

**National  
Presenter  
Outlook**

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A dark silhouette of a person in a dynamic, athletic pose, possibly a dancer or performer, is positioned behind the main title. The figure is leaning forward with one arm extended and the other raised, set against a background of green leaf patterns.

# APAX

AUSTRALIAN  
PERFORMING  
ARTS EXCHANGE

2023

28 AUG - 1 SEPT  
CAIRNS / GIMUY

# Presenter outlook

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## Presenters:

- Performing Arts Centres
- 86% are owned by Local Government
- 65% are directly managed by Local Government
- Presenting Producers / Producing Presenters

# **Presenter outlook**

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**Member Data (2022)**

**Presenter Survey (March 2023)**

**Touring Advisory Group**

# Presenter outlook

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|     | % respondents | % membership |
|-----|---------------|--------------|
| ACT | 2.1%          | 3%           |
| NSW | 29.8%         | 27%          |
| NT  | 2.1%          | 2%           |
| QLD | 12.8%         | 18%          |
| SA  | 4.3%          | 5%           |
| TAS | 4.3%          | 3%           |
| VIC | 34%           | 26%          |
| WA  | 10.6%         | 13%          |

# Presenter outlook

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**How much...  
and how many?**

In 2019, PAC Australia members presented over 64,000 performances and events in their venues, attracting over 12 million audiences.

# Presenter outlook

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In 2019, PAC Australia members presented over 64,000 performances and events in their venues, attracting over 12 million audiences.

In 2021, that was just over 29,000 performances and events, and 6.9m audiences.

# Presenter outlook

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## What is it?

- 58% professional
- 24% touring work

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**What does all  
this cost?**

**SHOW FEES**

**2019 = \$44m+**

**2021 = \$39m+**



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**PLUS...**

**SHOW FEES = \$39m+**

**COST TO PRESENT = \$17.8m**

**MARKETING = \$11m**

**And other costs of being a presenting  
venue...**

# Presenter outlook

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## What's going to happen...

|                                | 2022       | 2023       |
|--------------------------------|------------|------------|
| Cut costs <b>SUBSTANTIALLY</b> | <b>27%</b> | <b>17%</b> |
| Cut costs <b>MINIMALLY</b>     | <b>43%</b> | <b>47%</b> |
| We're ok for now               | <b>30%</b> | <b>32%</b> |

# Presenter outlook

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**What's going to  
happen...**

Programming Funding:

**80% of presenters can budget to make  
a loss on their programming.**

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## What's going to happen...

Programming compared to pre-COVID

|                         | 2022 | 2023 |
|-------------------------|------|------|
| Spending more           | 13%  | 16%  |
| Spending less           | 33%  | 26%  |
| Spending about the same | 44%  | 58%  |

# Presenter outlook

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## What's going to happen...

Compared to this year

(what will presenters spend in 2024, compared to 2023)

| Spending more           | 20% |
|-------------------------|-----|
| Spending less           | 22% |
| Spending about the same | 58% |

# Trends

- **70% of presenters are investing more in the audiences experience of attending shows (e.g. engagement, pre/post show activities).**
- **32% of presenters are buying fewer, or less expensive shows to fund the above.**

# Quote

*“Not enough producers have a plan for community engagement - which we're happy to pay for.”*

**Regional NSW Presenter**

*“Productions need to have an interval for bar sales and patron comfort.”*

**Regional WA Presenter**

# Trends

- **64% of presenters are NOT raising average ticket prices, to keep audiences coming through the door.**
- **25% of presenters have raised ticket prices to offset increasing costs to present.**
- **23% of presenters are buying fewer shows than normal, specifically due to the unavailability of labour.**



# Quote

*“Labour is a big issue - not that we're buying less shows, necessarily, but that we are spending more time trying to negotiate dates with both hirers and producers as the labour shortage impacts scheduling - no back to backs or overnight bump-ins, we simply don't have the supervisors to run multiple crews.”*

**Regional QLD Presenter**

*“The technical labour shortage will be a go / no go for our business. Producers need to manage their expectations for presenter capacity to provide crew...we cannot dedicate all staff hours on a single event.”*

**Metro NSW Presenter**

# Trends

- **73% of presenters are looking to buy in small-scale works**
- **36% are looking to buy in works of scale.**
- **30% are interested in commissioning works.**

# Other common themes...

- **Co-operative marketing and comprehensive marketing materials.**

*“I've noticed producers and artists are more willing to provide supplementary marketing elements if asked by presenters i.e. shout outs, additional images - it really does help.”*

*“Even when there's a buy-in, we will need producers and artists to contribute to selling the show. We've had a couple of visiting shows where the artists have refused to do media, and their ticket sales haven't been as strong as others.”*

# Other common themes...

- **Co-operative marketing and comprehensive marketing materials.**

*“To meaningfully engage with audiences, artists must be able to tell their story, promote their event/offering thoughtfully and encourage action from their fans. Events are an act of co-creation, and this needs to be addressed more proactively.”*

**Metro VIC Presenter**

# Other common themes...

- **Technical labour shortage**

**We're all in the same boat.**

**Technical budgets will make or break the engagement. Be clear about needs, reasonable about expectations, and understand the limitations of the infrastructure available.**

**Audiences.**

**Presenter  
outlook**

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# Presenter outlook

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## Audiences.

Compared to pre-COVID levels:

|                     | 2022 | 2023 |
|---------------------|------|------|
| Less than pre-COVID | 66%  | 41%  |
| About where we were | 30%  | 39%  |
| Better than before! | 4%   | 20%  |

# Presenter outlook

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## Audiences.

85% - Audiences purchasing tickets late (close to the performance).

- Can I afford it this week?
- Permanent change in buyer behaviour (late decision making).



# Presenter outlook

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## Audiences.

67% of presenters are spending more on marketing and/or engagement to get audiences back.

Audiences are also spending more time researching shows – careful decision making.

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## Audiences.

17% - Some audience members have ongoing COVID-related concerns about attending live performance.

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## Audiences:

### common themes

- Cost of living, mortgage stress and inflation.
- Preference for relaxed consumption (e.g. Netflix) or unmissable events.
  - Market saturation

# Audiences.



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National NSW What's on

## Harry Styles, WorldPride, Backstreet Boys: Sydney road closures this weekend



Olivia Ireland

March 3, 2023 – 11.03am

Save Share A A A

Review

### Three decades of musical heroines rock Sydney in a single night

Sydney is in for a heaving weekend as three iconic acts are set to create significant

age  
/www.theage.com.au > ... >



Brisbane Times

<https://www.brisbanetimes.com.au> > ... > Suncorp Stadium

### Suncorp Stadium gigs set to double, prompting mayor's call for ...

12 Sept 2022 — With the number of **concerts** at Suncorp potentially rising to 12 a year, ... has backed a boutique stadium for **Brisbane** to meet event demand.

### More than 100 live music gigs planned for Melbourne - The Age

4 June 2022 — Creative Industries Minister Danny Pearson said the **performances**, which will take place across **Melbourne** – from St Kilda to Altona – will “rock ...

# Presenter outlook

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**Audiences.**

**PERTH FEB/MAR 2023**

**BJORK**

**ED SHEERAN (same night as Bjork)**

**HARRY STYLES**

**LORDE**

**MOULIN ROUGE**

**RED HOT CHILI PEPPERS**

**ROD STEWART**

**CYNDI LAUPER**

**PERTH FESTIVAL**

# Presenter outlook

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## Audiences:

### common themes

- Comedy, music and light entertainment.
  - Pull of nostalgia is very strong.

(JOYFUL EXPERIENCES)

- Audience will pay more for less 'risky' work.

# How do presenters program?

1. Artists or producers contacting the venue
2. The venue directly contacting artists or producers
3. National Arts Markets
4. Source directly from Tour Coordinators
5. State Arts Markets
6. Research and attending shows
7. Call for submissions (*very low score*)

# Presenter outlook

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## Markets

- 70% plan to attend... to buy.
- 26% will attend to network and reconnect.
- 4% don't intend of attending a market this year.