



**Review and Evaluation
of the
Australian Performing
Arts Market
1994 – 2002**

Summary and Response

Prepared by the Australia Council

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INTRODUCTION

The Australia Council's Australian Performing Arts Market [APAM] is the major showcase of Australian contemporary performing arts to international and national presenters and producers. The Australia Council will continue to support this very successful biennial event.

APAM is part of the Australia Council's long-term strategy to develop international markets which also includes the promotion of contemporary Australian work at four key international performing arts markets: CINARS-Montreal, APAP-New York, Asian Arts Mart-Singapore and Tokyo Performing Arts Market.

Touring is critical for the vibrancy, sustainability and international standing of Australia's contemporary performing arts. In its 10 year history, APAM has achieved extraordinary results with over 60 Australian companies undertaking around 150 tours to 1200 venues around the world.

APAM continues to attract increasing numbers of key international presenters and producers, many of whom have consistently presented Australian work. APAM's structure of bringing together the best contemporary performing arts work in one place at one time is highly attractive to international presenters who have a limited timeframe in which to see as much work as possible. In addition, the timing of APAM earlier in the year (late February/early March) works well for international presenters as it complements the northern hemisphere's peak summer season for performing arts presentations and touring.

APAM also helps to generate discussion about key issues in the performing arts sector. In 2004, for example, APAM provides a forum for delegates to explore approaches for the commissioning of new works, and to consider ways in which

international presenting partners can collaborate in the commissioning of new works and in the further development of works in progress.

BACKGROUND

APAM, a biennial marketplace for performing arts companies and programmers, was first held in 1994 to increase international and national touring opportunities for Australian contemporary performing arts groups and artists. In 1994 and 1996 it was held in Canberra in conjunction with the National Festival of Australian Theatre, and since 1998, APAM has been held in association with the Adelaide Festival and Adelaide Fringe.

The five-day program currently includes:

- Spotlight, where artists present 25 minute excerpts, or full-length performances as part of the Adelaide Festival and Adelaide Fringe
- On Display, a series of booths hired by performing arts companies, arts funding and development agencies, producers, and others
- industry seminars and briefing sessions
- keynote addresses
- receptions to promote networking opportunities

The Australia Council co-produces APAM with Arts SA which is the only State arts agency to contribute directly to the presentation and promotion of APAM. The Australia Council and Arts SA are responsible for organising APAM through the Adelaide-based company Arts Projects Australia.

APAM's Management Committee currently comprises senior representatives of the Adelaide Festival, Adelaide Fringe, Adelaide Festival Centre, Arts SA, the Australia Council's Audience and Market Development Division, and Arts Projects Australia. The Committee, in consultation with the Australia Council's performing arts boards, and State and Territory arts agencies, selects the Spotlight presentations based on published selection criteria.

PURPOSE OF THE REVIEW

Evaluations undertaken after each APAM with all stakeholders and delegates have resulted in the refinement of the operational and logistical aspects of the Market so that it has become more effective.

In 2003 Council appointed Andrew Bleby Arts Management to conduct a comprehensive review of APAM in order to look at the longer term position and role of the Market.

The purpose of the review was to:

- ascertain the success of the APAM in securing overseas touring engagements for Australian contemporary performing artists and companies
- examine ways to strengthen APAM's reputation as a major international market
- identify ways to build stronger links with key overseas performing arts markets and to consolidate Council's existing relationships with State and Territory arts agencies and the Department of Foreign Affairs and Trade [DFAT]

The consultant reviewed the feedback provided by delegates after each Market and analysed APAM's databases of Market delegates. A survey and in-depth interviews were conducted with Commonwealth and State and Territory arts agencies, international delegates, and Australian artists and companies and other national delegates.

REVIEW FINDINGS

The desirability of touring is a key assumption of APAM. Around three quarters of the companies that had appeared as part of the Spotlight program said touring was a "very important" part of their activities. They said touring provided a significant proportion of their income, increased their contacts nationally and internationally, extended the life of a work, provided an opportunity to re-visit and enhance works, introduced them to new markets or assisted with the professional development of artists and managers.

While international touring is a priority for APAM, the Market is also an important vehicle for encouraging national touring and it complements other key events which are focused entirely on national touring, such as Long Paddock, Cyber Paddock and the Kultour program.

Since it began, APAM has directly resulted in over 60 Australian companies undertaking around 150 tours to 1200 venues. Taking into account the ripple-effect of additional tours being secured as a company's reputation grows in new markets, the international touring outcomes have generated revenue of around \$30 million for Australian companies. It should be noted the volume of national tours secured from APAM was nearly as great as that for international touring.

The direct investment in APAM – 1994 to 2002 – was in the region of \$2.8 million, which includes contributions from all government agencies, sponsorship, registration and display booth fees. The Australia Council contributed approximately 30% of the total cost. In addition, State and Territory agencies contributed over \$550,000 by directly assisting companies to attend the Markets.

Around two thirds of the 53 Spotlight companies and non-Spotlight companies (those represented through the On-Display booths) surveyed said they had secured a national or international tour as a direct result of APAM. An impressive 84% of international delegates surveyed said that future tours to their region were likely as a result of APAM. For example, Performing Lines attributes much of William Yang's touring success to APAM – he participated in all Markets except the 1998 Market. By the end of 2002, Yang had given 370 performances (42% overseas) in 80 locations.

The most common touring destinations for Spotlight participants in the 2000 APAM were Europe including the UK (c.50%), Asia including Japan (c.20%) and the United States (14%).

This is a sound return on investment. But financial return is not the only measure of success. Delegates reported that APAM had helped them to be better prepared for international touring, had provided invaluable networking opportunities and 10% of Australian companies said they had acquired international agents.

The value is not just economic ... it is a valuable and vital interconnection for Australian companies with each other, exposure to internationals to learn what their values and needs are and a way to build relationships that are more than just sales based. (Australian producer)

The number of tours reported has increased with each Market, with the exception of 2002. The reduction after the 2002 APAM may be the result of fewer Spotlight presentations, the lag time in tours being finalised (often negotiated over 12-18 months), the events of September 11, 2001, or the Adelaide Festival program which had fewer tourable shows in that year. A number of international programmers also reported budget cutbacks.

ATTENDANCES

The number of delegates registering has increased each year, with the five Markets held to date attracting a total of over 1,500 delegates. Around half of these were from overseas and nearly a third of international delegates had attended the Market more than once.

The countries of origin were well distributed over nearly every continent and the key markets of Asia, Europe, Canada, the USA and New Zealand were all well represented. Australian delegates were drawn from across the country, roughly in proportion to the population of each State.

PROGRAMMING

Genres represented by Australian companies showed a balanced mix of theatre, dance and physical theatre, but the number of music producers attending has declined sharply since 1998.

In response to feedback that more time was needed for networking the number of Spotlight presentations was reduced for the 2002 Market.

The number of On Display booths has remained fairly constant over each Market at around 28-30 booths and it is unlikely that the number of booths available could increase in the near future, given the space constraints of the current location.

SATISFACTION AND PERCEPTIONS OF APAM

There is a high level of satisfaction with APAM.

- 94% of Australian companies said their attendance was worthwhile
- 88% of international delegates said attendance was 'very' worthwhile
- 94% of Spotlight producers said APAM was relevant and effective in developing tours
- 62% of Australian producers and 88% of international delegates said it was 'very well organised'
- 64% of the 4th Market delegates said the quality of the productions and artists were either excellent (12%) or good (52%); they were similarly positive about the balance and variety of genres represented

- features of Australian performing arts that were of interest to international delegates were: quality of the work (35%), particular energy and style (29%), cultural considerations (26%).

THE FUTURE

The following points draw on the key recommendations of the Review and also indicate developments that have been or are being implemented by the Australia Council.

- It is important to ensure that the goals and objectives of APAM are regularly refined to take account of the changing national and international environment. The goals for 2004-2007 are to:
 - increase international and national touring and commissioning opportunities for Australian contemporary performing arts groups and artists
 - promote Australia's contemporary performing arts as dynamic and vibrant
 - ensure APAM's position as a major international performing arts market is enhanced
 - generate more revenue for Australia's performing artists and companies
 - present a cross-section of some of Australia's best new contemporary performing arts in one location
 - provide a dynamic environment for Australian performing arts companies, agents, other presenters and producers, and key arts funding and development agencies to meet, exchange information and ideas, commission new work and negotiate and secure international and national tours
 - build the Australian arts community's skills in the business of touring
 - develop the regional focus in partnership with Creative New Zealand
 - strengthen APAM's strategic relationship with overseas performing arts markets
- APAM will continue to present a diversity of contemporary performing arts. However, Council acknowledges the findings of the Review that indicate not all artforms and genres are equally well represented. The Council is addressing this in several ways. For example, the inaugural Australian Contemporary Music Market was held in association with the Queensland Biennial Festival of Music in 2003, and international programmers have been invited to key events and

festivals in Australia, such as the Melbourne International Arts Festival in 2003 with its focus on contemporary dance.

- The Review noted that the majority of delegates interviewed were satisfied with the current location in Adelaide. It recommended that as part of regularly evaluating the effectiveness and value of APAM, it would be important to review the location for APAM. Key considerations for reviewing the location for APAM should include:
 - association with a major festival which will have a strong national representation of tourable work
 - a centrally located venue with sufficient facilities for APAM
 - a State government willing to provide significant financial support
 - an accessible location for delegates and artists
 - the timing of the event, particularly in relation to the northern hemisphere summer season
- The selection criteria for works to be included in the Spotlight program need to be rigorous to ensure that work of the highest quality and innovation is presented and to guarantee the export readiness of the work. The international standing of the Market rests on this core element of APAM. Council agrees with the Review that the selection process should be transparent. As a result, Council has reviewed and published the selection criteria and consulted extensively with the State and Territory arts agencies both prior to and during the selection process for 2004. A similar review will occur after the 6th Market as part of the Council's commitment to a transparent process.
- Council agrees with the Review that the criteria for selecting international delegates who may receive assistance should also be rigorous and reviewed regularly. This will continue to form a key component of the evaluation of each APAM.
- The Review noted that the Spotlight program approach of presenting 'excerpts' might not always be the best way to engender knowledge and interest in work. Council will continue to encourage variations in the presentation format to allow for more effective promotion, including presentations by video, and works-in-progress presentations.

- More recently, APAM has included companies from Singapore and New Zealand, indicating an interest in reflecting a regional focus. However, just over half Australian producers thought that overseas countries should not be included, and a further 28% said this should be limited to New Zealand. The Review recommended that APAM might offer an Oceania/Pacific focus that would complement Singapore's Asian Arts Market, which is held in the intervening years. This approach has now been agreed to as a result of discussions with the National Arts Council Singapore and the Asian Arts Market organisers, and with Creative New Zealand.
- The involvement of DFAT in providing support towards international delegates' attendance is critical to the success of APAM, and complements DFAT's successful Cultural Awards Scheme . The Australia Council will continue to work closely with DFAT on this key element of APAM, and to secure a longer-term agreement with DFAT, as recommended by the Review. In addition, the Council will investigate other potential partners for the international delegates program.
- For the Australian artists and arts companies at APAM, networking with the national and international programmers is a critical aspect of the Market, and opportunities for introductions and meetings need to be facilitated. Council is reducing somewhat the opening hours of the On Display booths (recommended by the Review), introducing a pitch session for works in progress, and facilitating opportunities for small groups to meet to discuss specific projects. This complements the forums, seminars and social functions that are a regular feature of APAM.
- The Australia Council is also seeking stronger links between APAM and key overseas markets. These links potentially create opportunities for Australian companies to showcase at other markets, inform the development of APAM and encourage attendance at APAM. Initially, this will be fostered through the Australia Council's commitment to participating in four strategic international performing arts markets: CINARS-Montreal, APAP-New York, Asian Arts Mart-Singapore and Tokyo Performing Arts Market
- It was widely acknowledged that pre-Market preparation and follow-up are critical to the success of participants at APAM. Some State and Territory arts agencies hold pre-Market seminars, and all are encouraged to take an active role in helping companies with both preparation and follow-up. In addition, APAM presents dedicated sessions on the business of international touring, and further

advice and assistance is provided through the APAM website, and through resources such as the Let's Tour guide on fuel4arts (www.fuel4arts.com).

- Finally, to assist with future evaluations the Council is standardising the format for the collection of data and feedback and, in line with the recommendations of the Review, these will be administered at the end of each APAM and 12 months later.