



Australian Performing Arts Market Scoping Study

By

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Table of Contents

1.	The Task	p 3
2.	The Brief	p 3
3.	Methodology	p 4
4.	Executive Summary	p 5
5.	Recommendations	p 7
6.	Background	p10
7.	Introduction	p11
8.	Overview	p12
9.	S.W.O.T.	p18
10.	External Environment	p19
11.	Internal Environment	p23
12.	Some Options	p27
13.	The Work	p30
14.	Delegates	p35
15.	The Region	p40
16.	When, Where, How	p42
17.	Management	p46
	Appendix	p50

1 The Task

The Market Development division of the Australia Council for the Arts (the Principal) wished to undertake a study to research structures, models and relevant strategies for successful market events and showcase platforms which would inform future directions and priorities for the Australian Performing Arts Market (APAM).

In particular, the Principal was interested:

- To evaluate the relevance and appropriateness of the current APAM Model; and
- To make recommendations around future strategic directions for APAM.

2 The Brief

The response to this Brief, the study was required to:

- consult across a range of stakeholders in the sector, note issues of concern and develop models for the delivery of export and international touring outcomes; and
- produce a report that offered a comprehensive overview of the relevance and appropriateness of the current structure of APAM in developing national and international touring opportunities for Australian contemporary artists, groups and companies.
- This would include:
 - examining the current structure of the market, including practical aspects such as the market's timing, location, management, trade fair and showcasing extracts;
 - evaluating the impact of key market influences such as the global financial crisis, environmental issues and new business models;
 - appraising the reach and fit of the current market model to national and international market places; and to specific performing arts genres;
 - consulting with a range of key stakeholders; and
 - providing recommendations to the Australia Council on viable strategic directions towards a market model that enhances the positioning of APAM as a major international performing arts market of high repute and builds stronger links with national and international performing arts touring circuits and networks.

The recommendations were also required to address themselves to a balance between the historical export-orientation of the event and the lack of reciprocity and collaborative partnerships.

3 Methodology

In respect of these terms of reference, the study pursued the following methodology:

- Reviewed all relevant written matter, policy documents, reports, assessments, documentation and other related material that shed light on past practice and which had a bearing on the development of new strategies; including feedback and reports generated following each market from 1994 – 2010;
- Conducted an analysis of these and create a basis for further investigation and consultation;
- Consulted key stakeholders in the field both persons and organisations whose experience, views, culture or location might bear on this task including: key practitioners from the Australian performing arts sector (presenters, producers, performing artists and companies), key international contacts (presenters, producers and performing arts markets); contacts in State & Territory agencies, the Department of Foreign Affairs and Trade, Austrade, Creative New Zealand; and industry peak bodies.

(A summary of those consulted appears in the **Appendix**);

- Conducted four focus groups of recent (2008 or 2010) once only APAM attendants and of frequent attendees aimed to obtaining a perspective on the market experience both close up and over time;
- Conducted an online survey of MPAG members;
- Analysed these and where appropriate worked into Issues papers;
- Shared Issues papers with the Principal as work in progress and tested with them;
- Constructed one or more proposed frameworks for leveraging opportunities and collaborations and extrapolate draft strategies for them;
- Conducted a scoping exercise on how all of the agreed options might work in practice;
- Out of all of this, created and presented a draft report to the Principal;
- Tested the draft Report with the Principal and any other key stakeholders whom the Principal may choose to identify; and
- Created and presented the final Report in a mutually agreed form.

4 Executive Summary

The study found that there was broad endorsement of and support for APAM as a key performing arts meeting and working place that brought producers and presenters together to promote and export Australian work to the world. Its primary goal should remain international exchange, predominantly through buying and selling, but also through growing collaborative ventures and taking the pulse of the sector. However, there was equal enthusiasm for its secondary purpose to be national exchange with similar aims.

There was wide agreement that APAM should remain a biennial event linked to, or in parallel with, a major fringe or arts festival with significant Australian content and hosted in an arts centre or precinct so as to preserve the special culture and services it has evolved. There is, however, a strong preference for fewer general topics in the forum program and more hands-on sessions devoted to the acquisition of export skills. The study has therefore recommended that those goals be formally adopted together with a set of objectives to give effect to them.

Nonetheless, in view of rapidly changing external circumstances, it is apparent that APAM needs to reconsider the markets it targets and the methods it uses to do so. In particular, if the event is to be genuinely distinctive and globally competitive, it should rethink what it presents and the format in which it is presented. Critical to this is acknowledging that the performing arts is more mature and experienced than it was when APAM was formed. For that and other reasons, the sector also needs to be informed about the Australia Council's overall plan for market development and the role APAM plays within that plan.

The study found a strong wish for the domestic market mechanisms, such as the APACA conference and Long Paddock, to be included in APAM so as to offer alternating cycles of international and national performing arts exchanges. In addition, and to provide a more coherent offering of the various genres, APAM should consider rotating its focus across different areas of practice either from market to market or from day to day within each market. There was strong support across the sector for APAM to extend its program by offering limited showcasing opportunities to artists in AsiaPacific beyond New Zealand.

All these factors suggested a wider brief for APAM than buying and selling and for this reason the study has suggested a change of name from "market" to "exchange" and a move towards building continuous export promotion through ongoing communication with and about its participants. To this end, APAM should investigate new e-commerce methods to ensure greater engagement between producers and presenters before, during and after each market. These need to be based on a broader constituency within the entire performing arts spectrum through strategic partnerships with key stakeholders to scope areas of potential collaboration in growing a better and more inclusive market event.

The study further found that APAM needed to be more proactive in the choice of work to be presented by itself sourcing and selecting some of it, rather than merely relying on what is proposed. That would mean applying greater scrutiny to the export readiness of works to be showcased and above all their suitability for their identified target market(s). In that context APAM also needs to rebalance the Spotlight program by increasing the number of full length presentations and reducing its reliance on the short format and be given the resources to do that. As an aid to this, the study has proposed that the Australia Council, alone or with other funding agencies, establish a grants or GAL scheme to assist companies to be included in the Spotlight through self-presenting at the accompanying fringe festival. It would be vital that APAM work more closely with such festival(s) to enhance those opportunities.

In all of this APAM clearly needs a more rigorous procedure for matching the work selected for showcasing with the assessed interests and capacity of those international delegates invited to see it. Part of that should be a tougher test for financial support and better ongoing liaison with the Cultural Diplomacy Section of DFAT and the Creative Industries Division of Austrade. Above all, it requires better and more continuous international market research.

It was clear that many of these reforms could only be achieved if APAM moved to being a year-round, multiyear operation under a revised tender agreement and was financially resourced to do so. The corollary would be to provide it with greater operational and programming autonomy through a self-governing entity or similar. As a first step in that direction, the Australia Council should lead a planning exercise with key stakeholders to work through the study's recommendations and seek to trial the most immediate of them in the 2012 edition of APAM.

5 Recommendations

1. That APAM be retained as a major, signal performing arts exchange that brings producers and presenters together in a biennial cycle to promote and deploy work of quality and interest;
2. That it have as its primary goal the international exchange of the performing arts largely, though not exclusively, through touring;
3. That it have as its secondary goal the national exchange of the performing arts largely, though not exclusively, through touring;
4. That it adopt a statement of purpose and a set of objectives of which the following might be taken as a guide:

Purpose:

To operate and maintain the pre-eminent performing arts exchange by Australasian artists and companies matched by a program of strategically selected/invited presenters from key markets and regions to create sustainable national and international touring outcomes.

Objectives:

- To inform the nation, the region and the world of the quality and range of Australian performing arts through direct experience of the work and personal contact with its creators;
 - To drive the sale of Australian performing arts work to both national and international markets;
 - To foster and grow relationships with presenters with a history of presenting Australian work;
 - To seek out and forge new relationships with presenters nationally, regionally and worldwide with interest and capacity to present Australian work;
 - To build on the profile of artists and companies in alignment with and response to periodic artform-specific events and festivals in Australia so as to promote collaborative and touring opportunities for Australian work;
 - To stimulate commissions and collaboration between Australian and international artists and organisations;
 - To function as a key element in the Australian government's overall strategy to promote the performing arts nationally and internationally.
5. That, in consideration of the current and likely future external environment, APAM needs to rethink its target markets and the means by which it can engage with them, including the use and application of technology;
 6. That, for this purpose, APAM will need to rethink the product it offers and the format it adopts to deliver that product if it is to be truly distinctive and competitive on the world stage;

7. That in doing so, the Australia Council needs to take into account the greater maturity of the sector, building on its strengths and successes and communicating to it a comprehensive plan for market development and the place of APAM within that plan;
8. That the domestic market mechanisms such as the APACA conference and Long Paddock, or its equivalent, be brought within the APAM footprint every two years to offer an alternating international and national pattern of performing arts exchanges;
9. That in order to ensure a more efficient and balanced exposure of the various artforms APAM give consideration to adopting either a cyclic pattern in which an genre or area of practice is featured above others in successive events and/or that APAM features these on specific days within its program;
10. That, having regard to the current disparate mechanisms for the promotion of Australian music internationally, the Australia Council bring together the key stakeholders to develop a new strategy and a more coherent pathway for the future;
11. That, in seeking to fulfil a wider brief than buying and selling, APAM give consideration to changing its name from “market” to “exchange”;
12. That APAM be empowered to build a greater export skills base, and experience in the performing arts sector through year-around rather than seasonal effort;
13. That APAM explore means by which it can, through year-round activity, assist in maintaining ongoing communication with and about its key constituents;
14. That APAM seek to grow a broader constituency within Australia through strategic partnerships as to which engaging in a consultative process with Live Performance Australia and AMPAG to scope areas of potential collaboration in growing a better and more inclusive market might be taken as a guide;
15. That APAM become more proactive in the choice of work to be presented by sourcing and selecting a proportion of the work rather than relying solely on proposals;
16. That APAM assess more rigorously the track record and export readiness of work under consideration for the showcase program;
17. That APAM take into account the suitability of work to be presented in relation to its identified target market(s);
18. That APAM take steps to rebalance the showcase program by increasing the number of full-length presentations and reducing its reliance on the excerpt format and be given the resources to do that;
19. That the Australia Council, either alone or in concert with other funding agencies, give consideration to establishing a support scheme by way of grants of GALS to enable more companies to be included in the APAM program as self-presented work at the accompanying fringe festival;
20. That APAM work closely with partners such as the accompanying fringe festival(s) to enhance opportunities for work presented there to be systematically introduced to presenters, as to which the Honey Spot mechanism at the Adelaide Fringe might be taken as a guide;

21. That APAM seek to establish a range of e-commerce platforms as a mechanism for greater engagement between producers and presenters before, during and after each market;
22. That APAM adopt a more rigorous procedure for matching work selected for showcasing with the assessed interests and capacity of those international delegates officially invited to consider it;
23. That, in doing so, APAM also adopt a more rigorous and targeted test in the application of financial incentives for attendance of international delegates;
24. That APAM move to upgrade the quality of its liaison with both the Cultural Diplomacy Section of DFAT and the Creative Industries Division of Austrade perhaps by way of an MOU providing for a multiyear consultative framework;
25. That APAM move to internationalise its program by opening its doors to showcasing from artists in countries in addition to New Zealand;
26. That, for that purpose, it consider both an open application process capped with a quota and/or establishing a rotating focus nation/region scheme which might be selected in consultation with the Department of Foreign Affairs and Trade;
27. That APAM remain a biennial event linked to or in parallel with a major fringe or arts festival with significant Australian content;
28. That, in shaping tender requirements for future editions of APAM, the Australia Council emphasise the value of hosting it in a performing arts venue or precinct which can maintain the culture of intimacy and access which APAM has grown but which provides adequately for the conduct of its initiatives in information, introductory and networking services;
29. That APAM shift the conferencing aspects of its program away from general topics to those aimed at touring/export skills acquisition and development;
30. That APAM move to a year-round, multiyear operation under a revised tender agreement;
31. That consideration be given to financially resourcing APAM to make that transition, as to which in the first instance a management fee of the order of double that currently provided to APA could be taken as a guide;
32. That, under such an agreement, consideration be given to proving APAM with a greater degree of operational and programming independence through the creation of a self-governing entity or similar mechanism, as to which the model offered by AIDC might be taken as a guide;
33. That, as an interim step, the Australia Council should convene a joint planning process with key stakeholders to work through these recommendations and, as part of that, seek to trial the most immediate of them in the 2012 edition of APAM.

6 Background

APAM was established by the Australia Council for the Arts in 1994 to “increase international and national touring opportunities for Australian contemporary performing arts groups and artists”.

However, since APAM was last substantively reviewed in 2003 by Andrew Bleby & Associates, much has changed in the external environment as well as in the international and domestic deployment of performing arts product in Australia and in the aspirations of Australia artists. At the same time, much has also changed in the presenting world which throws open to question the ongoing efficacy of those assumptions on which the sector has relied in its export strategies and the continued value of those mechanisms that support and enable them.

Nine markets have been held to date in Canberra and more recently in Adelaide and that is a not insignificant body of evidence on which to draw. It is noteworthy, too, that the current contract for APAM, held by the South Australian Government (through Arts South Australia) and produced by Arts Projects Australia (APA) since 1998 expires following the 2012 edition. It is always prudent to review why and how things are done.

Without doubt, APAM has achieved considerable success since its inception and continues to maintain international reputation. Recent levels of attendance suggest that it may be doing better than other trade fairs in this respect, though many considerations come into play in that assessment.

Nonetheless, there are external factors which impact on such an event. The evolution of communication technologies and social media, environmental issues and the global financial crisis are among these. It was a critical part of this assessment to evaluate these both as challenges and opportunities. In addition, the way the performing arts do business and where, is changing. Traditional markets may no longer have the capacity to deliver as in the past. New markets may offer – or seem to offer – new prospects. And it must also be noted that no one mechanism will ever hold all the answers. A basket of strategies, including the vital component of personal relations and on-ground knowledge and on-site representation, especially in emerging markets, will in all probability have to be part of the mix.

These and many other factors needed to be taken into account if a comprehensive and finally useful picture was to emerge from this scoping study.

7 Introduction

Like many other mechanisms seeking to promote and sell Australian product abroad, APAM is at base about the Australian government intervening in what might otherwise be a free-for-all. Somewhere along the line it is also, inevitably, about government setting the market agenda: who's in; who's out; what are the market conditions and what are the mechanisms to influence that.

On the one hand, the arts market model such as APAM is tried and true and one could take the view that if it ain't broke, don't fix it. On the other hand, the arts market phenomenon has had limited application internationally, and only ever successfully operated in certain parts of the world. Born in North America, it spread to Australia with success and with less success to Asia and Latin America. It worked briefly in Africa and never gained traction in Europe. That last is curious as art fairs, media markets and single artform fairs such as WOMEX and SONAR thrive there.

Is it because Europe invented the festival? Festivals can fulfil some of that showcasing/selling role. Surprisingly, the large multi-artform festival never really took off in the US. Australia, as in so many other things, is a hybrid of the two.

At its rawest end, for example in APAP, the market model represented a commodified supermarket distasteful to many. Yet it has undoubtedly been successful and business was done through it and still is being done (though perhaps to a diminishing degree). At its softer end, such as APAM, it has represented a unique opportunity and gathering place where, in all probability, less hard business was done but more genuine connections were made. In the Australian context, APAM undoubtedly helps to overcome the "disadvantages" of location and distance by offering an intensive smorgasbord every two years.

However, it is possible that the model only truly works where the market place is large, the product is extensive and the intermediaries, e.g. agents and presenters, are highly organised and pervasive. That is accompanied by considerable skill and experience across the sector which are still very weak in Australia. As well, in order to have an effective trade fair one must have buyers and sellers. It is arguable that in APAM there have been buyers, but there has never really been selling. The work has been offered but not sold. There is, too, something somewhat artificial about the buyers, often lured by subsidised travel and the like. It is necessary to question how genuinely engaged have they been.

The Australian performing arts sector has grown in confidence and sophistication vis-à-vis export and much of that may be attributed to APAM. As well, there are increasing media-based arts that know no boundaries and require no physical presence. How are they accommodated in an "export" market model? Further, Australian festivals and other presenting organisations are increasingly commissioning and co-producing internationally. How does that relate to the maintenance of a physical market?

The Australia Council has adopted a number of market-specific Initiatives in various regions. One must ask how they link back (or forward) to APAM and what, as a result, the total strategic picture looks like.

8 Overview

Purpose

In considering APAM as a whole, the first thing that strikes is that there appears never to have been a formal statement of purpose or codified set of objectives for it. Andrew Bleby noted this in his report of the event's operations in 2003 (p.33). This has meant that in their otherwise detailed assessments after each market, Arts Project Australia (APA), APAM's long term management, has never reported against any prescribed goals or prescribed measurements. (Source: APAM reports) APAM has, in fact, never had an agreed plan.

This is surprising in an arts funding environment dominated today by business plans and KPIs. It is true that after each market APA has reported comprehensively and made recommendations for change based on feedback from participants. As far as possible these have been put into practice. One might argue that all this constitutes a de facto blueprint. But it is not a plan, as such. It may be that this goes to explain some of the uncertainty expressed in the sector about why APAM is there, what it is for and where it might go in the future.

To be fair, there is a general understanding developed over the years, that the prime purpose of APAM has been to create and promote opportunities for Australian performing arts and artists to tour their work abroad. The aspiration from 1994, quoted above, to "increase international and national touring opportunities for Australian contemporary performing arts groups and artists" has been the guiding principle, but it is a very loose one. That goal is also implicit in the name and use of the term "market". Certainly in 1994, by cloning the "market" model, which existed elsewhere in the world, the intention was undoubtedly to bring producers and presenters together in an event in which they could buy and sell.

Whatever may have encrusted itself around that original aim, it is overwhelmingly the understanding of those consulted in the course of this study that that is still the intention. That is the case even where they themselves might not participate in or benefit directly from that core activity. As well, in the range of programs in which every two years delegates are invited to engage at APAM, it is clear that that is still the expectation of those agencies of government, notably the Australia Council, Arts SA, DFAT, Austrade and other State and Territory arts departments, which to varying degrees and in varying ways have funded or enabled it.

Many Pathways

However, APAM has never been the only way in which that goal has been pursued. Nor has it ever been the sole instrument. In the sixteen years of APAM's existence the Australian government has trialled and continues to trial many other strategies. These have included: Australia Council support of Australian artists and producers to attend markets and comparable events in other countries; in-bound visitor programs to key festivals and other major viewing sites either individually or in groups like the now discontinued "Dance Ambassadors"; support of key personnel off-shore, of which the most recent is the IETM program in Europe; strategic engagements with select artists' managements in North America; and a range of brokering activities in other regions.

The Department of Foreign Affairs and Trade, likewise, has long had in-bound cultural visitor programs which from time to time have paralleled or intersected some of the Australia Council's initiatives. Some posts, as well as the bilateral bodies such as the Australia China Council and Australia Indonesia Institute, have been active in support of artistic residencies and exchanges over many decades. To give just one example: DFAT's forty year association with Musica Viva has assisted innumerable Australian musicians in many genres to be seen and promoted internationally and above all in Asia.

Australia has, of course, lacked a single mechanism for the co-ordinated promotion of Australian artists abroad such as have been provided in Europe through bodies like the Goethe Institut, British Council and AFAA. The ill-fated *Playing the World* might have delivered that, but it was not to be.

Thus, depending on one's point of view, Australian artists have had either the benefit of many pathways to international exposure or the disincentive of having to thread their way through a thicket of programs and mechanisms to find their place in the international sun. Some few, of course, have chosen to make their own way regardless, and a handful have succeeded. In that respect, they are no different from those in other industries who chose to eschew government export programs and find their own markets for their product through their own efforts.

Activity

So in the midst of this, what has APAM sought to do? Essentially, from the very beginning it aimed, de facto, to *showcase the best available Australian work in the performing arts* and to *invite international presenters to see it*. That was the essential proposition.

Showcasing

Equally, from the beginning, and drawing on various overseas models, it chose to undertake the first of these by presenting short extracts from the work on offer together with a range of full length presentations. This was aided greatly in the first two editions in 1994 and 1996 by the market's location in Canberra in parallel with the then National Festival of Australia Theatre.

This meant that not only were full length productions possible, but work of scale could also be presented. By these means, Circus Oz and Bangarra mainstage shows, which could scarcely have been represented in excerpt, were featured for delegates. Since APAM's move to Adelaide, even allowing for the proximity of the Fringe and of the Adelaide Festival, that has been more problematic. The short form showcase remains the norm at APAM and one of its most contentious and hotly debated issues.

Possibly as a consequence, the tendency has grown for the work presented in what is now called Spotlight (as opposed to pitched in Searchlight) to be of smaller scale and supposedly more "cutting edge". As well, the range of genres has narrowed perceptibly so that it is now exhibits a preponderance of non text-based theatre, dance and physical theatre. Theatre which is primarily reliant on text has been progressively diminished and music has all but vanished.

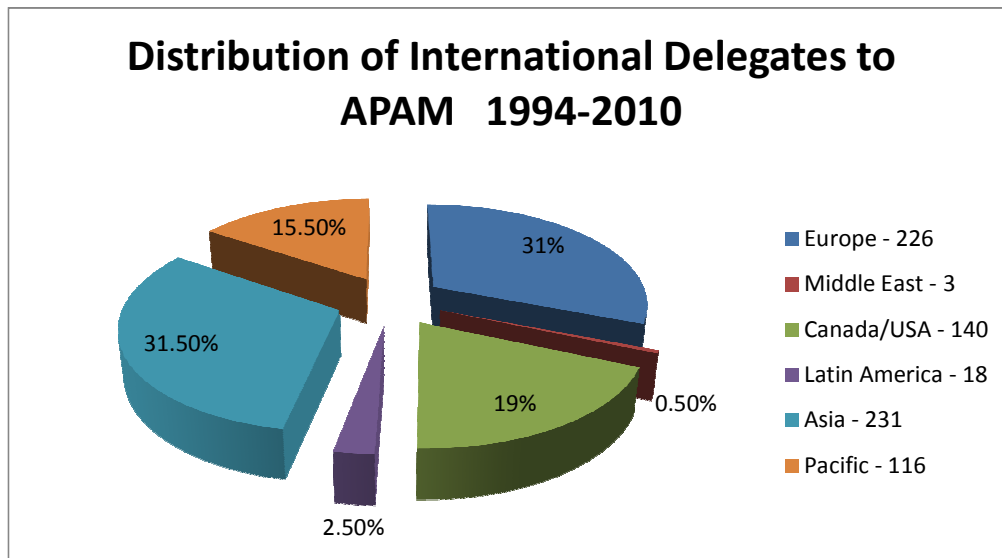
The belief has grown that APAM is essentially about *original* Australian work, though that is not a formal criterion and that it should be "new" which has often resulted in it being somewhat untested. Certainly, it is often untested on the road. Such full length works as

there are, result from either the chance interest of the director of the Adelaide Festival or through self-presented work in the Fringe. That has meant, in the former case, that they are more likely to be Adelaide based companies and, in the latter, presented at not inconsiderable cost to the producing company or artist and at their own risk. It is no longer a given, however, that the best available or the most export ready are being offered. That has been flagged as a matter of concern by all parties.

Presenters

In the case of the second aim: APAM has scoured the world for likely suitors and through a variety of incentives lured those to Australia to watch and talk and network and, in an ideal world, effect some bookings. Over the years, some 736 international delegates have come from all corners of the globe (see Table 1), including the traditionally large cohort from New Zealand/Aotearoa. (Source: APAM reports)

Table 1



604 of these (82%) have come once and never returned. 132 (28%) have made multiple trips. Some fewer have become enthusiastic visitors, partners, collaborators and even advocates. Nonetheless, there remains a significant concern about the match between what is presented and who is invited to see it. That, too, has emerged as a major issue.

Conferencing

Around that original export proposition has grown up an *omnium gatherum* of the performing arts in Australasia. In 2010 there were 584 delegates of whom 416 were from Australia (Source: APAM 2010 report). That is a remarkable phenomenon and greatly exceeds the number who appear to be formally engaged in the buying and selling. Partly to accommodate that, APAM and its partners have devised and added social gatherings, talks, forums and other elements of an arts conference many of which are not germane to buying and selling but might, at a stretch, be deemed to inform that process.

Above all, APAM is a major networking opportunity and as with all such gatherings, it is likely that much of the "business" is serendipitous or at least below the radar of the official program. Beyond anecdote, however, that aspect is harder to gauge. Even with feedback from participants and scrutiny of tour grants, accurate tracking of the outcomes has always been elusive.

Part of this informal activity clusters around what the event means for the national touring scene in Australia. Anecdotally, there is evidence that some trading goes on at that level as well. Certainly, in quality and range of work on offer, APAM fulfils a need not met by the current domestic mechanisms of Long/Cyber Paddock and the like. Since in any market, buyers including international buyers are often in some degree sellers, there may be a case for formalising this previously unacknowledged dimension of APAM and providing properly for it. There would appear to be considerable enthusiasm for making such a move.

Single Track

There is concern, however, that APAM has been designed largely around a single track export mechanism rather than formally acknowledging that there are many (often collaborative) paths to pursue and that are pursued. Nonetheless, there is an understanding that APAM is only one of a number of strategies in place for export purposes though there is great confusion about what these are, little sense of how they inter-relate (if they do) and no sense at all of an overall plan (if there is one).

It is reasonable to add that the Australia Council has failed to articulate or at least communicate to the performing arts sector an overarching proposal for international development. For instance, while it has a series of initiatives operating in different regions, there is little published sense of how these might interrelate as part of a coherent export strategy. There is also no ongoing, shared planning, discussion or information exchange among these Initiatives other than that which (presumably) goes via Market Development in the form of periodic reports. There is no sense communicated to the sector as a whole of how the more recent emergence of market-like activities such as the AWME, Dance Massive and potentially Come Out, which also attract some international buyers, relate to these. Where does APAM sit in all of this? Might these new events be feeders to it? Or are they competitors?

No urgency

That said, one of the curious aspects of the sector's attitude to APAM is that there is in fact little sense of urgency about it. Many of those consulted seem relaxed about its results and often content to see it as a broad networking, skills development and information sharing opportunity. That is not to say that delegates neglect the sales aspect, but surprisingly few can point to unequivocal outcomes. Many note conversations or business relationships started there and continued by other means. Or the comment goes: such and such got a tour out of APAM, but that might have happened anyway. How that might "have happened anyway" is often harder to define and rarely expressed.

Judgement

In short, there is strong support overall for retention of APAM in some form as a key industry gathering and a strong sense that, across the board, APAM has made a major and measurable contribution to the industry. That view is also strongly held by the State arts agencies which contribute financially in varying ways and degrees usually so that their

constituents can attend APAM. As well, there is no discernible groundswell of dissatisfaction with the event *qua* event.

Nevertheless, the question remains: has all the effort and investment been worthwhile? Is "market" and more particularly "international market" still the implied goal? There are certainly concerns that some of the accretions to the program over time may have blunted the original objective. But there is also awareness that what constitutes a "market" may have changed; that collaborations and co-productions and the brokering of these are finding an important place in international arts trading; and that conventional touring despite the ever ravenous festival maw, may for economic and other reasons, be in retreat.

Without doubt, the message from those consulted is that APAM is worthwhile and should be, above all, international in its focus. However, there is a clear sense of the need for substantial though not necessarily radical change in how it delivers on that focus.

The Task ahead

So, in summary, the task is: if export is the primary goal, APAM needs to say that loud and clear and sharpen its focus on the goal. If it is not, it needs to say what it has become or wants to be and find a model to pursue that. If APAM is to endure and prosper, it needs an unmistakable purpose and it needs to be judged by its capacity to meet that purpose.

RECOMMENDATIONS:

1. That APAM be retained as a major, signal performing arts exchange that brings producers and presenters together in a biennial cycle to promote and deploy work of quality and interest;
2. That it have as its primary goal the international exchange of the performing arts largely, though not exclusively, through touring;
3. That it have as its secondary goal the national exchange of the performing arts largely, though not exclusively, through touring;
4. That it adopt a statement of purpose and a set of objectives of which the following might be taken as a guide:

Purpose:

To operate and maintain the pre-eminent performing arts exchange by Australasian artists and companies matched by a program of strategically selected/invited presenters from key markets and regions to create sustainable national and international touring outcomes.

Objectives:

- To inform the nation, the region and the world of the quality and range of Australian performing arts through direct experience of the work and personal contact with its creators;
- To drive the sale of Australian performing arts work to both national and international markets;

- To foster and grow relationships with presenters with a history of presenting Australian work;
- To seek out and forge new relationships with presenters nationally, regionally and worldwide with interest and capacity to present Australian work;
- To build on the profile of artists and companies in alignment with and response to periodic artform-specific events and festivals in Australia so as to promote collaborative and touring opportunities for Australian work;
- To stimulate commissions and collaboration between Australian and international artists and organisations and presenters;
- To function as a key element in the Australian government's overall strategy to promote the performing arts nationally and internationally.

9 S.W.O.T.

In the course of this study, many respondents made observations in many different ways. But, over time, certain key messages emerged and converged, however they may have been expressed in the first place. The following is a summary of these set out in the conventional but still quite useful SWOT format.

<p>Strengths</p> <ul style="list-style-type: none"> Size growing but still containable Warm, welcoming, accessible culture Searchlight program Recent innovations such as speed dating and buddy system Good track record Good management Good location small city few distractions Proximity to major fringe and major festival Regularity Efficiency of program Some recurrent visitors Overall widespread satisfaction 	<p>Opportunities</p> <ul style="list-style-type: none"> Exchange rather than Market Share as well as sell Seek fresh energy Ownership by industry not government Focus on national touring Focus Asia/Pacific region Hands on sessions Wider constituency Picking winners while offering emerging work More space for curated conversations More match making/brokering Use of new technology
<p>Weaknesses</p> <ul style="list-style-type: none"> Blurred purpose Short form showcases Lack of full length work Mismatch of work with delegates Quality of work Not enough recurrent visitors Distance and cost to travel Hard to break into for new comers Lack of export readiness of work Vague forums Booths Government presence Lack of real market research and targeting Narrowness of focus in artforms and scale of work Lack of cultural diversity 	<p>Threats</p> <ul style="list-style-type: none"> Loss of focus Model becomes irrelevant Model becomes tired Lack of quality product Competition from artform specific events Competition from the region, notably Singapore Missing the technology boat World economic downturn

What is clear from this is that overall the sector likes and supports APAM and wishes to see it reformed rather than removed or diminished.

10 External Environment

In considering the external environment in which APAM operates, there are three prime issues: the economic environment; the cultural or artistic context; and the ways in which the Australia performing arts sector itself has matured in the period since the event began.

Economic

The economic and financial issues are taken first, not because they are necessarily the most important, but because they are the most apparent. It is instructive that when the terms of reference for this study were being framed, the effects of the GFC on the performing arts environment were assumed to be the major economic question and, in a broad sense, that may still be true. Simply stated, the prime factors are:

- The US market has collapsed and shows only weak signs of recovery:
 - The US economy remains in free fall. Housing values - always the most reliable indicator of trends - is little short of catastrophic in many States. Unemployment has hit 10% and the stock market is, to put it mildly, erratic. All this has been passed on to consumers and through them to the arts across the country. Government revenues have plummeted and with them such grants programs as there were at City and County levels have been drastically reduced or in many cases wiped. Foundations and private donors have lost the value of their investments and thus their capacity to contribute. Box office revenues have declined sharply though not uniformly.
 - Many artists' managers, who are the gatekeepers of the US booking system, report 2009/10 as their worst year ever. Some have had to take out loans to survive. Thus far, 2010/11 is looking more optimistic. But the threat of a double dip recession remains.
 - The recent mid-term congressional and gubernatorial elections demonstrate that middle America is hurting more than at any time since the Great Depression. The difference is that now people have entertainment options. They are less and less reliant on live performance. They can stay at home and download, fileshare or hire on Netflix.
- Europe continues to weaken with budgets generally becoming tighter. For this reason, it is likely that Australia will need to pay more attention to Central and Eastern Europe than to its traditional Western European markets.
 - While the overall conditions in Europe are less dramatic, the GFC impact has been no less severe than in the US though it has been more uneven. While some countries like France and Germany have weathered the storm moderately well and some like Poland actually avoided the storm altogether, others like Spain, Ireland, Greece are in real trouble.
 - Normally robust and stable economies like UK, the Benelux countries and Scandinavia are making massive structural adjustments. When conservative governments in Britain and France cut defence, it is a sign that nothing is sacred and everything is on the table. Recent budgetary cuts to the arts across Western Europe have been savage and unprecedented.

- That is not to suggest that the market has collapsed. Some Australian companies - especially those that are reliably represented - are continuing to achieve bookings, though it is reasonable to suppose that these might shrink over the next three years.
- Asian countries have, by and large, remained buoyant but generally speaking Australia would not seem to be offering product suitable for those markets either in terms of content or scale and too often fails to distinguish by country but persists in regarding "Asia" generically.
 - Interestingly, Asia and Latin America, like Australia and New Zealand, have more or less avoided the worst. Our region's economic engagement with China and, to a lesser extent with other expanding economies such as India, Singapore and Korea, has sheltered us from the much of the downturn.
 - Paradoxically, the severe structural adjustments forced by IMF, the World Bank and others on the frontline Asian and Latin American economies in the 1990s helped prepare them to weather the GFC storm better than most OECD economies.

But in all of this, few had been watching the exchange rate. Now Australia is faced with a double whammy. While our traditional markets of Europe and North America are contracting, the vertiginous rise in the Australian dollar risks pricing our product out of consideration everywhere. Parity with the US dollar is only one part of this. AUD has also hugely appreciated against the Euro and Sterling.

All these factors have and are likely to go on having profound implications for our arts export trade. This would suggest, at the very least, a refocusing of effort on those markets which are holding up. That will involve some serious rethinking about the nature of the product placed on offer. It may also involve giving up some of the more cherished preoccupations which have guided the selection of product at APAM (and similar events) and taking a more pragmatic view of what is genuinely saleable - certainly as far as Asia is concerned.

To deal with this, Australia will probably need to make some critical decisions about what we select and promote and maybe in that process abandon a few sacred cows. It will also need to engage in serious market research. That can no longer be left to a guessing game every two years.

Cultural

When APAM was born, arts markets/booking conferences were flourishing. They seemed to be delivering the goods. Various producers and arts funders went to those in North America and thought: we can do this. The resultant APAM has been a success story not least because of the commitment of its funders, the enthusiasm of its participants and the quality of its management.

But as well, in the mid-1990s most of the communication technologies and emergent e-commerce and social networking platforms which we now take for granted were in their infancy. What can now be carried on a USB then needed several crates of printed brochures and VHS tapes or a mountain of CDs to represent. Fax was cutting edge. In 1994 no one had a web page. In order to be seen, one had to be there.

Clearly, that is no longer true. Anyone, anywhere in the world at anytime can now see anyone's newest show on U-tube. One can have an hour long Skype-with-webcam conversation from Adelaide to Amsterdam for virtually no cost.

That is not to say that these means have replaced seeing a work or meeting the artist in person. In all probability, they never will. But they have revolutionised access to *knowledge* of the work and creating and maintaining contact about it. In addition, as platforms for creativity as well as communication, these new media have shaped and reshaped our awareness of the way we interact, work and do business around the world. That, in turn, has led to an upsurge in creative collaborations and co-productions among artists separated by distance and time zones. There has also been a prodigious increase in competition with tens of thousands of artists and companies worldwide striving for the attention of a few hundred key presenters. Perhaps needless to add, such technology has also reshaped habits of public consumption.

All those developments have changed the environment within which we operate as purveyors of arts product and about the ways in which we strive to inform and influence others about our work. So the question is: ***how special does APAM need to be as a market to stand out in that increasingly crowded and noisy world? The answer would seem to be: much more than it is.***

Nonetheless, ultimately all choices of what to present in the arts are subjective. And there are factors in those choices which are beyond plans and strategies and mechanisms. Some factors even favour us. As one US artists' manager with a significant antipodean stake noted: "Anything Australian will always be sexy in America". One hopes that Oprah Winfrey's recent sojourn here will bear that out.

Nevertheless, it should be noted that we are far from alone in thinking about how to stand out in the crowd. Competition not only comes from other producers, but also from other markets and mechanisms and notably in our own region. *LIVE! Singapore*, billed as "Create connections, Exchange ideas, Inspire visions" represents an interesting and dynamic rethink of the arts market template. Abandoning many of the conventional aspects of a trade fair, they opted for a limited showcasing and big conversation format. Time will tell where this will go, but Singapore is ideally positioned, geographically and culturally, to capture the arts exchange leadership in the South Asia region. If it flourishes, we might find more Australians going there to buy and sell than finding value in an unreformed APAM.

All this suggests that there is a case for thinking about how emerging arts practice, the application of technology and our place in the region might shape a future APAM and, within that, how to weigh "exchange" as against "market" as its core purpose.

The Maturing of the Sector

Along with what now seem like primitive selling tools, when the Australian performing arts sector set out on the APAM journey, it had relatively few international scores on the board. Most regular international touring was in music, while a few larger companies like Sydney Dance Company and Circus Oz also made a mark. A handful of small, largely self-promoted companies had created some inroads into specialist markets and one-off productions or individual artists achieved overseas tour bookings through a combination of chance and persistence. Australian government promotions and the efforts of diplomatic posts accounted for other exposure. It was, for the most part, hit and miss.

The establishment of APAM offered a focus for much of what had been disparate. Crucially, it raised the bar. It brought Australian producers and artists face to face with overseas presenters in an intensive encounter and forced them to think about what they did, why they did it and how they presented it for consideration. Some succeeded, others failed. It compelled some to acknowledge that however significant their work might appear locally,

internationally it would not fly. Moreover, it engendered the notion that this was about *selling* work, not *giving it away*.

Above all, it led to a heightened sophistication within the sector about how it thought about export. To suggest that this maturing occurred quickly would be naïve. It's probable that still most Australian performing arts companies aspiring to overseas touring lack the skill, the critical tools or the preparedness to make this happen, irrespective of the quality of their product. But over time, there has been a series of success stories of companies that have learned on the job, made connections and blazed some trails. Few now expect instant gratification in sales and most recognise that all relationships take time to mature and show benefits. In their estimate, APAM has been a crucial factor in those advances. Such changes also form a key part of the environment in which an APAM now functions.

This is nowhere more apparent than in the sector's need for knowledge about an overall plan. None of those consulted was arguing for international market development undertaken by the Australia Council to be bureaucratic. Rather, they urge that for a highly competitive and financially lean industry such as this where inevitably some artists will be supported and others not, it is critical that the sector understand very clearly the parameters within which activity is undertaken, and the mechanisms by which decisions are made. That way, it can only grow in maturity and the best of its work flourish in the best possible markets.

Thus, economically, culturally and in terms of its own development, the sector today finds itself in a more complex and competitive world than ever. As a mechanism to drive this, APAM has not perhaps taken sufficient account of that change or found new ways of meeting the challenges be that through the application of new technologies, adopting a more dynamic format or finding a more precise focus.

RECOMMENDATIONS:

5. That, in consideration of the current and likely future external environment, APAM needs to rethink its target markets and the means by which it can engage with them, including the use and application of technology;
6. That for this purpose, APAM will need to rethink the product it offers and the format it adopts to deliver that product if it is to be truly distinctive and competitive on the world stage;
7. That in doing so, the Australia Council needs to take into account the greater maturity of the sector, building on its strengths and successes and communicating to it a comprehensive plan for market development and the place of APAM within that plan.

11 Internal Environment

The National Scene

Most conversations held during this study revealed a considerable tension between the international and domestic concerns at APAM which need to be resolved either by bringing them closer together or more effectively separating them. It is noteworthy that, in looking at mechanisms such as these, perhaps inevitably we tend to compare ourselves with those events in first world countries, largely in North America. But they draw upon a market place in excess of 300 million compared with our combined Australia/New Zealand CER pool of 25 million. The result is that we have tended to assume the externals of events developed elsewhere without having their crucial context. Thus, part of the problem with APAM or, it would seem many of the start-up “international” markets in Asia and Latin America is that they exist in isolation and not as part of a broader domestic market activity.

For that reason, it is important to recognise that what steers North American conferences like APAP, WAA, IPAY, CAPACOA and even CINARS is, to a very large extent, domestic consumption. That, in turn, is activated by an interplay of buying consortia, which are for the most part regionally based, and year-round selling engines, of which artists’ managers and agents are the driving force. The latter range from global monsters like CAMI with hundreds of artists to one person boutique outfits with six to ten clients. With few exceptions, Asia and Australasia have none of these.

It is also the case that US and (to a lesser extent) Canadian mainstream presenters are formulaic in their programming. Overwhelmingly, they program in series: Dance, Family, Great Masters, Jazz, World Music, Chamber Music, sometimes though less often Theatre. This is rarely true in our region where presenting tends to be less structured. Nor has the tendency emerged of block booking where in the US and some Canadian provinces groups of presenters actively collaborate to bring product to their network.

To some extent, this happens in the Australian context of Long Paddock and the Blue Heelers network, but those mechanisms lie entirely outside of the APAM process and international promoters have no access to or even knowledge of them. So, in a way, it is as though we had made a market for international consumption which offers little or no year round follow up to build on the successes of that market and we have encouraged domestic participation in APAM while divorcing the domestic trade fair mechanism from it.

Moreover, there is currently deep dissatisfaction apparent regarding the working and outcomes of Long Paddock among both producers and presenters. In particular, there is concern that more and more the selection and ultimate support through Playing Australia funding is driven by numbers rather than quality of work.

Not surprisingly perhaps, for all of these reasons, some respondents argue that national function should be drawn closer into the APAM process. If there is to be a serious domestic dimension to the market and since APACA represents the body of domestic presenters, especially outside of the main metropolitan areas, might it not make sense to bring them into the dialogue and, with them, the Long Paddock/Cyber Paddock mechanisms?

Clearly, this has some attractions. A single marketing event would more closely parallel the operations of the major North American markets and it is true that some domestic sales are affected or at least built on at APAM. By contrast, some would argue that there are already too many agenda operating at APAM and to add a national touring dimension might overload the ship. Moreover, the APACA annual conference is already of a good size for delegates to work the room. Putting it in a larger context might risk diluting that benefit.

But even if these could somehow be accommodated, there are more practical considerations. The APACA conference is an annual event. There are two Long Paddock rounds each year. There is no suggestion that APAM should become anything other than biennial. And while there are those who consider that the second annual cyberpaddock rounds often discards quality product already on offer, there would be little sense in the process being less than annual.

These concerns could, of course, be met. A major biennial event with both an international and a national focus alternating with events with a specific national focus would be an entirely rational response to current and emerging touring needs. It would also make optimum use of the available product through the two yearly cycle and best engage the resources and energies of producers and presenters alike.

Other benefits would lie in the value of retaining the opportunity for the sector to come together nationally; networking for whatever purpose; giving a snapshot of what has been happening and maybe what is best across the sector or sectors in the last year or so; promoting a sense of shared identity; and without doubt some buying and selling within the domestic market. Above all, it would ensure that this last could happen at a level of quality, diversity and scale not apparent in the more basic domestic gatherings of Long Paddock and APACA

Such a move would also connect and involve many delegates more effectively in APAM including those who currently find themselves somewhat disenfranchised. It could as well bring the Australian and New Zealand players more effectively together as a single larger market rather than as at present two undersized markets. It could offer a new incentive for international delegates who often come to sell as well as buy and for whom it is currently very hard to break through to the second tier of local presenters. It is noteworthy that even most New Zealand producers do not have any sense of the Australian domestic scene outside of the capital cities, still less do Australians understand the New Zealand market place. Finally, and not unimportantly in our continental nation, it would offer real incentives for States such as Queensland and Western Australia to strengthen their interest and participation as a means of better showcasing the arts of their states within the domestic market with potentially some spin-offs to the international.

APAM is an important national meeting of performance makers in Australia. For many, especially less experienced artists, the national aspect of APAM is the most important. In re-framing APAM for the future, it may be helpful to make national activity a deliberate part of it, rather than, as at present, incidental.

Competing Events

Just as APAM has only ever been one of a mix of export strategies (however poorly communicated) that are available to the sector, so for some time APAM has only been one of a number of market type activities in Australia and New Zealand to which presenters from other countries have been invited and attracted. Some of the major festivals, either by design or accident, have served that purpose and continue to do so. Depending on the quality and range of Australian work presented there, they can offer a very suitable context for this.

In addition, many have noted the rise of the artform specific or sector specific event to which international delegates are invited. Compared with APAM, most are new. For instance, two quite different attempts have now been made to create a stand-alone international music market. The first was the IMM (International Music Market) held in association with the Queensland Music Festival in 2005 and 2007 and since discontinued. Now there is the annual Australasian World Music Expo (AWME) in Melbourne begun in 2009. IMM was

broad in its approach. AWME, as its name suggests, is more concentrated. The launch of Melbourne's Dance Massive in 2009 as, in effect, a stand-alone dance showcase, is directed to some degree at international consumption and has added another new player to the mix. In the youth arts area the Adelaide based festival Come Out is building an international market dimension to its program and there may be another contender in that sector under way in Queensland with the proposal for an Australasian Theatre for Young Audiences International Showcase. All are or would be valuable additions to the scene. But none, by definition, addresses the needs of the visiting multi-artform presenter or agent who are worldwide the norm. Of course, the huge gain for observers is that in all of these cases the format allows them to see full-length works as against 20 minutes chunks.

But one might question what happens in this trend to those artforms which do not yet have their own special event? Are we to create ever more? Text-based theatre had always suffered in the APAM context (as it has in other markets worldwide) both because of the language issue but also because having few repertory theatre companies in Australia, the costs of remount are generally prohibitive. Even Bell Shakespeare which comes closest to a repertory company wrestles with this.

It's instructive in this context that music has also struggled to find a place in APAM. This is so even though it is usually the most portable of the artforms, has, generally speaking, no barrier of language and is most easily and usefully showcased in excerpts. At the other end of the spectrum, if the single artform market prevailed, where would physical theatre go? It has been, arguably, the most successful export product for Australia in the last twenty years.

But in fact, the majority of those consulted do not favour a proliferation of such events at the expense of a more efficient bringing together of the sector as a whole and promoting internationally by that means as APAM has represented. This seems especially so as the perception grows that less new Australian work is being included in major festival programs.

It is clear that this process could go one of two ways: it could see a proliferation of such events that might force the abandonment of APAM entirely in favour of more targeted markets which would have the benefit of cleaner and easier matchmaking but with inevitable duplication of effort and cost; or it could lead to a change in the APAM approach to accommodate some if not all of those needs.

Rather than retaining the current broad brush approach, there might be a case for having an artform focus for APAM in some cyclic fashion. That would enable the best of that genre to be chosen in a particular year and showcased full-length and international delegates in particular targeted for that purpose. This approach need not preclude other work, but might serve to make better matches between seller and buyer and thus a more effective use of the ever-scarce dollar. Alternately, a structure could be adopted that rotates genre within the program so that delegates could use their time more efficiently. By that means, those who want only dance could come for the dance day(s) and so on. Those that want everything could come for all or use their non-showcase days for meetings and the like. Since there is not much sense of structure in the present arrangement, such a change might not disadvantage anyone but rather benefit many.

As noted above, among the performing arts, music has been relegated to a somewhat secondary position in APAM. Not the least of the considerations in its progressive diminution has been to recognise that unlike theatre and dance there are many music-specific presenters operating circuits, festivals, venues and as well as booking agencies worldwide and that these did not match well with APAM's needs for multi-artform presenters. One would have thought that that consideration ought to present an opportunity rather than being as it currently appears as disadvantage.

Since the demise of AIMM in Brisbane it could be argued that AWME fills some of the music need but is very far from having coverage of spectrum. The Musica Viva/DFAT program seems entirely reactive within a limited funding framework and, frankly, limited thinking. APAM of late makes merely token gestures. This situation needs serious attention and perhaps an entire rethink

RECOMMENDATIONS:

8. That the domestic market mechanisms such as the APACA conference and Long Paddock or its equivalent be brought within the APAM footprint every two years to offer and alternating international and national pattern of performing arts exchanges;
9. That in order to ensure a more efficient and balanced exposure of the various artforms APAM give consideration to adopting either a cyclic pattern in which an genre or area of practice is featured above others in successive events and/or that APAM features these on specific days within its program;
10. That, having regard to the current disparate mechanism for the promotion of Australian music internationally, the Australia Council bring together the key stakeholders to develop a new strategy and a more coherent pathway for the future.

12 Some Options

An Exchange

It is instructive that none of the North American events is called a “market”. CINARS is a “Conference for the Theatre Arts”, APAP, we sometimes forget, is usually just called “Arts Presenters” in the US, WAA in the west is an “Alliance”, PAE on the Eastern seaboard is an “Exchange” and so on.

Some artists and arts workers, both in Australia and abroad (notably in Europe), feel uneasy about the term believing that it implies an undesirable commodification of the arts. Others consider that one should call a spade a spade. If a broader brief for APAM is being contemplated, that goes the buying and selling and into a more collaborative mode, “exchange” might be a preferable term to “market”. As one international delegate observed: perhaps we should be there to *share* rather than merely *show*.

That choice is carried into other parts of the debate. All consider that APAM has a networking and relationship-building significance alongside its buying and selling role. While there is concern with the narrowness of what “market” might mean, many consider it would be useful to add a dimension to the program to facilitate what might be called “curated conversations”. Such a development could meet the need for more emphasis on international collaborations and forging creative partnerships than Searchlight and its aftermath discussions can currently offer.

Other the other hand, because the question of APAM’s primary goal remains unresolved and other activities have grown up around it, there is concern at the diminution of the “market” element. To this uncertainty has been added a kind of *faux* conference with keynote speaker(s) and forums. Since it is the only gathering that brings the performing arts together in one place every two years, that too has grown in visibility. All of these have emerged on the reasonable premise that everyone in the sector has something to trade, be it product or experience, information or ideas. So it may be that barter has become more important than trade.

Maintaining Contact

Whatever view is taken and whatever format may be used, it is clear that the sector generally lacks the means to keep conversations going *between* APAM’s two yearly cycles. In the regions from which the arts market evolved, there are active lines of communication that maintain the dialogue begun at one encounter until the next. As has been noted above, Australia generally lacks those conduits and the skills and experience that go with them.

Certainly, a small but slowly growing number of Australian companies have reliable representation in North America and to a lesser extent in Europe. Some companies have active and skilled staff dedicated to keeping their work in front of the international community, who can travel to other markets, visit presenters and advance discussion. Overwhelmingly, they are the companies that secure the lion’s share of the dates. There are, too, a handful of independent producers, such as Marguerite Pepper Productions, InSite Arts, and Strut-n-Fret and in some ways Performing Lines, who represent companies or pieces of work on an international level. But all of these are exceptions rather than the rule. In the Northern Hemisphere they are the rule.

In this context, one should acknowledge that government arts agencies, notably but not exclusively the Australia Council, have developed programs to grow the skills needed to undertake this work more effectively. However, the lack of genuinely experienced mentors has limited their effectiveness. The Australia Council has also taken steps to create a compendium of market information on a country-by-country basis. But nothing beats first-

hand and face-to-face experience. It is also noteworthy, that with all of this, the most commonly expressed need across the sector is for training that focuses on the basics: negotiation, budgeting and promotion. If there are to be forums at APAM, or in the lead up to APAM, that is where most would wish the emphasis to lie.

All this points to an acute lack of resources to underpin the export effort and through that the effectiveness of an event like APAM. Even where an attempt has been made to offer resources, they are not always well deployed. For instance, there is a view that, though well intentioned, the OzArts site is a wasted effort as being too reliant on busy people having to update their own entries. Most commercial experience shows that self-input sites hardly ever meet their objectives.

By contrast, the targeted use of social networking might generate benefits. Programs of advice and market sensitivity might be maintained between conferences through monitored blogs. But these would have to be managed proactively and would need to ensure the regular involvement of key participants. They could not be left to be self-generating. Such sites might be useful places for good news stories and experiences about touring to be run. All that implies a more continuous and proactive management system than APAM currently has in place. Delivering that may prove to be the most critical change that could be made to in APAM and the service it offers.

The Constituency

During this study, it became clear that if APAM was to be distinctive and world class, it might have to cast off some of the thinking that has shaped it over the past sixteen years. In this regard, one issue stood out: why does it seem to focus on the not-for-profit sector to the exclusion of others?

It is a curiosity of the performing arts in Australia that some sectors and agencies act as though there was a wall dividing the for-profit from the not-for-profit. Even a casual examination of how much work is generated shows that to be a misreading. The performing arts are predicated on artists of many practices who move easily and effortlessly across such lines of demarcation. Equally, presenters do not distinguish but book what works for them, in their market and in response to factors of which whether a producer is held to be "commercial" is the least.

Of course, it could be argued that nothing prevents anyone of whatever description from registering as a delegate to APAM. Presumably, too, space alone would prevent anyone from hiring a booth and promoting their wares in the On Display section. In fact, some "commercial" producers do attend, in a variety of guises. Indeed, APAM is managed by a company which morphs between these worlds. Yet, it is widely believed that if a producer who wore the badge of "commercial" attempted to gain a showcase spot, it is highly improbable they would be successful, irrespective of the quality of the work offered.

Thus, there is a sense of exclusivity even of exclusion about APAM which is neither informative of nor outreaching to its colleagues in other areas of practice. If this is driven by threat, it is mistaken since it is hardly likely that APAM is going to be swamped by the large scale "commercial" shows. Nonetheless, if the process is to be driven by opportunity, it is entirely possible that a producer who under the present circumstances would never dream of going to APAM, might, if encouraged to do so, see a work there which he or she could take in a new direction or to a different level of exposure to the benefit of all. There should be nothing to fear in the prospect of success.

Accordingly, some question why APAM has come to be about just one part of the industry and not about the whole industry. If true, this seems particularly counterproductive given the Asian markets which are touted as among our prime targets. The for-profit producers have

much more experience and success there than the non-profits. Why would we not want to draw on that? By maintaining those barriers the sector weakens only itself.

Moreover, there is much talent and knowledge in the commercial sector which could be shared more widely. Given the size of the Australian industry and the domestic market, can we afford not to maximise the benefits of those for the general good?

Many of these observations could apply equally to the absence from APAM of the so called “major organisations”. Some ask: who decided that APAM was chiefly for the small to medium sector and why? Again it is unlikely that the event is likely to be swamped with showcases of “Swan Lake” or “Tosca” but these are our fellow Australian artists who form a vital part of the industry and some may wish to share the experience and the opportunity.

If APAM is to remain the place to assemble the performing arts sector together every two years, it should strive to be as inclusive as possible.

Perhaps APAM can be base to build a wider, practicing constituency within the industry. That might start by including in its planning processes an organisation like Live Performance Australia (LPA) which covers the spectrum and can draw on a significant body of skills and experience. This may also include an extension of its recent outreach to AMPAG. That could only strength training and information services at APAM for which there has been such expressed demand.

If APAM is to build on its past success and offer genuine market leadership it needs to build a new and broader constituency. Finding new partners across the sector will be critical to that.

RECOMMENDATIONS:

11. That, in seeking to fulfil a wider brief than buying and selling, APAM give consideration to changing its name from “market” to “exchange”;
12. That APAM be empowered to build a greater export skills base, and experience in the performing arts sector through year around rather than seasonal effort;
13. That APAM explore means by which it can through year round activity assist in maintaining ongoing communication with and about its key constituents;
14. That APAM seek to grow a broader constituency within Australia through strategic partnerships as to which engaging in a consultative process with Live Performance Australia and AMPAG to scope areas of potential collaboration in growing a better and more inclusive market might be taken as a guide.

13 The Work

Quality of Work

There is concern about the *quality* of work on offer at APAM. Many of those consulted are not convinced that it is the best or most representative available. There is, too, a strong belief that in the need to “pick winners” rather than obeying cultural geographic or artform equity. There are also questions about the *range* of work which are shared almost equally by those in Australia and delegates from abroad.

So what can quality of work mean? And what does showcasing it mean? Inevitably, any comment made about the quality of work which has been showcased at APAM must be highly subjective. The question must arise: quality, in whose opinion and for what purpose?

One of the problems in a democratic society of having an event that is essentially driven by government is that it becomes difficult to pick winners. Government agencies are constrained by policies and pressures to ensure equity and demographic balance. They find it hard to focus solely on issues of quality and saleability. Often, they are faced not with what is actually saleable in a market, but what interest groups would like to think was saleable. That seems to argue for more arms-length management model for APAM than has been the case to date.

Since most of the work at APAM is presented in excerpt, few would claim that it is a fair representation of the complete work in whatever genre. ***Functionally, that aspect could be overcome by rebalancing the number of short form showcases to full-length work. It may not change the quality of the work selected, but it would make possible a fairer evaluation of it.***

Quality can also be a matter of *appropriateness*. What may be excellent in one set of circumstances might be entirely inappropriate in another. There is work that may speak eloquently to a domestic audience which might be largely incomprehensible in other settings. There may be work arising from particular cultural contexts that has impact locally, but which may be viewed as naïve and simplistic elsewhere. There is work that may be rare in Australia but of which there is an oversupply in other markets. ***All these are important considerations and could be met by the application of a more rigorous selection process in which sentiment played a lesser role than it sometimes appears to do.***

Quality is also, literally, in the eye of the beholder. For that reason, a more rigorous process of matchmaking needs to be put in place with between the work selected and those who are invited, usually with some financial incentive, to see it.

Quality may also be about the *suitability* of work on offer. Is it really export ready or even tour ready? The principle in the past had been that everything showcased had been road tested. There is a belief that that principle has been eroded.

However, there are also questions of *genre and scale* which are much less subjective. There seems little point in bringing presenters with 1500- 2000 seat venues from, say, Korea who have an expressed preference for theatre for young people only to show them work made for a black box. There is a colossal demand in the plethora of new venues in China for traditional western arts, such as orchestras and ballet which are effectively not presented at APAM. This is despite the Australian government's devoting some \$51 million to their annual support at home.

Quality in this instance has to be that it is the best of its kind currently available; that has been adequately tested before audiences and peers in a variety of circumstances

locally and/or beyond its home base; that can, within reason, be available over the following two to three years for export; that has been measured against known and understood international programming interests; that is readily and cost effectively remountable; and that forms part of its producer's export plan.

Choosing the Work

All this may mean that APAM, rather than being the passive recipient of a series of showcasing proposals essentially every two years, becomes proactive in its search for the best. This may mean it should have its own network of assessors year-round, spotting and advising. That need not preclude open application. Indeed, it should not. But it would mean that delegates could be assured of a core of outstanding and appropriate work that could, in fact, be the best that has been generated in the period between markets and that could seriously represent Australia on that basis. A small start was made to search out such work for the 2010 program. That should be continued.

2010 also year saw the market take first steps to encouraging the Major Performing Arts Group companies and the Key Organisations to find ways to leverage value from APAM. Both the Spotlight and Searchlight programs could benefit from the inclusion of tailored works from these companies that are among our most highly funded and which would also effectively help to engage them in this important process.

Quality may also have to do with the *availability* of work. One of the issues that has recurred in both APA reports and in discussion is whether there is enough export ready, quality work to sustain a fully fledged multi-artform market every two years. Australia is a small nation which often produces above its apparent capacity in many fields. Perhaps we overestimate what we can make in any two years. Here, surely the question is: enough for what? There is no quota to meet. There is no arbitrary scale of demand to be accommodated. Many international delegates have observed that they would rather see six works of outstanding quality and in their entirety that had been seriously exposed and worked through, than twenty extracts of which only a few showed signs of future life.

Many considered that a multiyear process of tracking work from Searchlight to Spotlight and building a working environment around that would have more value rather than pursuing some illusory quota. Most, either implicitly or explicitly, believed that less is more and that picking winners and investing in the showcasing of them, however difficult that might be, was the only genuine way forward.

Perhaps with fewer works to see, more attention could be devoted to robust discussion about what has been seen and how it would work, where and why, or conversely why not. How much richer the APAM environment might be if we could engage producers and presenters in discussion about real examples rather than participating in talk sessions that mostly speak in the abstract.

All these factors indicate that an ongoing, independent management for APAM might have more capacity to shape and develop the event to ensure these differing aspects of quality and grow the range and depth of engagement with it both at the national and international levels.

Showcasing the Work

It can come as little surprise that there is almost universal rejection of the 20 minute extract showcase as appropriate for anything other than music which is often presented in short sets. For that reason, it is generally agreed that whatever happens, APAM ought to move away from that format or reduce its reliance on it.

While it is true that some presenters have been known to program from a showcase, both at APAM and elsewhere, they are rare. No one would dispute that seeing the full production is always to be preferred. However, practical considerations have led to the short form, with all its attendant issues, flourishing in many markets.

Despite the negatives, there are many Australian works that might not have been seen by such a range of presenters or in any context other than normal theatre presentation were it not for the APAM Spotlight. Nor have artists or companies always been very imaginative in the way they have used that format. This is, after all, about creating a sales tool. Too often they have chosen to present a "bleeding chunk" rather than crafting a "trailer". More recently, some producers have begun successfully to employ multiple screens and the like to enhance the live aspect of their presentations. Nevertheless, the essential limitation of the format remains and is hotly contentious.

Yet while it is easy to decry the Spotlight format and its all too obvious limitations, it is far from easy to offer solutions. Then, too, if by some means only full-length works were showcased, it would greatly reduce the number of works able to be presented and thereby, possibly, the appeal of APAM overall.

Even if significant funds could be found to increase the number and range of full-length works, scheduling alone would dictate that as a consequence less work could be seen. That might not concern all, but to those who travel great distances and hope to make their visit as productive as possible, it could be a disincentive. However, that should not prevent APAM's aiming to build its capacity to showcase full-length work through a variety of means.

The most obvious way is to develop a closer working relation with the resident presenting infrastructure which currently is the Adelaide Fringe (or with whatever equivalent event is to hand in whatever other city APAM might in time find itself) and seek to provide greater opportunities for exposure within its program. That already occurs to some degree. In 2010, 4 productions in the Fringe festival were officially featured in the APAM program and there were 8 in the Adelaide Festival (By contrast in 2008 it was 12 and 3) (Source: APAM reports) There are other productions which, by the application of ambush marketing, present their work in the Fringe and seek to bring it to the attention of APAM delegates, with varying degrees of success.

But these are all done at a cost and at considerable financial risk to the producing company or artist. It is probably that if that risk could be removed or at least reduced, more would chance their arm and a wider selection of work could be placed on offer to APAM delegates. Fringe festivals, unlike "mainstream" festivals, exhibit varying degrees of curatorial oversight and some rightly pride themselves on open access. If this proposal were to be adopted, that aspect would need to be carefully negotiated. The same rigor would need to be applied to the inclusion of such work into APAM as for entry into other showcases.

The simplest way to engender such a move would be to create a mechanism of financial support for such productions. That might be through grants, a guarantee-against-loss scheme or a mix of the two. The Australia Council would be the obvious leader in such a tactic. But it may have interest, too, for the States and Territories and for Creative New Zealand to consider this either separately or through some joint venture.

Such devices would undoubtedly stimulate more interest in bringing work to APAM and help ameliorate some of the artistic and financial reservations currently expressed.

Were APAM to remain in Adelaide, which is a popular preference, it should certainly enter into a more in-depth association with the Fringe about such processes. In particular, it might

explore how the Fringe's Honeypot scheme, which aims to match presenters with work in its program, might be linked to it.

There are, as well, other ways to change showcasing. APAM could invite a small number of works of known quality with track record and export readiness to showcase full-length and foot the bill out of its own resources and from box office revenue. That would presuppose a significant increase in its revenue base and - depending on the works in question - have implications for venue availability. As well, and depending on APAM's future location, such a move, drawing as it would on the ticket buying public, might or might not be welcomed by the accompanying festival(s) as offering additional competition for them.

Any or all of these could contribute to a better balance between full-length and short form showcasing and thereby enrich the APAM program. But Spotlight is not the only APAM mechanism that offers work. Searchlight, which is designed to catch projects at an early stage of development and to seek partners for them, is a highly regarded mechanism for promoting new conversations and new collaborations. However, few of these are tracked beyond that initial outing. Anecdotally, delegates may be aware that such and such a project went on to production and success or failed to live up to its promise. A number of overseas delegates asked why there was no formal follow up to this or indeed why there is no apparent connection between what is pitched Searchlight one year and showcased in Spotlight the next. Since many delegates of all kinds are interested as much in the journey as in the final product, some link between the two – if only with respect to a few works – would surely be both desirable and enlightening.

Again, it is clear that only an APAM working long term and to a plan rather than short term and to a deadline could offer that scope of work. It is yet another argument for considering under what model APAM is managed.

In any event, showcasing, as a way of informing presenters, can mean many things. It need not be just about presenting a show, whether in whole or part. It can also mean drawing attention to the underlying talent pool. In that sense, it might take the form of "showcasing" a body of work or a particular artist's or company's trajectory. That might, in turn, be offered as a platform for future collaboration and/or co-production. There could be a showcase of the working process of an artist or even of work-in-progress. This might be for emerging artists or for those whose reputation is already established but who may wish to engage others in support of a new direction. That might be done through workshops or demonstrations in a way that goes beyond merely talking or showing a video. APAM needs to be open to all these possibilities.

Finally, where does the application of technology sit in all of this? To date, at APAM as at most similar events, it has been mostly passive. Delegates are offered DVDS or USBs to take away, or shown DVDs or referred to U-Tube. They can sit at a booth and watch; they can go to a designated area at the market; be lured to a mystery destination for that purpose; or, as one unfortunate international delegate reported, be pursued into the lavatory with a press kit. But in the end, it is all about getting someone to watch a DVD.

Yet technology as we all know can go much further. It can set up pre- and post-market conversations about a given work; it can help contextualise it through offering other perspectives, be they cultural, social or artistic on what is immediately presented in the market; it can also offer a context within which the presenter can make a more informed judgment about the work he/she sees. Contrariwise, technology can also help producers to prepare themselves for these vital encounters. While anyone can go to the presenter's website and see what they present, how many trouble to learn the presenter's "language"; consider their history and how they talk about what they do.

The world has never been smaller or easier to access than technology has made it today. Sadly, so little of our export effort has passed beyond putting what was once a printed brochure onto a disk.

RECOMMENDATIONS:

15. That APAM become more proactive in the choice of work to be presented by sourcing and selecting a proportion of the work rather than relying solely on proposals;
16. That APAM assess more rigorously the track record and export readiness of work under consideration for the showcase program;
17. That APAM take into account the suitability of work to be presented in relation to its identified target market(s);
18. That APAM take steps to rebalance the showcase program by increasing the number of full length presentations and reducing its reliance on the excerpt format and be given the resources to do that;
19. That the Australia Council either alone or in concert with other funding agencies give consideration to establishing a support scheme by way of grants or GALS to enable more companies to be included in the APAM program as self-presented work at the accompanying fringe festival;
20. That APAM work closely with partners such as the accompanying fringe festival(s) to enhance opportunities for work presented there to be systematically introduced to presenters, as to which the Honey Spot mechanism at the Adelaide Fringe might be taken as a guide;
21. That APAM seek to establish a range of e-commerce platforms as a mechanism for greater engagement between producers and presenters before, during and after each market.

14 Delegates

Choice

One of the concerns raised repeatedly in this consultation has been the matching or rather mismatching of work presented at APAM to the delegates who are invited to see it.

Australian producers, having been selected to showcase their work, are rightly urged to research their targets among those invited to the event. Often they find there are few apparent matches. Many commented that there often seemed little logic and no system to those who are invited or at least those who come apparently with official support (since it is often difficult for them to distinguish between the two). One producer observed: I think we all recognise that some good targets will slip through the cracks, but sometimes it seems as though all have done so. Equally, a number of artists' managers, especially from the US, have expressed surprise and even dismay at some of the presenters invited from their region, not once but repeatedly, whom they consider would never be disposed to buy anything that is on offer at APAM.

Clearly, the link between what is selected for the Spotlight and (to a lesser degree) Searchlight programs and who is invited to consider it needs to be better made. There is concern that not only has this been a problem in the past but that the gap between work selected and the international delegates has been growing in recent editions of APAM.

Such comments are inevitably subjective. Because a presenter or agent has not expressed interest in a given piece of work or body of work does not mean he/she was the wrong choice. Taste and opportunity to present also enter into those decisions. There are reliable reports of presenters and agents who have not liked the specific work they saw, but were sufficiently interested in the artist or the company to begin a dialogue. That has sometimes led to a productive and ongoing relationship. Notwithstanding, the negative comments are too pervasive not to need attention and correction.

The argument advanced for the current difficulty of mismatch is that it is one of timing of the two selection processes. That is simply not persuasive. If timing is the issue then a different schedule needs to be adopted. This is too critical an issue to be the subject of administrative convenience.

In order to address this problem, one of two possible steps could be taken: Either the selection of work is made and subjected to expert advice from the various markets as to the appropriate presenters for that work; or the invitees are chosen on criteria such as known programming policy, cultural outlook budget, venue and market size and composition and the work is selected to match the invitees. The current process seems to do neither of these consistently. As a result, it appears hit and miss. Clearly, more rigour is needed.

A few regular international guests commented that having been asked for their suggestions found that these were either not followed or, for whatever reason, did not succeed. Frustrating as that may be, one is sympathetic to the complexities of the task. Nevertheless it does seem rather open ended.

It is also not merely a case of inviting individuals. Particularly in North America, greater care needs to be taken to invite those who regularly collaborate with each other through existing networks and partnerships in their own market. This is crucial to build a body of influence within the touring circuits there rather than having a scattering of presenters from across the country. Those "syndicates" are not hard to research, but only an ongoing and proactive management will be able to undertake that research. Various people in the sector have

advocated this practice over time but it seems not so far to have found favour. It is time that it did.

On the other side of the fence, a greater engagement by the Australian producers whose works are selected might also help to better inform the choice of invitations. In the past, desultory attempts have been made to ask those applying for Spotlight selection to nominate presenters who might match their work in their preferred markets. It has not been pursued at all vigorously. Mandating it as part of the process for each to nominate, say, six to ten such presenters would be useful in itself as a means of extending APAM's reach. It would also be indicative of the applicant company's maturity of thinking and the extent to which they have researched their targets and their seriousness in pursuing genuine export opportunities.

Such mechanisms of course apply mainly to those actually showcasing. There is comment that most participants in APAM feel left out of that inner circle and are relegated to picking up crumbs of information as they go. It would be helpful to supply all with greater information about overseas delegates. Biographies in the program are useful, but often fail to reveal much about programming interests. Information sessions at APAM are often too late for locals to use effectively.

Perhaps each visiting delegate who comes with official support should be asked to prepare a short U-tube that would help locals to understand what they want and/or what might they be looking for. It could be run on the APAM website for a couple of weeks in advance and during the conference. It is scarcely an onerous request. The technology is within everyone's reach and, if the presenters are serious about making connections, they should welcome it. If they don't, that might tell the organisers something about the quality of their choice.

Whatever the precise means that are finally adopted, it is clear that APAM can only aspire to be a world pacesetter in these processes and the regional focus for them if it adopts a more outcome driven method of matching and matchmaking.

Incentives

What are the implications for genuine buying and selling if a large number of the international delegates are subsidised? After each APAM there is a self-congratulatory note about the number of international delegates and their growth or change from year to year. Yet that success needs to be balanced with the understanding that on average over the last ten years 41% have received some form of financial support for their visit (See Table 2). This assistance comes not from their own base (though that may also be the case) but from the host organisation either direct or via some other means. That, as we have seen, may include the Australia Council, DFAT, Austrade or some other entity. Does that fact confer some sense of unreality on their presence?

Table 2

Year	Total Internationals	Assisted	%
2000	120	55	46%
2002	188	59	31%
2004	160	57	36%
2006	135	74	55%
2008	170	65	38%
2010	149	67	45%
Totals	921	377	41%

Source APAM reports and Australia Council files

Notes:

1. These are registrations not visitors. Through multiple visits these totals exceed those given in Table 1 for actual visitors
2. Records prior to 2000 do not provide sufficient, consistent evidence of assistance to delegates to include here.
3. This does not include those who may have been assisted to attend from non-Australian sources e.g. New Zealanders through Creative New Zealand

It is also noteworthy that while there are delegates who have made repeat visits sometimes subsidised and sometimes not, or a mix of these, APAM would appear to have no long term plan for engagement with presenters through the use of such incentives. Repeat visits by key presenters could be used to pyramid-build constituency in a region. For instance, an invitation to market 1 to presenter A is followed by an invitation in Market 2 but which is extended through presenter A to presenters B and C, and so on. There seems little evidence of such thinking in APAM. Yet that is just one of a number of tactics that could be employed. The Dance Ambassadors was a partial attempt at this, but was not driven by peer selection and that aspect is vital. That said, clearly this needs to be accompanied by significant skills development across the sector to ensure that such identification can occur and is factored in to the business plans of all those aspiring to international exposure.

With respect to subsidy, it is worth comparing practice elsewhere. In the case of VIA, the performing arts market in third world Colombia associated with the Bogotá Iberoamerican Theatre Festival is instructive. There each international delegate *pays* a fee of \$US500 in return for which she/he receives tickets to the shows, five nights' accommodation and local transfers but not travel assistance. When asked about this, the organisers of VIA simply noted: "paying makes our guests value the experience more". When one considers that this is a country which many think more than twice about visiting at all, that is a critical comment. It is a strong festival and a great cultural environment but scarcely the most user friendly city on earth. It achieved over 100 international delegates in 2010.

It's interesting that none of CINARS in Quebec, Puerta de la Americas in Mexico or any of the markets in Asia subsidise attendances as a rule. Mercado in Brazil did so at the very beginning to get it off the ground, but only because they had some Rockefeller Foundation money to enable it.

All that is not to argue that some priming of the pump may not be necessary and justified. Australia and New Zealand have often needed to offer incentives to visitors merely to overcome the length and expense of travel. There are instances in other industries where to overcome perceptions of distance and cost, Australia has had to offer inducements. However, that factor must be taken into account when evaluating the pulling power of the event itself. We need to be careful about that lest it become self-fulfilling, that is to say: we pay guests to come; many come; and that number is used as a measure of success.

No amount of strategy will make the matching of invitations and incentive into a science. Nor can one use subsidy to determine outcomes. But it can be used to target better and to create multiyear or multimarket strategies. If APAM is to rise above the increasingly crowded arts market field, it will need to pursue such means.

DFAT and Austrade

The question of where DFAT sits in the overall APAM construct is illuminating. Almost since day one, the Department has had some involvement in securing international delegates. Usually this has come through the deployment of its international visitor program whereby leaders of cultural programs or institutions in various territories are identified and recommended by Australian posts there and some go forward to be invited. Until 2006, the Cultural Affairs Division of DFAT allocated money to APAM to use for that purpose. As its own funds became more restricted, DFAT opted to expend that allocation direct.

This has represented a considerable investment over the years and has materially added to the number and range of international delegates that APAM has been able to attract. Nevertheless, there is a sense from many of those consulted that these visitors are not always as well selected or as well integrated into the program as they might be. Especially when they come in sizeable groups from Asian countries, there are often barriers (real or imagined) between them and the local sellers. Sometimes these are of language. More often they are gaps in understanding about their respective interests and aims.

One producer observed that it was sometimes reminiscent of those parties of Japanese tourists who were so carefully herded by their guides that they seemed never to meet or speak with a local. That feeling has been compounded by the observation that the translators provided, while skilled for everyday purposes, often had no knowledge of the performing arts and thus cannot sustain a conversation between hosts and guests of any depth, complexity or interest.

The Cultural Diplomacy Section of DFAT considers that it could do a better job of informing arts presenters and institutions around the world about APAM if it had better and timelier information than at present. They could, for instance, be more useful in Europe in spreading the word about APAM but that this would require greater advance notice. APAM, for its part, would argue that late notice of funding from DFAT had often made timing problematic. It has also been frustrated by the constantly changing DFAT staff and fluctuating departmental attention to the cultural diplomacy area. Clearly, both sides need to re-engage with this and find better means of liaison and co-ordination. Perhaps some formal commitment to consult might be considered?

The Creative Industries Division of Austrade shares some of DFAT's concerns though inevitably its slant is somewhat different. It has brought groups of its Business Development Managers to APAM and through them has over time identified key presenters in various

territories. Its frustrations extend to the selection of showcased work and question whether this takes adequately into account export opportunities in its prime markets. It cites as a prime example the absence of productions of scale for young people which is a constantly and clearly expressed demand in a number of Asian markets but which is consistently unmet at APAM.

In considering these issues it is important to note that there will never be a perfect match – or anything like it – among the disparate objectives of those charged severally by the Australian government with the international promotion of Australian artists as artists, their engagement as a vehicle for international diplomacy and their value as part of the export mix of Australia’s creative and intellectual capital. However, there are important points of convergence and these needs to be better understood and brought together where appropriate.

Clearly, more research is needed of the markets Australia hopes to address, their context, the objectives of presenters there and the economies within which they operate. Most of that is missing from the APAM mix especially but not exclusively in the AsiaPacific region. Some of the initiatives taken by the Australia Council e.g. IETM in Europe and ALAF in Latin America go some way towards ameliorating that, but much more could be done.

DFAT and Austrade can be key contributors to that process and need to be brought more closely into the APAM fold for that purpose.

RECOMMENDATIONS:

22. That APAM adopt a more rigorous procedure for matching work selected for showcasing with the assessed interests and capacity of those international delegates officially invited to consider it

23. That in doing so, APAM also adopt a more rigorous and targeted test in the application of financial incentives for attendance of international delegates

24. That APAM move to upgrade the quality of its liaison with both the Cultural Diplomacy Section of DFAT and the Creative Industries Division of Austrade perhaps by way of an MOU providing for a multiyear consultative framework

15 The Region

If APAM is to be truly special it needs to spread its wings beyond Australian concerns. While for some time New Zealand has occupied a special and valued place in the program, there have seemed to be reservations about extending the scope more widely.

Nevertheless, many of those consulted raised the question: Should APAM be about the region, rather than just Australasia? Should it be genuinely an international showcase rather than one that only pushes the national barrow? Some have some concerns about the absence of cultural diversity in the program beyond the inclusion of indigenous work. Others worry about the face of Australia that APAM presents to the region when it is predominantly white artists performing for a white audience in a rather non-diverse city.

Given those concerns, there was an expressed wish across the sector to see the APAM door opened more widely. Some suggested the introduction of rotating regional showcases as a means of further internationalising that aspect of APAM. Respondents noted that overseas markets regularly include work from other countries as a matter of course, and that Australian artists and companies frequently take advantage of that. However, we tend not to reciprocate other than with New Zealand and, on one occasion, with Singapore.

One of the most persuasive arguments used in this context was that a broader market can generate a more complex network of activity. Interestingly, in the course of the study it became clear that APAM has been to some limited extent the occasion for New Zealand presenters booking New Zealand work. Perhaps, if a wider range of presenters was attracted to APAM by work from a greater number of cultures that might in turn generate a more dynamic exchange overall. That suggests that the cross-benefits of opening up APAM in these ways could be considerable.

CINARS probably comes closest to offering a model and a method. Its management recognised early in its history that there was not enough work of quality in Quebec or even in Canada to keep delegates coming back. Thus, it opened its showcase to all comers. Productions from elsewhere are still a minority for logistical and cost reasons, but there is no “national” barrier to application. Many of those consulted felt that Australia's location in the Asia Pacific region could open up a similar opportunity.

The same applies to other foreign markets where anyone off-shore can apply to showcase but only a few may be chosen. In fact, most companies edit themselves out because of expense but sometimes “focus” nations at a market support their artists to make a special effort. Equally, anyone can in theory showcase in or around the US markets. Yet few do, other than at APAP and there usually offsite. There is no reason to suppose that the result would be any different were APAM to go down that path. However, the gain in profile for the event and in diversity of program and attendance could be considerable. Should there be concerns about the danger of imbalance with too much “foreign” product”, it would always be possible to impose a cap.

Many respondents considered that such a move would make APAM less inward looking, attract a stronger range of presenters and demonstrate a preparedness to practice what we preach about being part of Asia. There was also the practical concern that if APAM doesn't take that step, somewhere else, probably Singapore, will become the lead regional event. As noted earlier, Australian promoters may prefer to invest in that rather than at home.

Such a development might also open up the possibility of aligning DFAT's cultural diplomacy objectives in the region more closely with what they do at APAM. For instance, with the

promotion in India in 2012 looming there might there be a special focus on India in that year. Or beyond, Latin America might be featured in 2014.

This could also lead to reciprocal showcasing of Australian work in those territories. Indeed, DFAT is interested to develop a conversation about cross showcasing in general. Its officers speculate whether a broad showcasing agenda might position Australia better, both to sell its own work but also to develop co-producing opportunities. As well, the Department is interested in exploring ways in which APAM might form part of a strategy to deepen cultural engagement with the Pacific nations both through the current visitor program and perhaps cyclic showcasing opportunities.

RECOMMENDATIONS:

25. That APAM move to internationalise its program by opening its doors to showcasing from artists in countries in addition to New Zealand;

26. That, for that purpose, it considers both an open application process capped with a quota and/or establishing a rotating focus nation/region scheme which might be selected in consultation with the Department of Foreign Affairs and Trade:

16 When, Where, How

This study was not intended as a review of how APAM is administered. However, it would be remiss to engage in it without noting that there has been no suggestion that it is not well run. This was established in the earlier Bleby report and it is clear in this exercise that, within the agreed circumstances, APAM has been efficiently and cost-effectively managed and the expected outcomes delivered. Inevitably, there will be quibbles and points of minor dissatisfaction. But these are reported after each event and within reason acted on and tracked in successive markets.

Location

Nor is it in this brief to recommend where future markets should be held. That will properly form part of the tender to be conducted in 2011. Nevertheless, it should be noted that there is no apparent dissatisfaction with it remaining in Adelaide.

It is, however, reasonable to note the optimum conditions under which APAM should be held. That does bear on location, to some degree. For example, many have commented on the benefit of being able to conduct virtually all of the activities within a single building or at least within a single precinct. The efficiency of moving quickly and easily from showcase venues to contact rooms to social events is a factor in a crowded schedule. Since most major Australian cities have a large performing arts complex or precinct that feature could be reproduced in places other than Adelaide.

International delegates, in particular, applauded holding APAM in an arts venue since most similar events elsewhere take place in large hotels or impersonal convention centres. Not only is the care given to the work in the Adelaide Festival Centre greater than in such commercial spaces, there is also a discernible pride in ensuring the best for the artists in often challenging conditions. Again, this could be replicated elsewhere in Australia, but is an important consideration.

The collocation with the Adelaide Fringe Festival and Adelaide Festival has long been recognised as a major advantage for APAM though since the days do not overlap, the latter is sometimes – though not invariably - less significant than the former. In considering future sites, a similar pairing with a fringe festival and/or a major festival *with significant Australian content* ought to be a major criterion.

In this context, it is worth noting the recent emergence of the Australian Theatre Forum which was held in 2009 at the instigation of the Australia Council (Theatre and Major Performing Arts Boards). Staged in Melbourne, it represented the first comprehensive meeting of Australian theatre makers in 21 years. There are plans for future such gatherings in 2011 (to coincide with the Brisbane Festival) and in 2013 (as part of the Centenary of Canberra). There are also some moves to resurrect a national theatre festival or something like it. It may be that if these ideas flourish, they may offer new and interesting settings for future editions of APAM.

Timing

Interestingly, while during this study there has been speculation about the timing of APAM, there has been none about its frequency. Overwhelmingly, the sector prefers to retain it as a biennial event.

By contrast, one can debate at length the merits of the late Australian summer, as at present, over an Australian spring. For the Northern hemisphere, February/March has the advantage of coming towards the end of the season there, but late in the planning cycle.

February in North America is clear of the regional booking conferences in September/October, but close to APAP and IPAY. Two major trips in successive months are too much for many US presenters who characteristically have limited travel budgets and tend to travel abroad less than their European counterparts.

On the other hand, the Australian spring sits at the beginning of the northern hemisphere season and clashes with the US regional conferences like WAA and PAE. Over the years one has heard many presenters decrying the suggestion of holding APAM then on those grounds. Europeans seem divided. Booking conferences are not an issue there, but the opening of the season in September/ October is a concern for year-round presenters. Climate, too, should not be overlooked as a factor: a torrid Adelaide summer is often to be preferred to a frigid northern February.

In the end, reputation will trump all of these. If the event is attractive and the settings right, those genuinely interested will find a way to come. If it is not of value, no timing will lure them.

Format

There are many ways in which one could discuss the format which APAM has adopted and refined over the years. Given its long tenancy in Adelaide, it is also difficult to comment on them without addressing the specific circumstances of the Adelaide Festival Centre. In endeavouring to separate future options from the particulars of past experience, it may be best to consider the issues under two headings: physical circumstances and program format. Even there, it is not always easy to distinguish.

Physical Circumstances

As the numbers at APAM have grown, the concern as to how the spaces may be best deployed has come more into focus. Through that, the question arises as to the value or otherwise of some traditional activities.

Nowhere are both more intertwined than in the On Display area and nowhere is the hand of government more apparent. Leave aside that it is squashed into an increasingly inadequate area with what many regard as overpriced booths, it is dominated by "official" presence.

The many government arts agencies in booths on which their constituent companies "roost" only strengthens the impression that APAM is somehow about "official" art and not about market. (It was only recently that the Australia Council dropped the designation of APAM as "its" market). That sends a mixed message to many other cultures but above all to Asians. Moreover the presence of arts companies on government booths gives a false sense of ownership, even of "representation", which in no way contributes to the sales effort since obviously, these government officers can at best engage in passive offering and cannot be seen to "push" one work more than another.

As well, a combination of this dominance plus the constriction and cost of space inhibits a wider participation of artists and probably prevents real expansion through economies of scale. For these reasons the On Display arrangements would seem counterintuitive and act as a restraint of market and crowd out the development of independent representation to do the work between markets. Most of those consulted urged that the booths be abandoned in favour of simple meeting tables. Many quoted approvingly recent experiments along these lines at other markets. However, if this is not favoured, it will be vital to find ways to offer cheaper booths to promote the growth of a less government-oriented culture.

The major issues regarding the Spotlight program have been noted previously. There are moves to decant some of the showcases to a venue outside the Festival Centre. That will be

widely welcomed and serve to relieve some of the current pressure on the Playhouse and The Space.

In considering the physical arrangements for APAM, it is important to note that the strong support for recent innovations such as the G'day scheme and the new Buddy breakfast and even the round table encounters were all tempered with comment about the physical circumstances. APA is well aware of these. Crowding and the acoustic properties of the rooms proved an inhibition to some otherwise worthy initiatives. The sector looks to building on these as providing multiple pathways to new dialogue and new collaborations in ways that have perhaps been missing or insufficiently pursued in the past but the spaces for them need to be better chosen.

In addressing the future, whether in Adelaide or elsewhere, a better match between the program needs and the venues has to be taken seriously into account.

Program Format

By contrast with all of these, the Searchlight program is almost universally regarded both for the intrinsic interests which all find in work in development but also for the excellence of its presentation. It is widely regarded as a critical part of the program and, as noted above, the only reservation is in not being able to learn the outcome of most of the projects.

Indeed, this highlights a major plus for APAM. That is the "culture" it has that built up and the strong desire on all sides to preserve that. It is a culture of scale, ease of access and connectedness. One of its strengths is that of variety. Many attendees from abroad, especially North America commented on this, noting that APAM is less pressured than many conferences at home. They stressed, too, the value which APAM offers of forming long term relations and the broad understanding which is manifest within it that the encounters enjoyed there are not just about the "quick fix". That said, some would also argue for more work-oriented format, considering that the schedule often leaves too much wasted time. They would argue for a better daily flow including the themed approach to days, as suggested earlier.

CINARS has been held up both by Australians and overseas guests as the most effective format and most productive market in this respect. Much of this approval comes from it being regarded as having the most effective balance of showcases and contact opportunities. With its "focus nation" approach it can also rotate the international balance to ensure regular renewal of that aspect without losing sight of the prime importance of promoting Canadian and, above all, Québécois work.

The structure at CINARS is also favoured by many because the contact room is open only at designated times. This compels producers and presenters to the showcases and because they are either full-length or significant 45 minute chunks there are real opportunities to form a view about the work. Moreover as they are offsite, there is a bonding process in the local bus transfers (usually in sub-zero temperatures) which are also held to be beneficial to the very hardy. Climate aside, perhaps APAM could take more account of some of these features.

Also because it is biennial and regional (in the best sense of being both of Franco- and Anglo-phone Canada and of the USA) CINARS acts as an overview of the North American scene in a way that no US market does. Significant European and growing Asian participation has also helped this. The only other markets that were cited to the study with the same enthusiasm were single artform events.

APAM has the potential to fulfil that overview role in the AsiaPacific if it is prepared to take some of the bold steps outlined earlier, build on its successful aspects and rethink and reposition those which have perhaps been less well targeted.

The study noted earlier that a kind of conference has grown up in and around APAM, arguably in response to the presence of a number of delegates who were not directly involved in buying and selling. That manifests itself as a series of speeches and panels on topics generalised around the export area, but not necessarily germane to it. The study found that there is little interest in this, and identified it as one of the “wasted time” aspects in the program. There is an equally strong desire to see these forums replaced with “hands on” sessions directly related to the touring and export experience. It is acknowledged that some start has been made in this direction. Topics like tax regimes and work permits were often mentioned with approval as well as more mundane touring operational issues. These, as noted earlier, are areas in which a partnership with LPA might prove fruitful.

Delegates would also like to hear more from those who have achieved success in international markets as well as why and how. They want to understand the services that Austrade offers or could, and how and how the performing arts sector might more effectively partner with trade and cultural diplomacy initiatives, to their mutual benefit.

These preferences not only suggest ways forward for APAM itself, but indicate the value of a broader consultative mechanism between it and other key stakeholders in the area to help formulate the best and most productive program for the event.

RECOMMENDATIONS:

27. That APAM remain a biennial event linked to or in parallel with a major fringe or arts festival with significant Australian content;

28. That, in shaping tender requirements for future editions of APAM, the Australia Council emphasise the value of hosting it in a performing arts venue or precinct which can maintain the culture of intimacy and access which APAM has grown but which provides adequately for the conduct of its initiatives in information, introductory and networking services;

29. That APAM shift the conferencing aspects of its program away from general topics to those aimed at touring/export skills acquisition and development.

17 Management

Many questions have arisen in this consultation about the potential for change and growth of APAM. Whether they concern its purpose, the selection and showcasing of work, the matching of that to attendees or securing and promoting the culture of APAM itself, all are predicated on two notions: that the creation of an ongoing mechanism to research, plan, target, plan, select and maintain the dialogue between APAM events may be the most important way to ensure that APAM has a new and dynamic future; and that in order to fulfil those tasks to the maximum benefit for all, such a mechanism should ideally operate further from government and with more independence than at the present.

Ongoing

The study has noted the constraints on APAM's ability to be proactive in the sector. Clearly, the major limitation is that its management is contracted to run the event, while others, elsewhere make crucial decisions about it. That has, of course, varied over time. There have been periods when, as its management, APA has been left somewhat to its own devices and yet others, when stakeholders have taken a more hands-on approach.

The results are there to see. The study has noted the absence of capacity to maintain a flow of market intelligence and communication between markets. The study observed inconsistency in the search for new presenters and, through them, the building of new relationships to make APAM more strategic and more effective. The study noted the need for constant attention to a broader range of fully maintained collaborations across the industry and across government. The study proposed the inclusion of the domestic touring market alongside that of international trading. The study urged the opening of APAM to a wider international constituency through association with artists and countries in the AsiaPacific region.

It is hard to see how these developments could be pursued under the present contractual arrangements by which effectively APA "gears up" every two year to manage and present APAM. It is evident that the present stop-go operation will not suffice and that it must shift to a year round, multi-year effort.

That need not imply either abandonment of a tender process or the invention *per se* of a new entity. It is possible to envisage an arrangement under which an existing management, that is resourced to devote a set amount of time and energy to the task, could undertake that role according to contracted guidelines with agreed goals.

However, unless its effort is continuous APAM cannot in all probability advance to the next level of value to the sector.

Arm's Length

The corollary of the previous comment is to ask to what degree it would be prudent to distance this responsibility from the Australia Council. If the aim is truly to have an exchange which is "by the sector for the sector" government may need to step back. That raises the question of whether there may be a case for disconnecting APAM altogether from the Council. It could, for instance, become an independent body with its own governance and program, but charged with implementing that part of the performing arts national and international exchange strategy that is delegated to it by the Australian government.

There may be clear benefits in such a change. Most immediate would be greater flexibility in the choice of work to be presented. For instance, over the years there have been various methods by which showcased work has been chosen, involving a range of stakeholders with a mixed involvement from APAM's management. Most recently this was done by a panel

separate from APA. For some years DFAT provided funds direct and largely left their application to APAM. More recently, it has chosen to make the choices itself. For good or ill, these factors act as constraints. Acknowledging that is not to second guess the quality of the decisions made, but to recognise that there is a disconnect between those decisions and their implementation.

CINARS has such an independent status and has succeeded in one critical area, probably largely attributable to its independence, namely to make the market genuinely international. But CINARS, like all other funded companies, has to argue annually for its support and with the vagaries of public funding that has sometimes been under threat. As effectively an initiative of the Australia Council, APAM does not confront that need. However, "initiatives" come and go and one could argue either way the relative merits of being permanently inside or outside the funding tent.

In many of these respects and somewhat closer to home, the Australian International Documentary Conference (AIDC) offers a useful template. Like APAM, it too has grown (since 1987) into an important event on the international calendar. Like APAM it has moved through stages of change and development. Unlike APAM, it has now achieved a degree of self-determination and operates at a level where it can proudly declare itself run "by the industry for the industry". That boast ought to be nailed equally to APAM's masthead. AIDC is self-governing, offers the kind of continuity advocated for APAM earlier in this study, together as well as member services and capacity building programs. While, documentary film and the live performing arts have much that distinguishes them, the platforms which they need for global advocacy and sales are not, in the end, so very different. Nor are the needs of their producers so distinct that useful lessons cannot be learned.

Yet even if APAM did not become completely independent there could be a case for an intermediate step by which some governing mechanism more representative of the arts industry and less dominated by funding agencies should guide and destiny of the market and shape its activities.

Throughout the study, a number of key players or potential players have been identified that have an important stake in generating a reformed APAM. These have been variously mentioned above. They include, APACA, the Blue Heeler network, LPA, MPAG, DFAT and Austrade. Each has something vital to bring to the APAM table. Logically, in considering the recommendations of this study, the Australia Council should enter into a joint planning exercise with them to work through these. It would be vital in that respect that APA be a full party to those deliberations as having the most experience and firsthand knowledge of what is actually possible financially and organisationally to move APAM forward.

It would also be desirable to seek to trial some of the recommendations which can be most immediately implemented in 2012

Financial

A key service which APA has brought to APAM has been its financial management and control. Over the past ten years it has delivered regular surpluses ranging from modest to significant in growing, if somewhat erratic, funding conditions. As noted above, those conditions are due to the shifting levels of and source of contributions for international delegates between DFAT and the Australia Council.

At the same time, the budgetary outcomes have been achieved without apparent compromise to the service provided or the quality of experience enjoyed by its participants. Indeed, it could be argued that as confidence in the event has grown and numbers have increased, the reliance on subsidy has declined as a proportion of the total.

In 2000 it was 73%; by 2010 it had dropped to 64% Table 3 gives some indication of these trends.

Table 3

Year	Subsidy	Total Income	Surplus/Deficit
2000	400,000	548,716	10,638
2002	450,000	657,657	33,776
2004	515,000	678,842	70,538
2006	557,435	808,007	26,020
2008	615,000	957,060	80,620
2010	653,405	1,018,300	85,928

Source: APAM reports

In considering this pattern, it is worth emphasising that APAM is a trading activity. That is to say, it is heavily reliant for its financial success on paid attendance. That is always unpredictable. It now hovers around 25% of gross income. In any one event, like box office anywhere, it could go either way. The subsidy provided and the surpluses earned act as a safety net for that risk factor.

Several of the issues raised in these discussions and proposed in the recommendations have obvious, future financial implications. The study was not required to model these, but rather to indicate where they might arise. Nevertheless, it is clear that if APAM is to change in the ways indicated in the recommendations, it can only do so from a larger revenue base. For the foreseeable future that implies an increase in non-earned revenue. In all probability that can only be provided through public subvention.

The first and most obvious organisational change is the suggestion that APAM become an ongoing activity. Growing the capacity to devote time and attention to planning, research and communication year-round demands that development.

Without a more detailed assessment of this option it is impossible to be prescriptive as to its cost. The task itself would occupy effectively twice the time of the current biennial commitment. However, since the frequency of APAM itself would not change, there would not be twice the intensive work period in the lead up to, operation of and follow up to the market event.

How that is provided for would have to be the subject of detailed negotiation. However, the prime features would surely be that an organisation such as APA, or its equivalent in another city, was prepared, in a multiyear timeframe and under any new contract, to undertake that function over three markets (six years), as under the present agreement.

In that case, it seems unlikely that a transition to a year-round arrangement could be accomplished at less than double the current cost of managing the enterprise with suitable provision for increments over the period. In calculating that requirement, the APA management fee of \$135,000 per event might be taken as a guide.

The second issue to which the study has alluded is the desirability of granting greater permanency and autonomy to APAM as an entity. This could range from the extreme of incorporating it as a company Ltd (or equivalent), through establishing an intermediate semi-incorporated mechanism, to leaving the arrangement as it is but providing what might be called a board of advice to have some oversight of it.

In none of these instances need the additional financial outlays be great. They might include the one-off cost of incorporation and annual corporate fees but effectively little more than whatever costs might be incurred through the governance process. In short, such a change might be anything from cost neutral to very slight. Nevertheless, these are factors that must be taken into account in making any informed judgement as to the most prudent implementation of these proposals.

However, the largest area of change with significant cost implications would be in the area of showcasing and in particular, a shift to a greater emphasis on full-length presentations in the Spotlight program. A number of scenarios have been scoped earlier for this purpose. They range from the establishment of a grant program or GAL provision for self-presented work in the "fringe" to APAM's presenting such work itself, the cost of which might to some degree be offset by box office revenue.

In the present state of information, and in the abstract, is not possible to quantify the cost of these in any reliable fashion. The funding programs would in any event be a matter for judgement by the relevant agencies. In the case of the shift to more self-presentation, APAM is already hoping to move to some degree in that direction as early as 2012. To that end, APA has developed some budgetary models for a limited off-site program in 2012. These indicative costs may be taken as a reasonably clear guide of the scope of the additional resources likely to be needed. Their estimates to date suggest additional outlays of the order of \$100,000.

FOR FURTHER CONSIDERATION

30. That APAM should move to year-round, multiyear operation under a revised tender agreement;

31. That consideration be given to financially resourcing APAM to make that transition, as to which in the first instance a management fee of the order of double that currently provided to APA could be taken as a guide;

32. That under such an agreement consideration be given to providing APAM with a greater degree of operational and programming independence through the creation of a self-governing entity or similar mechanism, as to which the model offered by AIDC might be taken as a guide;

33. That, as an interim step, the Australia Council should convene a joint planning process with key stakeholders to work through these recommendations and, as part of that, seek to trial the most immediate of them in the 2012 edition of APAM.

Appendix

Over one hundred colleagues contributed to this study in one-to-one or group meetings either in person or by phone. Many of the Australian Major Performing Arts Group were surveyed electronically.

In a number of cases, these persons also supplied supplementary written material to the study.