4. The market for dance

4.1 Introduction

The audience for contemporary dance is relatively small. While the market size for all forms of dance is similar to that for classical music, the dance audience is characterised by lower earning levels, with a significant proportion of purchasers eligible for concessionary ticket prices. Contemporary dance audiences appear keen to experience new work, but there is significant scope for raising their awareness of the work on offer.

The demise of the Australian Government touring scheme, Made to Move, has left a gap in coordinated touring arrangements for dance. The smaller performing arts centres which are committed to presenting dance have very limited resources for programming and marketing; some of the larger arts centres are also very supportive of dance presentation, but have focused primarily on the major companies. There are many presenting venues which consider dance to be a 'high risk' promotion compared with other types of event.

International market development for dance has been supported through the biennial Australian Performing Arts Market. Further strategies for supporting Australian dance in the international market are being considered jointly by the Dance Board and AMD.

The visual appeal of dance makes it especially suitable for reaching out to new audiences through film and broadcast media, as well as to international markets. There are some positive examples of dance/film and dance/broadcast initiatives, but much scope for future development.

Contemporary dance commands loyalty and interest amongst its audience. Its physicality appeals to young audiences. Its specialised appeal presents some significant marketing challenges, but also opportunities for market development.

4.2 The current audience for contemporary dance

The current market for dance in Australia is relatively small. The Australian Bureau of Statistics has estimated that 9% of the population attends dance performances. This compares with 16.5% for theatre, 16.3% for opera or musicals and 8.8% for classical music performances [4]. However, the audience for *contemporary* dance, which forms the primary focus of the companies covered in this analysis, has been estimated in other research as closer to 6% [5]. At this level, the potential adult (15+) audience for contemporary dance would be approximately 840,000 across Australia.

A study of box office results of six capital city-based presenters (1997–99) showed paid attendances at contemporary dance performances had been between 230 and 350 per performance (105–118 performances in total). By comparison, the average attendance of 12 consistently-funded companies included in the present analysis over the four years to 2001 was 228 per performance. It is worth noting that the contemporary work of the major dance companies accounts for a significant proportion of the overall contemporary dance audience.

---

[4] Australian Bureau of Statistics, *Attendance at Selected Cultural Venues*, April 1999.

[5] The Dramatic Group report on Regional Performing Arts showed that in 1998 contemporary dance attracted 6.7% of purchasers and 5.4% of ticket sales. Roy Morgan Research has also indicated contemporary dance audiences at 6% of the population.

4.3 The audience profile for contemporary dance

Perhaps the most detailed recent profiling of contemporary dance audiences was provided by a national research project conducted by Judith James Consultancy and Positive Solutions in 2000 for Made to Move, a group of venues presenting contemporary dance across Australia[6].

The Made to Move audience was predominantly:

- from an English-speaking background (98%) and female (75%)
- two thirds earned under $50,000 a year
- 41% had attended once a year or less.

The low proportion of audience members from non-English speaking backgrounds suggests that there may be significant opportunity for audience growth amongst these sections of the community. The 2001 census indicates that the proportion of Australians for whom English was the only language spoken at home had declined to 79.1% of the population, from 81.4% in 1996[7].

Less than half the respondents had bought a full price ticket (23% were subscribers). This corresponded with a three-year survey of box office results at Made to Move venues, which showed that full price tickets rarely accounted for more than one third of all tickets sold. This reflects the profile of the audience—student (10%) and others with a reliance on promotional discounts. This is a clearly distinguishing feature from the audience for classical music.

Visual interest, reputation of the company and the music used in the production were the top three motivators for attendance, although venues' promotional materials rarely mentioned the music used in a production, which can be a strong selling point. Younger audiences tended to prefer less formal venues.

Contemporary dance audiences were receptive to abstract work—but negative perceptions expressed by some interviewees included that it would be dark, slow moving and minimalist. They liked the freedom of expression, the energy and the relevance of contemporary dance to today.

Interest in seeing a company corresponded with awareness of a company. There was very little knowledge of what was happening nationally. Contemporary dance for many began and ended with Sydney Dance Company's Graeme Murphy.

The audience had a thirst for 'the new' and were very interested in low price access to see works by less familiar choreographers—but many did not know how to access such work.

4.4 Venue demand for dance

Both the small-scale contemporary-focused venues listed above, and the major performing arts centres, have shown a commitment to support the presentation of dance. However, the former lack resources, (and in some cases physical infrastructure) to regularly present contemporary dance; and in many cases regional venues are reluctant to take the risks associated with product which they believe will not generate a good response at the box office.

---

[6] A self-completion survey was conducted from May to November 2000, at dance performances given by seven companies at 10 venues in every state and territory, except the Northern Territory. The sample size was 2,146. It should be noted that many of the venues were major performing arts centres, and as such, did not represent audiences for independent contemporary dance performances at more alternative venues. Qualitative research was also conducted with 116 people in seven locations.

[7] The census also indicated that 71.8% of the population were Australian born, down from 73.9% in 1996.

Made to Move was a dance-presenting consortium of the major performing arts centres, enjoying support from Playing Australia. The consortium has now been disbanded because of growing perceptions that it was not succeeding in growing the audience as intended. An alternative circuit or promotional structure has not yet been established, although a report has recently been submitted to Playing Australia for consideration.

4.5 Major festivals

There is no dedicated dance festival in Australia, as there are in some other countries[8]. The major Australian festivals include dance within their broader program, and the Melbourne International Festival of the Arts is including a strong focus on dance in 2003, including conference activities through a link with Ausdance Victoria. The presence of dance (including Australian companies) at the major festivals is summarised here:

Table 4.5a Dance Companies in Australian Festival Programs

Festival	Number of Dance Companies									
	1998		1999		2000		2001		2002	
	Aus	Int'l	Aus	Int'l	Aus	Int'l	Aus	Int'l	Aust	Int'l
Adelaide Festival	3	6			3	6			4	2
Brisbane Festival	1	4			4	1			5	1
Melbourne International Festival of the Arts	1	4	0	5	2	3	0	4	No dance program	
Perth International Arts Festival	N/A	N/A	2	4	1	2	2	1	1	2
Sydney Festival	0	3	1	2	0	3	0	2	1	1
TOTAL	**5**	**17**	**3**	**11**	**10**	**15**	**2**	**7**	**11**	**6**

Allowing for the fact that the Adelaide Festival and Brisbane Festival are biennial, it appears that there has been a trend towards decreasing the proportion of international dance being programmed, and that Australian dance may have benefited from this. However, from the interviews held with festivals no specific rationale for dance programming or artistic policy framework affecting the choice of dance could be determined. Potentially, the festivals would be open to policy initiatives which provide incentives to support dance more consistently.

4.6 International market development

The small scale of the dance market in Australia highlights the need for active development of overseas markets to maintain the viability of dance companies and individual artists.

---

[8] Dance Umbrella in the UK has played a significant role in building the popularity of dance during the last decade; other dance-specific festivals include Vancouver's Dancing on the Edge, and the Canada Dance Festival

4.6.1 Australian Performing Arts Market

The biennial APAM is a key means by which the Australia Council supports the export of Australian performing arts. Since 1996 dance has regularly been presented through Spotlight presentations during the biennial APAM, to encourage international tour bookings. In 1996 three dance companies were profiled in this way, but in subsequent Markets there were eight, seven and nine dance companies presented. Subsequent to their presence at the 1998 APAM, three of the dance companies secured international tours, and a further three subsequent to the 2000 APAM. Generally it has been the larger companies which have benefited.

4.6.2 Future strategy for dance

The Dance Board and AMD are currently in discussion regarding an international market development strategy for dance, to be pursued following the conclusion of the present Analysis. It is possible that a similar initiative to Playing the World may emerge to support international development for Australian dance as part of this strategy.

Playing the World is a joint initiative of the Theatre Board and the Audience and Market Development Division, aiming to assist Australian theatre artists to develop international markets and reach new audiences overseas. It does this by supporting international tours of innovative Australian theatre productions as well as other international market development opportunities.

4.7 Dance and film

Dance and film have enjoyed a symbiotic relationship since the birth of cinema. Australian film directors and producers continue to collaborate with choreographers and performers to create documentaries, narrative, experimental shorts, feature films and moving music videos.

Until recently, there were limited local opportunities for Australian dance film/video makers to present their work. In 2000, One Extra launched Reeldance, Australia’s biennial International Dance on Screen festival. Since its inception, Reeldance has recorded a significant increase in attendance and submission of films for their Digital Picture Awards. Reeldance aims to expose Australian artists and audiences to international dance film. The festival plays an active role in audience development and aims to improve the standard of dance film in Australia.

The recent opening of the Australian Centre for Moving Image (ACMI) in Melbourne provides a forum for critical dialogue about contemporary dance film/video and a sophisticated platform to present and collect works. ACMI’s geographical location attracts a diverse range of people to the Centre. In January 2003, over 67,800 people experienced *Close Up* by Chunky Move.

IMZ Dance Screen Festival is a leading international forum and festivals for dance films, and a potential marketplace for the distribution and promotion of Australian dance films. IMZ provides a platform for broadcasters, producers, directors, publishers, dance film makers and agents from around the world to build networks by presenting their work in competition and pitching new ideas. A number of artists and programmers have been supported by the Australia Council to attend this festival.

Other mainstream avenues for dance film and video are the ABC and SBS. The ABC broadcast of *Wet* by Chunky Move (classified MA) in a prime-time slot reached a national audience of over 700,000. In addition, the most extensive broadcast of contemporary dance on the ABC was a six part series *Dance Now*, broadcast in the late 1990s during summer (low season). The producer could not imagine this opportunity arising again in the current funding climate, as the ABC does not currently program contemporary dance film. A representative stated this is a result of issues involving management, programming and funding.

As a portable medium, dance film/video is an affordable vehicle to capture the essence of Australian dance and communicate it to national and international presenters and markets. Currently there are 12 dance film festivals worldwide dedicated to the presentation of dance film. These include well established and long running Festival International de Video Danza, Argentina; Moving Picture Festival, Canada; TTV Festival - Performing Arts on screen, Italy; Dance on Camera, USA; and Dance on Screen, UK.

Dance film is a collaborative process between dance and film professionals. With any collaboration, roles and responsibilities of people involved need to be defined, and in some cases redefined to accommodate the development of the practice.