



CircuitWest 5-year Touring Strategy



Findings from online survey



Department of Culture and the Arts
Department of Regional Development



ROYALTIES
FOR REGIONS



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Table of Contents

1	Executive Summary	1
	Objective	1
	Scope.....	1
	Respondents.....	2
	Methodology	2
	Key Findings	2
	Summary.....	8
2	Preamble	9
3	Project Brief	10
4	Scope	10
5	Key Definitions	11
6	Methodology	12
7	Respondent Profile	12
8	Research Findings	14
8.1	Presenter Respondents.....	14
8.2	Presentations by Artform	15
8.3	Presenter Programming	18
8.4	Factors affecting the number of shows presented	19
8.5	Type of work interested in	20
8.6	CircuitWest’s role.....	21
8.7	Presenters greatest frustrations	22
8.8	Touring tools, services and mechanisms	23
8.9	Consistency of presentations by companies	26
8.10	Preference for bookings.....	27
8.11	Presenter ability to negotiate a deal.....	27
8.12	Known level of demand	28
8.13	Factors affecting the number and type of shows programmed	28
8.14	Presenter marketing staff.....	29
8.15	Non-presenter respondent profile.....	30
8.16	Importance of touring for producers	30
8.17	Touring activity over past five years.	32
8.18	Familiarity and use of mechanisms, services & programs.....	33
8.19	Producer preference for developing tours	36
8.20	Producer showcase and market attendance	36
8.21	Producer understanding of how to secure a tour in W.A.	39
8.22	Potential factors to increase touring activity amongst producers.....	40
8.23	Producers’ greatest frustrations in regard to mounting tours.....	42

8.24	Producer suggestions for improvements to touring	42
9	Analysis of Research	44
9.1	Presentation of W.A. shows by W.A. presenters	44
9.2	Touring activity	45
9.3	Reasons W.A. presenters present shows	45
9.4	Local Government and cultural investment decision-making	45
9.5	Presenter programming decisions	46
9.6	Factors affecting potential increased touring activity	47
9.7	Delivery of technical information from producers	48
9.8	Presenter programming	48
9.9	Non-performance activity	49
9.10	CircuitWest's role within the sector	49
9.11	Regional producing support	49
9.12	Touring programs and tools	50
9.13	Regularity of touring by the same artist or company	50
9.14	Awareness of existing touring mechanisms, services and programs	50
9.15	Preference by producers for developing their tours in-house	51
9.16	Attendance at W.A. Showcase	51
9.17	Knowledge of how to tour in W.A.	52
9.18	Relationships	52
10	Summary	52
11	Appendix A – list of respondents	54
12	Appendix B – list of cities / towns represented	56
13	Appendix C – Producer frustrations in regard to mounting tours	57

Cover image:
 Barking Gecko Theatre Company; *In a Dark Dark Wood*
 Image by Juicebox

1 Executive Summary

This report is stage one of a consultation process to develop a five-year touring strategy for Western Australia on behalf of CircuitWest.

To better understand the needs and desires related to performing arts touring an online survey was undertaken with organisations and individuals active or interested in touring. This report details the findings from the online survey.

The online survey was designed and undertaken to inform statewide face-to-face consultations – the second stage of the project. The survey was not intended to be the means of determining touring strategies. As such, the Analysis of Findings presents a number of questions for further investigation and discussion.

Information gathered via the survey will be used to design the priorities of the consultation and as a reference for the development of the final strategy.

Acknowledgement: the online survey design was strongly informed by the content and format used by the Australian Performing Arts Centres Association created by Bronwyn Edinger. This has allowed for an analysis of state and national comparisons on some questions.

Objective

The key objective of this survey was to inform decision-making and the development of strategies for improvement of touring practice and outcomes in Western Australia. The information from this survey will be pooled with desktop research, in-depth interviews and group workshops.

The survey aims to:

- Provide a snapshot of the level of existing touring activity
- Inform thinking to increase touring activity
- Identify barriers and opportunities for performing arts touring
- Identify demand for touring amongst existing and potential presenters and producers
- Measure satisfaction with existing touring systems and practices

Scope

The scope of the survey included engagement with the following industry and non-industry stakeholders:

- Producers/arts companies – major and small to medium
- Festivals
- Independent artists

- Service organisations [e.g. Country Arts WA]
- Government – Local and State [Departments of Culture and the Arts and Regional Development]
- Presenters - Professionally managed arts centres
- Presenters – Community/Volunteer organisations

The scope was limited to live performing artforms as such did not seek respondents predominantly involved in visual arts or film.

The reach of the survey was focused on presenters statewide, including remote, regional and metropolitan participants and state and national producers interested in, or engaged with, touring in W.A.

It is important to note that Aboriginal and Torres Strait Islander peoples were not targeted specifically and as such it is the consultant's view that the level of information reported regarding performing arts activity from this sector is underrepresented.

Respondents

85 valid responses from regional, remote and metropolitan areas were received.

- 88% of responses were from Western Australia.
- 32% of respondents self-classified as producer/artists/creative.
- 39% of respondents self-classified as presenters
- 29% classified themselves as service organisation, government or other.
- Of respondents classified as presenters, 58% were professional presenters and 42% community presenters.

The location of respondents was as follows:

- 17% remote area; 50% regional; 12% City and 21% metropolitan.

Representation from presenters was:

- 21% remote; 54% regional; 12.5% City and 12.5% metropolitan.

Methodology

The survey was undertaken online over December 2016 and January 2017 using SurveyMonkey. The survey was distributed to a database of CircuitWest Members, APACA members and delegates of the WA showcase 2016. The survey link was also provided for distribution through several additional networks.

Key Findings

Key findings from presenter respondents

- 59% of all presenters did not produce or co-produce productions. 24% produced community or amateur productions. 12% co-produce professional work with other

companies or artists. No presenters produce professional productions in which they take the full financial risk.

- Amongst presenter respondents, 51% presented over eight productions a year in which they took some active process of selection or financial risk. 43% presented one or two productions in which they took some active process of selection or financial risk [as opposed to hiring the venue].
- 100% of community presenters presented four or less shows and 83% presented only one or two shows in which they took some active process of selection or financial risk.
- 29% of presenters presented one or two Western Australian productions. 7% of all presenters presented more than 10 Western Australian works.
- 54% of outcomes that presenters hope to achieve by presenting performance relate to community building.
- 70% of presenter respondents considered social contact, entertainment, pleasure, building social cohesion and mental stimulation as 'very important' reasons for presenting work.
- 87.5% of presenter respondents considered economic impact as an important or very important outcome.
- 65% of presenter respondents agreed or strongly agreed that it was important to make their own programming decisions irrespective of what other presenters are programming. This was a similar figure amongst professional and community presenters.
- 53% of presenters agreed or strongly agreed that their programming decisions are highly dependent upon neighbouring presenters in the area or region selecting the same shows.
- 81% of presenter respondents agreed or strongly agreed that a service that provided coordinated programming decisions between presenters (i.e. about shows for touring) would be of great benefit to them.
- 25% of presenter respondents agreed with the statement "I would present more shows if the shows available were shows that I liked."
- 56% of presenter respondents agreed or strongly agreed with the statement "I would present more shows if the shows available were shows that my community wanted".
- 60% of presenter respondents agreed or strongly agreed with the statement "I would present more shows if I had greater capacity to pay for the show fees".
- Almost two-thirds of presenter respondents [62.5%] agreed or strongly agreed with the statement "If I had more human resources in general in my organisation I would present more shows".
- Presenters were questioned about which areas of human resource that would most benefit. 44% of respondents indicated that additional resources in marketing and/or audience development would be most beneficial.

- 50% of professional presenters considered the service from producing organisations (delivery of technical/marketing information) average or below.
- 78% of presenter respondents agreed or strongly agreed that they would like to present a broader range of work for their community [i.e. different artforms dance, theatre, circus, opera, classical music etc.]
- 86% of presenter respondents agreed or strongly agreed that they would like to present a broader range of performance related activities (as opposed to actual performances).
- 64% of presenter respondents agreed or strongly agreed that they would like to present more indigenous work.
- 71% of presenter respondents agreed or strongly agreed that they would like to present more multi-cultural work.
- 79% of presenter respondents agreed that they would like to present shows that appear in the Perth International Arts Festival.
- 71% of presenter respondents agreed that they would like to present shows that appear in the FringeWorld Festival.
- The types performing arts activity presenters would like to program but have been unable to include: musical theatre productions, work that is culturally and linguistically diverse, Aboriginal and Torres Strait Islander work, large scale productions of any kind, contemporary music and disability based work.
- The reasons why presenters were unable to program this type of work included: affordability, lack of suitable venue/facilities, lack of organisational capacity, kind of work is not offered for regional touring and artist availability.
- 79% of presenters agreed or strongly agreed that it was important to them that some visiting companies spend more time in their community [beyond the performance only].
- 57% of presenters are interested in presenting their own festival.
- 50% of presenters indicated that CircuitWest should have a role identifying shows suitable for touring. 71% of professional presenters indicated that CircuitWest should have a role identifying shows suitable for touring.
- 36% of presenter respondents indicated they were not really clear about many of the purpose of many touring related programs and events.
- 50% of presenters responded that it was essential to present productions from W.A. every year. 36% of presenters responded that WA productions were 'nice to have' or not important' to present.
- 15% of presenters indicated that it was essential to present Productions from the major performing arts companies [e.g. Black Swan State Theatre Co, WA Ballet etc.] every year.
- 46% of presenters indicated that it was essential to present small-scale productions that can be presented in simple spaces with limited technical facilities every year.

- The cost of production/performance fee, technical specifications and venue crew requirements were the most significant factors affecting the selection of shows.
- 75% of respondents considered a video of the full-length production not essential or not important at all as a factor affecting their programming decisions. 84% of respondents considered a copy of the script not essential or not important at all for text-based productions.
- 54% of respondents regard the track record of the producer not essential to their programming decisions.
- An online menu of tour-ready productions and the opportunity to attend full-length productions were most highly rated by presenter respondents regarding the likelihood of their use of various tools and events, assuming a nominal fee was applicable.
- 69% of presenter respondents indicated that they would still travel to W.A. Showcase even if they could access all production information online.
- 69% of presenters believe their ability to secure visits from the same company or artist in successive years [e.g. each year, over three years] would greatly or somewhat impact on increased support for a company or artist. 77% believe it would greatly or somewhat impact on developing an audience for an artform. And 69% it would greatly or somewhat impact on increasing audience attendance. Known level of demand.
- 61% of presenters appear to be confident they know the level of demand [type and number of performances] from their community.
- 46% of presenters indicated their marketing resources and expertise was a significant consideration in the type of shows they presented.
- 69% of presenters indicated their marketing resources and expertise was a significant consideration in the number of shows they presented.
- 62% of presenters indicated the number and expertise of their staff (in general) was a significant consideration in the number of shows they presented.
- 46% of presenter respondents noted that they have no staff whose primary role it is to promote the shows they present. No presenters reported that they have more than one full-time person in this role.

Key findings from non-presenters

- 92% of non-presenter respondents indicated that undertaking touring activity was important to them or their organisation.
- The most significant reasons that non-presenters considered touring important [unprompted] were providing exposure or increasing profile of their organisation or the work/artists, creating employment opportunities and extending the product life of the work.

- 70% of respondents stated that in the 2011-12 financial year they had undertaken no metropolitan touring - in the 2015-16 financial year this figure was 54%.
- The percentage of producers not undertaking any state-based touring decreased from 50% in 2011-12 financial year to 29% in the 2015-16 financial year.
- 30% of respondents undertook no national touring activity in the 2015-16 financial year.
- The number of producer respondents undertaking no international touring activity decreased from 70% in the 2011-12 financial year to 61% in the 2015-16 financial year.
- A high level of familiarity and awareness of the majority of state based mechanisms, services and programs exists amongst non-presenters.
- The majority of producers [59%] reported that they had approached and negotiated touring proposals directly with presenters.
- Almost half of respondents [41%] indicated that they had participated in the National Touring Selector or the Australian Performing Arts Market.
- Over one third [36%] had participated in the Performing Arts Exchange.
- Almost one third [32%] of producers had not participated in any of the mechanisms and events listed.
- 77% of non-presenter respondents indicated that a face-to-face touring market should be held even if presenters could access online all the information required for them to program their production and could connect with the producer if further information was required.
- 37% of independent artists or independent producers indicated a preference to use a third party to produce their tour.
- 27% of small to medium organisations indicated preference to use a third party.
- 100% of major organisations indicated a preference to develop tours in-house.
- 27% of non-presenters had previously attended W.A. showcase.
- 41% of non-presenters indicated they would attend W.A. Showcase even if they didn't have a formal presentation opportunity or a specific production in mind. Almost a quarter of respondents [23%] indicated they wouldn't attend but believe other producers should have the opportunity to do so.
- 68% of non-presenters indicated they would attend a market or showcase other than W.A. Showcase in 2017 even if they didn't have a formal presentation opportunity or a specific production in mind.
- 55% of producer respondents have previously attended a national touring market.
- 48% of producer respondents feel they have enough information on how touring works in W.A. to effectively develop opportunities, 48% do not.
- 34% of producer respondents Strongly Agreed or Agreed with the statement that they do not understand how to secure a tour in W.A. 47% Strongly Disagree or Disagree.

- 70% of non-presenters indicated a likelihood of them undertaking more touring activity if there was a service to assist in managing the delivery of the tour.
- 90% of producer respondents indicated they would undertake more touring activity if they could secure investment to tour regularly over a three year period.
- 90% agreed strongly agreed that would undertake more touring if they could establish long-term relationships with presenters.
- 80% strongly agreed that they would undertake more touring if there was greater demand from presenters for the style of genre of work at their organisation made.

Whilst satisfaction levels with existing touring systems and practices was not specifically measured, key frustrations from the sector focused on:

- The high cost of touring activity and the resources required to achieve success
- Capacity/expertise - the human resources and ability to perform the tasks required
- Audience demand – the lack of and the propensity for risk taking
- Geographic isolation
- Facilities – limitations of physical infrastructure
- Logistics – the difficulty in securing tours among a highly varied set of circumstances

Key barriers for performing arts touring include:

- Apparent lack of importance for W.A. presenters to present W.A. produced shows.
- A lack of familiarity with touring programs, services and mechanisms.
- Minimal marketing resources (business to business as well as business to consumer).
- Limited audience research.
- Geographically dispersed network and the inability to meet face to face regularly.
- Limited capacity amongst smaller and volunteer presenters as well as skills gaps.
- Lack of cultural plans in local government authorities.
- Inability to plan touring activity in a strategic manner [as opposed to ad-hoc/project-based].

Key opportunities for performing arts touring include:

- Develop understanding of the ability for touring activity to deliver on local government community development objectives.
- Long-term planning and secure ongoing investment [three-year minimum] for individual organisations to develop relationships with presenters, artists and/or audiences.

- Professional development for producers and presenters [in regard to developing tours and delivering touring performing arts activity].
- Increased capacity for CircuitWest to assist the connection and of sector participants and building their touring capacity.
- A coordinated approach amongst agencies and sector participants to the delivery of touring programs.
- Centralised programming assistance.
- Specialised marketing and audience development support.
- Longer periods of time for the touring company to connect with the community physically and virtually.
- Performing arts centres extending their role beyond receiving houses [Presenters producing work].
- Development of segmented touring circuits.
- Increase the diversity of work presented.
- Increase the presentation of W.A. produced work.

Summary

This report significantly contributes to the development of ideas for discussion and future strategies to support touring opportunities in Western Australia.

Several barriers and opportunities exist in regard to performing arts touring activity. These barriers appear to focus on three key areas:

- Forward planning
- Marketing communications and audience research
- Stronger networks and relationships

Opportunities focus on these same three areas and can be expanded to include:

- Relationships specifically with local government and the connection between performing arts activity and their community development objectives.
- Building presenter resources to support local artists and creators and the ability to support a hub-and-spoke approach to extend reach.
- Developing a balanced mix of programming.

Indigenous performing arts activity is under-represented in this report and requires additional research to discover opportunities particularly in regional areas and by non-subsidised performance makers.

Overwhelmingly, this report has identified the need for touring strategies to be developed that are specific and tailored to meet a highly varied set of conditions [skills, facilities, budgets and communities] that exist across the state.