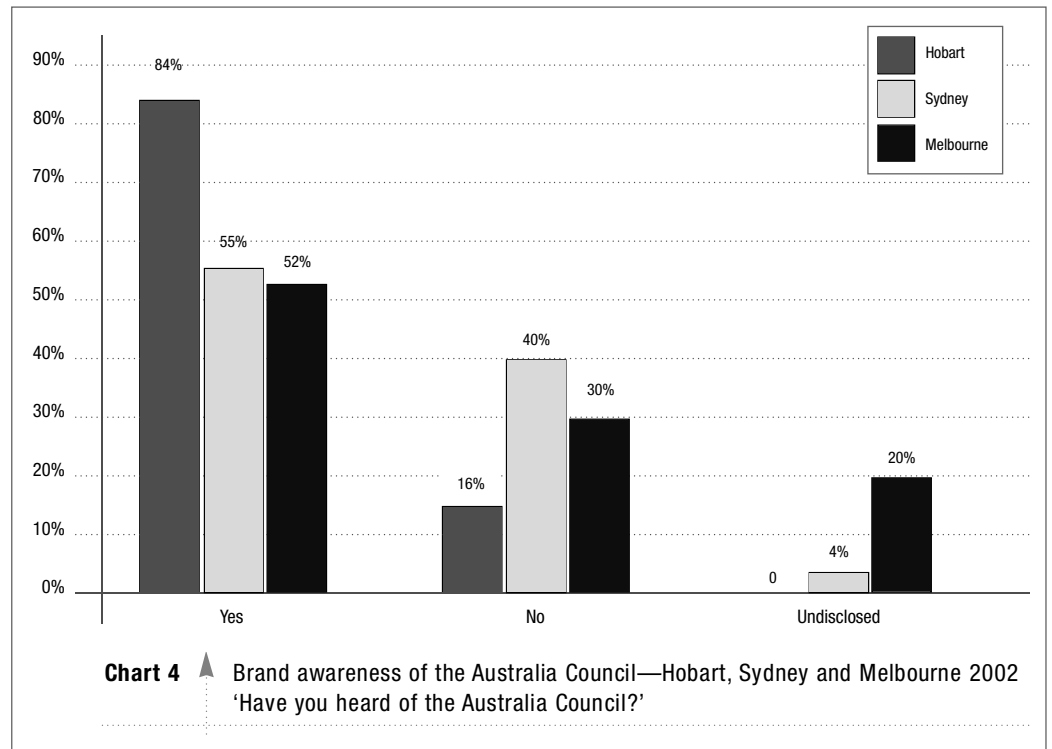
It is up to members to provide kultour with tour-ready products, or specify which products are developmental and/or emerging. Thus, allowing



Figure 2 TokyoDASshoku Girl 2003
Photo Brad Hicks

presenters to identify price range and presentation options, limiting the gap between audience expectation and outcome.





kultour future brand development and equity

With the right brand attributes, presenters can use kultour to augment their own branding and extend their audience reach. IHOS as a producer of innovative music and opera projects enjoys strong brand equity in Hobart. Hobart as one of the smaller Australian capitals has lower competition and brand clutter in comparison to Sydney and Melbourne.

'In our [IHOS] case kultour provides us an opportunity to secure programs from the larger states, which we can not usually get. Next time we will go for something in the north of Tasmania, over 90% of the people have not had the chance to see any new product. We never had any great Latin music in Tasmania and it was great for us as a company to offer diversity through Latin Gypsy. Latin Gypsy extended IHOS' core audiences. We secured profile through different channels and people'.⁵⁷

Mr Koukias sees kultour brand health premised on product diversification and sponsorship from sources outside the Australia Council. 'There is no other network available for the presentation of such work. Blue Boy, a development piece, has given the artist a chance to perform with good production values and in a good venue and by the end of kultour 2002, it will secure longer

term profile. There is nothing which compares to kultour'.⁵⁸

He suggests that kultour is industry brand not an audience brand. The audience are fundamentally interested in product.⁵⁹ It follows that the audience are not the key receivers of the kultour brand attributes, but rather the arts industry itself. The audience may or may not know what they are seeing is a kultour program, but the industry, the presenters, venues, promoters, funding bodies, artists, media and future sponsors are the ones that need to be cognisant of kultour as a brand.

Due to the program's infancy kultour brand awareness was low. Due to IHOS' advocacy up to 41% of all Blue Boy survey respondents in Hobart were aware of kultour when asked: Have you heard of kultour? (Chart 3). In comparison only 22.2% in Sydney and 7.6% in Melbourne had heard of kultour. Approximately 26.6% of the Victorian respondents did not complete the question seeking to gauge their awareness of kultour.

The presentation of Blue Boy and Fouad Harraka's Middle Eastern Knights with Claire Naffah in Frontiers 3 was part of the Melbourne Arts Festival with a range of other artists at the Forum Theatre. Fouad Harraka's Middle Eastern Knights with Claire Naffah at Carnival was one program among many others. In Melbourne and Sydney

brand clutter and a range of similar products created competition thus limiting exposure for the kultour brand.

In comparison, Blue Boy in Hobart and Fouad Harraka's Middle Eastern Knights with Claire Naffah were dedicated offerings for targeted audience. In Perth and Hobart opportunity arose to promote kultour specifically, without much competition. Smaller arts market such as those in Hobart and Perth in comparison to Sydney and Melbourne, make the task of securing new audiences for new product and establishing a new brand easier for the presenters and promoters.

For Mr Gomez, KULCHA WA kultour provided an opportunity to increase brand awareness for KULCHA among Perth's Middle Eastern communities and to introduce a new audience to a mainstream venue.

'We had 900 people at the concert and a lot of Arabic people. We had significant support from the community particularly as it was in a mainstream venue. Usually when Middle Eastern and other ethnic music bands come over they end up playing in community halls.'⁶⁰

A greater product range, a mix of tested larger and smaller products as flagships, with smaller emerging products as pilots, may firm the kultour brand for industry and audiences. Brand harmonisation and relevant presentation are critical in growing brand equity.

The Australia Council for the Arts however enjoyed strong brand equity in all the states.

Chart 4 suggests that 83.9% of respondents in Hobart knew of the Australia Council, as did 56.6% and 51.9% of the respondents in Sydney and Melbourne. There was a higher rate of survey returns from Hobart. In Melbourne up to 20% of the respondents did not complete the question; Have you heard of the Australia Council?

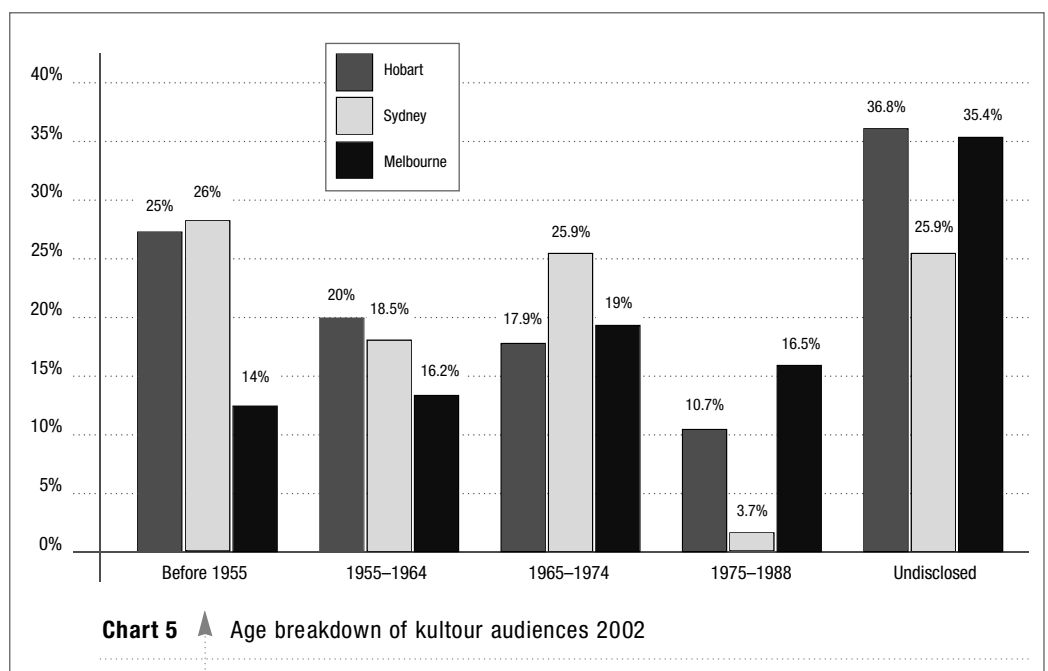
Awareness of the Australia Council can support kultour brand health. The Australia Council may need to consider strategies which allow kultour members to focus on selection, presentation and communications.

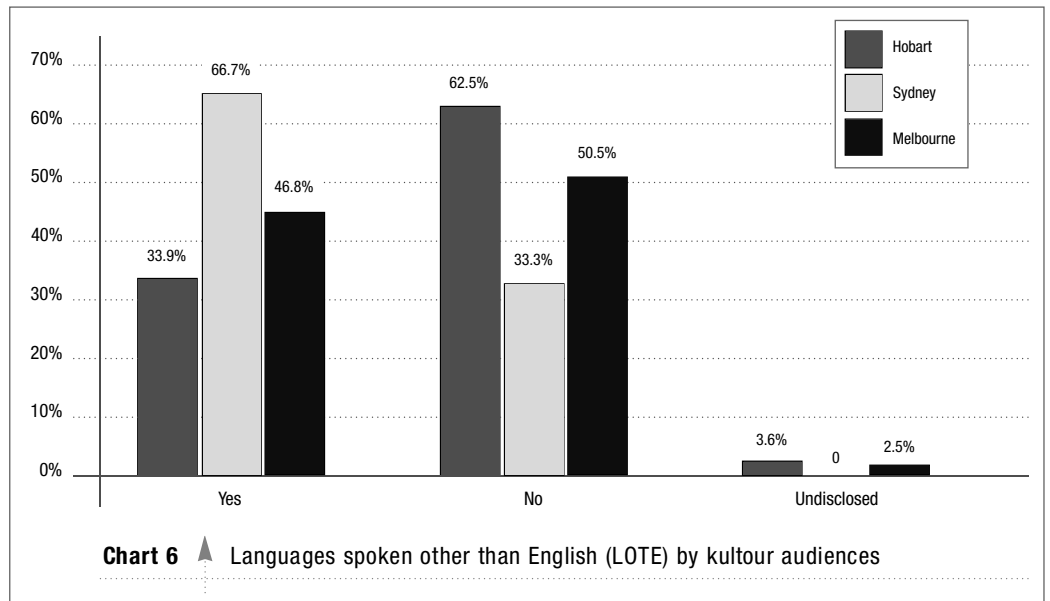
It is premature to gauge the future of the kultour brand, but awareness assists in seeking funding from other sources. It is difficult to entice sponsors and other funding or present larger scale products on \$160,000 per annum.

kultour audiences

The psychographic orientation of most kultour audience consisted of Socially Aware or Café Society, and Something Better, Young Optimists, or Cosmopolitan & Cultural.⁶¹ This was amplified in the focus groups which consisted mainly of professionals, educators, artists and students with a high proportion of Australian-born of non-Anglo-Celtic background and a larger percentage of females.

These cohorts represent educated employees of government and public utilities, NGO workers, artists, educators, niche and progressive



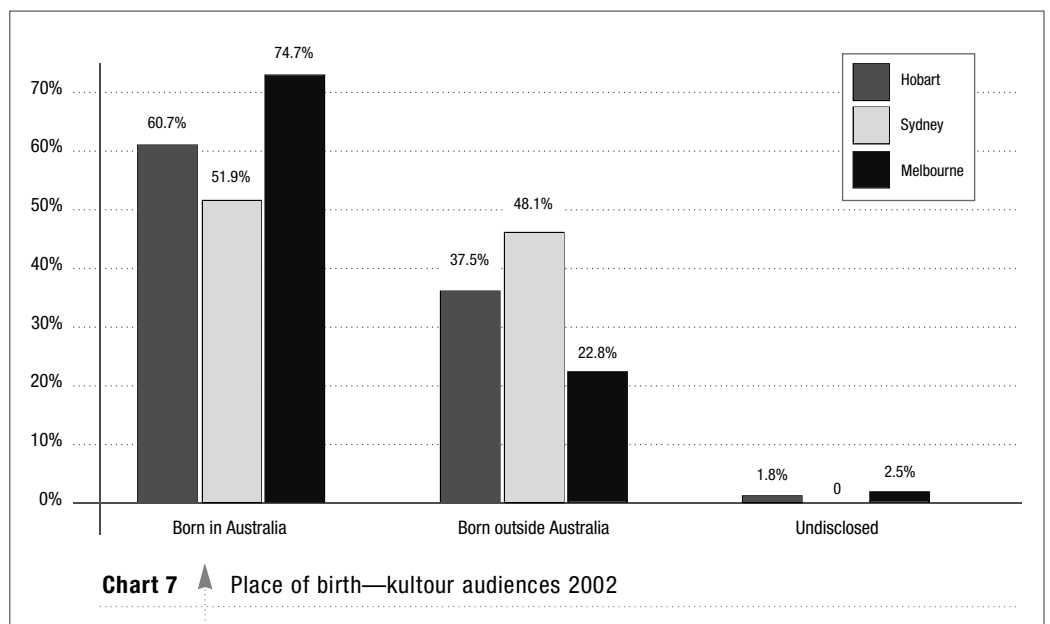


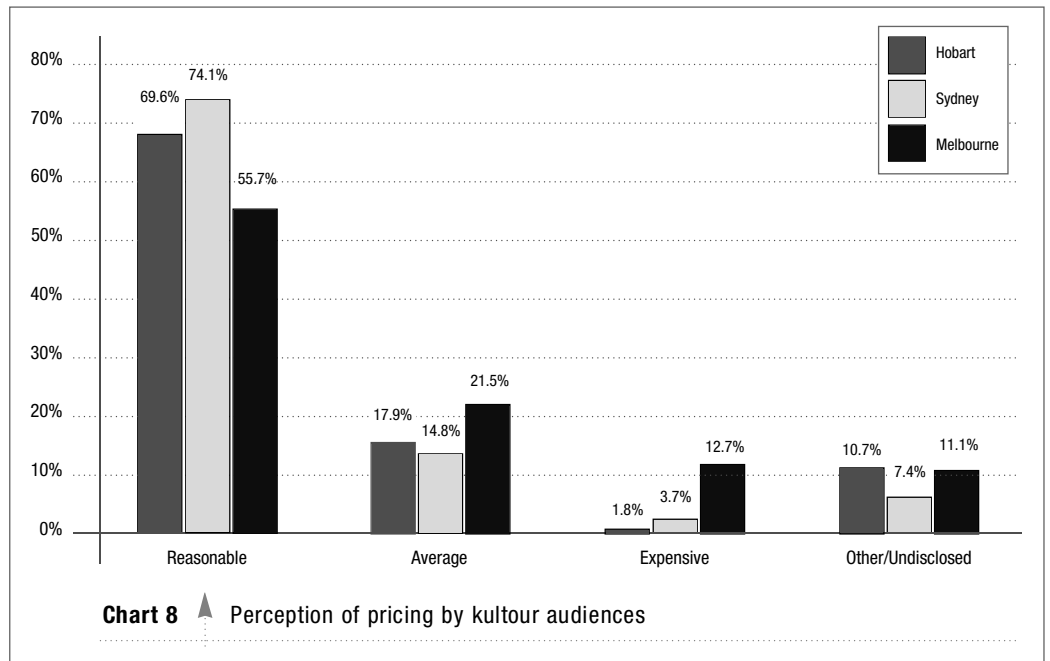
businesses, independent professionals, discerning youth and tertiary students, people in de facto relationships, same sex relationships, some new families, singles, and a high proportion of people of second generation migrant background. These segments hover between the ages of 24 and 46 years of age.⁶²

They place a higher value on cultural diversity, social and environmental issues, the arts, local and international politics and seek new cultural experiences.⁶³ They tend to spend on arts, culture, travel and lifestyle rather than commodities, cars, saving, DIY and housing. Most can be classified as Baby Boomers, born between 1945 and 1975.

Chart 5 suggests that up to 60% of all kultour survey respondents were born before 1975. Close to 25% of respondents in Hobart and Sydney were born before 1955. Findings correlate with ABS data which indicate that half the population of Tasmania by 2021 will be aged 65 years and over.⁶⁴ The 13.9% of pre-1955 born respondents in Melbourne Frontiers 3 program needs to be contrasted with 35% of Frontiers 3 respondents that did not complete the age section of the survey.

The age of the respondents reflects Australia's ageing society.⁶⁵ Kotler et al suggests that age, while very important, is less significant when

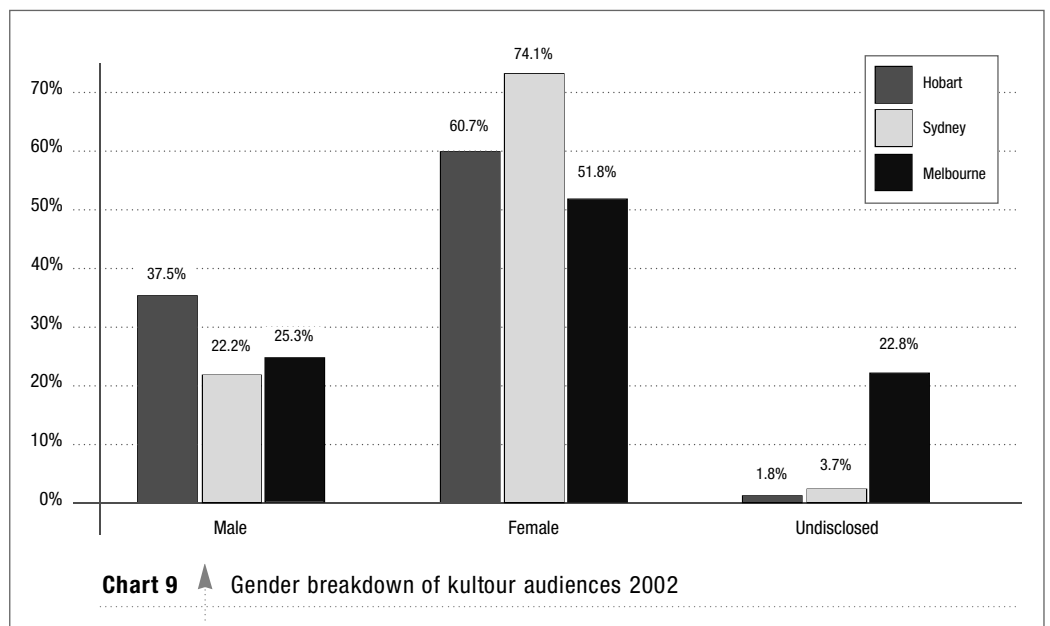




determining customers' motivation to purchase new products and services. It is more important to consider cultural, social and economic status than age.⁶⁶

Some have suggested that Baby Boomers are the key beneficiaries of Australia's arts, making it difficult for youth to participate due to pricing programs out of reach for youth. This argument is relevant but holds less water when considering world music and dance such as Latin jazz and Middle Eastern music which crosses over into popular youth segments and communities.

The National Endowment for the Arts in the US dissected Baby Boomer cohorts into three segments, Early Boomers born between 1946 and 1955, Late Boomers born between 1956 and 1965 and Baby Busters 1966 and 1976, or otherwise referred to as Generation X.^{67 & 68} Interestingly there is less participation in classical and contemporary arts by Baby Busters and Late Boomers than their predecessors. Regardless of education and professional occupations, Late Baby Boomers and Baby Busters are historically the poorest cohorts.



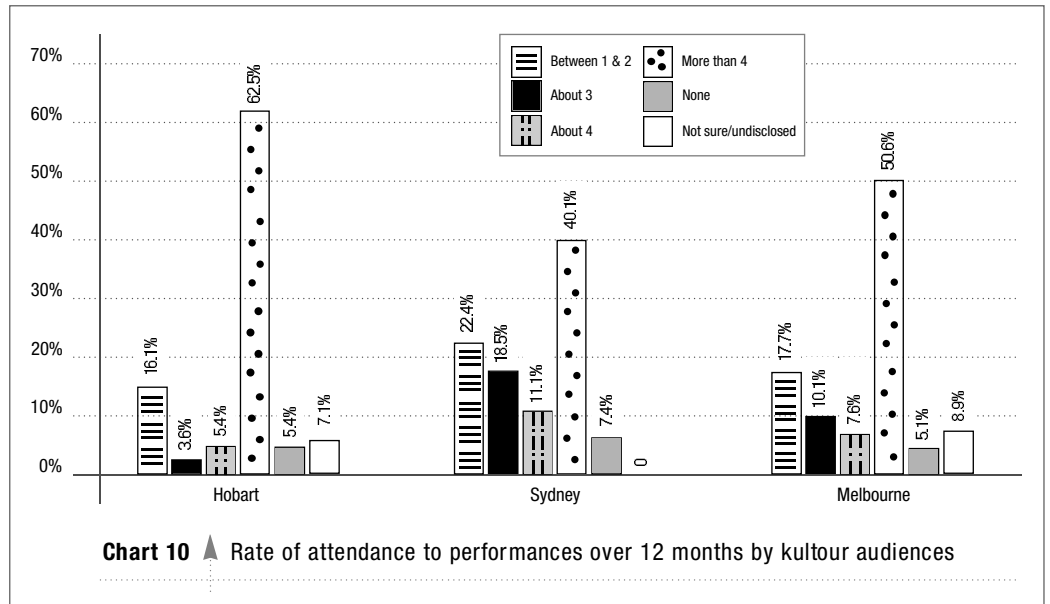


Chart 10 ▲ Rate of attendance to performances over 12 months by kultour audiences

These segments are more numerous and face less certainty in relation to employment while having to deal with rising house prices, higher education costs and historically lower incomes in traditionally high value professions.⁶⁹ Arts festivals have lowered pricing for international events to a median \$35–\$55, and for local product \$25–\$35 as a way of maintaining their more natural constituents.⁷⁰ This lowering of ticket prices is a strategy adopted by many festivals and institutions across the industrialised world.⁷¹

A notable finding in surveys and focus groups was the proportion of second generation Australians of non-Anglo-Celtic background. This needs far more analysis than a binary youth versus Baby Boomers position on audiences. This area of

marketing and audience development has been taken very seriously by Carnivale Multicultural Arts Festival.

Chart 6 indicates respondents were split down the middle between those that spoke a language other than English (LOTE) and those that did not. Tasmania had a higher rate, 62.3%, of English-only speakers reflecting Hobart's low immigration intake. From 45,094 people born overseas only 14,094 spoke a language other than English.⁷²

Approximately 60% of audiences to Fouad Harraka's Middle Eastern Knights with Claire Naffah spoke a language other than English, in part due to Carnivale's direct marketing and geographic location of the venue. Carnivale

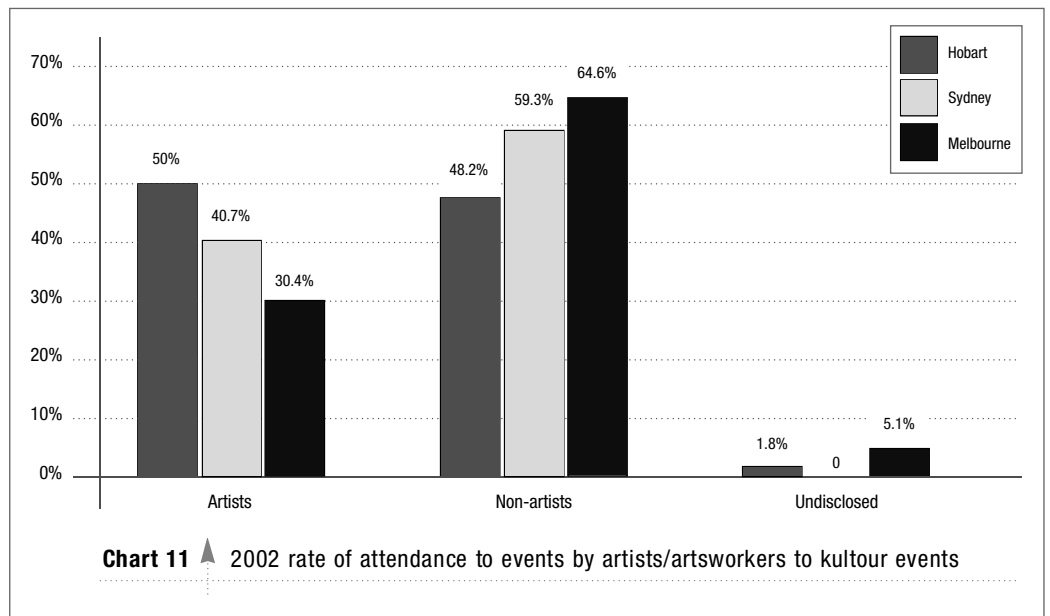
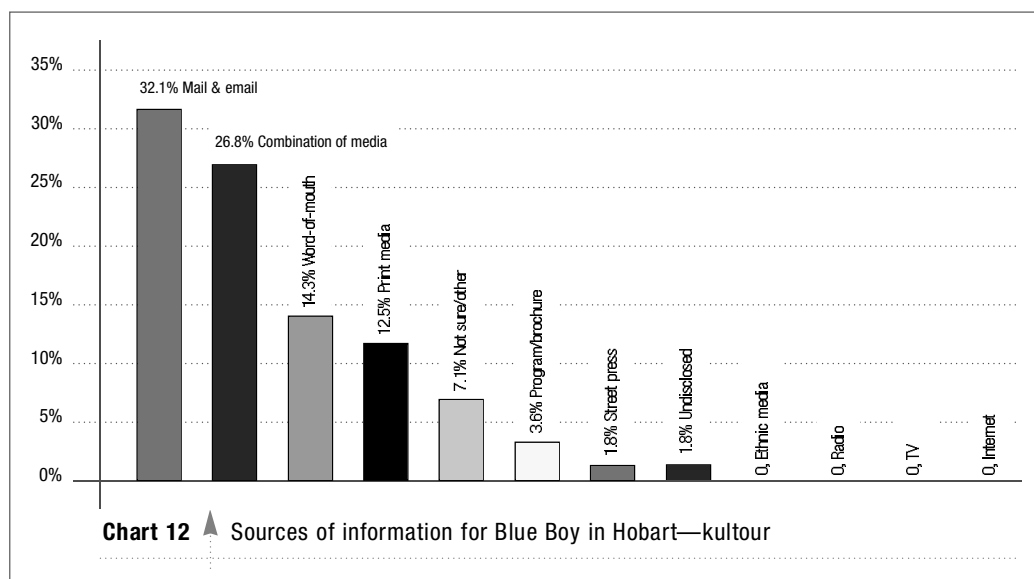


Chart 11 ▲ 2002 rate of attendance to events by artists/artworkers to kultour events



presented the program in an Arab populated area of Sydney and targeted Middle Eastern dance schools and Middle Eastern cultural and community associations.⁷³

Chart 7 indicates that between 50%–75% of respondents were born in Australia. While many respondents speak languages other than English, most were born in Australia. There may be a proclivity by audiences of diverse background to see more multicultural acts, but an equal number of audiences who spoke only English seemed keen for similar work.

Chart 8 indicates that most respondents found pricing reasonable. Close to 70% of Tasmanian audiences, almost 75% of Sydney audiences and up to 60% of Melbourne audiences thought the price for tickets paid was fair. Melbourne audiences had the highest number of returns with the question uncompleted.

There was some price sensitivity in Hobart. One focus group participant suggested that Tasmanians had a culture of poverty which did not reflect what they could actually pay.⁷⁴ After further probing it became clear that the participant felt that while most Tasmanians could afford to pay more for the arts and entertainment, it was the perception that they could not afford to pay more which limited the viability of having more expensive productions touring Hobart. However, most of the focus group disagreed and felt that anything over \$40 would be considered expensive in Hobart. After probing the whole group on the issue of pricing, it seemed clear that there was significant price sensitivity in Hobart.

Chart 9 reveals that females dominated among respondents. In Hobart and Melbourne around

60% of the audience surveyed were female. The figure is higher for Sydney which stands close to 75%. This may reflect that Fouad Harraka’s Middle Eastern Knights with Claire Naffah was targeted to Oriental dance schools with a higher proportion of female students. As one of the Fouad Harraka’s Middle Eastern Knights with Claire Naffah focus group pointed out, ‘I run a Belly Dance school and as soon as I heard that Carnivale was putting on Claire Naffah, I brought all the class to the concert and even got many of the girls up to dance’.⁷⁵

The correlation between gender, age and rate of attendance to performance highlighted in *Chart 10* suggests that psychography of the respondents belongs to the Something Better, Socially Aware, Look at Me and Young Optimist segments. Over 60% of the respondents in Hobart had visited more than four performances in a 12-month period, over 50% in Melbourne and about 41% in Sydney.

Between 15% and 17% of all respondents visited at least two live events in a twelve month period. These figures tend to reflect ABS data that up to 50% of Tasmanians aged between 18 and 24 years of age visited at least one popular music concert along with the 30% of those aged between 25 and 34 years.⁷⁶

Australians over the age of 15 years had an average 16.5% attendance rate to theatre, 16.3% to opera or musical and 17.8% attendance to other performing arts between 1995 and 1999.⁷⁷ Over one fifth of the population, 22%, aged 18 years and over attended at least one cultural event in a 12-month period.⁷⁸

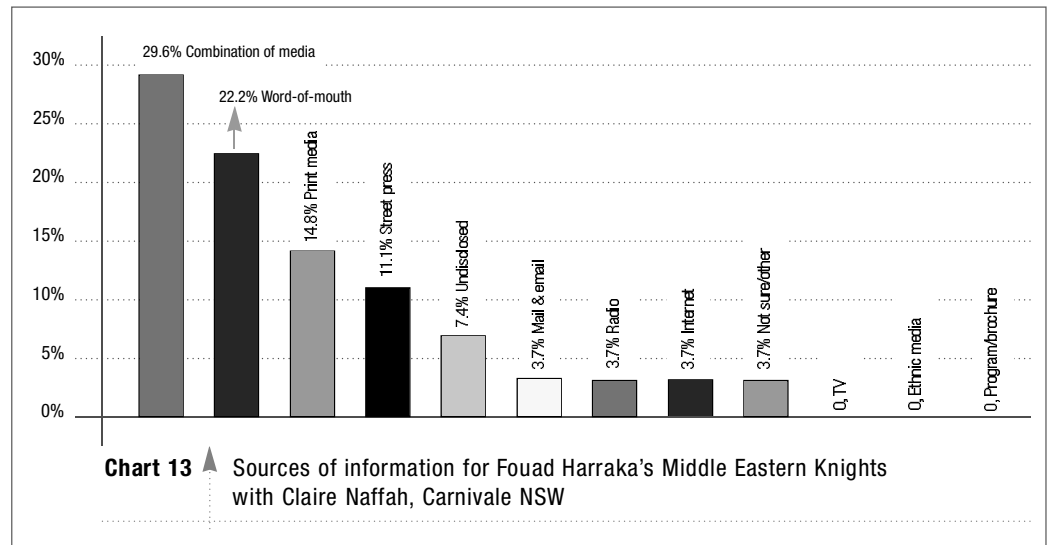


Chart 11 reveals that between 30% and 50% of all respondents considered themselves artists. The highest percentage of artists were in Hobart at 50%, followed by Sydney at 40% and Melbourne at about 30%. It may reflect that programs such as Blue Boy in Hobart and Fouad Harraka's Middle Eastern Knights with Claire Naffah in Sydney attracted artists involved in contemporary and Middle Eastern dance. Frontiers 3 suggests that given the large number of artists on stage, artists were attracted by word-of-mouth, as friends and colleagues of the performers.

Like all other professions which Late Baby Boomers and Baby Busters enter, swelling the ranks of the Socially Aware and Something Better segments, arts, culture and entertainment industries have grown dramatically over the last 20 years. There were 2.2 million people, 15% of the Australian population aged 15 years and over, involved in paid or unpaid work in culture and leisure activities in 1997.⁷⁹

Artists and those engaged in arts, culture, tourism and leisure activities in Australia constitute a major market for performance and arts events. Given the multicultural nature of Australia, it is safe to say that arts which reflect cultural diversity in an innovative way, will secure a reasonable percentage of those involved in the arts and entertainment industries.

Audiences to kultour do not exhibit dramatically different characteristics to general arts audiences within the Late Baby Boomers, Baby Busters in the Socially Aware, Something Better and Young Optimists segments. Australians spend more on performing arts, they travel and are more sophisticated and demanding than organisers may assume. The percentage of attendees to

performing arts aged over 45 years increased from 38.8% to 42.3% between 1991 and 1995, and given Australia's ageing population, there is no reason to believe that the trend will end.⁸⁰

The median age of kultour respondents was approximately 38.7 years old, reflecting Australia's median age. In accord with general trends, focus group participants had higher education qualifications and represented professional status.⁸¹ Close to 50% of all respondents spoke a language other than English, and up to 50% of focus group participants were born overseas or came from parents born overseas.

kultour communication approaches

The overwhelming form of communications used by the presenters tended to be in the form of direct and relationship marketing. There was very limited above the line promotions, the emphasis being on low cost one-to-one marketing and a mix of promotions such as brochures and posters, email, public radio, database marketing and mail-outs.

For IHOS in Tasmania, email was the most effective way of making audiences aware of the production. IHOS has a healthy brand, which audiences support and trust. As Chart 12 reveals, a significant number of the respondents (32.1%) found out about Blue Boy from the IHOS email and mail-out, the next largest percentage of respondents identified as word-of-mouth. Word-of-mouth, the process of referral, is one of the most important sources of information in the arts, particularly for programs with little or no advertising budgets.

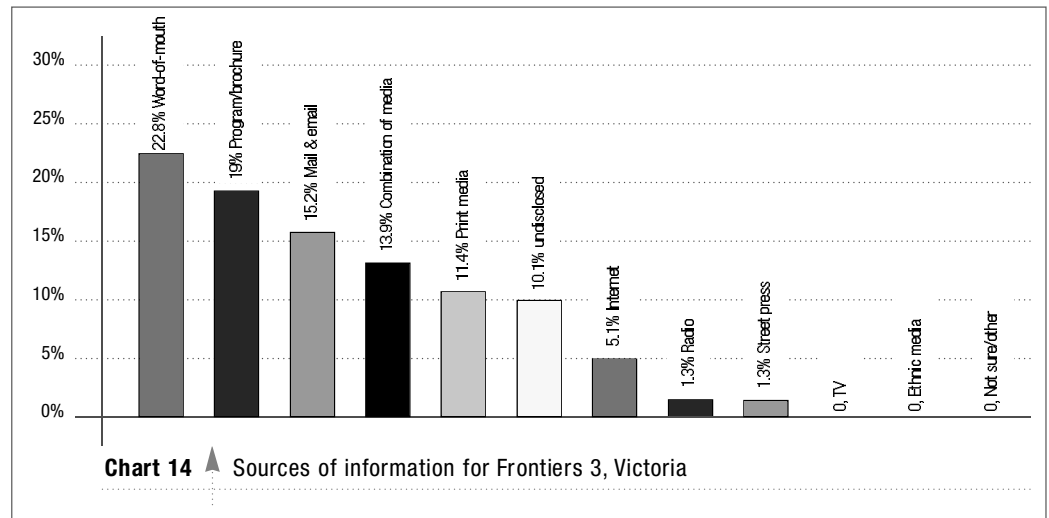


Chart 14 Sources of information for Frontiers 3, Victoria

As Asseal et al and others assert, personal sources are a more important influence on buyers than impersonal sources.⁸² The mix of all three key promotional mechanisms, word-of-mouth, media liaison and direct email and mail were the most successful at approximately 27% of the respondents highlighting a mix of all forms. One area to be investigated by IHOS in the future is ethnic marketing. It became clear in the focus group that a significant minority of Indian-Fijians could have been targeted for Blue Boy.⁸³

Thus, media liaison and public relations added to electronic messaging, newsletters, mail-outs, cooperative marketing strategies with aligned organisations and festivals, brochures and posters, were the most effective in securing audiences.

Chart 13 highlights a significant number of the respondents in surveys, 22%, sourced their information about Fouad Harraka's Middle Eastern Nights with Claire Naffah through word-of-mouth. Interestingly 14.8% and 11.1% of the respondents sourced information from mainstream, independent and street media. The fact that 25.9% of respondents sourced information about the event from print media indicates the importance of print media as a key source of information in larger cities. It reflects Carnivale's positioning as a key festival with an established following. Jorge Menidis from Carnivale used mail, email and direct call up to Middle Eastern dance schools in Sydney to generate audiences for Fouad Harraka's Middle Eastern Nights with Claire Naffah. While the focus group respondents found it difficult to pinpoint all the diverse sources of information, they did highlight the Carnivale brochure and/or program in the *Sydney Morning Herald*.

It is important to note that while the data does not reveal ethnic media as source of information, it may suggest that those who completed the surveys and who were part of the focus groups represented a mix of first and second generation culturally diverse and Anglo-Celtic respondents. They are active arts consumers within the Baby Boomer and other cohort groupings. Thus, a significant section of the respondents were over the age of 35 and Socially Aware segments who may be less inclined to read or access ethnic media as a key source of information.

Frontiers 3, presented by MAV in partnership with the Adult Multicultural Education Service (AMES) as an umbrella event in the Melbourne Festival of the Arts program, had the most extensive and wide reaching communications approach (Chart 14). It could be argued on the face of it that the program being sold out was evidence of the effectiveness of various communications approaches used. At the same time, the Melbourne Festival guide provided significant reach. Up to 20% of all respondents highlighted the Festival for the Arts guide as a main source of information with close to 30% highlighting word-of-mouth as a main source of information. AMES mail-outs combined with those of MAV also added to the reach of the communications effort. MAV also used ambassadors, to advocate for the program. As Jacqui Geia, the Victorian kultour coordinator highlighted:

'We know our sector and our audience well. We used the principle of ambassadors of MAV, who go out to their communities and talk it up, making personal recommendations we know in a world of mass advertising, the personal recommendation is incredibly important, especially

in the context of culturally diverse communities, where grass roots support is important.⁸⁴

MAV translated their media releases into seven languages and embarked on an active relationship marketing approach through their ambassadors, AMES and other partnerships. The low profile and pre-publicity of *Frontiers 3* in mainstream media was attributed by the organisers to the Melbourne Festival's monopoly of the mainstream media.

'The Melbourne Festival has also its limitations, we can not influence their overall marketing, we can market through our own expertise, through our networks and our modes, but it is the Festival which carries out the major media liaison, and that causes some issues, they will of course want to secure media for their main events, the ones they have paid for, which means that an umbrella event like ours will find it difficult to secure mainstream media. That is a consideration when choosing to have something in a major mainstream arts event, but we considered that carefully and felt it was more important for our artists and kultour to be part of the Melbourne Festival.'⁸⁵

The relationship between the main event and the umbrella program while necessary is a complex one when it comes to securing media profile.

Umbrella events, while securing significant value from a festival's program guide, website and ticketing promotions, tend to suffer from limited media attention due to the festival's efforts to promote programs which it has invested in financially. Clearly the relationship between festival and umbrella event is an unequal one, usually favouring the festival.

Relationship and target marketing, the partnership with AMES added to MAV's concerted effort to draw in members, did in the end result in a capacity audience and importantly, an audience which represented a broad range of segments.

Conclusion

kultour can be an excellent touring and promotional tool for culturally diverse artists, presenters and producers. Evidence—qualitative, anecdotal and quantitative—suggests that a diverse audience base exists for national touring culturally diverse arts.

IHOS and KULCHA, and MAV in 2003, used kultour to secure new audiences. Other presenters payed less attention to targeting new audiences within the Traditional Family Life, Visible Achievers and Young Optimists, and culturally diverse youth 16–25 years of age, and culturally diverse audiences born in Australian over 25.

The production values and communication approaches may need some harmonisation without losing unique regional and cultural attributes represented by each of the kultour members. Given that kultour is an infant program, added to the marked improvement in 2003, there is no doubt it can develop into a sustainable long-term brand representative of quality in Australian culturally diverse arts.

In closing, kultour after some adjustment can penetrate new Australian audience segments and assist multicultural artists and presenters in finding new markets overseas, especially through festivals in Europe, North America and Asia.

para//elo CASE STUDY 2

Summary of findings

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para//elo 2002–03 selected activities

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Conclusion

This case study examines para//elo, one of Australia's key cross-cultural theatre companies and its approach to audience and program development. The case study focuses on the initiation of the Novecento 1900 Project.

Summary of findings

Engagement and participation by community and audiences, and equal emphasis on contemporary and excellent work guarantees para//elo's maintenance and augmentation of audiences.

para//elo possibly has the most intact and professional audience development strategy available as a model for performance companies, especially those in the development of new theatre.

Key elements to para//elo's audience development:

- seeking original and flexible relevant material from which to create theatrical work
- extensive community and audience liaison through workshops, forums and communications
- full integration of future audiences in the fibre of the work
- creating product ownership among the audience by involving them in the process.

para//elo's ability to take the audience through a process, from the initiation of a program, to development and final presentation, secures loyalty and audiences well ahead of any product promotion or marketing effort.

para//elo's understanding of its consumer base as a company and for its individual products assists in determining which specific segments are appropriate in advance of the presentation of any program.

para//elo's audience and product development process ensures loyal and long-term audiences and seeks new ones.

The partnerships with arts and non-arts sectors aids para//elo's success in broadening the portfolio of work which seeks new audiences while not losing traditional ones.

para//elo has integrated publicity, promotions, and market research which underscores the para//elo audience development model.

The integration of community, art and real life in product development is a foundation in para//elo's operating rationale.

Competition with new digital art producers could be a future weakness, particularly where the competition may have more expertise or resources in new media. There is no real competition for para//elo in the context of Italian-Australian work thus the new approach does increase the understanding of new bicultural work.⁸⁶

Overview

para//elo invited communities in South Australia to provide stories of ship travel between their original home and Australia, to be woven into a performance.

The 1900 Project is based on Alessandro Baricco's *Novecento*, written at the turn of the 20th Century about Italian migration to the US.

The story, *Novecento*, revolves around an orphan found aboard a transatlantic liner who becomes a skilled jazz pianist but never sets foot on shore. para//elo, through a process of community liaison and networking, will present the program in 2004–05.

The inspiration for para//elo's work comes directly from community collaboration through interviews, workshops and feedback from community members. Their recent successful arts making practice was para//elo's contribution to the 2002 Adelaide Festival, *Stories from the Market Place*.

para//elo background

para//elo, funded through the Australia Council for the Arts Theatre Board, and Arts SA, creates theatre and performance art which connects with and reflects cultural and social diversity. para//elo began life as Doppio Teatro in 1984 as the first full-time professional contemporary Italian-Australian theatre company.⁸⁷

In 1997 Doppio Teatro changed name to para//elo reflecting the natural progression from purely Italian-Australian theatre, to developing as Teresa Crea suggests, 'the space to work more broadly from a bicultural platform to a cross-cultural platform'.⁸⁸

While para//elo has historical and cultural links to Italian-Australian theatre, the company is now involved in web-based exchanges, installations, workshops, photography, forums and multimedia performances. para//elo is an example of *Arts in a Multicultural Australia* policy in that, 'innovation is not mutually exclusive or oppositional to tradition. In fact, innovation can only be measured in relation to tradition'.⁸⁹

para//elo combines technology, performance, film, music and digital expression. A traditional core aim is to 'value and incorporate languages other than English'.⁹⁰

'For us, art is integrated into everyday life. It is viewed holistically, as a social, cultural, political and economic fabric that weaves our sense of identity, our sense of being and our sense of place. Over the years, our work has evolved from its bilingual and bicultural foundations to incorporate wider cultural landscapes. This change in artistic direction not only reflects generational shifts that have occurred in Australia but also handing over from our "historical" audience (many of whom were first generation migrants and their children) to those that embrace broader societal and cultural perspectives.'⁹¹

Peter Heydrich, company director and Teresa Crea drive para//elo. para//elo employs four core staff and other artists and cultural workers on a project by project basis. As Ms Crea suggests:

'As Australia's first professional bilingual and bicultural theatre company, we forged new ground in the production and presentation of works that incorporated languages other than English to mainstream and NESB audiences.'⁹²

Strong traditions underline para//elo such as, *Commedia dell'arte*.⁹³ Other evident modern influences include Italian playwright Dario Fo and Brazilian Augusto Boal.⁹⁴

1900 Project background

'I suppose you could say that Nineteenhundred didn't really exist, as far as the world was concerned: there was not a single city, parish, hospital, prison, baseball team that had any record of his name. He had no country, no date of birth, no family'⁹⁵, *Novecento* by Mr Baricco.

Mr Baricco's *Novecento* was a commentary on Italian mass migration to North America at the turn of the 20th Century. A baby is abandoned on an ocean liner ferrying people between Italy and the US and the ship's musicians adopt the orphan naming it Novecento (Nineteenhundred), a reference to the year, the turn of the century and a new world environment dawning.

The orphan becomes a jazz musician who never leaves the ship making the ship his home, as thousands of immigrants come and go. The ship is a metaphor for inequity, migration and the loss of place. While traversing the oceans transporting immigrants from Italy to the US is a narrative focus for the monologue, the work is about Novecento's inability to find his place in the world.

para//elo 2002–03 selected activities

- Seta: Silk Threads
Seta is a collaboration between para//elo and Co.As.It the Italian Assistance Association in Victoria which is aimed at inter-generational programming which includes artists and community. A multi-artform exhibition presented at the Festa della Repubblica, Royal Exhibition Building (Melbourne) in June 2003.



Figure 1 ▲ 2003 Jason Sweeney, in *Ciao Mamma Ciao*
Photo Peter Heyrich

- **Ciao Mamma Ciao**
A cabaret performance which premiered at the Adelaide Cabaret Festival in 2001 and toured regionally in South Australia and Victoria in March and May 2003. The black comedy examines the mother-son relationship in the Italian-Australian cultural context.
- **Stories from the Market Place, Adelaide Festival 2002**
A free event, which included performance, sound, photography and visual installation in collaboration with UK sound artist Scanner, at the Adelaide Central Markets. It integrated oral histories.⁹⁶
- **Distance (working title)**
This ongoing program explores distance and memory. Phase 1 centred on the curating of a website that collected the digital exchanges between artists in Europe and Australia. Phase 2 will see the development of this material into a mix of music and performance at the Queen's Theatre, Adelaide in September.
- **Pulcinella at Lion Arts Centre 10th Birthday**
para//elo's lovable Pulcinella, a Commedia dell'arte roving troupe, entertained audiences at the Lion Arts Centre's (Adelaide) 10 year birthday party.
- **Kismet International Theatre Exchange**
Kismet, a theatre company from Bari (Italy) worked with para//elo to develop exchanges including performances and workshops in Adelaide and Ceduna in regional South Australia.⁹⁷

Research approach

The primary research on para//elo's audience strategies was qualitative. The research sought pattern matches of responses and reactions from select para//elo members, audience, staff and supporters.

The key approaches used were:

- focus group of key themes identified in consultation with para//elo

- documentation of the 1900 Project community showcase at the SA Maritime Museum in Port Adelaide
- a small survey of showcase attendees
- discussions with Ms Crea, Mr Heydrich and communications coordinator Paola Niscioli.

Secondary research consisted of para//elo annual general report and website, English language translation of Mr Baricco's *Nineteenthundred a Monologue*, relevant reports, articles, essays, and online material.

para//elo 1900 Project community showcase

A key in the 1900 Project is the integration of local stories of ship travel by people from immigrant communities. These personal stories are recorded, reconstructed and melded into para//elo's adaptation of Mr Baricco's work. The 1900 Project development process was launched through a community showcase at the South Australian Maritime Museum in Port Adelaide.

The showcase was a textbook not-for-profit marketing exercise. The process was a natural outcome of the company's traditional approach rather than a marketing methodology.

para//elo integrated primary audience research, product development and public relations all within a low cost event. Yet, this was not the core intention of para//elo. The company's historical



Figure 2 ▲ 1900 Project community showcase
Photo Peter Heyrich

knowledge, professionalism, its cultural and local knowledge make para//elo an expert cultural broker.

The Maritime Museum with its old ship hulls, mastheads and a range of maritime artefacts represented the history of migration and settlement in South Australia and the walking tour of Port Adelaide placed the event in context, authenticating the process. The community showcase was a curated event across all aspects, from the location, food, the focus of making guests comfortable, creating a stage for the actors and generating a sense of excitement. Generating excitement is a key element of the marketing. It is imperative for medium size non-profit arts organisations with limited marketing resources to strive to achieve this.

This showcase maintained audience loyalty, created new activity and sustained brand awareness. At the same time, it sought new audiences for future programming. The building of excitement for a new product, 18 months prior to presentation, is an excellent form of promotions for a medium performance company.

Through community showcases, personal interviews, research and workshops, the various stories are reconstructed and will be weaved into the 1900 Project performance.

para//elo audience development method

para//elo is a broker between communities, artists and patrons creating a new space for project and audience development. The para//elo method encompasses strong curatorial focus, community and cultural brokerage. It underlies the company's focus since Doppio Teatro in the 1980s. The Australia Council report, *The World is Your Audience* highlights para//elo's (then Doppio Teatro) audience development tradition:

'...[R]ealising that everyone in the potential audience had gone through the migration process was a great leveller of class, language and regional barriers amongst migrants. It realised that each community had specific experience and ways of operating and that work needed to be subtly tailored to engage with the unique experiences of each community.'⁹⁸

As Dr Kurin in his *Reflections of a Cultural Broker*, writes:

'The role of strategic broker necessitates the creation of settings in which problem-solvers and

problem-identifiers can work together without undue interference. The strategic broker is a facilitator and a coach—finding the people in both camps who can learn most from another.'⁹⁹

Participants from what Dr Kurin refers to as the 'relevant camps', groups, partners, from diverse backgrounds and areas, were brought together by para//elo through the 1900 Project community showcase at the South Australian Maritime Museum in Port Adelaide. Media, para//elo board members and artists, Italian and other community members, funding body representatives, current and future sponsors and local government representatives were invited to participate. The showcase was part of the development of the 1900 Project text, it assisted in promotions as liaison began to secure loyalty from the participants and guests.

The guests arrived by 6.30 pm and were welcomed by Ms Niscioli, who registered their details. They were then offered refreshments and diverse foods such Italian antipasto, Greek mezzes and Vietnamese spring rolls.¹⁰⁰ It was a subtle non-intrusive approach which allowed the guests to take time and examine the museum and consider the impact of ship travel and migration to Australia's development.

An historic walking tour of Port Adelaide was also organised. On return from the tour, Ms Crea introduced the 1900 Project, relaying the story and highlighted the necessity for community members to relate their stories of immigration. That was followed by readings from *Nineteenhundred a Monologue* by para//elo actors. At the completion of the readings, discussion began and participants provided examples of personal experiences of ship travel.

The themes emerging included expectations of the new world, relationships built during the journey and the reality of reaching Australia. One participant talked of the excitement and fear of waiting to see the person that was arranged for her to marry. Another talked of leaving home and his family, in those times there was no future in Italy. A Slovenian man talked of ship travel from Slovenia to Germany, then Australia. His motivation was the desire to own his own home. Others talked of the waiting to see a land of large cities and large houses with white staircases, of almost Hollywood proportions, only to be devastated to find a place of small houses with red tiled roofs.¹⁰¹

para//elo had succeeded in creating a space where people could tell their stories knowing they would end up as material in a new program.

As important, the media, board members, artists and patrons heard the stories, met the community and engaged on a personal level with community and audience.

Kotler's non-profit societal marketing approach, and Assel's strategy of multiple transactions and multiple relationships for non-profit organisations was reflected in para//elo's approach.¹⁰² The combination of multiple transactions and multiple relationships are a natural outcome of limited resources and vision or passion, rather than careful study of marketing techniques.

Targeting the appropriate segments is the key to non-profit arts marketing. Budget limitations restrict the capacity for medium sized not for profit organisations to pay for extensive research, paid advertising, incentives and rewards. Loyalty, passion, support, civic duty and appreciation are the things that are of value in the transaction process.

The overriding intention by para//elo was not public relations, even though a sophisticated understanding of them was evident, rather it was the development of a new program which integrated the experiences of culturally diverse communities through their stories of ship travel and migration.

The 1900 showcase targeted key community segments while maintaining the core of para//elo's audiences. para//elo engage communities as product, as participants and as audiences.

This process is unique in respect to other community development programs as para//elo's focus on product. The process is not the core aim. The strategies adopted by para//elo integrate community, communications and production values.

para//elo's audience development allows for the involvement of communities from the outset of the project in sourcing material and audiences for the future.

para//elo are adept at maintaining relationships across audiences, communities, business, board, government and patrons. They exercise a full range of what Assel et al describe as 'multiple exchanges of resources in dealing with donor and clients'.¹⁰³

para//elo integrated the use of the Maritime Museum as a venue, used the skills of company board members for public relations, provided interesting food and put on a small presentation. In doing so they created great atmosphere, gave

something to their patrons and future audiences and generated expectation for the future presentation of the 1900 Project. As part of the process, they created partnerships with the tourism authorities to present historic walking tours of Port Adelaide highlighting the integral nature of migration to Australia.

The experience exemplified for all board members, staff and sponsors the importance and excellence of the para//elo brand. The Artistic Overview in *para//elo's Annual Report 2002* describes the philosophy underpinning the organisation:

'Our work has always tended to blur the line between community involvement, cultural and artistic development. As an extension of this principle, we continued to experiment with intimate grass roots activities designed to involve community in projects from concept to implementation.'¹⁰⁴

Ms Crea believes that art and culture are meshed with everyday life; it is part of a social, cultural, political and economic fabric that nurtures our sense of identity and our sense of place.¹⁰⁵

para//elo programs where the line is blurred between theatre, installation, performance, media and audience, have used audience development traditions founded in Doppio Teatro to secure audiences for what are at times difficult contemporary art programs.

As Saatchi & Saatchi suggest, 'the buck stops with the arts sector' when it comes to communicating difficult arts.¹⁰⁶ Blaming the consumers, or creating divisions between mass, popular, commercial, innovative and traditional arts, limits the producer's responsibility to audiences. para//elo has taken on this responsibility and seems to communicate with a range of audiences, regardless of the complexity of the arts product.

para//elo branding position

The 1900 Project community showcase is a classic example of brand building through public relations and cultural and community brokerage. It was an effective way to test new work, carry out more research, maintain patron and client relationships, secure long-term media support, and build excitement for the 1900 Project in advance of the presentation.

para//elo's method is a low cost and effective way of sustaining brand awareness and developing new audiences.

The company presents professional, contemporary programs which reflect community process but are arts focused. Branding is maintained through strong values in presentation, imaging and conceptual development. As important, para//elo has extended its brand by developing partnerships nationally and internationally.

Each program is carefully crafted and tested, so by the time it is presented, it has reached a level of maturity which makes it easier to adapt to touring and re-presentation in diverse contexts. Through the process of development, long-term audience and community liaison, para//elo projects generate media profile, audience loyalty and partnerships across institutions, businesses and communities.

Conclusion

para//elo exhibit confidence and knowledge based on a successful history of product and brand development. The 1900 Project suggests an awareness by para//elo of the need to maintain a balance between tradition and change.

The difference between para//elo and other community-based theatre and arts programs is the company's adherence to best practice in research, communications, production and presentation.

The process is not an end in itself, participants in the 1900 Project showcase, be they communities, individuals, artists or non-traditional attendees, become fellow travellers. At the end of the process, they are transformed into audiences experiencing a worthwhile performance in which they share ownership.

CARNIVALE MULTICULTURAL ARTS FESTIVAL NSW **CASE STUDY 3**

Overview

Summary of findings

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Developing a new audience

Conclusion

CARNIVALE

'As dinkidi as the kebab you had for lunch', *Real Time* advertisement 2003, Carnivale Multicultural Arts Festival 2003

Overview

Carnivale Multicultural Arts Festival NSW is Australia's peak multicultural arts festival and based in Sydney. The festival boasts a 27 year history. This case study focused on the re-branding of Carnivale in 2002–03 and its impact on audiences. Mr Menidis the chief executive officer/artistic director, appointed in 2002, continued with changes in branding and communications initiated in 2001 which aimed at increasing profile, audiences and sponsorship.

Carnivale Multicultural Arts Festival was initiated in 1976 by the NSW Ethnic Affairs Commission. After a period of merger with the Festival of Sydney, Carnivale was reinstated as a stand-alone festival, with the objective to support and nurture the development of multicultural artists and artforms in NSW.¹⁰⁷

The festival was hampered by limited resources and at times heightened expectations from artists, communities, funding bodies and sponsors. The imbalance between resources and expectations was at times reflected through uneven programming, marketing and brand development. However it consistently secured media support and generally presented quality arts programs. Carnivale is recognised as the peak festival in Australia which focuses on contemporary arts which reflect cultural diversity.

Carnivale began re-branding as part of an integrated marketing strategy in 2002. The strategy sought to develop audiences among culturally diverse youth, the general public, mainstream arts audiences and culturally specific communities. Partnerships with artists and arts groups, key media and selected communities, and the presentation of a mix of contemporary and traditional programming from around Australia and internationally, were important aspects of the festival's new audience development strategy. As the *Sydney Morning Herald* commented:

'Menidis seems to have delivered on this new, sophisticated vision...The ad campaign, conceived by the new management team, is a thing of delicious irreverence. The often huge and unwieldy program has been ruthlessly pared down from 100 events to 40.' 'Carnivale picks up sex appeal', *Sydney Morning Herald*, 24 September, 2002.

Carnivale by 2003 had generated a new level of excitement over its program and sophisticated new approach to imaging.

Summary of findings

- Carnivale Multicultural Arts Festival underwent re-branding aimed at a more contemporary, youthful and irreverent approach to multicultural arts.
- Management expressed a desire to secure culturally diverse audiences born in Australia through programming reflecting a hybrid notion of Australia's creative and cultural identity and by linking festival programming to global movements.
- Programming was cut back from more than 100 events in 2001 to 40 in 2002–03 with 13 flagship programs, each one tailored to specific demographic and psychographic audience segments.
- Audience development, positioning and marketing were integral to the program selection process.
- Word-of-mouth, email, digital communications and targeted media and partnerships attracted a younger and more target audience to specific events.
- The re-branding and repackaging generated significant mainstream, ethnic and youth media support.
- Carnivale maintained its more traditional 25 to 40 years old audiences while augmenting younger culturally diverse audiences between 18 and 24 years old through projects like culturally diverse hip-hop dance and music.
- Younger audiences increased by approximately 20% between 2001 and 2002.
- Those aged 25 to 35 years old in 2001 numbered approximately 37% of total surveyed audiences whereas they had reduced to 30% in 2002.
- The number of males attending the 2002 Carnivale increased by 10% from 2001. This suggests that the new programming and marketing strategies may appeal marginally more to young men.

- There is almost a 50/50 split between audiences speaking languages other than English and those who spoke English only. This suggests a strong desire for culturally diverse arts by all audiences, not only culturally and linguistically specific ones.
- Program selection is tailored to the desired market segments, thus each segment from conservative, contemporary and niche, to popular and youth are catered for by the festival.
- The notion of tacit approval is strongly encouraged through partnerships with media, venues and individuals legitimates and champions specific festival programs.

Research approach

The study is qualitative and uses data from research conducted in 2001 by Economic Strategies Pty Ltd; Kape Communications in 2002 and in-house data provided by the Carnivale management in 2003 and the *2002 Carnivale Marketing Report*. The data is not refined and the differences in approaches were taken into account. Interviews were conducted with the Carnivale director, Mr Menidis and the marketing manager Mr Hislop. A research of literature, reports, essays and policies and data from the ABS as well as ABS special reports was also conducted.

Programming Carnivale

Carnivale Multicultural Arts Festival's programming was reduced from over 100 acts in 2001 to a core of 40 with 13 highlights in 2003.

The 2002–03 programs reflected a sharper focus on innovation with a less parochial notion of representation and advocacy. There was a higher component of national and international arts programs. The general tendency in the past was the focus on local arts and community representation whereas in 2002–03 the aim was to represent a stronger program from across Australia and where possible, internationally. There was a greater emphasis on quality. Targeted communications all aimed at penetrating specific audience segments.

Sample of Carnivale programs

2003

- The Legend of White Snake
Peking Opera direct from China led by Li Shengsu and Yu Kuizhi, with over 80 performers, including musicians, dancers, acrobats and singers.
- Flamenco Rocks
A fusion of flamenco and rock music and dance idioms by Arte Kanela, under the direction of Richard Tedesco and Johnny Tedesco and Chari Saldaña.
- The Living Museum of Fetish-ized Identities
Collaboration between Chicano and Australian artists using performance, installation and 'living dioramas'.
- India@oz.sangam
Indian identity in Sydney through a Bollywood film shoot, incorporating digital chat rooms, video and fusion dance.
- Café Carnivale
Various world musicians and other artists appearing throughout the year.
- Mama's Cooking is Better than Sex
Panel of Australia's best known NESB comedians, such as Simon Palomares, Hung Le, Libbi Gore and the Sandman.
- Solo for Two
From Germany acrobatic, hip-hop and contemporary dance with humour constructed by Robitzky and Libanus.

2002

- Bollywood on Bondi
A dance party focusing on Indian-Sydney culture.
- Citizen X
Contemporary play by Sidetrack Theatre Company I.
- Wheels of Steel
A hip-hop subculture program focusing on NESB youth in the western suburbs.
- How Could you Even Begin to Understand
Yumi Umiuare and Tony Yap contemporary dance theatre incorporating Bhutto presented by MAV and kultour.

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- Viet Food Village
Authentic and contemporary performance with Vietnamese foods.

2001

- The House Plus
A reinterpretation of Garcia Lorca's The House of Bernada Alba by Flamenco Dancer Antonio Vargas.
- Shattered Jade
A Chinese music and dance performance.
- Conversations at the Frontier
Four writers dealing with one theme.
- Café Carnivale
World music café.

In 2002 and 2003 there was an effort to match product with specific audiences. Wheels of Steel for example was targeted to youth, whereas I Solosti Veneti was targeted to classical music lovers and the Italian community.

Viet Food Village was patronised by the Vietnamese community and How Could you Even Begin to Understand, targeted contemporary dance audiences. Claire Naffah and the Middle Eastern Knights aimed for oriental dance and Middle Eastern communities.¹⁰⁸

TABLE 1	Cultural Enrichment	General Quality	Value for Money
Better	59%	23%	71%
About same	38%	63%	26%
Not as good	3%	14%	4%

Table 1 ▲ Comparison of Carnivale with mainstream cultural events

The research from 2001 indicates strong support for multicultural arts activities among audiences; a finding which correlates with Saatchi & Saatchi's *Australians and the Arts*.¹⁰⁹ Over 60% of all Carnivale respondents supported multicultural arts activities.¹¹⁰

Issues of quality are based largely on subjective values such as personal taste and variables such as gender, cultural and social background. Regardless of the issues of determining quality the 2001 research suggests that 23% of sampled audiences felt that the Carnivale program was

about the same as mainstream cultural events. Correspondingly 14% felt that Carnivale programming in 2001 was not as good as the programming in mainstream cultural events.¹¹¹ As Mr Hislop writes in the 2002 *Carnivale Marketing Report*:

'Carnivale has historically gravitated between two perceptual (though not mutually exclusive) poles: "Community-based" and "Artistic Excellence". Carnivale 2002 was positioned as an Arts Festival, presenting "quality" work. Whilst community involvement is integral, the connotations of "amateurism" were to a degree dispelled & replaced with a more contemporary take.'¹¹²

Carnivale has always attempted to provide access to culturally diverse communities living in Sydney's outer suburbs by programming in suburban venues. At the same time, communication efforts have suffered from fragmentation due to geographical vagaries and budget limitations.

Anecdotal evidence suggests that all festivals in large cities tend to suffer from communication fragmentation. Smaller cities such as Adelaide or Washington create festivals transforming the whole city or a significant section of it, encompassing the city's population and visitors—creating what Kurin terms 'time out of time'.¹¹³ Creating 'urban hubs' around key centres was a strategy by Carnivale Multicultural Festival aimed at providing access to new audiences connected to specific suburbs and neighbourhoods.

The creation of hubs in partnership with key venues such as the Seymour Centre, Riverside Theatres, The Performance Space, Belvoir Street and Artspace extended the Carnivale brand while creating access to audiences who tend to have a stronger allegiance to these venues or artforms rather than the festival.¹¹⁴

Café Carnivale, a worldmusic cabaret, was extended over a 12 month period in an attempt to maintain brand awareness and audience loyalty outside the festival period. It is supported by direct marketing efforts in email, flyers, membership incentives, street and ethnic press ads, community and youth radio reviews and giveaways.¹¹⁵ Universities have become important focuses for activity and programming of special Café Carnivale events targeted at university audiences.

Café Carnivale now has become a major focus of generating members and linkages to new markets in the live music and especially world music scene.

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Figure 1 ▲ Carnivale logo 2002 & 2003

'One of our aims is to use Café Carnivale to keep the Carnivale brand in front of audiences for a full year, and to develop a strong database of new members and audiences, so when Carnivale comes around in 2004, we will immediately tap into a large database of loyal audiences'.¹¹⁶

Carnivale branding position

The logo is a play on iconic traditional Australian soup Campbell's with the slogan 'more than just meat and three veg' being a metaphor for cultural diversity juxtaposed on traditional Anglo-Australian food. (See Figure 1) The theme of food is cultivated in 2003 with 'as dinkidi as the kebab you had for lunch'. Cultural diversity related to food has often been seen as ephemeral by some theorists. Yet, food is the first port of call in the process of cross-cultural understanding and there is now a growing awareness of creating cultural meaning, social bonds and a sense of popular identity through food.¹¹⁷ Saatchi & Saatchi related the development of multicultural programming to Australia's unique culturally diverse cuisine.¹¹⁸

The two characters (See Figures 2 & 3) represent a sexually energised multiculturalism with a distinctly Sydney attitude. It is also a reaction to the notion of cultural diversity reflected in Carnivale of the past, making a very public statement that things had changed. The image is congruent with global trends in culture, style, youth issues and domestic new Australian cool, as Mr Menidis put it 'cultural diversity with attitude'.¹¹⁹

The 2002 logos and imaging were extended to 2003 (See Figure 4), in an attempt to sustain audience loyalty and awareness. The logo manipulates the classic Aussie car with the

hanging fluffy dice acting as an ironic reference to the impact of ethnic youth on Australian car culture. These symbols encode new messages aimed at influencing new receivers, in this case culturally diverse youth born in Australia.¹²⁰

They are also targeted to 25–35 Socially Aware and Visible Achiever segments. A new emotional response suggests Carnivale is ethnically diverse and hip, global, contemporary and highly relevant. It is an irreverent image, accounting for younger audience's cynicism, in this case towards the mainstream and more earnest visions of 'welfare multiculturalism'.¹²¹

Mr Menidis suggested that Carnivale's research in 2002 indicated a low awareness of Carnivale's position among youth and mainstream arts audiences.

'The fundamental thing we did, different to the past and to most arts organisations, is to guarantee a marketing spend, to lock away a minimum spend, in our case \$20,000, and that does not include salaries, printing, publication, design, ads. No matter what else happens it is an amount to run campaigns. Many non-profit arts organisations run out of money in production and then pull the money out of marketing. We have enshrined marketing as a fixed cost, not a variable.'¹²²

Partnership building secured a major financial sponsor for 2002, RESI mortgage and a media sponsor with commercial television through Channel 7. Spots for Carnivale artists on Sunrise, Channel 7's morning program, a range of public relations efforts such as actors and personalities from Channel 7's stable, and Home and Away attending the Carnivale opening were measures aimed at extending Carnivale's mainstream and youth audiences.¹²³ Nurturing future audience



Figure 2 ▲ 2002 Carnivale postcard



Figure 3 2002 Carnivale program image

segments is reflected in the partnership arrangements with new sponsor RESI mortgage. Mr Menidis feels RESI is aware of Carnivale's youth and professional audiences, in ethnic communities as a segment of future home owners, particularly in the 25–34 year age.¹²⁴

Communicating to a new audience

If 2002 was about re-branding, then 2003, as Mr Hislop points out, is about 'selling the product'.¹²⁵ New partnerships are 'critical in securing tacit endorsement from target audiences'.¹²⁶ For example, culturally diverse hip-hop music, Mark Pollard, editor of *Stealth*, a Sydney hip-hop music and aerosol art magazine, was contracted to write on Carnivale hip-hop artists for 2003. A recognised voice in a specific artform is tacit approval of Carnivale's programming in any particular genre.

Carnivale's new emphasis on liaison and research created a better understanding of new audiences. Mr Menidis focused on building partnerships with ethnic media with the view of new advertising deals, editorials and reviews.

The 2002 and 2003 Carnivale communications mix included postcards, television commercials and promotions on Channel 7, Special Broadcasting Service (SBS) coverage, cooperative marketing with venues, ads and editorial in niche media, such as, *Real Time*, *Stealth*, ethnic and mainstream dailies, banners, posters, website and email promotion, mail, membership and ticketing packages. Each approach is targeted to specific audiences while maintaining harmony with Carnivale's branding. Word-of-mouth, SMS and referral are a major part of youth targeting as

Mr Menidis suggested: 'Part of the marketing mix is targeting these second generation ethnic youth segments. The marketing techniques used are word-of-mouth, peer marketing, one to one marketing. We run shows exclusively through SMS and email recommendations.'¹²⁷

Mr Menidis and Mr Hislop both highlighted the importance of word-of-mouth communications at a time when traditional brands are losing power in the eyes of youth. The tacit approval strategy Mr Hislop refers to is premised on the view that youth audiences are cynical and need to gauge approval from recognised experts in the field of any genre.¹²⁸

As the *Economist* writes, 'some of the most cynical consumers are the young'.¹²⁹

Traditional brands, as stated earlier in the report, no longer command the power they once did. This is a worldwide phenomenon which has headaches for major producers of goods and services as competition comes from unlikely quarters such as word-of-mouth, the Internet, SMS and other media. This is a reality that Mr Menidis is well aware of:

'Brands are losing power to guerrilla marketing, look at General Pants®, where have you seen them advertised? They do numbers in the millions to young people, mainly because of low end

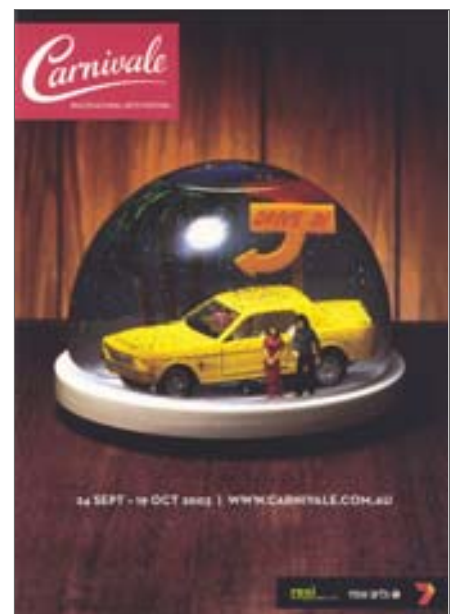


Figure 4 2003 Cover of pocket program

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above the line advertising, word-of-mouth, on the Internet and through SMS and Levis are struggling to get that market.¹³⁰

Carnivale’s focus on culturally diverse youth and professional audiences is emphasised by Mr Menidis, in the case of young Greek-Australians and their attendance to Rebetici Compania, a highly regarded Melbourne-based Greek Rebetica Blues ensemble.¹³¹

‘These are people of second generation Greek background, who have re-affiliated with their parents’ traditions and have rediscovered their Greekness. They are reconnecting with a group such as Rebetici Compania; they appreciate the authenticity of Rebetici, and the fact that they [the musicians] represent their art from in a contemporary Australian way the product attracts 18 to 35 uni graduates, relatively low income, but with high entertainment and travel expenses.’¹³²

The kultour data revealed only 6% of the respondents within the ages of 18 and 24. The number of under-18 year olds who attended the 2002 Carnivale was 7% compared to the 2001 Carnivale and kultour which were well below the 3% level.

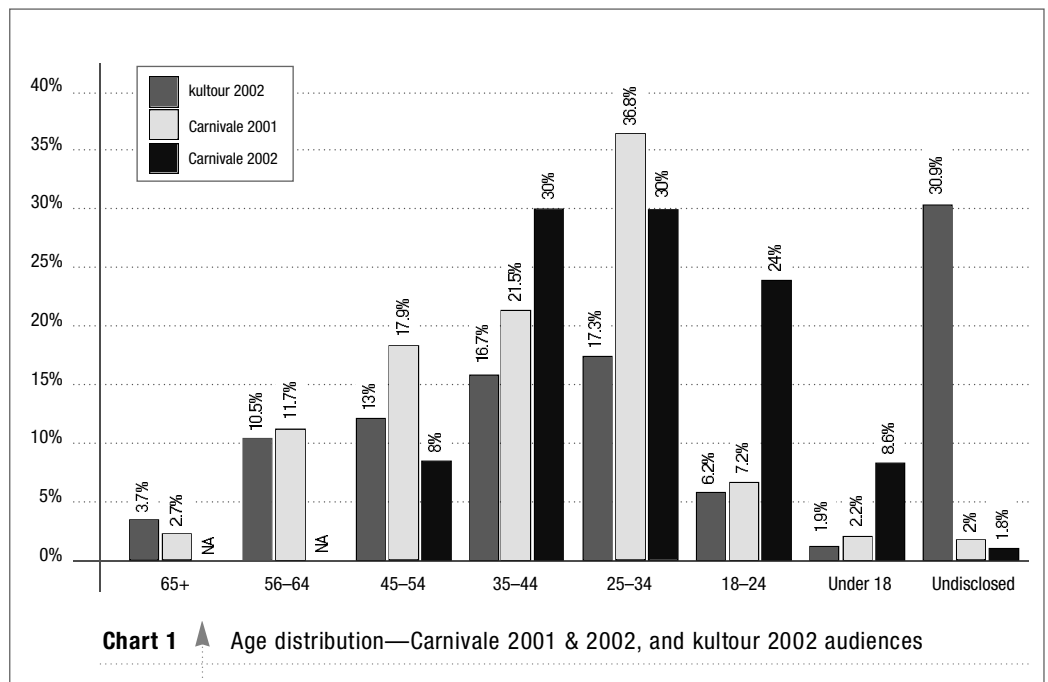
- Mikis Theodorakis Orchestra, The Legend of White Snake and Slava Grigoryan & Friends target mainstream segments such as, Traditional Family Values, or Ethnic Enterprise. They pay a slightly higher ticket and are confident that programming, while not Anglo-Celtic mainstream, is

excellent and will not be overtly challenging from an artistic perspective.

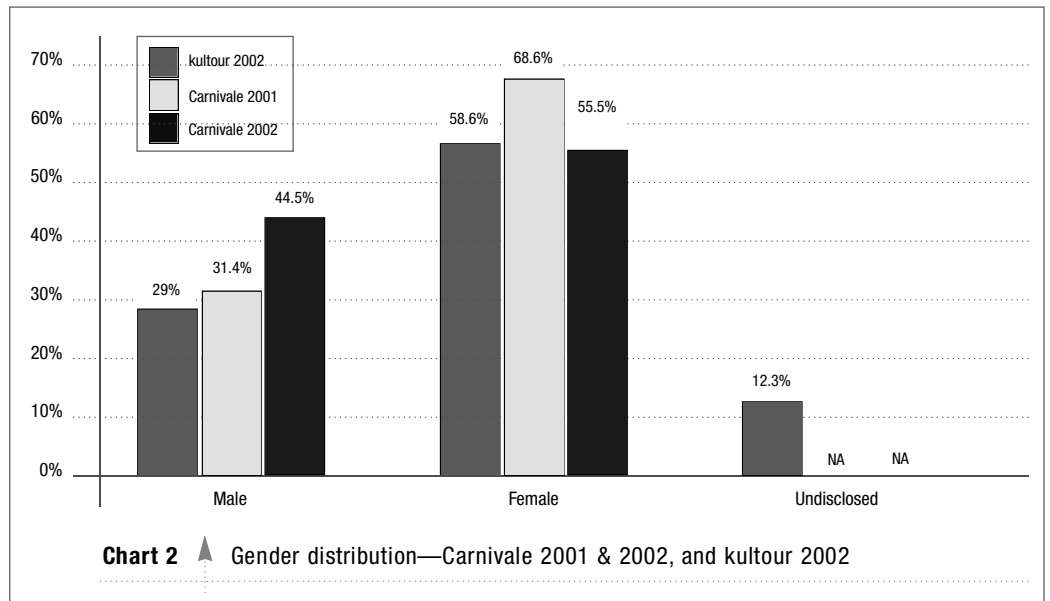
- Free outdoor programming is targeted at Pioneering Young Families and Time for a Change segments, in other words, new immigrant communities, young families and retirees with less disposable income.
- Flamenco Rocks, Mama’s Cooking is Better than Sex, The Living Museum of Fetish-ized Identities and Café Carnivale targeted the 24–35 year range of Socially Aware, Visible Achievers, or Cosmopolitan and Cultural and Ethnic Enterprise segments.¹³³
- Solo for Two, India@oz.sangam and some of the above such as Flamenco Rocks, are clearly targeted at the 16 to 24 years segments, or Look at Me and Young Optimists.¹³⁴

Developing a new audience

People in the Young Optimists and Visible Achiever segments, are confronted by a plethora of choices ranging from sporting events, cinema, digital media, popular music concerts, bars and clubs and dance parties all competing for their entertainment spend. Carnivale’s new communication approach began to pay dividends. There were noticeable shifts in the age distribution of audiences between 2001 and Carnivale 2002, a distribution that was more pronounced in 2003.



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As *Chart 1* reveals, there was a peak in 18 to 24 year old audiences attending the 2002 Carnivale, close to 25% of the sampled audiences, as opposed to the 7% who attended the Carnivale in 2001.

Mr Hislop, points to tickets being ‘heavily subsidised’ making it affordable allowing youth audiences to sample new programs such as Café Carnivale. Programs such as the Viet2Village (2002) and the Mikis Theodorakis Orchestra, or Legend of White Snake were targeted to culturally-specific audiences, Vietnamese, Greek and Chinese respectively, while being accessible enough for audiences outside those cultural and linguistic groups.¹³⁵ There is a shift in the gender makeup of Carnivale audiences. There has been an increase noted in male audiences from 31.4% in 2001 to 44.5% in 2002. Only 29% of the kultour audiences in Victoria, NSW and Tasmania in 2002 were male.

Mr Hislop suggested that the 2003 program and marketing were ‘skewed towards a male audience’.¹³⁶ This in the case of Carnivale indicated a shift away from the general trend in the arts of being associated with a larger proportion of female audiences. There was almost a 10% drop in the rate of females between the 2001 and 2002 Carnivale.

The lower pricing and targeting of Something Better, Visible Achievers, and Socially Aware segments, in the 18–30 year old range, through the presentation of world music may suggest a link between culturally diverse art and a desire for travel and new experiences by this segment.¹³⁷ The same group would be more inclined to go

to live music events, open air festivals and travel as backpackers.¹³⁸

Mr Menidis and Mr Hislop are paying serious attention to youth of culturally diverse background both as audiences and as future patrons. For example, Greek and Chinese Australians exhibit a tendency towards tertiary education and high levels of what Dr Agrawal would class as ‘ethnic entrepreneurship development’.¹³⁹

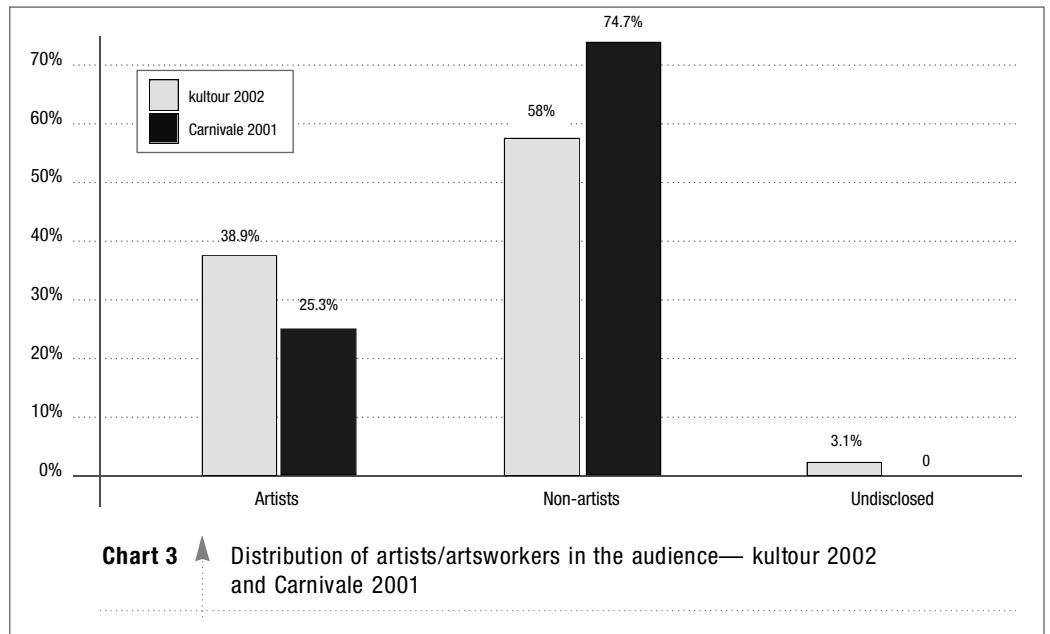
The ABS reports that in 1991 approximately 5% of Greek immigrants in Australia had a tertiary education. In contrast, 14% of Greek-Australians born in Australia achieved a Bachelor degree or higher. In the case of Chinese immigrants 16% had a higher degree and 21% of second generation Chinese-Australians had a tertiary qualification.¹⁴⁰

A study by Dr Bechervaise from the University of Sydney suggests that more research needs to be carried out on the correlation between cultural background and educational achievement rather than the usual focus on socialclass. Dr Bechervaise’s research shows that Asian students predominate in faculties of engineering, law and medicine whereas Southern European students predominate in the faculties of arts, science and economics.¹⁴¹

As Dr Bechervaise writes:

‘It is simple enough to dismiss the success of minority group students as aberrant when their numbers are small. It is more difficult, as with girls, to dismiss them when they are a clear majority.’¹⁴²

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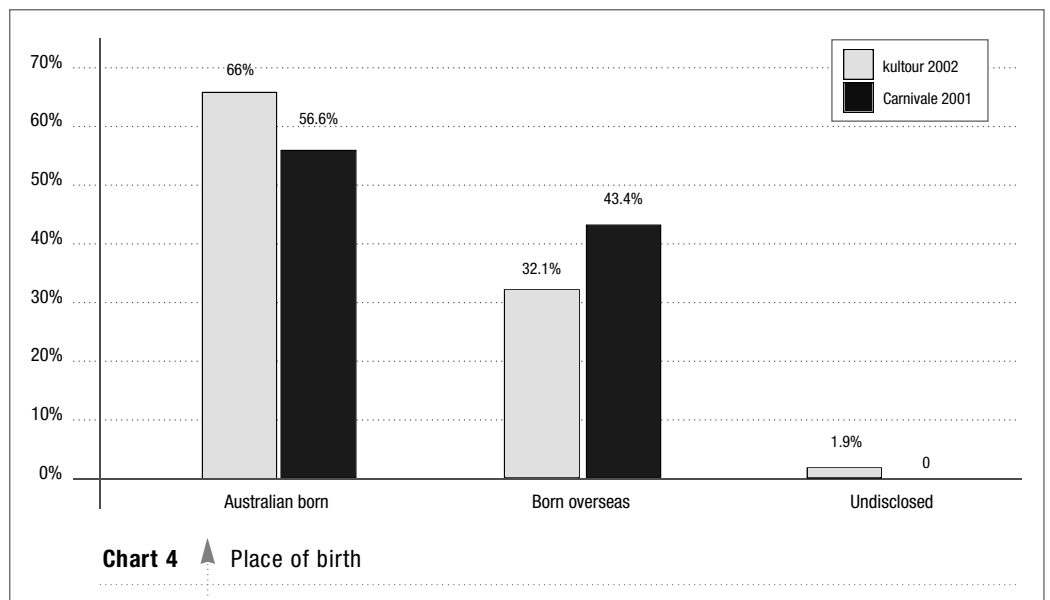
Mr Menidis has a deep understanding of the forces that impact on the development of new culturally diverse audiences.

'This young group of culturally diverse youth may not have a high personal disposable income, but their parents do; they live at home, usually till they get married, and they love the arts. This is similar for Italians, Chinese, Vietnamese, Arabic, and other communities, where the traditional family values mean you live at home till you are married; there is a comparatively huge flexibility in their expenditure for entertainment and travel. And if the product is good and not one that they do not have to cringe at, and if it is from their own cultural traditions, then they will support it and refer it to their parents. Thus you are

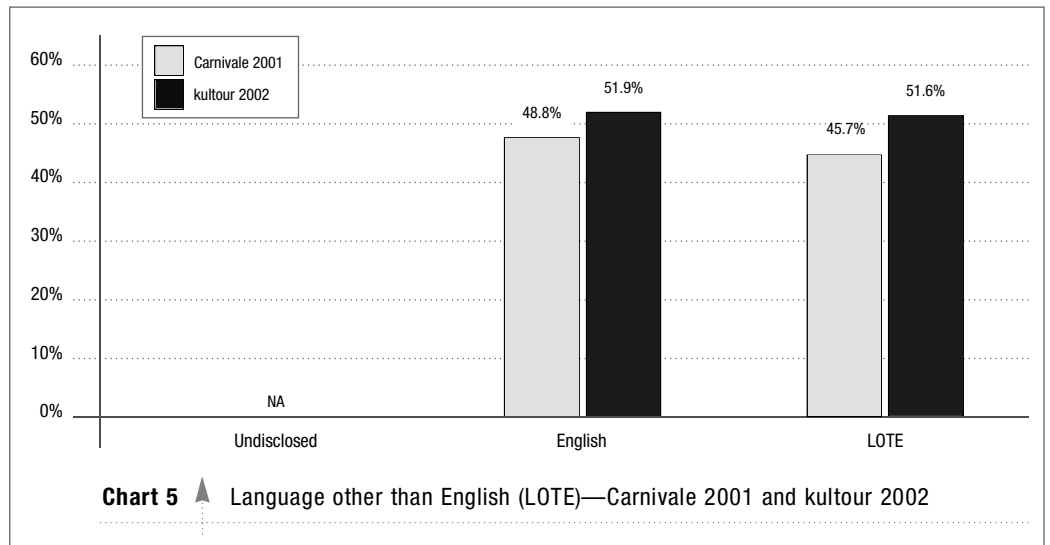
penetrating a youth market, and as key influencers they also bring an older generation, and the extension to this is we follow it up with new sponsors and new corporate support for the arts.'¹⁴³

A large proportion of culturally diverse youth may derive from families of a lower socio-economic status but still access tertiary education. Part of the reason is to be found in the level of social support provided by the family and the community as a whole.

In a study of the Vietnamese in the US, Dr Coleman identified a high degree of 'social capital' within the community.¹⁴⁴ The higher level of social capital in some immigrant communities



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means that increased resources are available to an individual through their membership in that community or group.¹⁴⁵

Another interesting aspect of audience research by Guldberg in 2001 and the surveys for kultour suggest a significant proportion of the sample audience were artists or involved in the arts. This may be common to all arts programming as it is always easier to secure the converted. Equally artists and artswokers are naturally more aware of what their sector has to offer.

In the case of surveys for kultour of three states, up to 40% of the sample identified themselves as artists or artswokers. Up to 26% of Carnivale 2001 audiences identified themselves as artists. Youth audiences which may have affiliations with hip-hop and popular music may in fact identify themselves as members of an arts community.

What impact multicultural art has on ethno-specific audiences is also of interest in developing an understanding of audience profiles. There are a high number of sampled audiences born outside Australia in the 2001 sample of Carnivale audiences.

Chart 4 reveals that up to 44% of sampled audiences in the 2001 data were born outside Australia. This could also reflect a skewing of audiences at specifically ethnic focused performances such as Jade House, which were predominantly of Chinese background. The comparative data from the kultour surveys reveal that up to 32% of the sample was born outside Australia.

When dealing with cultural diversity one of the most important elements is to determine

languages spoken other than English (LOTE). The 2001 Carnivale surveys did not specifically ask about cultural background of the sample audience. It was the determination of the researchers in this case, to group all those who were from non-Anglo-Celtic background with those who came from LOTE backgrounds, so as to draw a comparison between the kultour sample and the Carnivale research carried out by Guldberg in 2001.

Chart 5 suggests that there was almost a 50/50 split between those LOTE backgrounds and others. Closer analysis, and as some of the focus group outcomes from the 2002 kultour study suggest, those with LOTE backgrounds may have greater empathy towards multicultural programming, but it is not a major motivator in audience choice. In order to determine the impact of mainstream programming in comparison to multicultural arts programming, it may be advisable to survey a number of mainstream, popular and commercial arts events to determine the impact of LOTE.

Conclusion

Carnivale's approach to product development, branding and communications exhibit a strong desire to capture the current and future culturally diverse youth markets, while augmenting the existing Socially Aware, Something Better and Traditional Family Values market segments. The 2003 Carnivale program reveals the importance of a strong curatorial approach to program selection, something which has not been as evident in past programs.

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Carnivale's 2002, and more evidently 2003 programming, showed the relevance of selecting quality artistic products which are not captive to local constituent expectations but rather reflect the demographic changes in Australia and artistic movements globally.

The programs and the marketing approach of the festival suggest an understanding that 'multicultural arts', and the audiences they generate, are not dissimilar to audiences for general youth, contemporary and traditional arts.

The audience development approach taken by Carnivale should be seriously examined by

mainstream arts festivals and venues as well as traditional community arts programs. An emerging and economically significant culturally diverse youth audience needs to be addressed.

Culturally diverse audiences born in Australia, especially youth, may be less discriminating when selecting between arts and entertainment but more discriminating when selecting in terms of quality and relevance. Moreover, this audience desires new communication approaches, as they seem alienated by both the earnest social welfare approach of many traditional community-based arts activity and more elitist mainstream arts programming.

1. p25 *Australians and the Arts: A Report to the Australia Council* from Saatchi & Saatchi Australia 2000
2. p25 *Australians and the Arts* Ibid 2000
3. Multicultural Arts Marketing Ambassadors (MAMAS), 2000–04, was designed by Mr Lee Christofis, coordinator of Arts Management and Multicultural Marketing at Melbourne University. MAMAS was run in association with Multicultural Arts Victoria and focused on training bilingual artswriters to build relationships between major arts organisations and multicultural audiences and media. Ambassadors were seconded to major arts organisations and assisted with multicultural communications. The Multicultural Arts Professional Development program (MAPD), was initiated by the Australia Council for the Arts and designed by Fotis Kapetopoulos. It is managed by RMIT Business, Kape Communications and the Australian Multicultural Foundation. MAPD is a national program which enrolls approximately 15 participants per annum. MAPD trains multicultural artswriters in leadership, marketing, cultural brokerage and income generation. It is accredited as part of the Graduate Certificate in Leadership, a part of the RMIT University Business program.
4. *Lessons Learned: Case Studies Abrazando La Diversidad/Embracing Diversity*: Museum of Contemporary Art, San Diego 1999 National Endowment for the Arts
5. p27 *Who's wearing the trousers—Special Report Brands, The Economist* Sept 8–14, 2001
6. *Who's wearing the trousers? The Economist* Ibid
7. p21 Kotler. Phillip, etal *The Principles of Marketing* Ed. 2 Prentice Hall Australia 2002
8. p22–26 Kotler. Phillip, etal *The Principles of Marketing* Ed Ibid. 2002
9. December 2003 ABC Radio News from BBC Report
10. p159 Kotler. Phillip, etal *The Principles of Marketing* Ed 2 Prentice Hall 2002
11. p27 'Who's wearing the trousers?' *The Economist* Ibid
12. *Lessons Learned: Case Studies Abrazando La Diversidad/Embracing Diversity*: Museum of Contemporary Art, San Diego 1999 National Endowment for the Arts (NEA)
13. Walker-Kuhne, D, Lecture *Ten Tools of Success*, Melbourne November 7, 2003
14. Walker-Kuhne, D, Lecture *Ten Tools of Success*, Melbourne November 7, 2003, available on <www.ozco.gov.au> and <www.strategicqualities.com>
15. Roy Morgan/Ogivly & Mather Values Segments, 1996
16. Cultural Partners Australia Ltd is a multicultural marketing agency with years of experience in the area of culturally and linguistically specific marketing for products and services. They have adopted the notions of NESB1 and NESB2 as part of their methodology when determining influences within various culturally diverse markets.
17. Roy Morgan/Ogivly & Mather Values Segments, 1996
Cultural Partners Australia Pty. Ltd. have identified NESB 1 as those born overseas of non-Anglo Celtic background and NESB 2 as those born in Australia of non-Anglo-Celtic background.
18. Jarvis J, Qualitative Research Eggs, Thesis Extracts: J.Jarvis 'Billion Dollar Backpackers' 1994
19. *Arts in a Multicultural Australia* (AMA)—Australia Council policy on Arts in a Multicultural Australia 1999
20. AMA—Australia Council 1999 Ibid
21. Some Australian Statistics—Resources at <www.ozco.gov.au> 2003
22. p20 Kurin. Dr R, *Reflection of a Cultural Broker: A View from the Smithsonian*, 1997
23. Multicultural Arts Victoria has been successful, as a small organisation in developing cultural exchanges with Singapore 1999, Budapest 1999, Turkey 1997 and Athens 2000, branded as multicultural arts. At all times there was keen interest from international arts and media segments over Australia's multiculturalism.
24. see <http://www.latimes.com/extras/ads/2003Entertainment.pdf>
25. see <http://www.istanbul2004.info/> & http://www.gorhythm.com/festivals.htm>
26. p450 Lopez, M—'The Origins of Multiculturalism in Australian Politics 1945–1975', 2000
27. Kurin, Dr R—'Keynote Remarks 1990'—Summer Institute of Virgin Islands Culture 1990
28. Kurin, Dr R—'Keynote Remarks 1990' Ibid
29. p447–448 Lopez, M—'The Origins of Multiculturalism in Australian Politics 1945–1975', 2000
30. p450 Lopez, M, Ibid
31. p4 *Going Global: A Business Model for Diversity Management*—Australian Centre for International Business for Department of Immigration, Multicultural and Indigenous Affairs (DIMIA)

ENDNOTES

32. p5 *Going Global*, Ibid
33. p19 Bertone, S, Et al—*The Taxidriver, the cook and the greengrocer; the representation of the non-English speaking people in theatre, film and television*, Australia Council 1997
34. p6 *Going Global*, Ibid
35. NORPA—Northern Rivers Performing Arts is one of Australia's leading regional performing arts organisation based in Lismore, NSW. It is responsible for the provision of mainstream, contemporary, multicultural and all other performing arts to the communities around the Northern Rivers region of NSW <www.norpa.org.au>.
36. There were over 50 references in one search of kultour on Google of which none referred to the kultour program by the Australia Council—2003
37. p3–10 *Small to Medium Performing Arts Sector Report*, Standing Committee of Cultural Ministers—Commonwealth Government of Australia 2002
38. Chris Pascoe—past executive officer of Multicultural Arts Victoria (MAV), 2002
39. Liz Terracini—manager Interview NORPA, 2002
40. Liz Terracini—manager Interview NORPA, Ibid
41. Liz Terracini—manager Interview NORPA, Ibid
42. The notion of selecting programs on trust was highlighted by Jorge Menidis—artistic director of Carnivale, Walter Gomez director of Kulcha, Liz Terracini from NORPA and Con Gouriotis director of Casula Powerhouse NSW
43. *Going Global* DIMIA, 2002, Op cit
44. Chris Pascoe was MAV executive officer from May 2001 to December 2002, the current MAV director is Jill Morgan, who was the ex-executive officer of KULCHA (WA)
45. Jacqui Geia was kultour manager for Victoria and was contracted to MAV
46. Jorge Menidis was appointed as director of Carnivale in 2002
47. Assistance in the distribution of surveys in Melbourne was provided by Renea Akritidis and in Hobart by Mary-Ann Fisher from IHOS Contemporary Music
48. Interviews with Con Gioroutis director of Casula Powerhouse, Jorge Menidis director of Carnivale, et al, 2002
49. Blue Boy by Kamal Krishna, (Fijian-Indian extraction), is based on the cultural conflict of being a migrant twice over. Indians were brought into Fiji as indentured labourers in the 19th Century by the British. In the post-colonial period, they ascended to middle class and professional positions. Their relatively privileged position in Fijian society and dominance over the economic and political landscape made them targets among Fiji's indigenous population. In the 1980s after a military coup led by Col. Rabuka espousing an ethnocentric vision of Fiji many of the Indians, seeking a more stable future, settled in Australia.
50. Menidis J, Koukias C, Heruc M, Geia J, Pascoe C and Gomez W Interviews, 2002
51. Gomez W & Menidis J Interviews, 2003
52. Walter Gomez manager of KULCHA WA, Interview, 2002
53. p44 Kotlet et al 2002 Op cit
54. p19 Kurin, Dr R—*Reflection of a Cultural Broker*, Op cit
55. Hobart Focus Group—There was agreement by the focus group participants that there was a genuine lack of cultural activity in Hobart particularly in the areas of contemporary and multicultural arts.
56. Roy Morgan, 1995 Op cit
57. Interview with Constantine Koukias IHOS, Tasmania 2002
58. Interview with Koukias C Ibid, Tasmania 2002
59. Interview with Koukias C Ibid, Tasmania 2002
60. Interview with Walter Gomez, KULCHA WA, 2002
61. Roy Morgan: 1996 & Ticket2Ticket. Research An Arts Australia & Dramatic Group Pty Ltd[©]. National market research for the Australia Council 1999. NB: Ticket2Ticket has a highly detailed and comprehensive analysis of statistics and sub-segments, which complements the Roy Morgan Value Segments.
62. Roy Morgan: 1996, Ticket2Ticket: 1999, MAP—Arts Victoria 2003
63. Roy Morgan: 1999, Kotler et al 2002
64. Population Projections, Tasmania ABS 1999
65. Hugo, Prof G, Centenary Article; *A Centenary of Change Year Book Australia*, ABS 2001
66. Kotler Et al: 2002, Op cit

67. *Generation X* published in 1991 by Canadian author Douglas Coupland was a seminal book highlighting the lifestyle, of then 20 something cohorts who exhibited no vision or ambition, and at the same time, none of the teen angst, or nihilism attributed to previous youth generations. Gen X for Copeland represented a generation who engaged in a new hybrid world of digital and print media, who were neither satisfied, nor unsatisfied with what he termed MacJobs which represented semi professional, service industries, and who on the whole had none of the positivism, anger or vision attributed to post-war Baby Boomer cohorts. In various publications such as, <www.janmag.com/profiles/dcoupland.html>, <www.humnet.ucla.edu/ta/tacsite/HaylesHybridity.htm>, <users.metro2000.net/~stabbott/genx.htm> and others, it becomes clear that the term in its current usage by marketers and media to suggest youth was not the meaning Coupland envisaged for the term. Gen X tends to constitute those who were born in the 60s and 70s—not youth.
68. *Age and Arts Participation: With a focus on the Baby Boom Cohort*, National Endowment for the Arts No.34—USA: 1994
69. *Age and Arts Participation* No.34 NEA 1994 Ibid
70. Melbourne Arts Festival Program: 2003
71. *Age and Arts Participation* No.34 NEA 1994 Ibid
72. Tasmania Basic Community Profile and Snapshot Census ABS 2001
73. Menidis J, Interview Op cit: 2002
74. Blue Boy Focus Group—Tasmania: 2002. NB: This issue is one which will need further investigation as Tasmania has scope for growth in tourism and there is a flow of middle class people from the mainland seeking lifestyle changes. Interestingly there was comment by the focus group that most visitors to Tasmania come for the environment thus missing Hobart.
75. Fouad Harraka's Middle Eastern Knights with Claire Naffah Focus Group: 2002
76. *Culture and the Arts, Music, Tasmania* ABS 2002
77. *Some Australian Arts Statistics*—Australia Council for the Arts 2003
78. *Some Australian Arts Statistics*, Ibid
79. *Some Australian Arts Statistics*, Ibid
80. *Securing the Future: A Major Performing Arts Enquiry* Department of Communications, Information, Technology and the Arts 1999
81. Kotler et al: 2002, Assael et al 1997, *Securing the Future*: 1999, kultour Focus Groups: 2002
82. Assael et al: 1996 Op cit
83. Blue Boy Focus Group Tasmania: 2002
84. Geia J, kultour Victoria coordinator Interview: 2002
85. Geia J, kultour Victoria coordinator Interview: 2002
86. While IRAA contemporary theatre company is of an Italian character, IRAA do not focus on the engagement of communities and artists when developing works.
87. <www.parallelo.on.net>
88. Crea T, creative director of para//elo, Interview 2002
89. *Arts in a Multicultural Australia Policy (AMA)*—Australia Council for the Arts 2000
90. Discussions with para//elo director and staff
91. Interview with Crea T, creative director of para//elo 2003
92. Commedia dell'arte—popular improvisational theatre, 16th Century to 18th Century, and still performed today. The dialogue and action are adjusted to satirise events, people, society and politics. Characters were identified by costume, masks, and high slapstick. See <www.wikipedia.org/wiki/Commedia_del_Arte>
93. Italian playwright, Dario Fo, acclaimed for his sharp political satires and farces, is considered by some to be the natural heir to Aristophanes. His main targets have been capitalism, hypocrisy and Italian government corruption. His best-known plays are *Accidental Death of an Anarchist* and *We Won't Pay! We Won't Pay!* He was awarded the Nobel Prize for Literature in 1997. Brazilian playwright, director, Augusto Boal developed a new methodology—the theatre of the oppressed. His methodology explores the view that all human beings act and watch, and are spect-actors. This embraces the notion that participation engages placing the participant in control of the action, the course and conclusion of a play, thus making it essential in addressing audiences. (REHEARSAL FOR REALITY: by RANI MOORTHY: 2003)

94. p13 *Nineteenthundred A monologue* by Alessandro Baricco Translated by Joseph Farrell (ref of Italian Migration in 1900 to US and Canada)
95. para//elo's annual report 2002
96. For more details on para//elo projects go to <www.parallelo.on.net>
97. p42–45 Cultural partners establishing links with non-English speaking background communities—*The world is your audience* Australia Council for the Arts 1998
98. p18–19 Kurin, Dr R, *Reflections of a Cultural Broker*, NB: The quote is by Robert Reich the former US Secretary of Labour in, *The Work of Nations* cited in *Reflections of a Cultural Broker*, 1997
99. The foods were prepared by a para//elo board member who is also a key promoter of South Australia's fisheries industries. She is a strong advocate for the adoption of culturally diverse cuisine in the preparation of seafood among South Australia's population.
100. 1900 Project showcase, Maritime Museum of South Australia, Port Adelaide, November 2002 NB: The Slovenian man, also pointed to the desire of leaving Europe for a new future.
101. There are numerous textbook marketing techniques and terms describing the public and community relations in increasing audiences, sponsorship, patron and government funding, undertaken by arts, community, charity and other service organisations. Assel et al have developed the notion of multiple transactions for multiple publics. Assel et al point to arts organisations' need to market to multiple publics such as, patrons, government officials, board members, peers and partners, audiences and members. Building loyalty is about maintaining a focus on social conscience in charities and movements, or, in the case of arts, experience, product quality, uniqueness, status, social conscience. 1970s social conscience in vogue again, and multicultural arts and other progressive organisations can find new opportunities in the cynicism citizens have over government, consumers over corporate culture and globalising companies. Equally there is the danger that many of the non-arts empathetic and non-social conscious segments particularly in the low income young families and suburban will opt for xenophobia and reaction against cultural plurality and non-conformist lifestyles. For product which is encased in the aura of doing good to society.
102. p414 Assel et al *Marketing Principles and Strategies*, 1997 Op cit
103. Artistic Overview in para//elo *Annual Report 2002*
104. Discussion with Crea T, para//elo 2002
105. p31 *Australians and the Arts*, 2000 Op cit
106. <www.carnivale.com>
107. Hislop D & Menidis J, Interviews: 2003
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109. Guldberg H, *A Sample of Audience Responses from Carnivale*—Gulberg Economic Strategies 2002
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114. Hislop D, Interview 2003, Ibid
115. Hislop D, Interview 2003, Ibid
116. Hislop D, Interview 2003, Ibid
117. pp20–22 Ang, Prof I et al *Living Diversity: Australia's Multicultural Future* SBS 2002
118. *Australians and the Arts*, 2000 Ibid
119. Menidis J, Interview 2003, Ibid
120. pp20–29 Kotler et al *The Principles of Marketing* Ed 2, 2002 Op cit
121. Lopez M, 2001 Op cit; *The Economist* 2001, Op cit, and Kotler et al 2002, Ibid
122. Menidis J, Interview 2003, Ibid
123. Hislop D, Interview 2003, Ibid
124. Menidis J, Interview 2003, Ibid
125. Hislop D, Interview 2003, Ibid
126. Hislop D, Interview 2003, Ibid
127. Menidis J, Interview 2003, Ibid

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128. Hislop D, Interview 2003, Ibid
129. 'Who's wearing the trousers?', *The Economist* 2001, Op cit
130. Menidis J, Interview 2003, Ibid
131. Rebetica—Greek blues is improvised urban music played on Oriental and Western instruments such as, the ud, accordion, bouzouki and baglama. Rebetica were brought into Greece by millions of Greek refugees fleeing from Turkey in the early 20th after the burning of Constantinople. The refugees found themselves living a life of poverty, around the port cities of Pireaus and Salonika. The music was banned by the Western elites of Athens. Rebetica were first recorded in New York as many of the refugees became Greek migrants to the New World. The form underwent changes and since 1970s like jazz, has fused with other genres. The Melbourne Rebetici Compania, are excellent exponents of 1920s Rebetica and are acknowledged for their contribution in preserving the form. Australian historian, Gail Holst has written a definitive study, *Rebetica 1947–1976*, 1995
132. Menidis J, Interview 2003, Op cit
133. Roy Morgan 1997, Op cit & *Ticket2Ticket* 1999, Op cit
134. Roy Morgan, 1997 Ibid
135. Hislop D, Interview 2003, Op cit
136. Hislop D, Interview 2003, Ibid
137. Kotler et al 2002 & Assael et al 1996, Op cit
138. *Ticket2Ticket*: 1999, Ibid
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