

Growth State: Creative Industries Sector Strategy

Submission from Live Performance Australia

1. INTRODUCTION

Live Performance Australia (LPA) welcomes the opportunity to provide feedback to the South Australian Government's Growth State.

LPA is the peak body for Australia's live performance industry. Established over 100 years ago in 1917 and registered as an employers' organisation under the *Fair Work (Registered Organisations) Act 2009*, LPA has over 400 Members nationally. We represent commercial and independent producers, music promoters, performing arts companies, venues (performing arts centres, commercial theatres, stadiums and arenas), arts festivals, music festivals and service providers (such as ticketing companies and technical suppliers). Our membership spans from small-medium and not-for-profit organisations to large commercial entities. LPA has a clear mandate to advocate for and support policy decisions that benefit the sustainability and growth of the live performance industry in Australia.

LPA's submission is informed by feedback received from our Members, including festivals, performing arts centres and performing arts companies. We understand that some LPA Members have contributed to sector strategies or prepared their own submissions providing feedback into the consultation process.

2. SOUTH AUSTRALIA'S CREATIVE INDUSTRIES

South Australia has built a strong reputation as a leader and innovator in arts and culture. In acknowledgment of its vibrant music scene, Adelaide is the first and only designated United Nations Educational, Scientific and Cultural Organization (UNESCO) City of Music in Australia, and host to world class music and arts festivals. Key events, such as Adelaide Festival, Adelaide Fringe Festival and WOMADelaide, are internationally renowned and intrinsic to South Australia's celebrated identity as the nation's "festival state". Festivals such as Adelaide Cabaret Festival and Adelaide Guitar Festival are unique to the global festival scene and, if leveraged strategically, represent a great opportunity for elevating South Australia's live performance industry. South Australia is also defined by a rich arts landscape that prides itself on meaningful engagement with Aboriginal arts and stories.

LPA's research confirms South Australia's sustained presence in Australia's live performance industry. In 2018, South Australia:

- generated over \$130 million in ticket sales revenue (a 7% increase from 2017);
- generated more than 2.2 million attendances (a 5% increase from 2017), primarily through Contemporary Music, Festivals (Multi-Category) and Musical Theatre; and

- generated 34% of nationwide Festivals (Multi-Category) revenue and 37% of nationwide Festivals (Multi-Category) attendance.¹

LPA acknowledges the new inclusive narrative heralded by the *Arts and Culture Plan for South Australia 2019 – 2024* (Arts Plan) and wants to ensure South Australia continues to nurture local talent, attract investment and host events that draw local, interstate and international audiences. A stronger creative economy drives economic growth and supports social and cultural wellbeing, empowering all South Australians.

3. KEY CHALLENGES AND OPPORTUNITIES

a. Trade and Investment

Cultural diplomacy and exchange

The arts can help create connections and support cultural diplomacy in a community that is increasingly more diverse and multicultural. The creative sector in Australia generates exports of \$3.2 billion annually.² The total visitor spend in Adelaide directly attributed to ‘cultural heritage’ related tourism was an estimated \$375 million in 2013-2014.³ As global demand for cultural exports increases, it is anticipated that there will continue to be steady growth in Asian tourism markets.⁴

South Australia is defined by an exceptional breadth of creative expression and storytelling. Its distinctive work in the disability arts sector is supported by Access2Arts. The artistic works of South Australia’s Aboriginal population showcase extraordinary sophistication. Adelaide hosts the largest Fringe festival in the southern hemisphere. Adelaide Festival Centre’s OzAsia Festival is Australia’s leading contemporary arts festival engaging with Asia attracting 200,000 attendances in both 2018 and 2019.

There is an opportunity to further build and deepen meaningful intercultural relationships through arts and culture. This will enable access to international markets and develop future touring activities (Arts Plan Recommendation 11.1). In the short term, establishing a low-cost Artist-in-Residence program could forge long-lasting networks and build our understanding of overseas markets, resulting in increased touring and trade opportunities for South Australia. A bold longer-term plan could be to establish a cultural exchange program where artists from South Australia and Asia tour to each other’s regions to gain exposure and consolidate their local brand. Conversely for local artists, this could also include exposure to Asian arts forms, which could inform their career development and artistic practice.

There is also further opportunity for cultural networks to be strengthened through raising the profile of South Australian arts and culture at functions held at Australian Embassies. General overseas trade shows conducted by Federal Government agencies, such as Austrade and the Department of Foreign Affairs and Trade, can also support increased export opportunities for the knowledge and expertise of South Australian events, companies and artists. Ultimately, investment in these relationships may lead to other opportunities for South Australia, in terms of tourism, international education, trade and investment.

¹ Ernst and Young (2019), *2018 Ticket Attendance and Revenue Report*, Report for Live Performance Australia

² SGS Economics and Planning (2013), *Valuing Australia’s Creative Industries*

³ Adelaide City Council (2015), *Adelaide Heritage Tourism: Economic Value of Heritage Tourism – Adelaide 2015*

⁴ South Australian Tourism Commission (2019), *The South Australian Visitor Economy Sector Plan 2030*

Recommendation 1:

That the South Australian Government establish:

- in the short term, a low-cost Artist-in-Residence program to forge long-lasting networks and build our understanding of overseas markets, resulting in increased touring and trade opportunities
- in the longer-term, a cultural exchange program between South Australia and Asia to further build and deepen meaningful intercultural relationships within the Asia Pacific region and with established and emerging Asian communities in South Australia.

Recommendation 2:

That cultural networks and export opportunities be strengthened through raising the profile of South Australian arts and culture at:

- functions held at Australian Embassies
- general overseas trade shows conducted by Federal Government agencies, such as Austrade and the Department of Foreign Affairs and Trade.

Music Exports

UNESCO Creative City status acknowledges the diversity of Adelaide's music making and the collaboration between government, education and private sectors in developing the local music industry. As a member of the UNESCO Creative Cities Network, Adelaide is in a prime position to champion export opportunities for local musicians, with the support of both local and state government.

Contemporary Music contributed the highest share (48.4%) to SA's total ticket sales revenue in 2018. Between 2017 and 2018, ticket sales revenue and attendance in Festivals (Contemporary Music) increased by 37.4% and 57.5% respectively.⁵ Music SA's Live Music Census also reflects sustained growth in the live music sector across the state.⁶ Working with Adelaide Festival Centre, Music SA and the Adelaide City Council, the Department for Innovation and Skills could develop a professional development program for musicians that complements what is already offered by Sounds Australia. The program could support marketing and promotion of musicians and their product, provide education on music publishing, copyright and regulations, and help build global business opportunities and networks for musicians. Championing international success of local musicians would also attract musicians and artists from interstate to live and work in Adelaide and South Australia.

Networks, branding and exposure are particularly crucial when commercialising and exporting local product. The *Made in Adelaide Program* was used to support South Australian cultural exports at Edinburgh Fringe Festival in 2019 and will be used again in 2020. This program and its model could be expanded to the branding and export of South Australian musicians and their product. Depending on the success of the professional development program for musicians, it could be expanded to include other live performance forms, including theatre and musical theatre.

⁵ Ernst and Young (2019), *2018 Ticket Attendance and Revenue Report*, Report for Live Performance Australia

⁶ Music SA (2019), *Live Music Census 2019*

Recommendation 3:

That the South Australian Government work with Adelaide Festival Centre, Music SA and the Adelaide City Council to develop a professional development program for musicians, which supports marketing and promotion of export potential, and helps build global business opportunities.

International touring

While high profile events and festivals directly drive visitation in South Australia, there are opportunities for South Australia to be known for more than being the 'festival state'. South Australia is home to some world-class small to medium theatre companies producing shows for children, young people and families, notably Patch, Slingsby and Windmill Theatre Co. These companies regularly tour their productions around Australia, as well as overseas to Asia, Europe and North America. They are showcasing Australian creativity and artistic excellence on the world stage, as well as reaching the next generation of audiences in broad and diverse international markets.

The value of investing public funds into performing arts companies cannot be understated. Additional strategic support of South Australian arts organisations to tour internationally would help further leverage these organisations and encourage greater global awareness of South Australia companies and its broader creative brand. Moreover, increased international touring earns income for the companies and provides consistent work for South Australian presenters, arts companies and artists, thereby strengthening recognition and remuneration of the South Australian arts and cultural workforce.

Recommendation 4:

That the South Australian Government further support and leverage international touring activities and international promotion of South Australia based arts organisations.

Regional touring and access

There is currently no dedicated fund to promote and tour professional productions, performances, exhibitions or programs to regional and outer-metropolitan South Australia. Daytrip arts tourists tend to travel within their home state, and regional touring enables more Australians to access and immerse themselves in exceptional cultural experiences. Regional touring also supports local jobs and economies, and expands the audience reach of professional South Australian-based presenters, arts companies and artists into neighbouring states and territories.

Net touring costs and costs associated with core marketing, administration and organisational overhead functions are significant for both producing companies and venues. Many arts organisations are experiencing increased financial and resource strain. Therefore, regional areas not only suffer from the tyranny of distance, but also from a lack of local capability and capacity. For example, staff at regional venues are often 'jacks of all trades' and do not have the resources to adequately market a show. This may result in not enough tickets being sold to make a regional tour viable for the producing company and/or venue.

Bringing artists and live productions, including those from interstate, to regional communities would support intrastate and interstate visitation and income. Regional touring would be more successful if marketing and audience development capability existed in the producing company to support regional venues, or if regional venues could access a subsidy on the fees charged by the artist or producing company to bring works to the regional venue. Works could include showcased acts from

festivals. Consideration should be given to how best to promote audience development and include a subsidy for sell-off fees or high-risk work.

The South Australian Government must also consider investment in regional touring and access in the context of the National Touring Scan (the Scan), which is currently being undertaken by the Australia Council. The Scan will incorporate a high-level analysis of the current touring environment and structural gaps and opportunities. The Scan will reflect what is required to build sustainability of performing arts companies and enhance regional engagement with the arts. This includes consideration of investment in digital content and digital infrastructure (see Recommendation 8).

Recommendation 5:

That the South Australian Government establish a dedicated regional touring fund for producing companies and venues that includes funding for investment in digital content and digital infrastructure, and core marketing, administration and organisational overhead functions.

b. Infrastructure

Cultural infrastructure

A key element of a thriving arts and cultural landscape includes first-class infrastructure in which to present live performances and support South Australia's ability to establish a unique cultural hub that attracts tourism and builds a dynamic state economy. A suite of infrastructure assets needs to:

- accommodate growth in current and future audiences. Between 2010 and 2018, attendance at live performances in South Australia has grown 114%, while revenue has increased by 92%⁷
- adjust to the growth in South Australia's population, which is projected to grow from 1.75 million to a likely 2.05 million in 2041⁸
- attract national and international artists and tourists, to help achieve the ambitious target of a \$12.8 billion Visitor Economy by 2030⁹
- include venues of varying sizes that can accommodate live music and productions by local, commercial and interstate companies
- have the capability to accommodate productions, which increasingly have greater technical requirements in order to meet audience expectations.

Our Members report that there is a shortage of suitable venues in South Australia, namely:

- a concert hall
- first-class theatres with audience capacity between 250 – 300 seats, as well as 500 – 650 seats
- rehearsal spaces.

Adelaide's designated status as a UNESCO City of Music demands a concert hall that serves as a dedicated home and hub of music and music activity in South Australia. In order to cement Adelaide's national and international reputation as a city that espouses quality, quantity and diversity of music making, it is crucial that infrastructure supports UNESCO objectives. This is

⁷ Ernst and Young (2019), *2018 Ticket Attendance and Revenue Report*, Report for Live Performance Australia

⁸ Department of Planning, Transport and Infrastructure (2017), *Population Projections for SA*, <https://www.saplanningportal.sa.gov.au/data_and_research/population#future_population>

⁹ South Australian Tourism Commission (2019), *The South Australian Visitor Economy Sector Plan 2030*

particularly apparent when many of the other UNESCO Cities of Music, such as Almaty, Brno and Chennai, boast world-class concert venues that offer a unique and immersive experience.

As South Australia's largest performing arts organisation, Adelaide Symphony Orchestra plays a major role in Adelaide's cultural and economic vibrancy. However current venues, such as the Adelaide Town Hall, lack quality acoustics, are too small and have limited access for both the orchestra and its audience. LPA notes the recommendation in the Arts Plan (Arts Plan Recommendation 1.4) to assess the viability of an acoustic concert hall in Adelaide. LPA urges investment in a concert hall to house the Adelaide Symphony and Adelaide Youth orchestras, and act as a hub for music education in the state.

LPA also supports the establishment of a purpose-built arts precinct in Adelaide that could include the proposed black box theatre (Arts Plan Recommendation 1.5), and that connects existing theatre infrastructure and the wider performing arts sector. Exploring what the precinct might incorporate could be determined through wider consultation with South Australian theatre companies. An arts precinct would allow arts makers and artists to be physically situated near rehearsal space and offer performance, operational and production facilities in which to present and rehearse productions. It would attract arts makers, artists, arts administrators and technicians to live, work, collaborate and invest in South Australia.

In addition, having the right infrastructure is important for ensuring South Australia is included in the national touring circuit. When touring the eastern seaboard, many productions look to see if there is an opportunity to come to South Australia. However, lack of venue availability often makes it challenging to schedule the tour in South Australia. Subsequently, South Australian audiences miss out on the opportunity to see quality productions within their own state.

Recommendation 6:

That the South Australian Government invest in performing arts infrastructure such as:

- a new acoustic concert hall
- a purpose-built arts precinct in Adelaide that incorporates a new black box theatre and rehearsal spaces.

Cultural hubs

Arts makers are innovators and risk takers. The process of bringing an idea to life can often take many years, and support should be available for arts makers across South Australia to take creative risks. Access to active creative spaces is integral to the creative process and provides more opportunities for exposure and collaboration. It is therefore crucial that these spaces are available across the state for arts makers to connect, experiment, learn, expand and diversify their work in both the short-term and long-term. This is consistent with Recommendations 1.6 and 3.2 in the Arts Plan and will ultimately impact the cultural experience offered within South Australia.

Performing arts is the most popular domestic arts tourism daytrip activity in Adelaide and arts daytrips to South Australia have increased 14% since 2014.¹⁰ There is an opportunity to establish cultural hubs in regional and outer metropolitan areas of South Australia. Cultural hubs would improve the liveability of communities and help to stimulate commercial and communal activity, including through local and international tourism. Encouraging cultural engagement, recognition and support among arts makers and audiences in both metropolitan and regional and outer

¹⁰ Australia Council (2020), *Domestic Arts Tourism: Connecting the country*

metropolitan areas would also feed into the wider arts and cultural landscape and stimulate South Australia's live performance revenue.

Recommendation 7:

That the South Australian Government support local government to establish and maintain cultural hubs in regional and outer metropolitan areas of South Australia.

Musical theatre hub

Musical theatre is a popular genre of live entertainment. According to LPA's research, musical theatre contributes the second highest share of attendance and revenue nationally, and within South Australia, it contributes the third largest share of attendance and revenue.¹¹

There is an opportunity to capitalise on musical theatre's popularity, making it a key pillar for industry development. A bold plan could be to cultivate Adelaide into a hub where commercial musical theatre is developed and produced, underpinned by a skilled creative and technical workforce. The hub could support the experimentation of new ideas. New original productions could be tested in the South Australian market, prior to launching in larger markets. Importantly, a musical theatre hub would provide stable employment for performers, technicians and creatives, while enabling them to gain valuable experience and develop new skills. It would also provide a potential pathway for those graduating from training institutions and mitigate the flight of local talent interstate.

Recommendation 8:

That a plan be jointly developed by the South Australian Government and the industry to make Adelaide a hub for the development and production of commercial musical theatre in Australia, including construction and technical servicing.

Digital content

Increasingly, arts organisations are creating both live and digital content to expand their business models and audience reach. Digital content helps build engagement with audiences, builds company brands (locally and internationally) and is a vital component of the creative ecosystem. Practicable or environmentally sustainable digital theatre also has a role to play when physical touring is not feasible. Investment in a Digital Cultures Fund to support digital infrastructure (Arts Plan Recommendation 4.2) would improve creation, delivery and accessibility of digital content and establish a larger audience in interstate and intrastate rural and regional areas, including in schools and community centres.

Recommendation 9:

That the South Australian Government invest in grants and infrastructure to develop and enhance the creation and delivery of digital content to support companies' business development activities, to improve accessibility and establish a larger audience in rural and regional areas.

¹¹ Ernst and Young (2019), *2018 Ticket Attendance and Revenue Report*, Report for Live Performance Australia

c. Skills and Innovation

New training pathways

A key challenge for many performing arts companies is being able to access certain skills. Many performers and arts workers move interstate to pursue opportunities in larger markets. While it can be challenging finding suitably qualified performers in South Australia, the skills that are particularly in short supply are those of technicians (i.e. lighting, sound), company managers, event managers (i.e. festival management, programming and production) and stage managers.

Due to the limited talent pool locally, companies often need to import skills from interstate to work on productions. This can be a significant cost burden on companies, which are already operating on very streamlined budgets. There is a need to develop and nurture talent locally, while at the same time giving them reason to stay – that is, having a thriving performing arts sector where there are enough opportunities to sustain a career – and also encouraging flexibility within these roles.

Having a quality arts workforce is dependent upon having nationally competitive training institutions that can produce talent that meets industry needs. Support of existing performing arts and industry education providers, such as the University of South Australia and Adelaide College of the Arts, is a priority. There is an opportunity for South Australia to establish a performing arts academy that is located on one campus with one faculty, to support the state's standing as the epicentre of quality arts tertiary education (Arts Plan Recommendation 10.1).

Ways in which the academy could be differentiated from other training providers around Australia include by offering:

- a specialist musical theatre training course
- an enhanced technical training course
- an Asia-focused curriculum, that is able to attract international students to study at the academy and to ensure that Australian arts graduates are 'Asia ready'.

Recommendation 10:

That the South Australian Government support existing performing arts and industry education providers and consider establishment of a single high-class performing arts academy located on one campus with one faculty.

Mentorship

Early exposure to the creative industries, through arts-based work experience programs, industry-based training and mentoring programs, are all means to gain valuable skills, develop long-lasting professional networks and encourage talent. Without tailored support, new and emerging artists and arts makers are unable to meet their full potential.

Creativity is increasingly recognised as a driver of economic growth, and a critical skill within the current and future workforce.¹² In addition, industry-specific skills such as financial management, marketing, digital literacy, audience development and corporate philanthropy are crucial in maintaining a vibrant 21st century arts and cultural landscape.¹³

¹² Bureau of Communications and Arts Research (2019), *Creative skills for the future economy*, p. 5

¹³ Service Skills SA (2013), *Creative Futures Report*

Mid-career artists and arts makers would also benefit from formalised mentorships with industry leaders, particularly in the field of technology and innovation, which is increasingly being driven by creative industries. Professional development and ongoing upskilling are essential to access more revenue and entrepreneurial opportunities.

Increased connectivity creates a sustainable foundation within the wider performing arts sector. There is an opportunity for Arts South Australia and the TAFE sector to partner to develop lifelong learning modules for the sector, including for makers, creators and administrators (Arts Plan Recommendation 10.4). Matching students with experienced mentors during their studies will help bridge the skills gap and expand their capabilities beyond the creative industries. With the right investment, the South Australian arts sector can be vibrant and appealing, as well as support broader economic and social goals, such as jobs, inclusion and accessibility.

Recommendation 11:

That industry mentorships and learning modules are introduced for students, and industry mentorships established for mid-career artists and art makers, to develop industry-specific skills and access more revenue and entrepreneurial opportunities.

4. FURTHER INFORMATION

Thank you for the opportunity to provide feedback to the South Australian Government's Growth State.

Should you have any queries regarding our submission, or would like to discuss these issues further, please do not hesitate to contact LPA at any time.

Yours sincerely

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