



Australian  
Performing  
Arts  
Centres  
Association



## Performing Arts Touring Needs Analysis

April 2015

# Table of Contents

<b>EXECUTIVE SUMMARY.....</b>	<b>3</b>
Methodology.....	3
Respondents.....	3
Presenters.....	3
Producers.....	4
Face-to-Face Markets.....	5
National Touring Knowledge.....	5
Changes to National Touring.....	5
<b>BACKGROUND.....</b>	<b>6</b>
<b>Methodology.....</b>	<b>6</b>
<b>FINDINGS.....</b>	<b>6</b>
<b>Respondents.....</b>	<b>6</b>
Primary Function.....	6
Location.....	7
Financial Turnover.....	8
<b>Presenters.....</b>	<b>9</b>
Activity.....	9
Presenter Programming Challenges.....	10
Current Selection Mechanisms.....	11
Programming Needs.....	12
Information Needs.....	14
Future Tools and Events.....	15
Tour Development.....	17
Programming Administration and Planning.....	17
Marketing.....	19
<b>Producers.....</b>	<b>20</b>
Activity.....	20
Producer Touring Challenges.....	20
Current Touring Mechanisms.....	22
Future Touring Tools and Events.....	23
Tour Development.....	27

<b>Face-To Face Markets</b> .....	<b>28</b>
Presenters .....	28
Producers .....	29
Market Preferences.....	30
National Touring Knowledge.....	31
Presenters .....	32
Producers .....	32
<b>Changes to National Touring</b> .....	<b>33</b>
Stakeholder Opinions.....	35
<b>APPENDIX</b> .....	<b>37</b>

Prepared by Bronwyn Edinger

# Executive Summary

---

In March 2015 APACA conducted a survey into APACA members' satisfaction levels and performing arts sector touring needs. The questionnaire primarily focused on the needs of producers and presenters, as the actions of other stakeholders are driven by those needs. For the sake of clarity, the two primary stakeholders are referred to as "presenters" and "producers". Presenters are largely performing arts centres and venues, while producers include producing companies, independent producers and performance-makers.

## **Methodology**

The questionnaire was conducted online through Survey Monkey, with an ultimate total of 298 responses received.

## **Respondents**

A good representation from those engaged in performing arts touring was achieved.

- 47% were presenters and 37% were producers
- Over half (55%) of the respondents came from Victoria and NSW.
- A slight majority of presenters were located in regional and remote areas, and the majority of producers are located in city and metropolitan areas.
- The majority of producer respondents (72%) had annual expenses of under \$1M, while presenter respondents were more evenly distributed, with 73% under \$2.5M

## **Presenters**

- 16% of presenters programmed 8 – 12 shows per year, and 44% of presenters programmed more than 13 shows per year, suggesting a significant market for touring productions.
- The top challenges for presenters in programming an annual season were the combined issues of sourcing appropriate product for their needs and delivering a balanced program, followed by financial or budget issues. Other significant challenges were in audience development and marketing, and touring schedules – ie the difficulty in matching presenter and producer availability.
- Presenters were asked to approximate the percentage of their seasons selected from a range of program sources. Almost all producers negotiate directly with producers or touring agents for one or more shows in their program. The next most frequent sources were locally produced work – by the venue and by local organisations – followed by the combination of Cyberpaddock and Long Paddock.
- When asked about the importance of particular types of productions, "productions from your state" attracted the highest number of respondents who felt they were essential every year (56%), followed by "productions created in your community" (46%), Majors (41%) and interstate production (39%).

- In regard to productions, genres or artforms that presenters would like to program but were unable to, programming the Majors or large scaled productions were highest on the list of specifics, followed by dance. The issues around dance are more complex. Respondents reported a lack of ability to source and afford classical dance as well as some contemporary, but there was also a strong notion of the difficulty of finding an audience for contemporary dance. Presenters noted some disinterest in touring by a few producers they would like to program.
- Technical specifications was the most critical piece of information presenters required to base programming decisions once they had received the basic information on a production (artform/genre, synopsis, artistic personnel). Least critical to the programming decision are sponsorship commitments and receiving a copy of the script.
- Presenters rated out of 10 how likely they would be to use particular tools and events in the future. Most favoured was an online menu of tour-ready product. Least attractive were access to programming brokers and professional development in programming.
- When booking a production, almost half of respondents (45%) preferred to deal directly with the producing company.
- Season launch was the most pressing deadline for presenters when programming.
- In selecting productions, almost half the presenter respondents (46%) agreed that availability of marketing resources had a great deal of impact on their choices. Only 38% employed full-time marketing staff.

### **Producers**

- Independent producer and artists represented 49% of producer respondents, with small to medium companies representing a further 41%.
- Most respondents (81%) had touring experience in the last five years.
- The three most frequently cited touring challenges for producers were selling to presenters, costs and financial viability of touring, and building itineraries.
- The data on use of touring mechanisms was segmented by producer type. Majors and independents were more likely to preference "direct negotiation with presenters", while small to medium companies use Cyberpaddock more than other mechanisms.
- In terms of which touring mechanism worked best, producer attendance at another state's showcase had a high rate of success. Out of the selection set, the mechanisms least likely to help a producer create a tour appeared to be their own state's showcase and Cyberpaddock (alone), demonstrating the importance of an integrated touring strategy.
- Producers rated out of 10 how likely they would be to use particular tools and events in the future. Most attractive was the opportunity for presenters to see a full-length work, closely followed by formal opportunities to pitch and accessing the contact information of presenters. When segmented, all producer types still favoured the opportunity for presenters to see their productions, however the smaller the producer, the greater the need for touring support, so the more attractive all the other opportunities were. Least useful for all producers was live streaming of touring markets.

- 60% of producers cited that they would prefer to undertake their tour development in-house.

### **Face-to-Face Markets**

- Almost two-third (64%) of presenters indicated they would travel interstate to attend a face-to-face market even if they could access all the information they required to program a production online.
- 79% of producers confirmed that they felt a market was still necessary and of those, 37% said they would attend regardless of whether they had a pitch spot or not and a further 23% would attend even if they didn't have a production to pitch.
- Presenters had less capacity to attend markets (85%) than producers (94%). 50% of both had the capacity to attend 2 or more times per year.
- The majority of respondents (60%) preferred to minimise time and cost by attending touring markets either close to home or in capital cities.
- Half of the respondents said that time away from their organisation was not an issue as long as the content of the event was useful.

### **National Touring Knowledge**

- More presenters than producers are confident in their knowledge of national touring, with 71% of presenters agreeing they have sufficient understanding as opposed to 51% of producers.
- Respondents offered suggestions on how this situation could be improved. More information opportunities was the strongest theme from the comments.

### **Changes to National Touring**

Respondents were asked to contribute further ideas about changes to national touring. These comments covered topics such as types of programming and touring, markets and events, tour development mechanisms, funding and professional development.

Overall there is a tension between the perception of the need for one-stop shop with a streamlined approach and catering for the specific needs of a wide variety of stakeholders. The overall survey response also demonstrates a real need for a better level of understanding and industry knowledge of touring, but at the same time respondents are least interested in professional development. It is a possibility that respondents don't equate professional development with the provision of those information activities they have recommended in their comments.

The research supports an on-going need for both face-to-face and online markets, but also points to issues that are not being addressed currently through these mechanisms, such as the programming challenges of presenters and the information and support issues for producers.

## Background

---

The Performing Arts Touring Alliance (PATA) and the Australian Performing Arts Centres Association have been working on improvements to national performing arts touring. Changes to the national touring market mechanisms highlighted the requirement for robust data on the needs of the primary stakeholders – presenters and producers. At the same time APACA identified that it required a better understanding of members' current needs and attitudes towards membership benefits. The prevalence of surveys within the sector and concern about respondent fatigue led to the decision to combine both surveys into the one questionnaire.

This report analyses the touring needs component of the survey only.

## Methodology

In March 2015 an online questionnaire was created through Survey Monkey and circulated as a link through the APACA members' online discussion list. The link was also sent to industry touring bodies requesting they distribute the link to their constituents. The link was sent out through the Cyberpaddock email mechanism and an email was also sent to APACA's master database.

An incentive was offered - the chance to win a free registration to the 2015 APACA conference. A total of 332 responses were received. Unfortunately some respondents did not follow the instructions to submit one response per organisation. These have been identified through IP numbers and the data has been adjusted accordingly where appropriate, reducing the total responses to 298.

## Findings

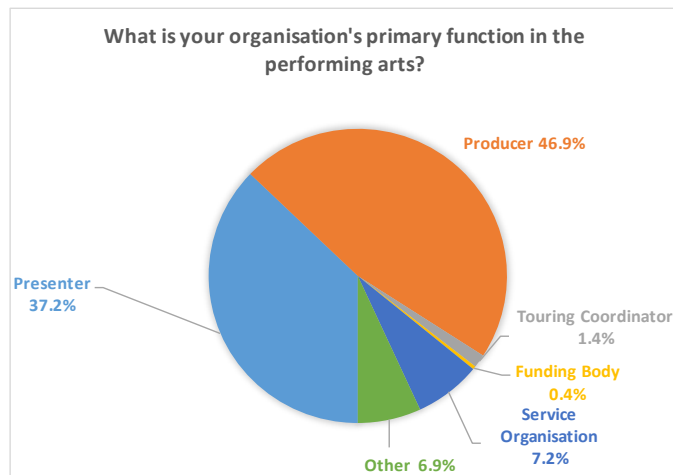
---

### Respondents

For the sake of clarity, the two primary stakeholders are referred to as "presenters" and "producers". Presenters are largely performing arts centres and venues, while producers include producing companies, independent producers and performance-makers. Service providers, touring coordinators and funding agencies are often aggregated as "other" except unless otherwise noted.

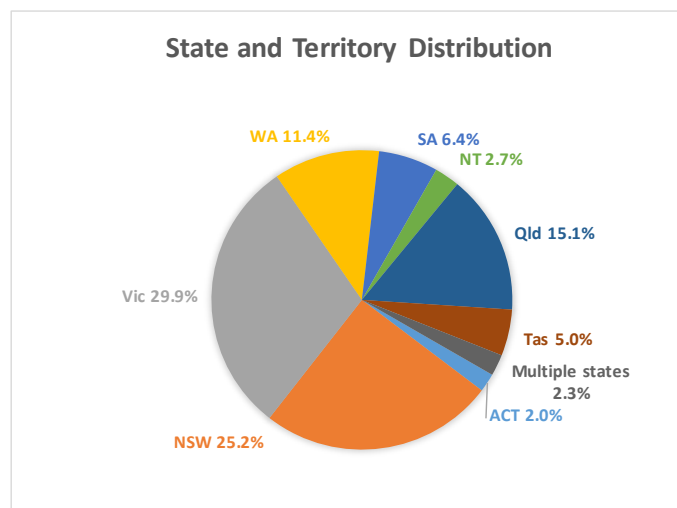
### **Primary Function**

Respondents fell into two main categories. 47% were presenters and 37% were producers. In this question, "Other" consists of multifunction organisations such as those who present and produce in equal measure. The following graphs shows the breakdown of the primary function of respondents.

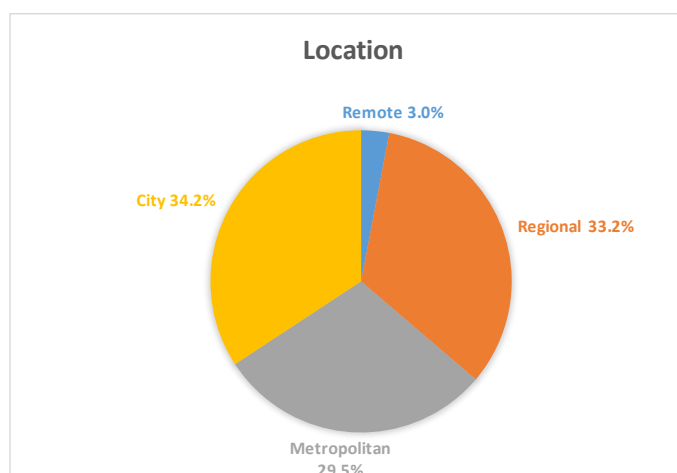


## Location

Over half of the respondents came from Victoria and NSW.

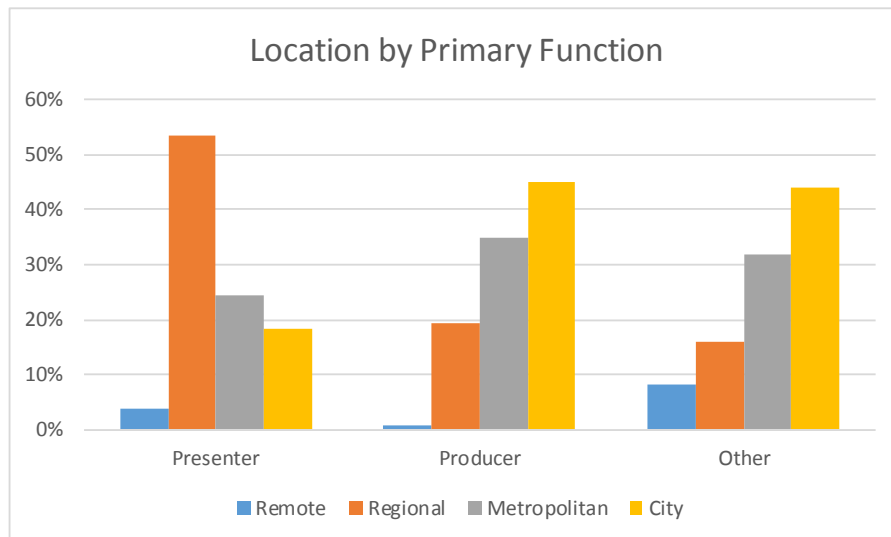


Just over one third (36.2%) of respondents came from regional and remote areas.



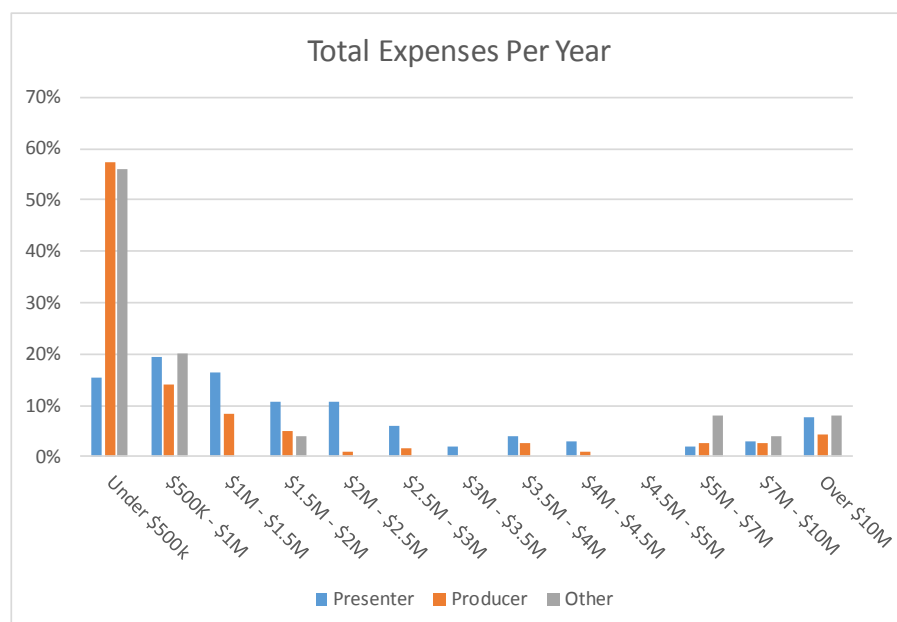


When the data set is further analysed it shows that a slight majority of presenters are located in regional and remote areas, and the majority of producers are located in city and metropolitan areas.



### Financial Turnover

Comparing the turnover of arts organisation is difficult due to the different accounting approaches between venues that are managed by local government and other arts organisations. Instead, respondents were asked about total annual expenses in an endeavour to more accurately compare like with like.

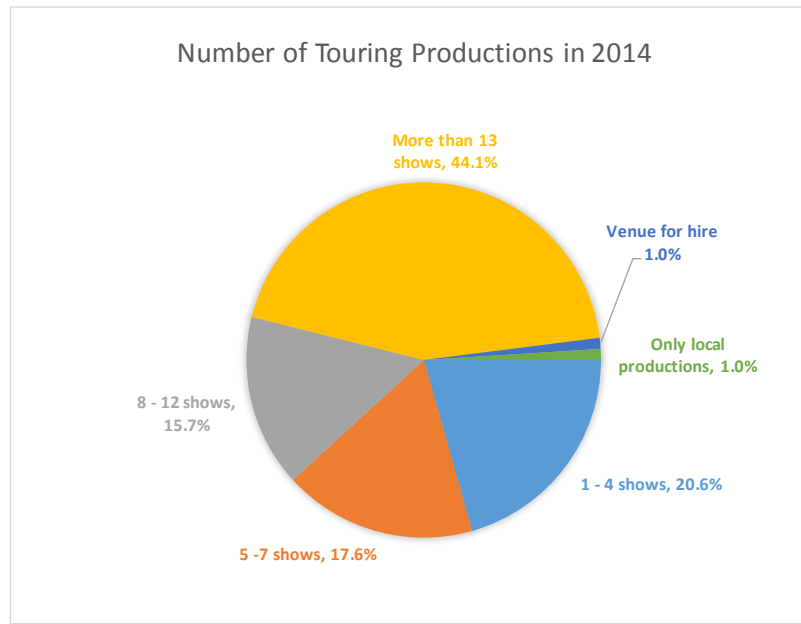


The majority of producer respondents (72%) had annual expenses of under \$1M, while presenter respondents were more evenly distributed with 73% under \$2.5M

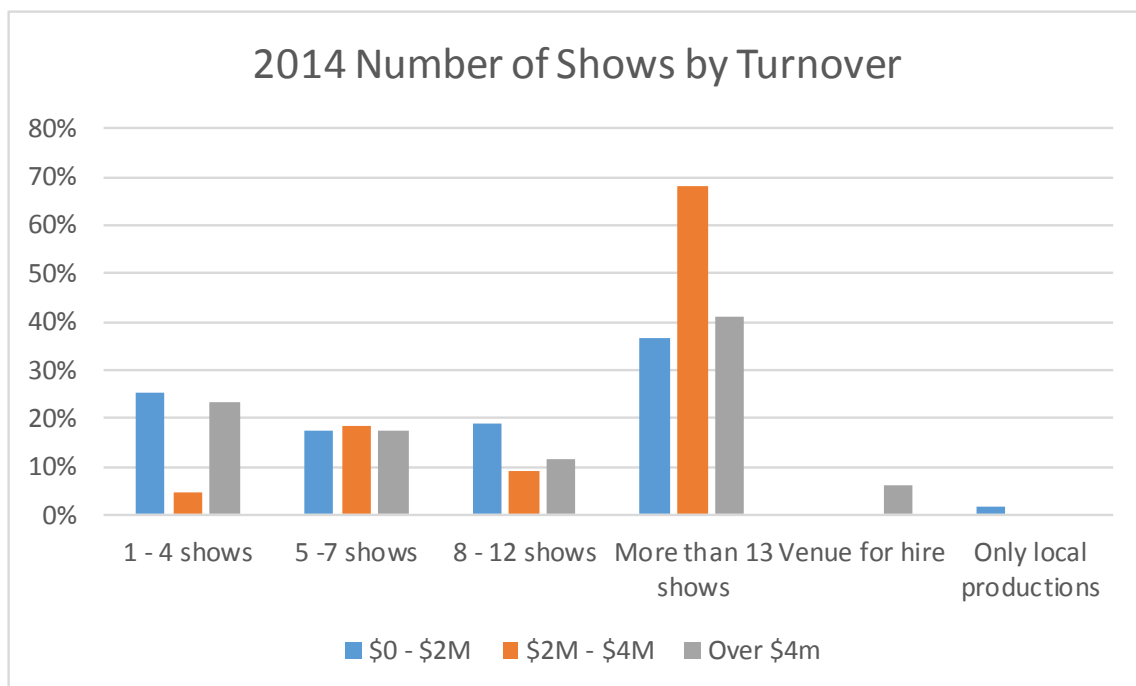
## Presenters

### Activity

Presenters were asked to assess how many touring productions they programmed in 2014 in order to gain insight into the scope of the market. Almost 60% programmed in excess of 8 shows per year.

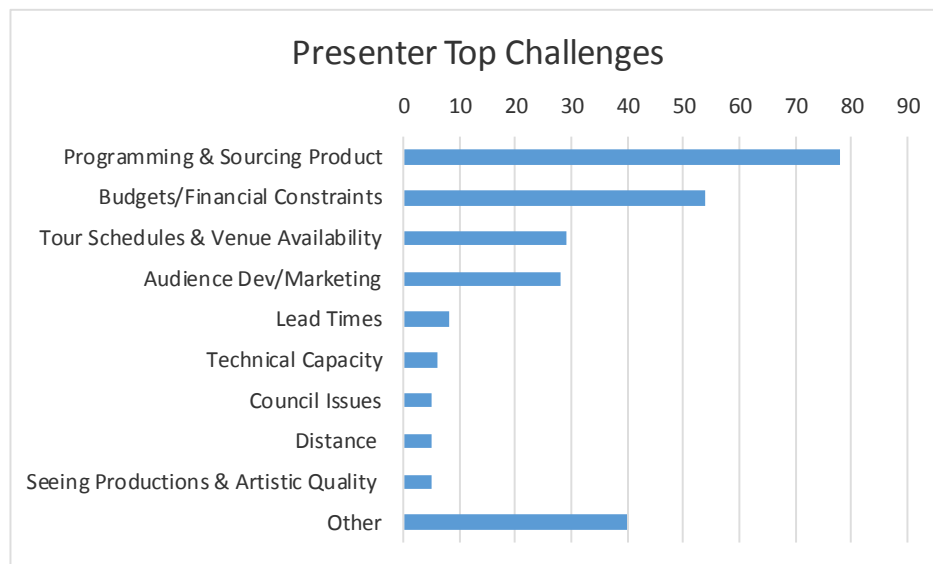


When segmented by total annual expenses, presenters in the \$2M - \$4M appeared to be the most active programmers, however this also a function of the lower level of presenter respondents in the \$4M+ category.



## Presenter Programming Challenges

Presenters were asked to list their three greatest challenges in programming an annual season. This was an open question to ensure the issues were completely unprompted. There were a diverse set of reasons – hence the large “Other” score. Many of these issues are interlinked. Programming for example, is inherently linked with the technical capacity of the presenter, venue availability, ability to market the event and the cost of the production. Responses were coded according to their primary concern.



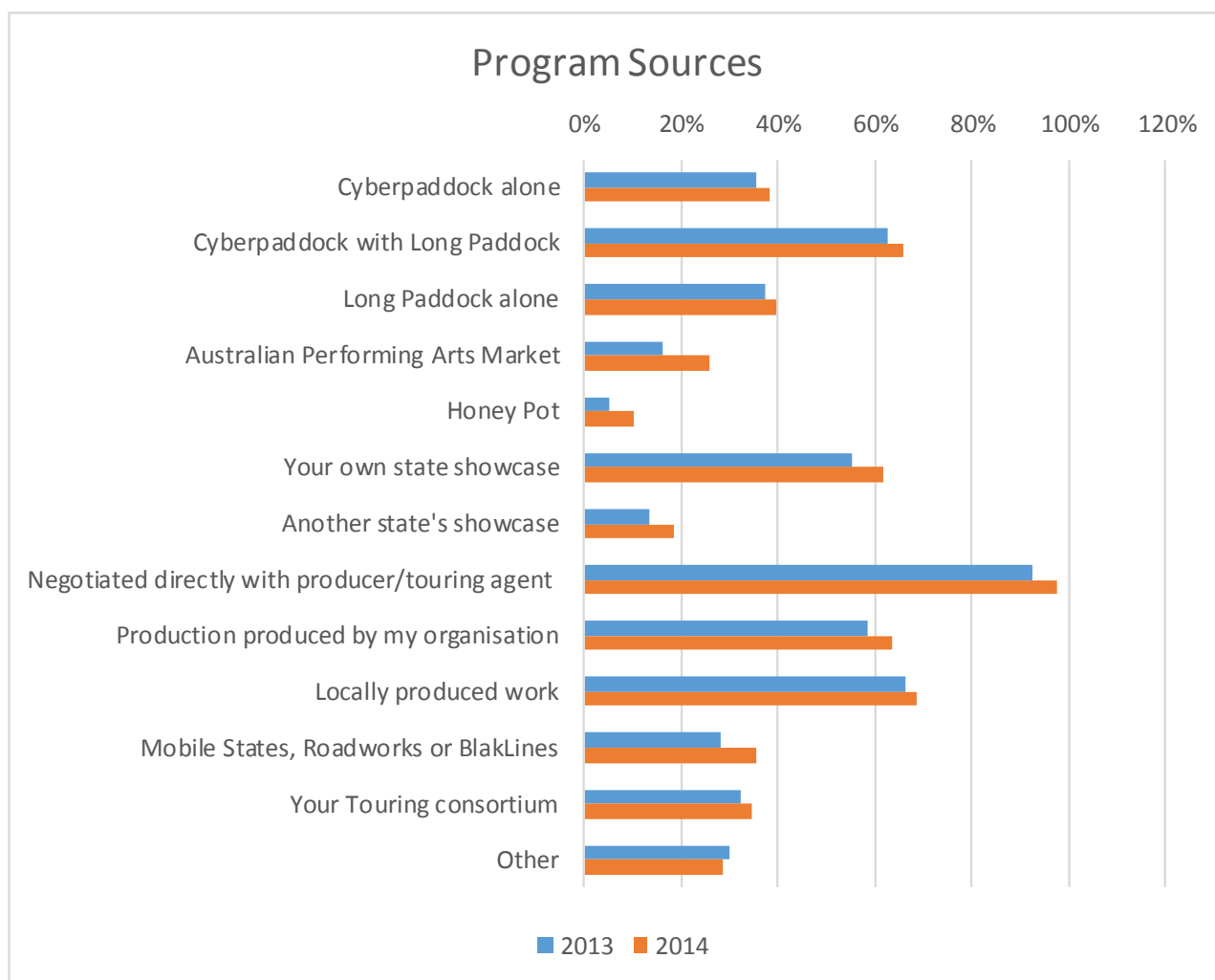
By far the biggest challenge facing presenters is sourcing appropriate product and presenting a balanced program. The nature of the comments are explained as follows:

- Programming & Sourcing Product – finding product suitable in scale, cost and diversity of artform and genre was a common comment and “affordable” was a recurring word.
- Budgets/Financial Constraints – lack of, or reduction in budget available for programming
- Tour Schedules & Venue Availability – programming bottlenecks, timing of tours, and the difficulty in matching venue availability with production availability.
- Audience Development/Marketing – from the difficulty in attracting patrons to the timing and quality of promotional materials from producers.
- Lead Times – matching organisational time frames with touring mechanisms and the long gap between pitch and final presentation of the work.
- Technical Capacity – venues struggle with lack of and ageing equipment, less than optimum venues and staff capacity problems.
- Council Issues – approval processes and red tape.
- Distance – regional and remote venues have fewer options to program from.
- Seeing Productions & Artistic Quality – Many presenters are uncomfortable presenting work they have not seen but are restricted in their ability to attend productions.

## Current Selection Mechanisms

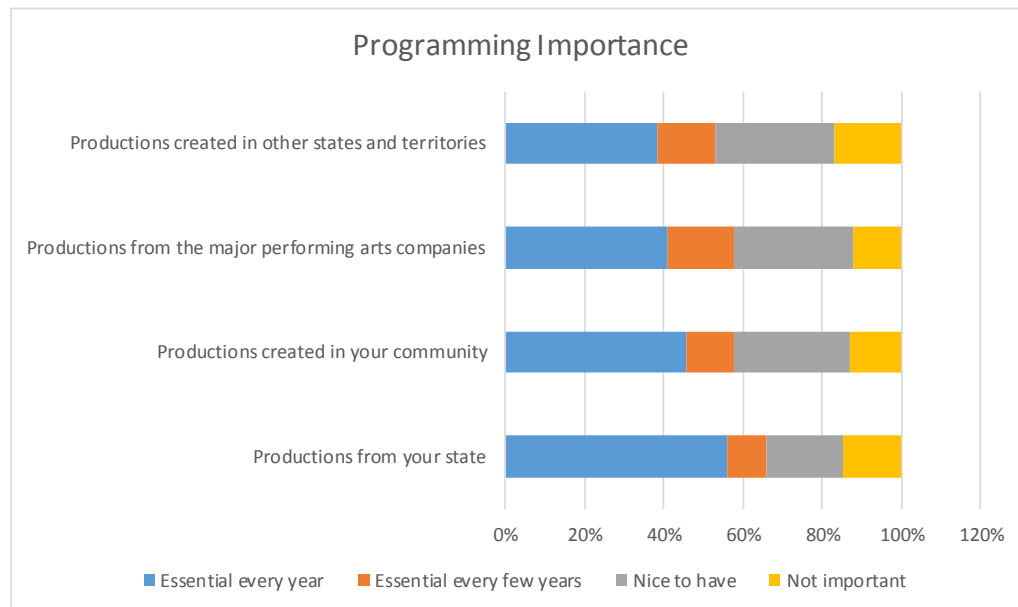
Presenters were asked to approximate the percentage of their program that was selected from the primary programming sources that were available to them, based on the total number of productions programmed in each season (2013 and 2014). The data patterns for both years were very similar.

It should be acknowledged that many of these programming sources are probably linked and the data cannot display that. The following graph identifies what percentage of presenters programmed one or more shows from each of the listed sources. Almost 100% of presenters negotiate directly with producers or touring agents for one or more shows in their final program. The other major sources successfully contributing to presenters' programs are locally produced work, either by the presenter themselves or a local producer, followed by the combination of Cyberpaddock and Long Paddock.

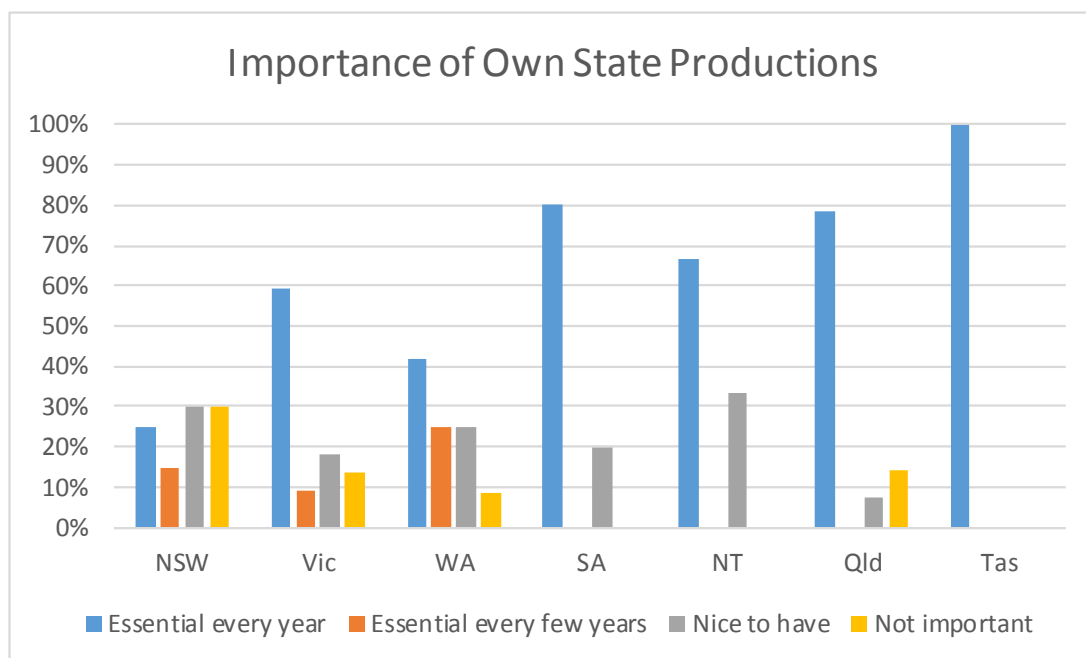


## Programming Needs

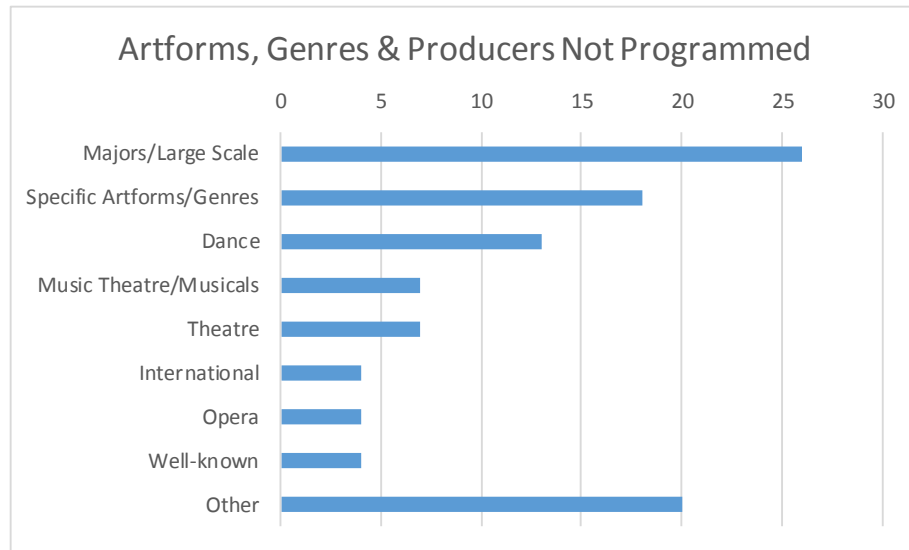
Respondents were asked about the importance of specific types of productions within their program.



"Productions from your state" attracted the highest number of respondents who felt it was essential to program them every year. The following chart breaks this down by state.

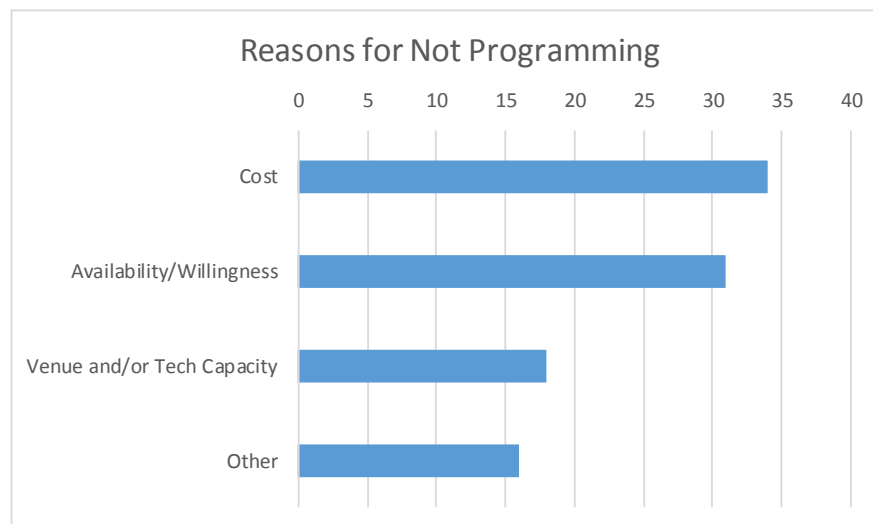


In an effort to understand if there were any specific trends or issues that acted as barriers to programming, respondents were asked if there were types of productions, genres or producers that they would like to program but have been unable to do so. Once again, answers were unprompted and coded later to show the most popular responses.



Desire to present the majors or large scale work was the most common comment. Dance also was a common theme – both in the difficulty of programming large-scale dance, classical and contemporary, and the difficulty of selling contemporary dance in regional areas. Wanting well-known casts can also be seen to be linked with the importance of programming the Majors. Well-known brands contribute to the presenters' ability to attract an audience and add to the credibility of the presenters' own brands.

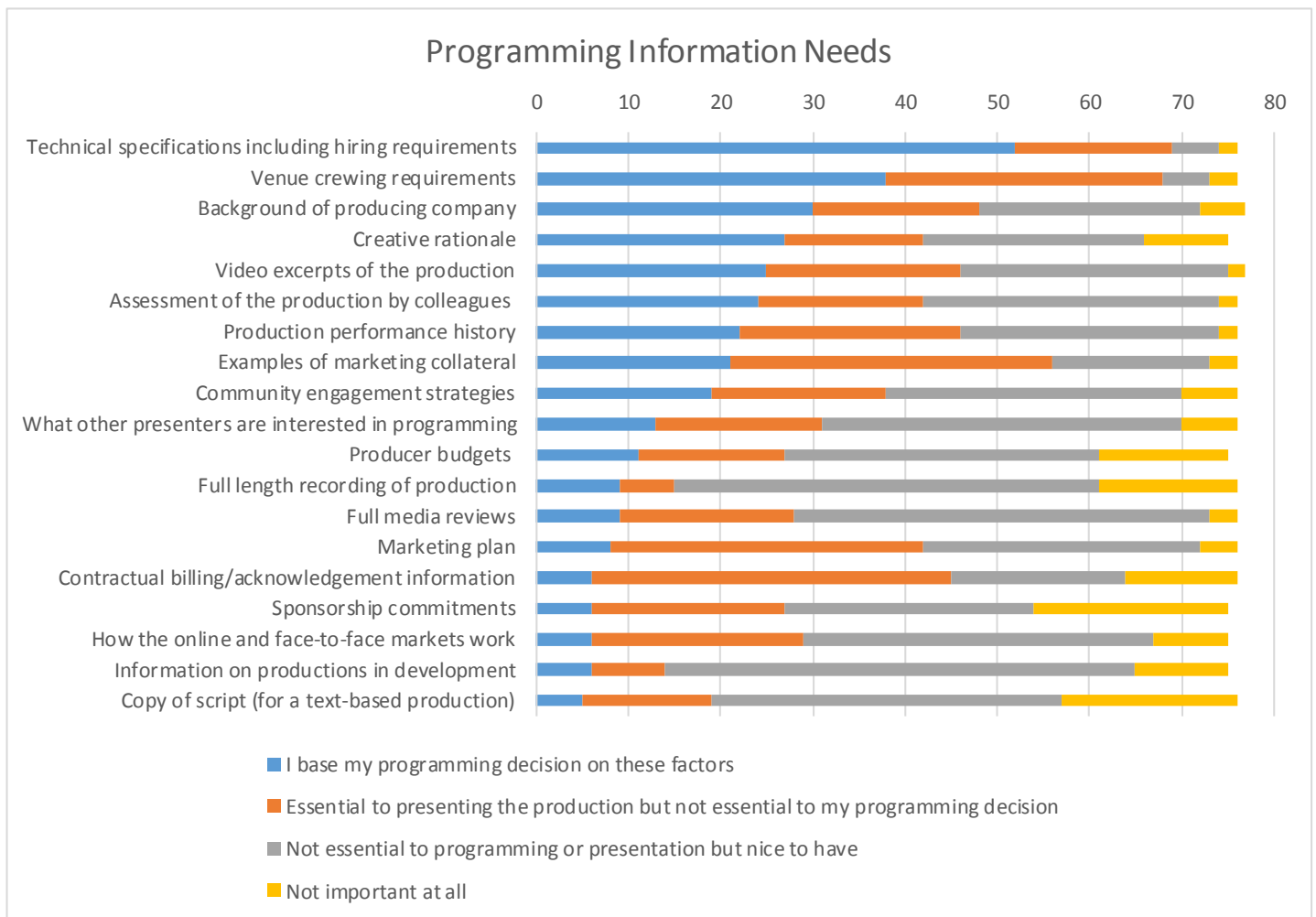
Reasons given by respondents for being unable to program these artforms, genres and producers can be grouped under some broad themes. One of the more prevalent gripes was the difficulty in securing appropriate dates, along with the inability or disinterest in touring of particular producers.



## Information Needs

Respondents were asked what information they required to program and present their seasons. The question assumed that key information such as genre/artform, synopsis, artistic personnel and producer contact details would be provided, and that fees and dates could be successfully negotiated.

The following graph shows that the most important information required on top of the basic details were the technical specifications of a production, followed by venue crewing requirements. The least important information was sponsorship commitments and receiving a copy of the script.



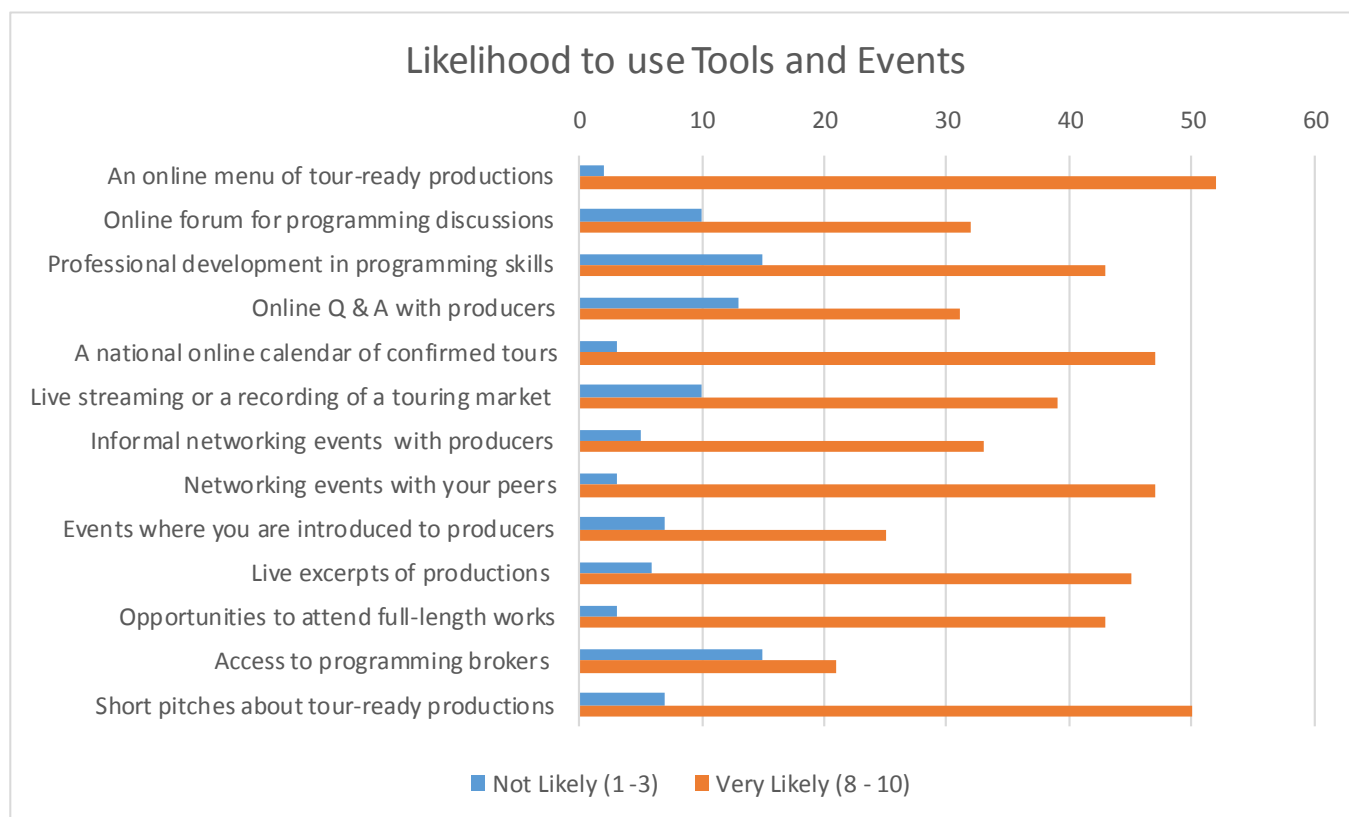
When asked about further information required before making a programming decision respondents included the following (verbatim sample):

- Are the company/artists able to communicate to a group of people? Can they articulate their work? Is there high quality images that represent their work?
- The target audience; we have been caught out with misleading information and disappointed or inappropriate audiences.
- Social Media ready information, and actor's/performer's that are active in social media. This makes it easy for us to share content onto our platforms.
- Availability, price and relevance to audience
- Reputation of producing company, existing relationship with producing company and endorsements by other presenters
- Overall program diversity for the year
- Actually seeing the work live is ideal. In reality it is not essential but nice to have.
- Our decisions are based on a combination of several items listed but primarily decisions are based on the centre's program philosophy, audience, marketability, reputation of company and actors, our budget.
- Frequency of presentation in our market... Actual cost of performance, touring party size
- Marketability of the title of the production
- Records of previous history (attendance to the company of specific performance)- audience demand or previous reaction
- Will it sell tickets, not always loads of tickets, but programming is a tightrope between new audience development and established patterns of audience behaviour.
- Clear understanding of market segmentation and messaging and how 'good' the company will be at helping to sell - ESSENTIAL
- Cost of production and bump in requirements. If it requires a 2 day bump in open on 2nd evening for example, then I will reconsider buying in as it may be too expensive to program unless it's an absolute blockbuster/box office gold
- Availability of core marketing material - TVC / broadcast quality vision
- Previous success of company in our theatre.

### ***Future Tools and Events***

Respondents were asked to rate out of 10 how likely they were to use the tools and events listed below to assist in programming, assuming there was a nominal charge. Most favoured was an online menu of tour-ready product. Least attractive were access to programming brokers and professional development in programming.



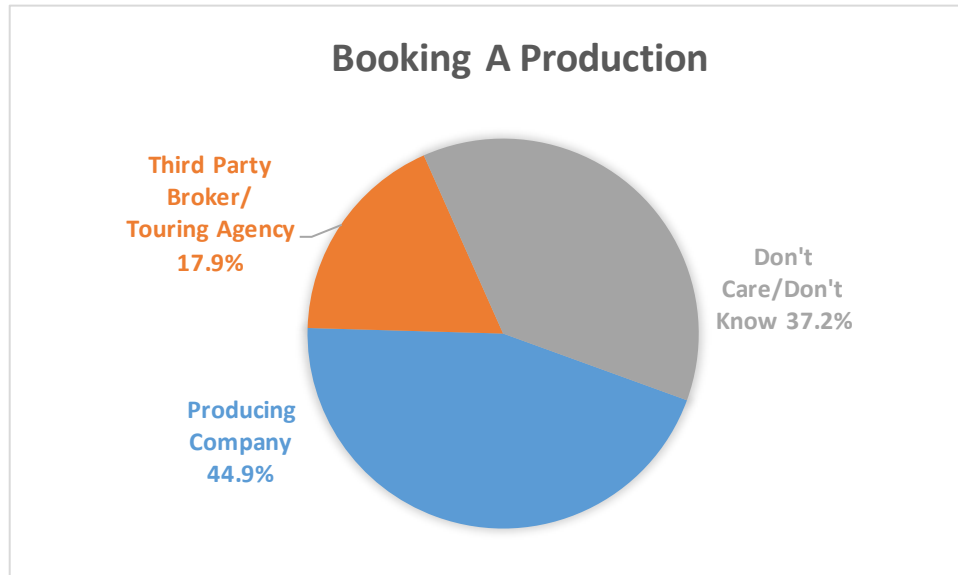


Respondents suggested the following tools and events (verbatim):

- See where other tours are going around the country. A menu of works in development. A list of what status a work is at (in development, about to premiere, developing a tour etc.)
- National online calendar of tours being planned. Generally once they are confirmed its all too late
- National production matching to presenters
- Venue case study presentation on the outcome of a year of programming.
- A NSW showcase
- I have previously found the cyberpaddock voting (open) useful to see where there is interest in my state allowing for conversation with like-minded presenters.
- It's all about the marketing, really. Seeing the show myself is useful so I know no matter what happens I at least won't have egg on my face in regard to quality or content. But the punters come without seeing it first. It's all about the marketing.

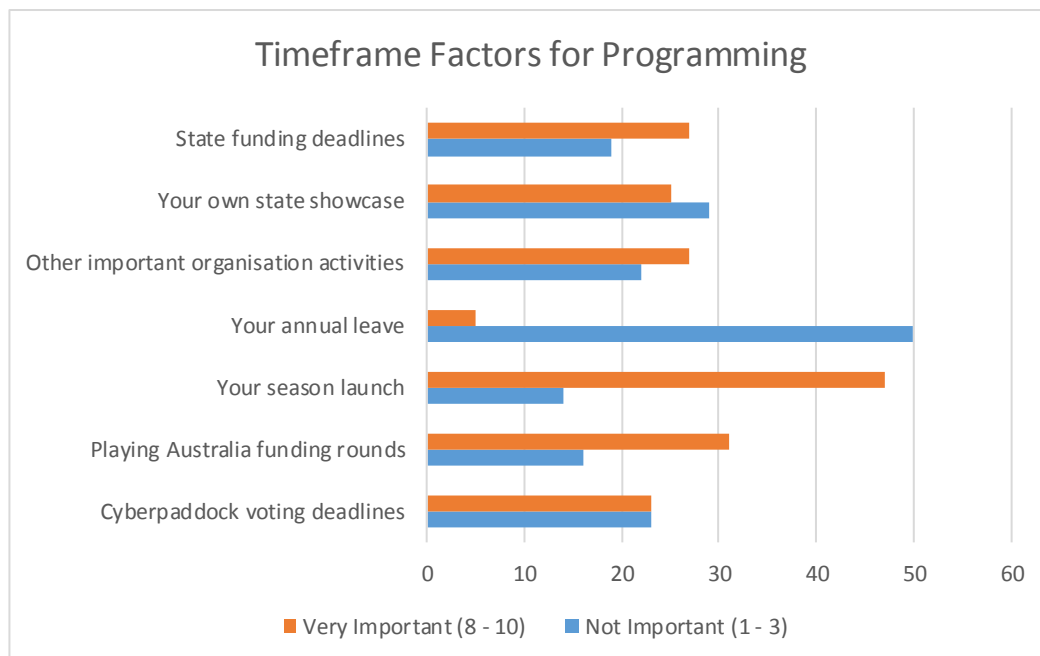
## Tour Development

When booking a production for their season, almost half (45%) of presenters would prefer to deal directly with the producing company.



## Programming Administration and Planning

Season launch is the most pressing deadline for presenters when programming.

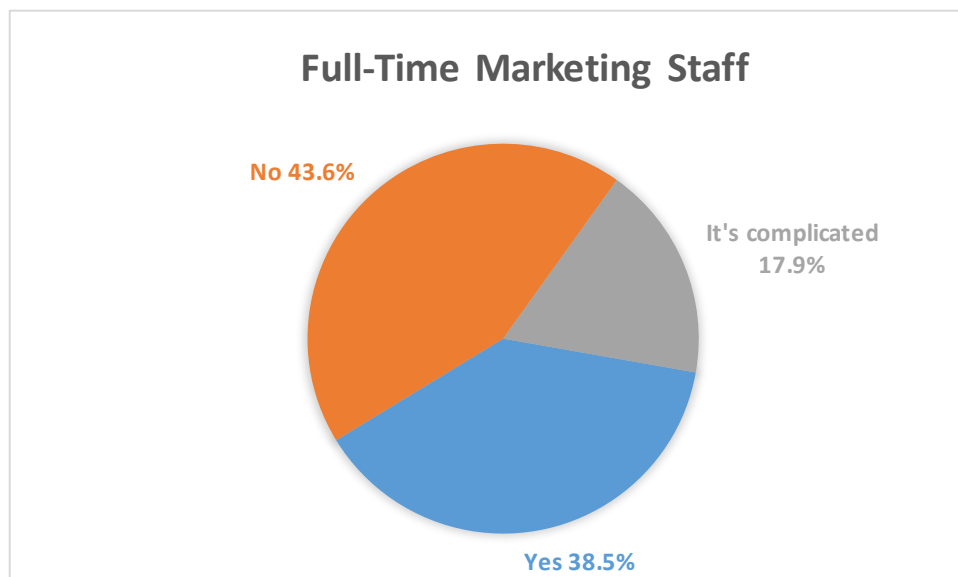
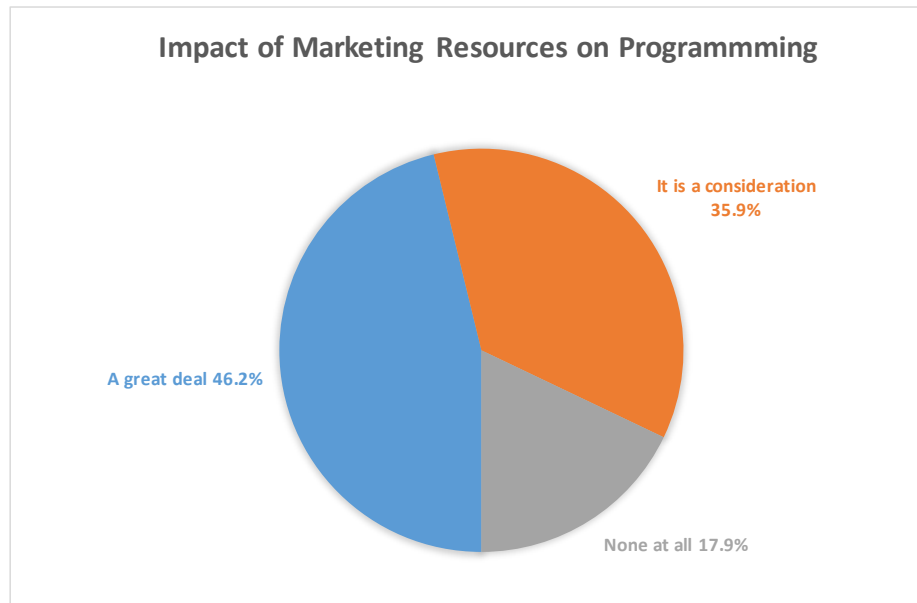


Other constraints on programming a season include (verbatim sample):

- Direction from Board and Councillors
- When the state budget is handed down.
- We are a shared facility with a local high school - so school use of the venue can sometimes dictate non venue use periods.
- We have to submit an EOI and program proposal to the venue 6 months before the season begins
- Working on programming is a 12 month a year process.
- Multiple factors including venue hires, occupancy, turn over & availability, curatorial & programming imperatives influenced by commercial demands, policies, social and political trends, signature seasons, presenting partnerships, audience/patron experience, community engagement etc
- As part of a touring network we are influenced by what we are offered and what other venues take in our region
- finding shows that will sell well and or bring something to my community that people would otherwise have to travel interstate for
- General availability of time - try to program well in advance to assist with finding sufficient product!
- what funding is available to me eg Lotterywest
- When work becomes available. Long term relationships with producers. Consortia discussion / deliberations. Commission/development processes.
- Date of tour. Our programming deadline = October each year
- We are influenced by the current available works and continue to program across the year into the next two years.
- production touring availability for remote
- Committing so as not to miss an opportunity or worse, they decide to go to another venue
- Program progressively - only issue sometimes this means you cherry pick shows as they arise not knowing if a more appropriate alternative is around the corner
- our own deadlines - budget, launch, market strategy and so on
- Usually the trigger is the producers starting to cold call a pitch. What influences me to start is when I start to see information about shows that grab my interest.
- As long as it is prior to the end of the year before as we are also extremely popular as a hire venue. Also we try and get it around budget development time, as we have no programming budget we have to line item each production.
- I select a lot of productions very early through direct negotiation with the producer or agent. I want my season basically confirmed 6-9 months before the season launch and main inclusions locked in 1-2 years in advance.
- Other bookings at the theatre - conferences etc.

## Marketing

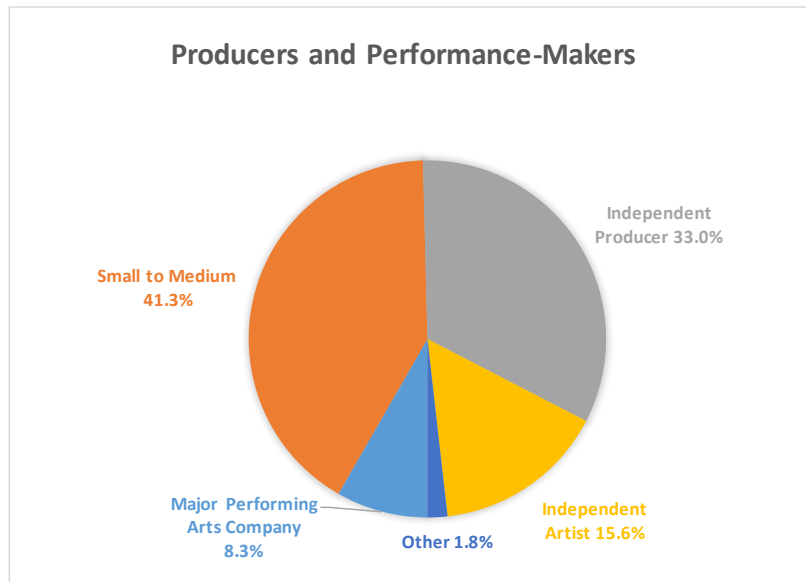
Presenters were asked about their available marketing resources and the impact that has on their programming choices. Almost half (46%) reported that it has “a great deal” and only 38% have a dedicated full-time marketing staff member.



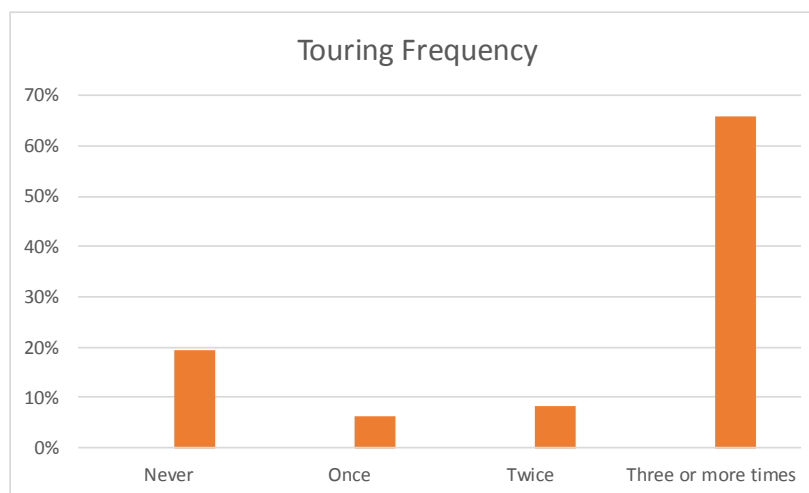
## Producers

### Activity

Independent artists and producers represented 49% of producer respondents, with small to medium producing companies representing a further 41%.

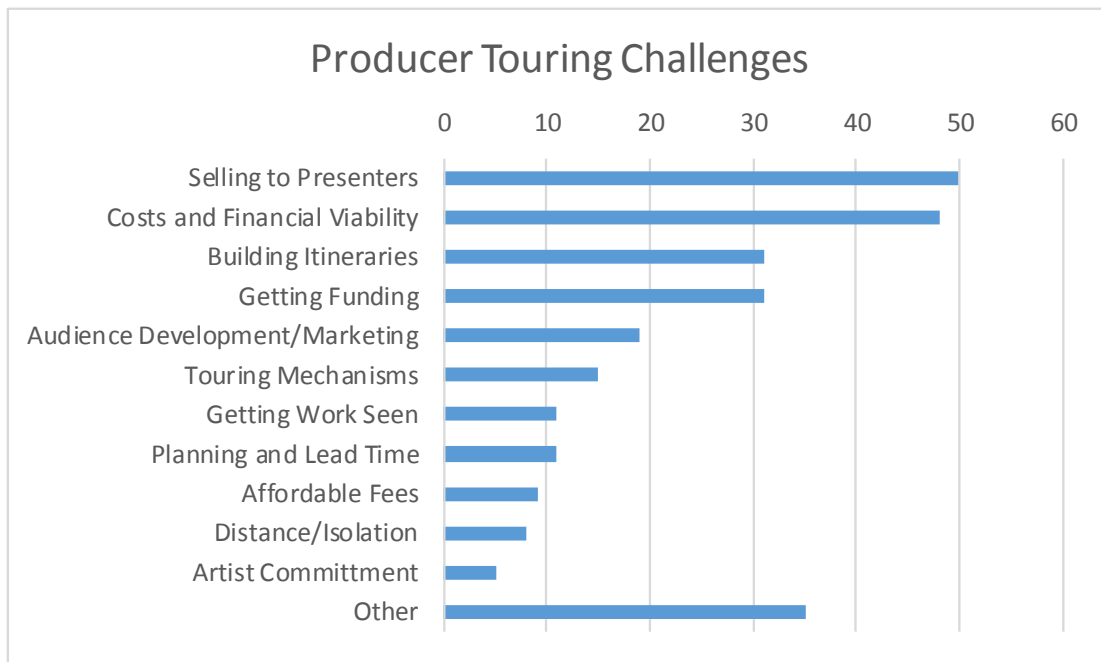


Most producer respondents (81%) had touring experience outside their home state in the last five years.



### Producer Touring Challenges

Producers were asked to list their three greatest challenges in mounting multi-state tours. The question later coded and key themes emerged.



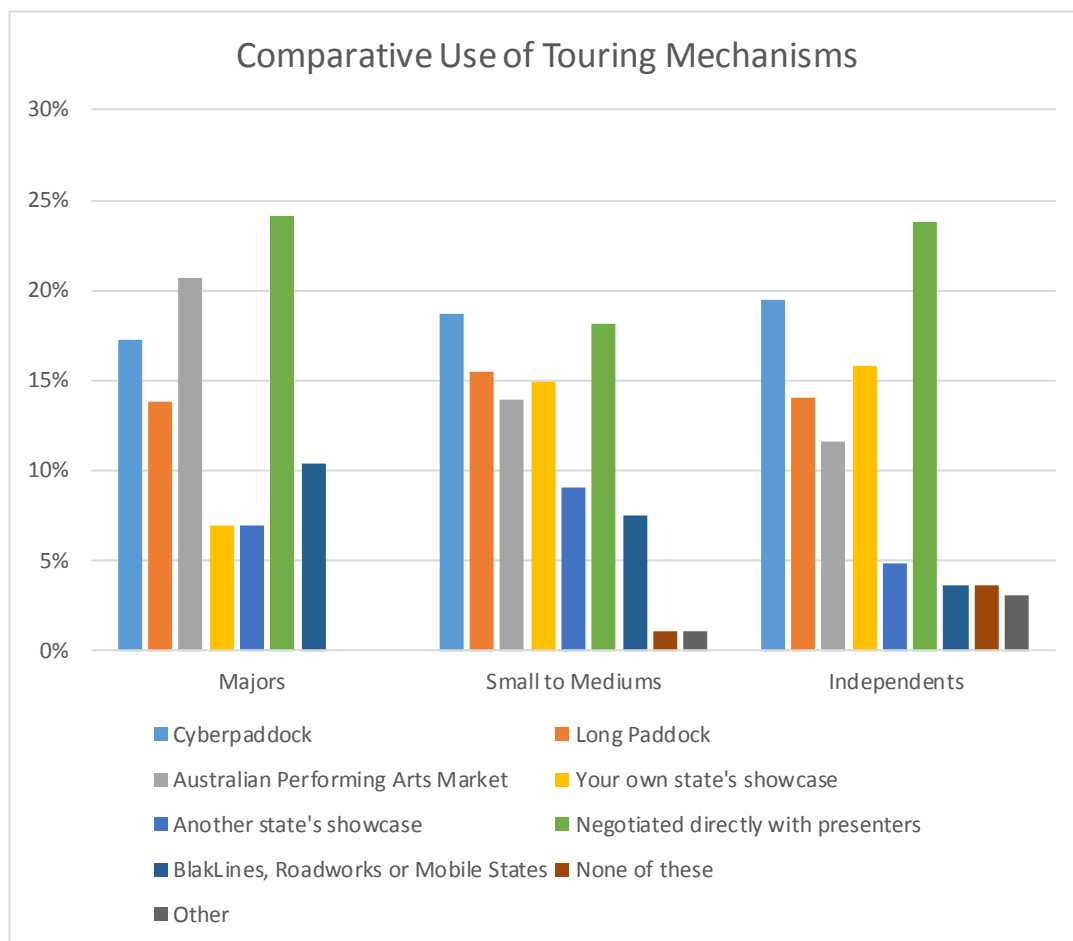
Comments fell into the following themes:

- Selling to Presenters - the most frequently mentioned challenge. Concerns included making connections and building relationships, communication, finding the right presenters with suitable venues, getting them to buy and the risk averse nature of some presenters.
- Costs and Financial Viability - included the expensive nature and the financial viability of touring, the difficulty in financing production and remount costs, high travel costs, cash flow issues, and the difficulty of accurate budgeting.
- Building Itineraries - the challenge of scheduling presenters in a sequential and logical order given venue availability.
- Getting Funding - included the difficulties of obtaining both state and federal funding and guideline constraints.
- Audience Development/Marketing - the challenges of meeting the needs of audiences, growing them, promotion in unknown markets and touring to venues that do not have well-developed audiences.
- Touring Mechanisms – difficulty using and understanding them and lack of touring support.
- Getting Work Seen – the desire of producers to have presenters vie their work.
- Planning and Lead Time – differing timelines and very long lead times often do not match the producer's shorter planning cycles.
- Affordable Fees – the difficulty in balancing a return for the producer that covers cost with the needs of very price sensitive presenters
- Distance/Isolation – Producers in regional areas often feel disadvantaged by the extra costs they incur to do business.

- Artist Commitment – the difficulty in signing artists for touring when funding is uncertain and lead times are very long.

### Current Touring Mechanisms

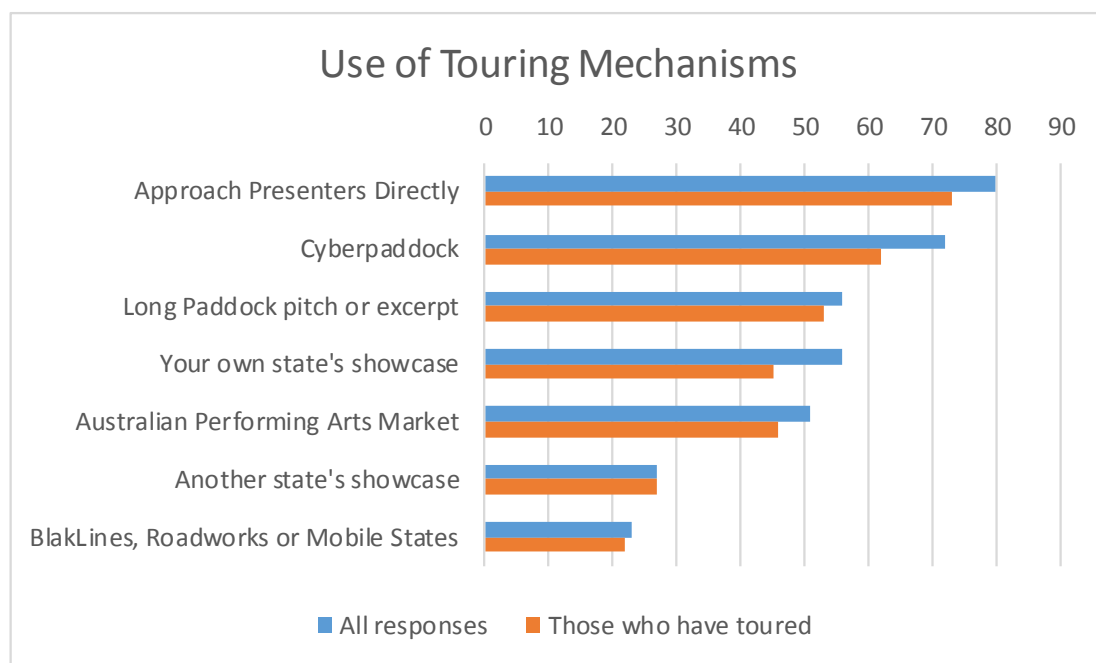
The following graph shows the relative usage of touring mechanisms by the different types of producers. Majors and independents are more likely to negotiate directly with presenters and least likely to attend state showcases. Small to medium companies use Cyberpaddock more frequently than other mechanisms, although only slightly more than direct negotiation. Independents favour direct negotiation. It should be noted that participation in touring initiatives such as BlakLines, Roadworks and Mobile States are not based on self-selection and so are somewhat different.



Other strategies suggested by producers include:

- Honey Pot Program at Adelaide Fringe
- Own pitching events
- Relied on own networking of relationships in own state
- Fringe festival circuit
- Requesting Presenters use Go See funds to attend shows

In order to better understand what mechanisms for touring are more effective for producers, respondents who had actually toured were mapped against the touring mechanisms they had used. The smaller the difference, the more successful the mechanism. This method shows that producer attendance at another state's showcase has a high rate of success. The touring initiatives such as Mobile State, etc. also have a high rate of success, but as these models are based on pre-selected productions, that outcome is expected. In a similar way, invitation for a pitch spot at Long Paddock appears to deliver a good rate of success. It should be noted that this graph shows success over time, and not per Long Paddock attendance. The least successful mechanisms for producers to create tours appears to be from participating in their own state's showcase and Cyberpaddock (alone).

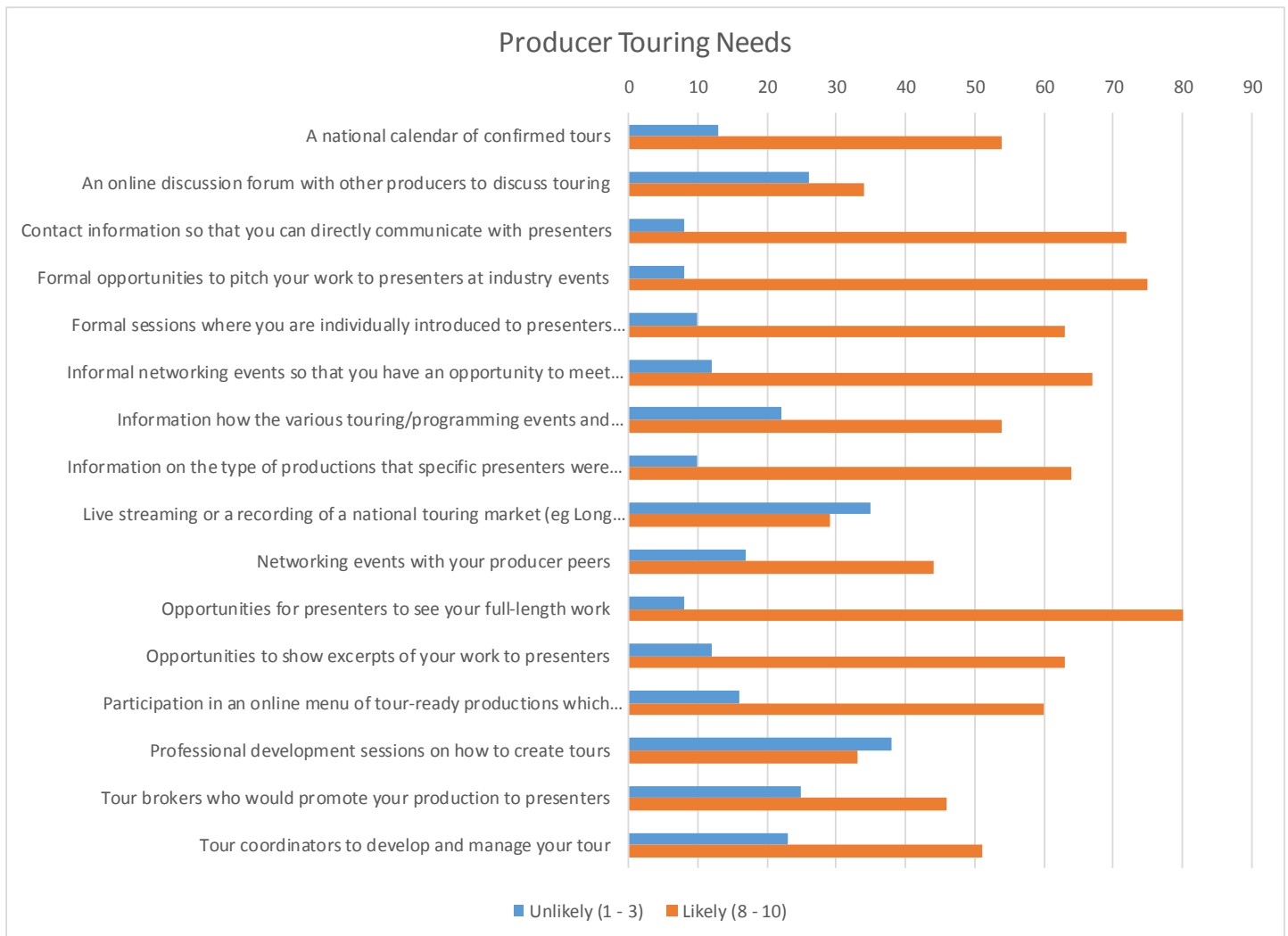


### ***Future Touring Tools and Events***

Producers were asked to rate on a scale from 1 – 10 how likely they would be to use the following tools and events, assuming there was a nominal charge, to assisted them in mounting a tour.

Those who were unlikely to use (rating 0 – 3) were compared with those who were likely to use (rating 8 – 10).



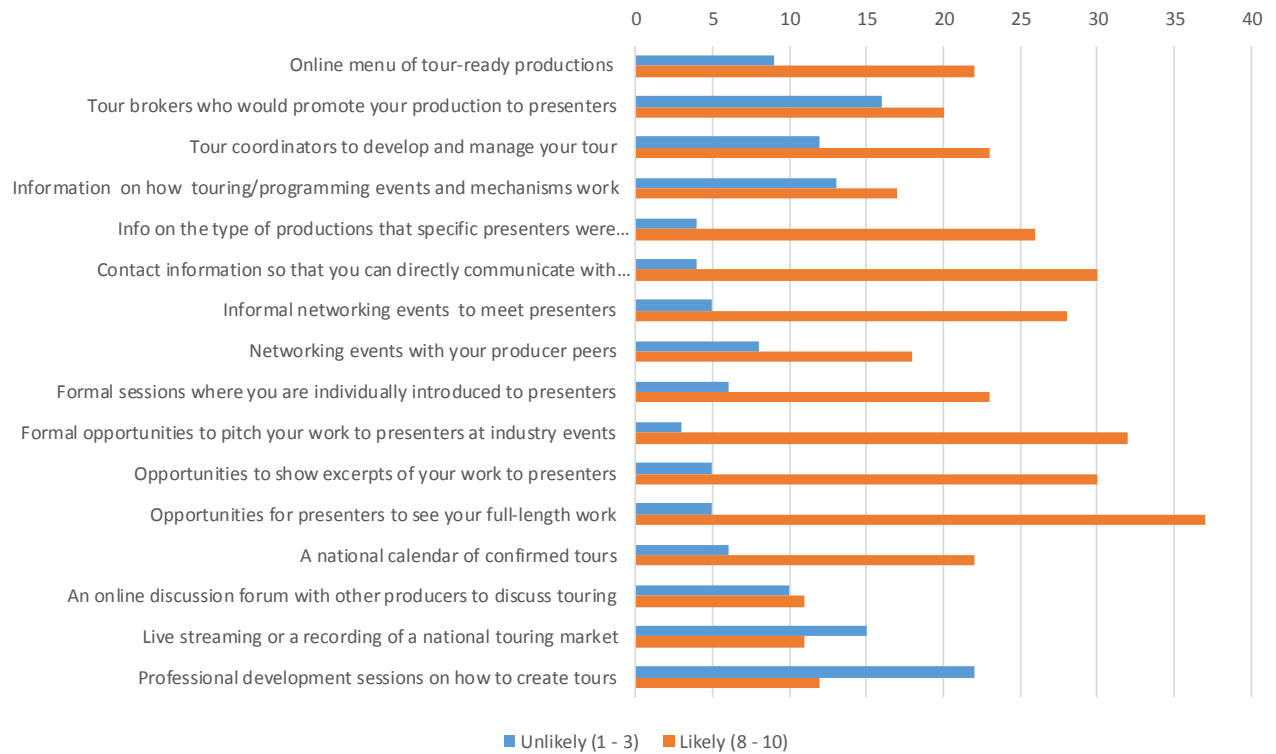


The most attractive of these was the opportunity for presenters to see full-length works, closely followed by formal opportunities to pitch and the contact information of presenters. Of least interest was professional development on tour creation and live streaming of touring markets.

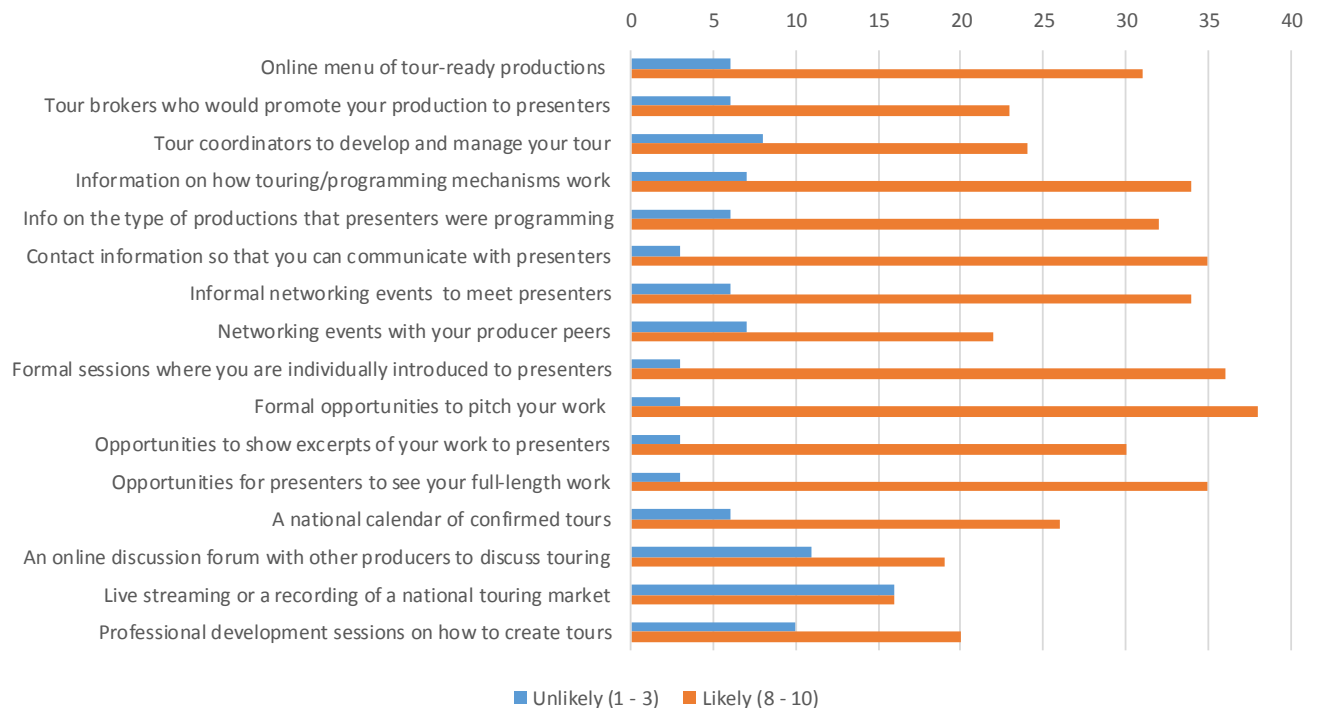
When the data are segmented according to the type of producer, it shows that the most useful tools for the Majors were opportunities for presenters to see full-length work and contact information so they can directly communicate with presenters.

The following graphs show the response from both the small to medium producer perspective, and the independents. The needs of the small to medium producers are more clearly defined, with the most important tool being the opportunity for presenters to see their work and the least useful is professional development on how to create tours. For independents, the least useful was live streaming of touring markets.

### Small To Medium Producer Touring Needs



### Independent Producer and Artist Touring Needs



Following are the verbatim comments of respondents who were asked if there were other tools or events that might be useful.

For the purposes of this report, frequent tourers have been defined as those producers who have toured three or more times in the last five years:

- National theatre availability data base so you could go on-line and check avails in real time
- Mentoring
- I think a lot of producers need help in how to pitch their shows (whether that is in a 1on1 meeting, in a formal pitching session, online)
- Mechanism and/or network to work proactively and collaboratively with presenters to co-commission work
- A Long Paddock style forum exclusively for presenters in professionally managed PACs to line up with the APACA conference
- Reworking of funding models
- The Long Paddocks and state showcases are extremely costly and awkward to produce and attend, however it gets all the decision makers in a room at once at a time when they have to make choices, so in that sense it's actually very efficient. The number one, two and three sales tool is presenting and excerpt to those people. And four.
- What about an app with all venues contained on it so i can know what each venue is like and who to contact.
- There are multiple levels of touring avenues for producers, whether it's intrastate, nationally or otherwise. Unless you've worked the touring game for years, for newcomers to the industry it can be very confusing & overly duplicated. I like the idea of a one-stop national touring on-line website that allows producers to be able to lodge their shows once & have a mechanism that indicates whether it's available for local or national touring. It would also be extremely helpful to know what presenters are actually keen to programme.
- Assistance with concepts such as finances and marketing for the arts
- The loss of a NSW-specific showcase event is devastating for our state. I have been out of the theatre game for a few years and now returning I notice this hole is extremely significant. A mechanism that could group a few independent productions together might be handy e.g a buy-in program to a collection/suite of indie shows that was facilitated by a tour coordinator
- More in the vein of Mobile States where like-minded presenters are working together
- Having a market place or forum connected to festival is crucial to provide context and see what's going on in the world.
- The costs associated with the services above might make them out of our reach. A central marketing organisation or individual that works with presenters to ensure national as well as local coverage of each work they present, would be useful.

Less frequent tourers offered the following:

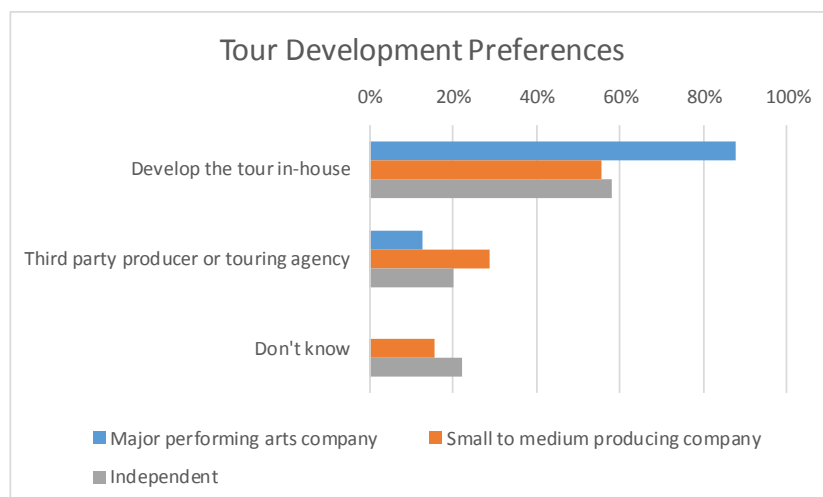
- Regionally specific touring mechanisms for supporting the creation and development of tour ready regional produced work
- presenters having a nationally accessible calendar on their programming timeline
- presenters being clearer about the style of work there are programming on an annual basis
- Budgeting guidelines so that we know what we are programming is affordable for purchase
- It would be great if playing Australia /RAV etc had a short form application that was quick and easy from which an invitation to apply with the full application could follow. This would save time in applying for grants you are unlikely to get.
- Partnering with logistic, accommodation and transport providers.
- The list above is pretty comprehensive. NB that 'their' should be 'there' but I guess you know that by now.
- A tour building platform where partially built tours can be promoted. Following Adelaide Fringe we have a few interstate presenters interested in touring our work and if we were able to have an online portal to communicate dates I think this would strengthen our ability to increase the length of the tour and gain interest from presenters who have gaps in their program.

Those producers who had not toured suggested:

- The more conversations that can be had that are not 'pitch' based the better.
- Access to a mentor with national touring experience at the earliest creative development period.

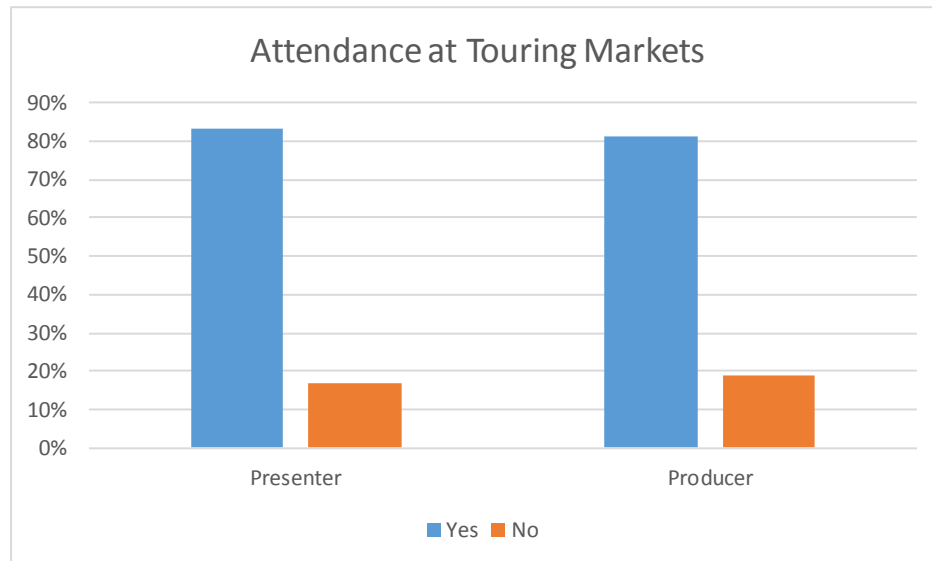
### **Tour Development**

Producers were asked if they received interest in touring, how they would proceed. The following graph shows the responses segmented by producer type. 60% of producers overall would prefer develop the tour themselves.



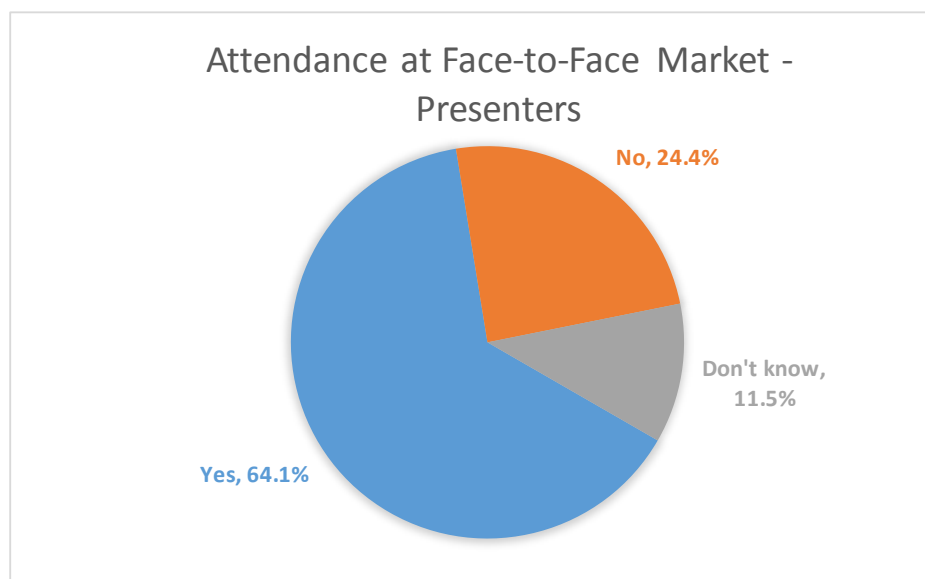
## Face-To Face Markets

Respondents were asked if they had attended any national touring markets previously. Presenters and producers attendance levels were very similar. Just over 80% had attended.



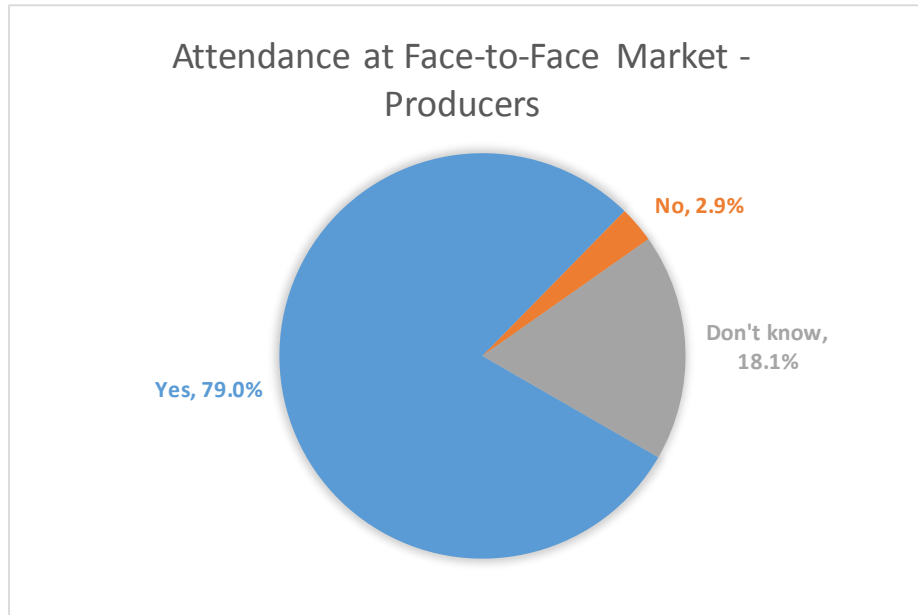
### Presenters

Almost two-third (64%) of presenters indicated they would travel interstate to attend a face-to-face market even if they could access all the information they required to program a production online. Of those, 69% confirmed the importance of face-to-face interaction, and another 20% confirmed the importance of seeing live performance. Of those presenters that said they wouldn't attend, or they didn't know, 50% said it depended on budget and another 13% said it depended on Council approval.

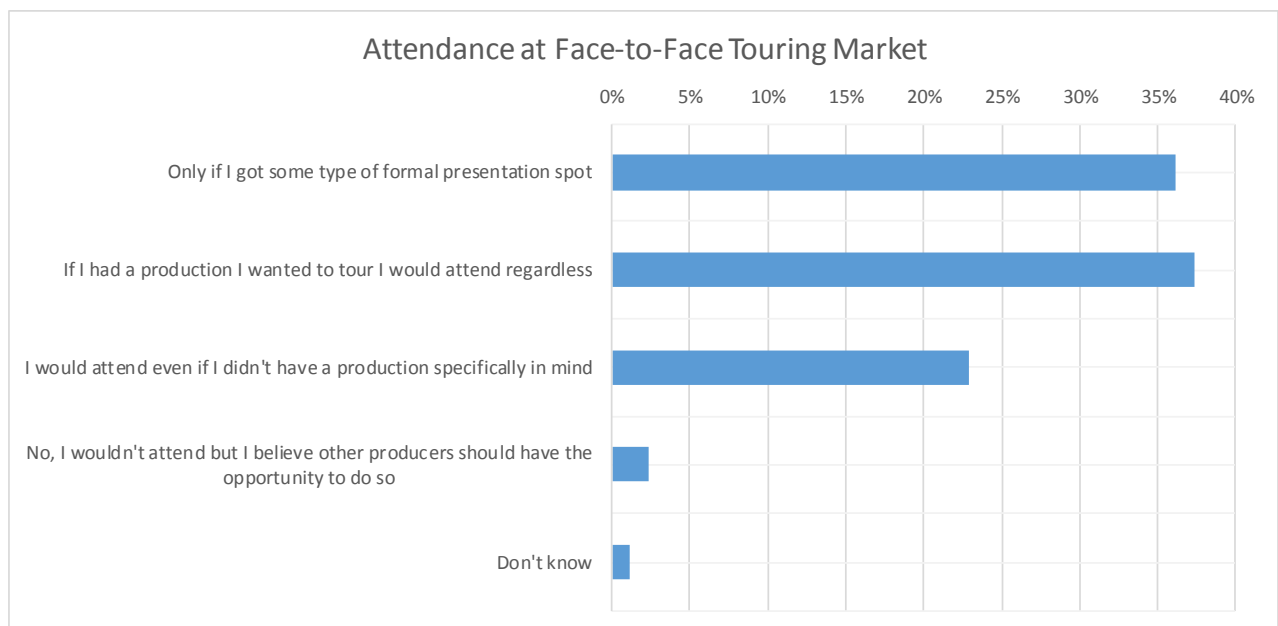


## Producers

When producers were asked whether a face-to-face market was necessary even if presenters could access everything they needed on line, 79% agreed that it was still necessary.

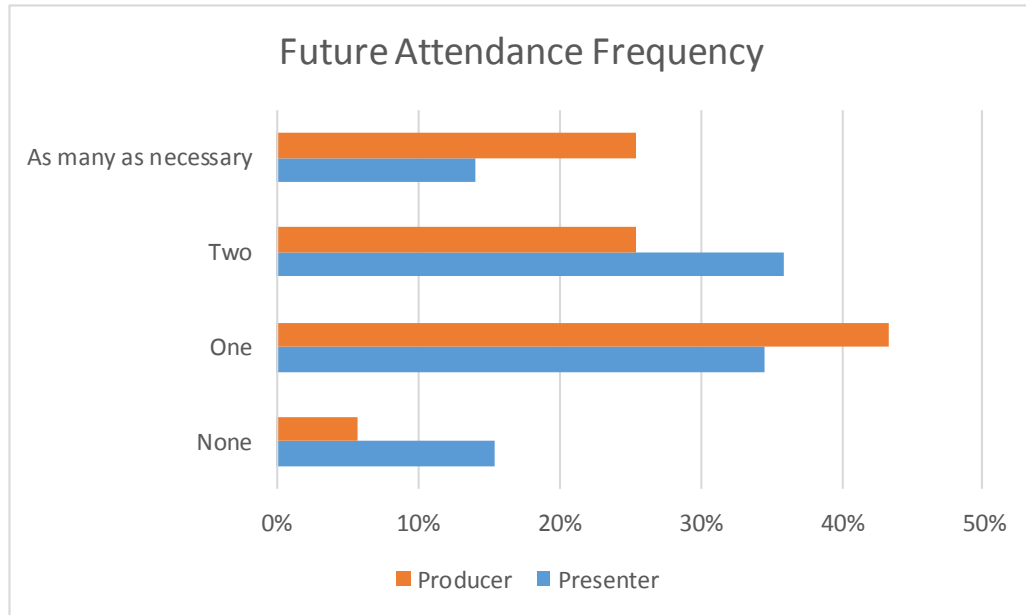


Of those that believed that a face-to-face market should still be held, 23% said that they would attend even if they didn't have a production to pitch and a further 37% said they would attend if they did, regardless of whether they were offered a formal presentation opportunity.

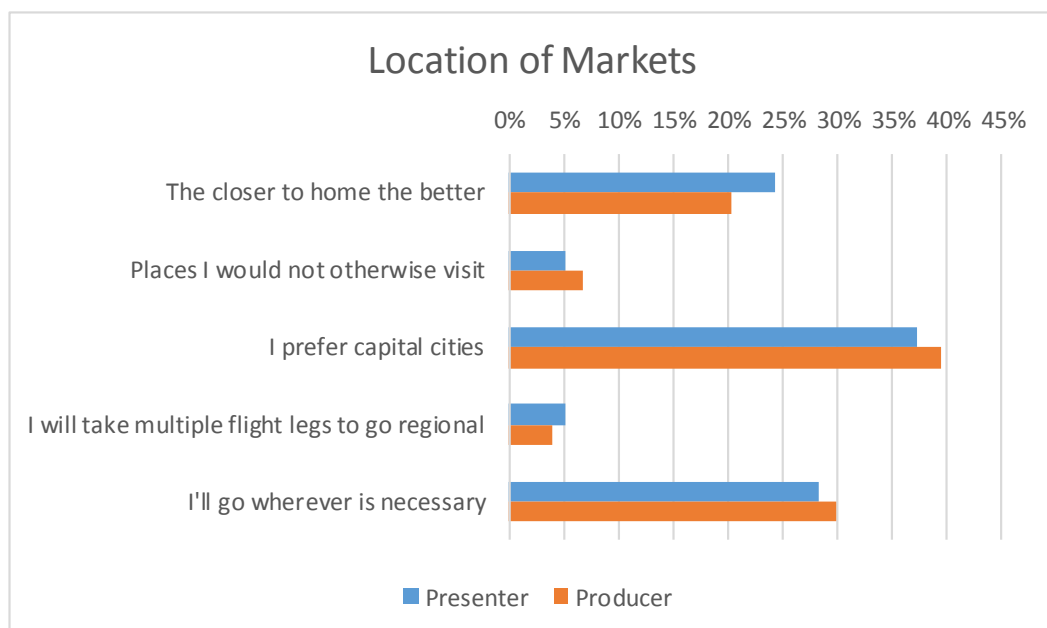


## Market Preferences

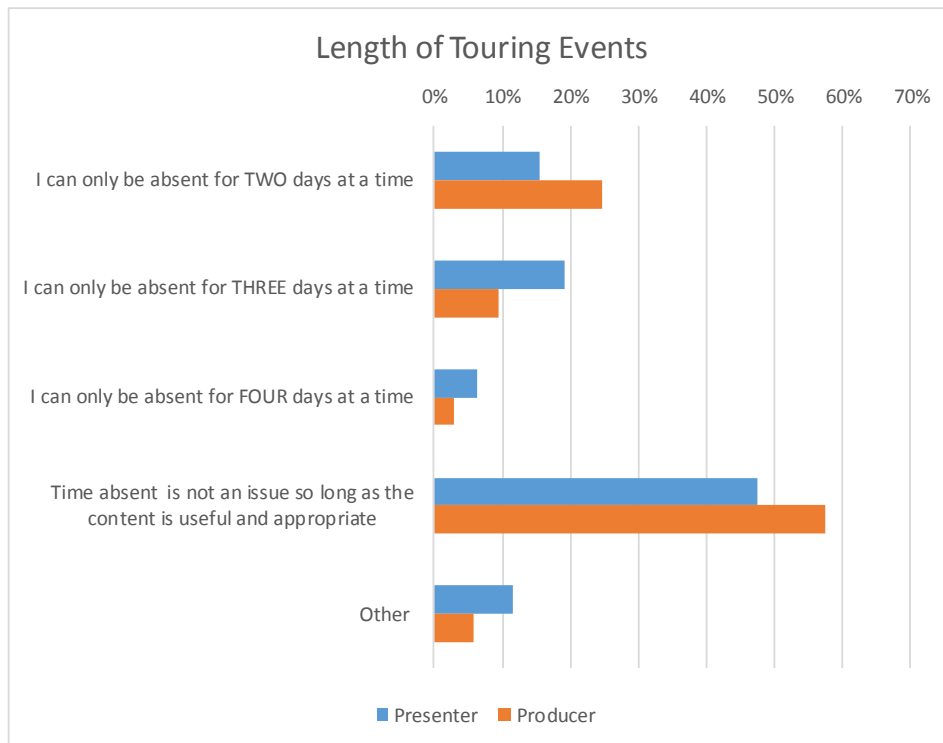
Respondents were asked how often they could attend touring markets per year. Producers appear to have a greater ability to attend more frequently than presenters.



When asked about their preference for the location of touring markets, respondents preferred options that were cheaper and less time-consuming. Roughly 30% of respondents will go wherever is necessary.

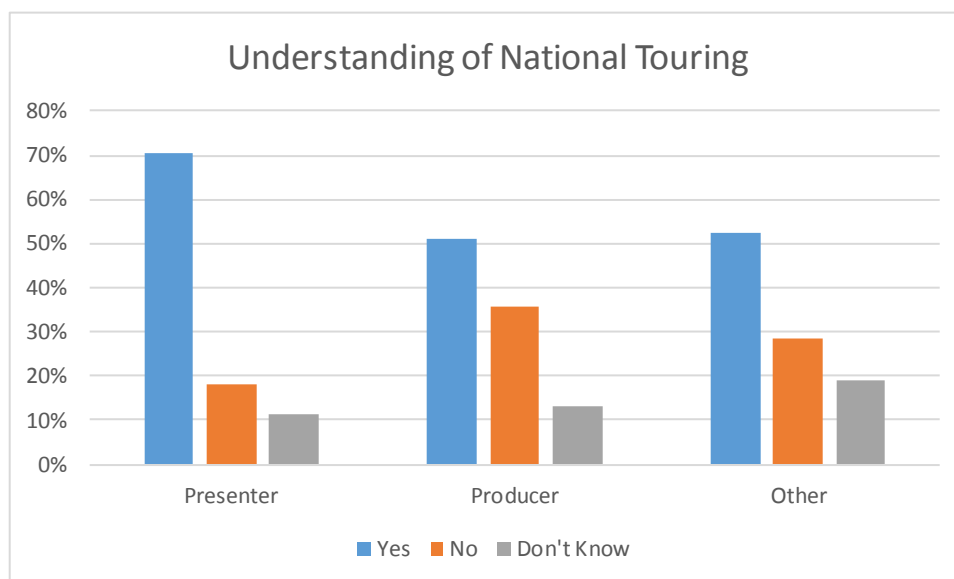


Producers also have more flexibility in regard to how long they can be absent from their organisations at any one time.



### **National Touring Knowledge**

More presenters appear confident in their knowledge of national touring than producers.



The following comments were offered on how an understanding of national touring could be improved. A sample of the comments are here verbatim.



## **Presenters**

- More APACA communications, website info, conference sessions
- Being a relatively new Theatre Manager, a peer/mentor that I can contact to ask the dumb questions!
- performing arts brokers engage fully with very remote regions as a matter of policy
- Presentation on the current nuts and bolts of schedules and processes as part of the Long Paddock format.
- what you are currently doing, ie assess our needs and replace Cyberpaddock and long paddock with an appropriate and relevant new mechanism
- A simple 1 page fact sheet outlining who is who and who does what. Include touring funding time frames (national and by state)

## **Producers**

- Formal information session(s) at a local level (i.e. conducted by TasPerforms, RAV, etc.), with the possibility of follow-up one-on-one sessions. All of which I would be willing to pay for.
- Touring calendar
- The formation of a peak-body that is there to support producers of work.
- Better advice and access points. If I can access the presenters I can organise tours, but it is hard to do it on an individual venue basis. That is very time consuming. If there was assistance that worked with my budget I would outsource some elements but not all.
- Clearer calendars for the stages of Cyberpaddock rounds and other touring mechanisms inc mobile states Having clearer program streams so you can better pitch your work to the interests of presenters
- Have a better idea of PAC's capacity to pay for a fully delivered act sometimes even with accom costs covered also
- A producer development/mentorship program where you and emerging producers, can gain valuable insights into current practices
- more connectivity between producers and presenters - clearer information - a commitment that is followed through when it comes to applying for funding
- Clearer websites with consistent application forms. every website and market has a different way of submitting content
- A step by step guide for new or entry level producers that assumes they know absolutely nothing about the process. Include definitions about what organisations are out there and what their roles actually are. Include flow chart of the different options or paths producers (and presenters for that matter) can take to achieve their end goal.
- A centralised web page that contained the outlines of the ins and outs of each states touring processes, requirements, restrictions etc. and opportunities for funding, as well as opportunities for national touring

## Changes to National Touring

Respondents were asked to contribute further ideas about changes to national touring. There are a range of positions. The overriding themes are that respondents want something simple, like a one-stop shop, but they have disparate needs they want addressed. This verbatim list is a sample of suggestions, grouped around some larger themes.

### Specific Types of Programming and Touring:

- Large scale national tours should be negotiated 1-2 years in advance
- International networks via Festivals.
- touring productions have a remote-ready subsidised version of their production
- More open dialogue between venues about what is being considered and planned to open up opportunities for more venues to become part of a tour.
- more info/discussion on regional touring to smaller venues
- Residencies with strong community engagement need to be a factor
- "like venue" network for programming
- More categorised touring approached: music - genres - cross-genres
- Smaller tours with longer community engagement
- Submissions from presenters to producers to produce product they want
- Creative development periods in communities that will eventually receive the tour

### Touring Markets and Events:

- For people in Regional WA the ability to attend multiple events at one time is of benefit and may lead them to be able to attend more often
- Curated exchange - has the opportunity to initiate/excite different programming choices
- Let venues/organisations pitch
- a NSW performing arts market
- Youth forums
- Regional forums
- Touring marketplaces need to have a point of differentiation to avoid duplication of product presented etc. to make them highly effective.
- Divulge the management of the national market to an established organisation with the capacity to deliver the event brilliantly
- There isn't a market for music as such. APAM doesn't have very little focus on music. AWME is too focused on roots and indigenous. We need a music market that's not commercial and wants to promote quality Australian music
- Return to the national marketplace. We can't afford to showcase at every state-based event

- Hopefully new Performing Arts Exchange will provide space to discuss/develop/promote collaborative models as well as conventional touring - commissions, co-productions, residencies, engagement and adaptive model tours, etc.
- This isn't probably possible, but some kind of 'fringe' event for unfunded companies would be great. Late night and a bit alternative.
- It's great to separate the professional development stuff from the pitching / selling stuff - less down time.
- As an independent producer some of the participation fees are a huge factor to participation. Attending APAM is a huge expense. Perhaps fees could be on a sliding scale.

#### Tour Development Mechanisms:

- That the 'voting' is done immediately - or as rapidly as possible - so that time is not wasted developing and costing tours that are not going to get funded.
- providing formal introductions by pairing people with interest in genre (like speed dating)
- One-stop on-line website for all touring opportunities throughout the country
- full length presentation opportunities
- Support for collaborating venues/presenters to build 'mini' touring networks, supporting one person within that 'mini' network to lead touring opportunities
- an online portal to assist the delegates at a face to face market / conference / forum is required, Cyberpaddock is a good tool and could use some evolution to suit the current market
- It would be really useful have more knowledge of the different circuits and consortiums - whether they are programming or geographically based. Also for presenters to articulate their timeframes - when they make decisions for the different years. If there is an online database of presenters, they should be able to say "program full for 2016 / looking for children's work etc."

#### Funding:

- National and state funding not always aligned - so meeting season deadlines are at times challenging
- In an ideal world, funding to cover costs of touring to showcase a work
- Touring funding for strategic one-off and/or non-regional tours. Maybe new model Australia Council Projects could include such things previously funded through Community Engagement Touring, Independent Artist Remount Fund, Capital Dance etc.
- Specific tour funding for regionally produced work to tour Nationally
- More financial assistance to attend events.
- Subsidy of innovative performance to support diversity of programming
- National touring programming to work by assessing demand/quality then to funding before tour logistics

## Professional Development and Information:

- Webinars
- I need to access more template's and tools re: national touring
- Match improved market models with appropriate professional development of venue programmers (not limited to the annual conference)
- "Community Engagement". I'd like an info session, or an info package, containing ideas/suggestions/examples of different types of "value adding" and "community engagement". What is there beyond workshops and post-show Q&A sessions? What else can I, as a producer, do to "value add" to my touring production, thus making it more attractive the presenters (and to Playing Australia).
- I think there is a great need for a "Producing 101" course in Australia, one that handles touring and its challenges head-on.

## Other:

- More consistency between various touring organisations so that everyone know who represents them and how
- Risks should be shared. That leads to best audience size
- A central marketing / publicity mechanism to assist venues and coordinate marketing for entire tours

## **Stakeholder Opinions**

The following comments focus on specific organisations, or describe a respondent's situation and are valuable in understanding the complexity and scope of the sector and its stakeholders.

- APAC should act as a formal agency between presenter and producer
- Just make the whole process less complicated!
- APACA run an annual booking conference in conjunction with PD conference
- Increase support for Blue Heeler Network to support and co-ordinate national tours
- Wind up PATA, ineffective and no longer required now RAA is no longer involved in Touring mechanisms
- At a state level there is much less support being provided to Producers for national touring at the moment which makes it incredibly difficult given the very specific skill-set and experience required to develop and coordinate a national tour. I'd also like to see less one-way conversations. There is a shift this way but I don't think it has shifted far enough. Producers are being invited to now have conversations with Presenters at various industry events but they are still all Producer-led conversations but it generally still feels like a sell. A forum for Presenters pitch their venue to Producers would be great. Presenters tell us Producers their programming policy or framework, the kind of works they want to present, the venues that they often do purchase deals with, the best way to contact them... that would make life a lot easier.

- I just need more contact with regional presenters
- If I had more time! The efforts and time and expense associated with developing a tour and/or pitch cannot be added to the budget or the show is too expensive so this is all voluntary labour which is difficult when the primary use of time needs to be spent in creating the actual work
- A general point - a better understanding of how and where national funding is headed and how the flow on effect of that funding will effect touring in the future ie programming/timing - ensuring that new works are being added to the list and the mechanism is not being clogged with work that is being resubmitted again and again
- That any tool or market is equitable and accessible no matter your skill, race, regionality or experience - and not driven by one interest group
- National performing arts touring is complex and quite standalone so there is a lot to learn. Tools such as APACA's guide to touring are important in learning the lay of the land, it should be handed to everyone when starting out!
- The marketplace should reflect multiple ways to engage - formal pitches, performances, meetings, plenty of time for networking, professional development
- Discussion of how recent changes to Playing Australia have affected national touring would be helpful at upcoming conference, with opportunity for setor to offer feedback.
- In the past we have had presenter votes and then followed them up with building a tour, putting a lot of work and effort in and then when it comes to booking the majority fall through - this stretches our resources and we leave feeling like we have wasted so much valuable time
- There needs to be a mechanism that recognises the independent producer's vital role in the creation of the work, even if they then step aside to invite a tour coordinator to manage the future seasons.
- Revert to old system of Long Paddock / Cyberpaddock, in line with Playing Australia deadlines
- Develop and adopt a truly national tool that everyone is committed to using and is a one stop shop
- Give producers the confidence to make one-off sales. Tours are great, but I want to be able to be the only guy in the room who wants it and still have the producer able to make a deal, or at least know the dimensions of it.
- APACA develop and manage an online touring website and put on more staff to handle the workload! :)

## Appendix - Questionnaire

---

Dear Colleague,

We want to hear your voice.

Performing arts touring is currently in transition and as the sector makes decisions for the future, it is important to re-visit the core needs of touring stakeholders. The needs of those who make and present performance should drive touring strategy.

APACA, Regional Arts Australia and sector colleagues who meet under the banner of the Performing Arts Touring Alliance will use this information to make evidence-based decisions about touring mechanisms and events. Those decisions may be constrained by budgets and resources, but that shouldn't stop us from engaging in some blue sky thinking and I urge you to use the comment boxes in the questionnaire to that end.

The questionnaire will be distributed widely across the sector to ensure as broad a representation as possible. If you know a colleague who has not received it, please feel free to pass on the link. At the same time, however, we only require one response per organisation.

This survey has a dual purpose, and APACA members will be able to offer feedback on their membership experience which will help the organisation better serve the members in the future. This section of the survey outcomes will only be accessed by APACA management.

I urge you to participate. We know you are asked to respond to many surveys and that your time is limited. Some of the questions can be answered instantaneously and others may take a little thought. It should take APACA members about 18 minutes to complete and others between 6 and 13 minutes, depending upon your role and experience in the sector. Note that due to the complex nature of the survey, the progress bar that tells you how much you've already completed may not be accurate, so don't let it discourage you! As a reward for completion, if you give us your email address you will be entered into the draw to win a free registration to *Mobilise*, the 2015 APACA conference and Performing Arts Exchange. Be assured that your details will be kept completely separate from your responses.

Please accept heart-felt appreciation for your thoughtful participation.

Bronwyn Edinger  
Executive Director APACA

\* 1. What is your organisation's average total expenses per year?

- ☐ Under \$500k
- ☐ \$500K - \$1M
- ☐ \$1M - \$1.5M
- ☐ \$1.5M - \$2M
- ☐ \$2M - \$2.5M
- ☐ \$2.5M - \$3M
- ☐ \$3M - \$3.5M
- ☐ \$3.5M - \$4M
- ☐ \$4M - \$4.5M
- ☐ \$4.5M - \$5M
- ☐ \$5M - \$7M
- ☐ \$7M - \$10M
- ☐ Over \$10M

\* 2. What state or territory is your organisation based in?

- ☐ ACT
- ☐ NSW
- ☐ Vic
- ☐ WA
- ☐ SA
- ☐ NT
- ☐ Qld
- ☐ Tas
- ☐ We have branches in multiple states and territories

\* 3. In which location category does your organisation reside?

- ☐ Remote
- ☐ Regional
- ☐ Metropolitan
- ☐ City



\* 4. Which of these, if any, does your organisation belong to?

- ☐ APACA
- ☐ AMPAG
- ☐ Live Performance Australia
- ☐ Circuitwest
- ☐ INAPAC
- ☐ SAPA
- ☐ NARPACA
- ☐ VAPAC
- ☐ Theatre Network Victoria
- ☐ Theatre Network NSW
- ☐ Country Arts WA
- ☐ Regional Arts Victoria
- ☐ Theatre Council Tasmania
- ☐ None

## APACA Membership Benefits

5. Why are you a member of APACA?

6. Please score each of the following APACA membership benefits out of ten according to their importance to you or your organisation (0 = no value and 10 = very valuable)

	Score
Discounted conference registration	<input type="text"/>
Access to full technical specifications of venues through the APACA website	<input type="text"/>
Access to the online email discussion list	<input type="text"/>
Having your organisational profile on the APACA website	<input type="text"/>
Access to benchmarking documents such as the Salaries and Venue Charges Survey	<input type="text"/>
Access to codes of conduct and guidelines such as the Touring Guidelines and PowerPAC	<input type="text"/>
Representation on issues of national policy or regulation by APACA on behalf of your organisation	<input type="text"/>
Access to the Membership Directory	<input type="text"/>

7. Before today were you aware or unaware of the benefits listed in the previous question?

	Unaware	Aware
Discounted conference registration	<input type="radio"/>	<input type="radio"/>
Access to technical specifications of venues on the APACA website	<input type="radio"/>	<input type="radio"/>
Access to the online email discussion list	<input type="radio"/>	<input type="radio"/>
Your organisational profile on the APACA website	<input type="radio"/>	<input type="radio"/>
Access to benchmarking documents such as the Salaries and Venue Charges Survey	<input type="radio"/>	<input type="radio"/>
Codes of conduct and guidelines such as the Touring Guidelines and PowerPAC	<input type="radio"/>	<input type="radio"/>
Representation on issues of national policy or regulation by APACA on behalf of your organisation	<input type="radio"/>	<input type="radio"/>
Access to the Membership Directory	<input type="radio"/>	<input type="radio"/>

## APACA Members

8. What are the top three challenges faced by your organisation today?

Challenge 1

Challenge 2

Challenge 3

9. Overall, how would you rate APACA's current level of communication with members?

- ☐ Poor
- ☐ Below Average
- ☐ Acceptable
- ☐ Good
- ☐ Excellent

## Membership Satisfaction

10. Would you say that APACA is succeeding in each of the following areas?

	Very Unsuccessful	Unsuccessful	Successful	Very Successful	Don't Know
Keeping you informed about industry developments	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Advocating to influence industry mechanisms, policy and regulation	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Providing you with professional development opportunities	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Developing and maintaining industry standards	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Providing sufficient opportunities to network	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

11. To what extent do you agree or disagree with the following statements

	Strongly Agree	Agree	Neither agree nor disagree	Disagree	Strongly disagree
I am proud to be an APACA member	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
APACA is respected in the industry	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
The Board and management understand the needs of the members	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
I feel my organisation is well represented by APACA	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
APACA membership is good value for money	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

## Membership Satisfaction

\* 12. Overall, how satisfied are you with your APACA membership?

Very dissatisfied	Mildly dissatisfied	Neither satisfied nor dissatisfied	Satisfied	Very satisfied	N/A
<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

13. Why do you say that?

\* 14. How likely is it that you would recommend APACA to a friend or colleague?

Not at all likely										Extremely likely
0	1	2	3	4	5	6	7	8	9	10
<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

15. In addition to APACA's current activities, is there anything specific that you think APACA should be doing?

## Primary Function of Organisation

\* 16. What is your organisation's primary function in the performing arts?

- ☐ Presenter
- ☐ Producer
- ☐ Touring Coordinator
- ☐ Funding Body
- ☐ Service Organisation
- ☐ Other (please specify)

## Presenters

\* 17. Some presenters also produce or co-produce. Which of the following descriptions best applies to your organisation?

*For the purposes of this question, "producing" means taking a financial and/or creative role in the original development of a production. Tick as many as are applicable.*

- ☐ We don't produce or co-produce productions
- ☐ We produce or co-produce community/amateur productions - there may be some professional creatives but generally the participants are volunteers and at best are paid their expenses or an honorarium.
- ☐ We produce or co-produce pro-am productions that include some professional artists. Some of the creatives may be paid and the rest of the Company are volunteers (at best paid expenses or a honorarium).
- ☐ We produce professional productions where we take the full financial risk. The participants are paid professional level wages or fees for their participation and we participate in artistic decision-making such as the selection of the work to be produced and the director
- ☐ We co-produce professional work with other companies or artists by contributing money and resources but we don't participate in artistic decisions aside from agreement on the work to be produced
- ☐ Other (please specify)

\* 18. Putting aside local productions created in your community, how many **touring** productions did you program for your 2014 season?

*"Touring productions" include shows from your own state as well as national touring shows. A "production" is one or more performances of the same show. For the purposes of this question, "program" means some active element of selection or undertaking of financial risk, but does not include the addition of hires, regardless of how you may market your season.*

- ☐ 1 - 4
- ☐ 5 - 7
- ☐ 8 - 12
- ☐ More than 13
- ☐ We operate as venue for hire and do not curate a program
- ☐ We only program local productions

## Presenter Programming

19. What are your three greatest challenges in programming your annual season?

Challenge 1

Challenge 2

Challenge 3

\* 20. Approximately what percentage of your program, **based on the number of productions**, was selected from the following sources? *In the event that multiple sources apply, pick the source that you predominantly engaged with for the delivery of the show. Totals should approximately equal 100% for each year. In the case that your response is 0%, please select option rather than leaving empty.*

	2014	2013
Cyberpaddock alone	<input type="text"/>	<input type="text"/>
Cyberpaddock with Long Paddock	<input type="text"/>	<input type="text"/>
Long Paddock alone	<input type="text"/>	<input type="text"/>
Australian Performing Arts Market	<input type="text"/>	<input type="text"/>
Dance Massive	<input type="text"/>	<input type="text"/>
Honey Pot	<input type="text"/>	<input type="text"/>
Your own state showcase	<input type="text"/>	<input type="text"/>
Another state's showcase	<input type="text"/>	<input type="text"/>
Negotiated directly with producer/touring agent (separate to touring markets such as those above or an online selection round)	<input type="text"/>	<input type="text"/>
Production produced by my organisation	<input type="text"/>	<input type="text"/>
Locally produced work	<input type="text"/>	<input type="text"/>
Productions delivered by the touring consortiums of Mobile States, Roadworks or BlakLines	<input type="text"/>	<input type="text"/>
Productions delivered through another type of touring consortium that your venue belongs to	<input type="text"/>	<input type="text"/>
Other	<input type="text"/>	<input type="text"/>

## Presenter Programming

21. How important is it for your organisation to include the following types of work in your annual program?

	Essential every year	Essential every few years	Nice to have	Not important
Productions from your state	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Productions created in your community	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Productions from the major performing arts companies	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Productions created in other states and territories	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

22. Are there types of productions, genres or producers you would like to program but have been unable to do so in the past? If so, be as specific as you can.

Type 1

Type 2

Type 3

23. Why haven't you been able to program this work?

*Please list your reasons in the order you have listed the genres/producers in the previous question.*

Reason 1

Reason 2

Reason 3

Presenter Touring Needs

\* 24. Tell us about your information needs. At what stage in the process do you require the following information and services, if at all? *Assume that basic information such as genre/artform, synopsis, artistic personnel and producer contact details will be provided, and that fees and dates can be successfully negotiated.*

	I base my <b>programming</b> decision on these factors	Essential to <b>presenting the</b> production but not essential to my programming decision	Not essential to programming or presentation but <b>nice to have</b>	Not important at all
Video excerpts of the production	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Full length recording of production	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Copy of script (for a text-based production)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Technical specifications including hiring requirements	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Venue crewing requirements	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Contractual billing/acknowledgement information	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Sponsorship commitments	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Production performance history (ie where it has previously played)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Creative rationale	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Marketing plan	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Examples of marketing collateral	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Full media reviews (as opposed to quotes)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Community engagement strategies	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Information on what productions other presenters are interested in programming	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Assessment of the production by colleagues who have seen the production (either online or contact details so you may discuss privately)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Producer budgets (as opposed to fees)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Background of producing company	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Information on how the various touring/programming online and face-to-face markets work	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Information on what productions producers are developing for the future	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

25. Is there any other information not already listed that you require before making a programming decision?

\* 26. If the sector were to start from scratch and create tools and events to assist you in your programming, how likely you would be to use them, assuming there was a nominal charge designed to cover costs? Please rate each of the following on a scale of 1 to 10 where 1 = extremely unlikely and 10 = extremely likely.

[illegible]



	1	2	3	4	5	6	7	8	9	10	Don't know
Short pitches (speeches) about tour-ready productions at industry events	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

27. Are there other tools and events you would like to see that would help you with programming, either in terms of product selection or logistics? Please specify:

## Presenter Touring Preferences

\* 28. If you could access online all the information you required to program a production would you still **travel interstate** to attend a face-to-face national touring market such as Long Paddock or the Australian Performing Arts Market?

- ☐ Yes
- ☐ No
- ☐ Don't know

29. Why do you say that?

30. When investigating and booking a production you would like to present, would you prefer to deal with

- ☐ The producing company
- ☐ A third party broker or touring agency
- ☐ Don't care/don't know

31. Please rate the factors that dictate when you work on your next season's program on a scale of 1 to 10 where 1 = no impact and 10 = very high impact.

	1	2	3	4	5	6	7	8	9	10	Don't know
Cyberpaddock national touring round voting deadlines	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Playing Australia funding rounds	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Your season launch	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Your annual leave	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Other important activities within your organisation	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Your own state showcase	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
State funding deadlines (which may be managed through Cyberpaddock or touring coordinators)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

32. Are there any other factors that influence when you work on your next year's programming?

## Presenter Marketing Resources

\* 33. To what degree does the level of your own organisation's marketing resources and expertise play a part in your program choices?

- ☐ A great deal
- ☐ It is a consideration
- ☐ None at all
- ☐ Other (please specify)

\* 34. Do you have a full-time marketing staff member whose primary role is to promote your venue and its program?

- ☐ Yes
- ☐ No
- ☐ It's complicated

## Producer Experience

\* 35. How would you classify yourself?

- ☐ Major performing arts company (as classified by the Australia Council)
- ☐ Small to medium producing company
- ☐ Independent producer
- ☐ Independent artist
- ☐ Other (please specify)

\* 36. How frequently has your organisation toured outside your home state in the last 5 years?

- ☐ Never
- ☐ Once
- ☐ Twice
- ☐ Three or more times

37. What are your three greatest challenges in mounting multi-state (national) tours?

Challenge 1

Challenge 2

Challenge 3

\* 38. In which of the following mechanisms and events have you participated in order to gain presenter interest to mount a multi-state tour?

- ☐ Cyberpaddock
- ☐ Long Paddock pitch or excerpt
- ☐ Australian Performing Arts Market
- ☐ Your own state's showcase
- ☐ Another state's showcase
- ☐ Approached and negotiated directly with presenters (separate from the touring markets and mechanisms described above)
- ☐ Specific touring strategies such as BlakLines, Roadworks or Mobile States
- ☐ None of these
- ☐ Other (please specify)

Producer Tools and Events

\* 39. If the sector were to start from scratch and create tools and events to assist you in mounting a tour of your production, how likely you would be to use them, assuming there was a nominal charge designed to cover costs? Please rate each of the following on a scale of 1 to 10 where 1 = extremely unlikely and 10 = extremely likely.

	1	2	3	4	5	6	7	8	9	10	Don't know
Participation in an online menu of tour-ready productions which presenters use to program their seasons	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Tour brokers who would promote your production to presenters	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Tour coordinators to develop and manage your tour	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Information how the various touring/programming events and mechanisms work to help you navigate the sector	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Information on the type of productions that specific presenters were programming	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Contact information so that you can directly communicate with presenters	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Informal networking events so that you have an opportunity to meet presenters	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Networking events with your producer peers	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Formal sessions where you are individually introduced to presenters (rather than having to introduce yourself)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Formal opportunities to pitch your work to presenters at industry events	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Opportunities to show excerpts of your work to presenters	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Opportunities for presenters to see your full-length work	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
A national calendar of confirmed tours	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
An online discussion forum with other producers to discuss touring	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Live streaming or a recording of a national touring market (eg Long Paddock) that you can view from your desk	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Professional development sessions on how to create tours	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

40. Are there other tools or events you think would help you develop a national tour? Please specify:

## Producer Tools and Events

\* 41. If **presenters** could access online all the information required for them to program your production and could connect with you or your organisation if further information was required, do you think a face-to-face touring market should be held?

- ☐ Yes
- ☐ No
- ☐ Don't know

## Producer Touring Needs

\* 42. Would you or a representative of your organisation attend?

- ☐ Only if I got some type of formal presentation spot such as a pitch or the opportunity to perform an excerpt
- ☐ If I had a production I wanted to tour I would attend regardless of whether I had a formal presentation opportunity
- ☐ I would attend even if I didn't have a production specifically in mind
- ☐ No, I wouldn't attend but I believe other producers should have the opportunity to do so
- ☐ Don't know

## Producer Touring Needs

43. Why do you say that?

## Producer Touring Needs

44. Based on your organisation's existing skills and resources, if you received interest in touring your production from presenters, would you:

- ☐ Develop the tour in-house
- ☐ Use a third party producer or touring agency
- ☐ Don't know

## Touring Market Attendance

\* 45. Have you previously attended a national touring market or event such as Long Paddock?

- ☐ Yes
- ☐ No

## Touring Market Attendance

46. What are the primary reasons you have not attended a national touring event?

### Touring Event Planning

\* 47. Given workload, budgets and other organisational constraints, how many industry touring events (eg Long Paddock, Australian Performing Arts Market) held **interstate** are you able to attend per year?

- ☐ None
- ☐ One
- ☐ Two
- ☐ As many as necessary

48. Which of these statements most closely represents your attitude to the location of national touring events?

- ☐ I don't have time to spare - the closer to home the better
- ☐ I like to go to places I would not otherwise visit
- ☐ I prefer capital cities
- ☐ I am willing to take multiple flight legs if the event is held in a regional place
- ☐ I don't care where it is, if I need to attend and I'll go wherever is necessary

\* 49. Which of these statements most closely represents your current situation?

- ☐ I can only be absent from my organisation to attend industry events for **TWO** days at a time
- ☐ I can only be absent from my organisation to attend industry events for **THREE** days at a time
- ☐ I can only be absent from my organisation to attend industry events for **FOUR** days at a time
- ☐ Time absent from my organisation is not an issue so long as the content of the industry events is useful and appropriate
- ☐ Other (please specify)

### Touring Information Provision

\* 50. Do you feel you have enough information on how national touring works to effectively do your job?

- ☐ Yes
- ☐ No
- ☐ Don't Know

### Touring Information Provision

51. What could be done to help remedy that?

### Touring Improvements

52. Are there other changes to national touring tools and events that you have not had the opportunity to suggest so far in this survey which would help you better meet your organisation's objectives? If so, please list.

Suggestion 1

Suggestion 2

### Thank-you!

53. If you would like to be in the running to win a free registration to *Mobilise*, the 2015 APACA Conference (including the Performing Arts Exchange), please give us your email address. Be assured it will be held separately to your answers.

**We really appreciate the time you've taken to complete this survey.**