



EVALUATION OF
AUSTRALIAN
PERFORMING ARTS
MARKET 2014-2018

EXECUTIVE SUMMARY 2017

Developed by

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ACKNOWLEDGEMENTS

This report has been created through the extraordinary assistance of APAM and Brisbane Powerhouse staff, in particular Zohar Spatz, Samantha Currie and Donna Orazio.

QUT acknowledges the Traditional Owners of the lands where QUT now stands, and pays respect to their Elders – past, present and emerging – and acknowledges the important role Aboriginal and Torres Strait Islander peoples continue to play within the QUT community.

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PHOTO CREDIT

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EXECUTIVE SUMMARY

The second year report on the Brisbane iteration of the Market

In the awarding of the tender for APAM by the Australia Council for the Arts to Brisbane Powerhouse for the delivery of the market in 2014-2018, a requirement is that a formal evaluation of the three iterations of APAM be undertaken by the Queensland University of Technology (QUT), Creative Industries Faculty, under the leadership of Associate Professor Sandra Gattenhof. The agreed research model delivers reporting on outcomes not only in the year in which APAM is delivered (2014, 2016, 2018) but also in the years between (2015, 2017).

APAM sits within a context of other Markets internationally. Other Markets include International Performing Arts for Youth (IPAY) and American Performing Arts Presenters (APAP), both annual showcases/conferences held in the United States of America; Performing Arts Market in Seoul (PAMS), held yearly in October; and International Society for the Performing Arts (ISPA), which holds two Congresses every year – one in New York and one in a different region of the world.

Unlike other Markets, which welcome the inclusion from outside the country in which the Market takes place, the focus of APAM is solely on the presentation of Australian and near-neighbour country (New Zealand) performance works, both Indigenous and non-Indigenous, ready for national and international touring.

This report provides an analysis of data for the period January to August 2016. It also draws on comparative data from four previous reports developed in 2014 and 2015. As such, it falls into phase 3 of the research process outlined on page 6 of this

document. The outcomes of the analysis are delivered through a set of narratives about the impact of APAM and its outputs, the activities that are enabling it to have this impact, and any barriers that may be preventing it from having the anticipated impact. The comparative report has been constructed through an analysis of data from the reports provided in May 2014, October 2014, August 2015, December 2015 and June 2016, which capture ongoing development of APAM.

Data for this analysis has been drawn from the following sources:

1. Online delegate survey delivered to all APAM 2016 delegates ten days after the event
2. Event observations undertaken by the QUT research team
3. Vox pops (*vox populi*) undertaken by the QUT research team immediately after performance presentations, pitches or delegate networking events
4. Two focus buyers' focus groups that occurred during APAM 2016
5. Interviews with 2014 and 2016 case study artists and company representatives
6. Interviews with key Brisbane Powerhouse and APAM staff
7. Interviews with key stakeholders identified by APAM staff.

The report highlights eight key trends emerging from the data:

1. The majority of 2016 delegates indicate in the survey response that they will return to APAM 2018 and that 2016 was a positive experience
2. The enhanced attention to include Indigenous staff, delegates and programming, particularly with the First Nations focus, was a highlight of the event
3. The central reason for attending is the networking opportunities the Market affords
4. Respondents are confident that a range of new relationships forged at the Market will afford long-term interest and buying opportunities
5. Respondents affirmed that greater attention to networking activities within the program enabled touring outcomes
6. The multi-venue model was still a concern, but is much reduced compared to delegate responses from 2014
7. The level of expense incurred by producers to present work at APAM, particularly at a time of severe funding cuts to the Australian small to medium companies, remains an issue
8. There is a need for recalibrating around the value proposition of APAM to respond to better stakeholder needs.

INTRODUCTION

Research framework

This section outlines the agreed research design (QUT/BPH executed services agreement 17 September 2013) for a longitudinal evaluation of APAM (2014–2018) across all APAM and non-APAM years, as per the Brisbane Powerhouse Tender and Australia Council Services Agreement. The Services Agreement with Brisbane Powerhouse notes the requirement for Brisbane Powerhouse, in partnership with the Australia Council, to:

Establish efficient evaluation methodology that assesses the impact of each APAM and work in progress year and is used to continually refine the events and assess the overall impact. It is vital that this methodology includes a longitudinal mechanism to capture relationships and income generated over time through attendance at APAM and the Works in Progress.

The five-year evaluation framework (2014–2018) for the APAM hosted by Brisbane Powerhouse will be developed and led by Associate Professor Sandra Gattenhof, Head of Drama, QUT. The research has ethical approval from the QUT Research Ethics Unit:

Project Title:	Evaluation of Australian Performing Arts Market 2014–2018
Ethics Category:	Human – Low Risk
Approval Number:	1300000811
Approved Until:	6/01/2019

It should be noted that on the request of Brisbane Powerhouse a variation for ethical clearance was approved in February 2016. This allowed online survey respondents to include identifying data or to choose to remain anonymous.



Research aims and research phases

As outlined in the Brisbane Powerhouse Tender document, the aims of the research will be to evaluate three interrelated outcomes (articulated below) through a longitudinal five-year study. As such, the following three foci have been used to construct the report:

- Evaluation of international market development outcomes through showcasing work to targeted international presenters and agents
- Evaluation of national market development outcomes through showcasing work to national presenters and producers
- Evaluation of the exchange ideas, dialogue, skill development, partnerships, collaborations and co-productions and networks with local and international peers.

The research proceeds in three phases.

In **Phase 1** (2014), the research team consulted with stakeholders – including the APAM Steering Committee, key Australia Council representatives (on advice from the Australia Council), key Brisbane City Council representatives, key Arts QLD representatives, key Tourism and Events QLD representatives, APAM Executive Producer and Project Coordinator, Brisbane Powerhouse key representatives (Steering Committee members) – to establish categories of impact. The outcome of this phase of the research was a set of narratives about the anticipated or desired impact of APAM for different stakeholder groups.

In **Phase 2** there are two distinct approaches. In the years in which APAM is/was delivered (2014, 2016 and 2018) observations, electronic survey, focus groups and still and moving images will be used to collect quantitative, qualitative and performative data on the stakeholders' and producers' (both national and international) satisfaction levels of attending and participating in APAM and the producers' impacts/outcomes – such as international market development, touring and partnerships. This began with the first APAM on 18–22 February 2014 at the Brisbane Powerhouse. In the years in which APAM is not delivered (2015 and 2017), a survey of all producers is conducted after producers have showcased at APAM. Over the life of the evaluation, this will track trends and markers of success that may include income generation, distribution of product nationally and internationally, network development and partnership establishment. To deepen knowledge of best practice, approximately three to six selected producers (as advised by the research stakeholders group) will continue to be tracked in-depth as part of Phase 2 to evaluate their international and national market development outcomes and to evaluate the exchange of ideas, dialogue, skill development, partnerships, collaborations and co-productions, and networks with local and international peers. Over the life of the study, approximately eighteen producer case studies will be developed and documented.

In **Phase 3**, the research team evaluate and report on the outcomes and performance of the APAM in the delivery years (2014, 2016, and 2018). This evaluation will report on the anticipated and actual impact of APAM in relation to established categories, including a summary of which processes, activities or engagement protocols have been the most effective catalysts for specific types of impact. In the non-delivery years (2015 and 2017), the evaluation report takes a broader focus to include consolidated producer data gathered through surveys and producer case studies to identify trends and habits that may lead to strong and impactful international and national market development outcomes and exchange ideas, dialogue, skill development, partnerships, collaborations and co-productions, and networks with local and international peers. These trends and habits will then be communicated to subsequent producers as models of best practice.

The final comparative and consolidated evaluative report delivered at the end of 2018 will provide evidence of the significance of APAM, in aesthetic, social and cultural terms, for communities in Australia.

Framing the narrative

The findings in this report are informed by earlier analyses undertaken by the research team – 2014 Year One Report, the APAM inter-year report (mid-2015) and the second inter-year report (December 2015). New data for comparison have been generated from interviews with senior APAM staff, interviews with APAM stakeholder organisations, interviews with case study organisation representatives, vox pops from delegates in response to individual presenting sessions, and responses from a detailed online survey sent to all delegates post-APAM. To ensure standardisation of attributing data to individuals the research team have decided to de-identify responses. This has been undertaken in previous reports.

Given that 2014 was the inaugural Market for the Brisbane Powerhouse, there were a range of complex elements that required juggling in the presentation of such an activity, and one that sat outside the usual range of activities produced by the venue. Due also to the new physical environment for APAM in 2014, the curatorial and operational processes had to be developed with little background from which the Brisbane Powerhouse and its staff could draw. Not unexpectedly, a range of recommendations from the 2014 report reflected this situation, particularly regarding the positioning and presentation of the APAM product. It can also be seen, however, that, by the 2016 iteration of the Market, the Brisbane Powerhouse and the APAM team had made significant progress in the conceptualisation and presentation of the event; this early evaluation reflects this improvement, evident in this snapshot of responses from the survey provided to all APAM 2016 delegates:

The schedule, presentation and content of the work presented was well devised and extremely easy to navigate as a presenter looking to see as much work as possible. (APAM online delegate survey, 2016)

I truly think the 2016 APAM was one of the best yet in terms of smoothness and form. The content (i.e. pitches and showcases) left me a little underwhelmed. But the contacts made and discussions were excellent and I went for the networking. (APAM online delegate survey, 2016)

I think Brisbane is getting better at hosting APAM each year, and I see it as vital for my professional development and networking as well as benchmarking what work is out there, and what the performance “zeitgeists” are. It is a vital part of [the] Australasian performing arts industry. (APAM online delegate survey, 2016)

These operational and positioning advances for the Powerhouse’s presentation of the event will be explored in further detail throughout this analysis, along with addressing other recommendations from the major report on the 2014 iteration.

From the research undertaken over the past two years and four months it is clear that APAM is not a static model and it will continue to respond to feedback and innovations through the course of the contract of delivery (2014–2018). Additionally, though, there were other significant factors that came to the fore, given that the arts climate in Australia has shifted palpably in the two-year interim. A significant factor which was made manifest for APAM 2016 was the weight of uncertainty and volatility surrounding the national arts funding climate due to changes,

particularly in the Australia Council for the Arts’ funding programs in 2015. This shift created another layer of complexity for the Market this year, so that nervousness around committing to touring activity was notable – in the 2016 online delegate survey, of 150 comments related to returning in 2018, 20 focused on uncertainty around funding. This can be compared to the same question from the 2014 survey where, of the 212 responses, 5 comments from delegates pertained to budget uncertainty.

Given that the costs for independent artists and small companies to present work at APAM was raised as a significant concern following the 2014 Market, the anxiety around the expense involved and weighing up of the return on investment for artists and companies becomes even more acute, raising a key question to be explored over the next 18-month period: does this volatility strengthen or weaken the resolve for touring and presenting outside of one’s home city? This may depend significantly on the nature of the specific companies and artists in question. As with the 2014 evaluation process, a range of case study productions have been tracked over the 18-month period preceding APAM 2016. It is a key issue for consideration, however, particularly as exactly half of all delegates (identified as sellers) who participated in the online survey advised that they had been provided with financial assistance to attend APAM.

SECTION ONE

Reporting back on recommendations arising from 2014

From the research undertaken from the 2014 Market, and the three previous reports (August 2015, December 2015 and June 2016) that were undertaken, five key recommendations were presented, which remain a key touchpoint for the analysis of the 2016 Market. In summary, the recommendations from the Year One Report (Gattenhof & Seffrin 2014, pp. 44-48) were described as:

1. Indigenous focus to remain central to the conception and delivery of APAM
 2. Re-framing APAM's function and its delivery
 3. Logistics and communications in a multi-venue approach, including communications and housekeeping, volunteers, catering, re-calibrating the employment of Brisbane Powerhouse protocols and processes for APAM
 4. Presentation and promotion for presenters
 5. Strategic targeting of Asian producers.
- The data collected in the mid-2015 survey and reported in the APAM inter-year report 2015 tabled in December (Gattenhof & Seffrin 2015a, p. 18) indicated that delegates saw three areas crucial to improvement:
1. Logistics related to concerns about the continued use of a multi-venue model that were flagged in the Year One Report (see Year One Report, 2014, p. 43 and p. 46). Concerns related to venues being fit for purpose to showcase, present excerpts or pitch their product. While respondents noted that indoor venues had excellent technical capacity and the technical staff were well-placed to help them manage the delivery of the product, many respondents noted that the venue was unsympathetic to the product itself.
 2. Indigenous focus to remain central to the conception and delivery of APAM. Survey data from mid-2015 indicated that presenters saw Indigenous performance as the unique selling point of APAM compared to other markets.
 3. Presentation and promotion for producers, particularly with greater emphasis on Asian markets. The Year One Report (2014, p. 48) noted the need for strategic targeting of Asian producers, to develop more impactful touring outcomes in the Asian market. The qualitative survey data from the mid-2015 survey showed that there were a number of companies who had successfully gained traction in the Asian market.
- With these three above areas in mind, an exploration of the 2016 Market's engagement with the five key recommendations emerging from the Year One Report 2014 will be presented.



SECTION TWO

Evaluation of national and international market development outcomes

In this section of the report two key research aims will be unpacked:

- Evaluation of international market development outcomes through showcasing work to targeted international presenters and agents
- Evaluation of national market development outcomes through showcasing work to national presenters and producers.

The research aims will not be dealt with individually as the data shows that Market development outcomes for producers and presenters have a dynamic interrelationship. Perhaps one of the best demonstrations of APAM's national and international market development outcomes through showcasing work to presenters, agents and producers is to look deeply at a selection of companies and artists who presented their products at APAM in either full-length showing (APAM uses the term showcase), 25-minute excerpts or through pitches.

This section of the report focuses on a group of works that was presented at APAM 2016 and APAM 2014, and which had been identified by senior APAM staff as providing a balanced cross-section of organisations at varying points in their maturation, along with a diversity of presentation models as offered by APAM 2014 and APAM 2016, for the purposes of inclusion in the evaluation process.

The focus is the work that was presented rather than, specifically, the company or individual artists; however, in so doing, a range of significant issues and some common threads derived from the views of each production's representative were brought to light, which have been identified at the end of this section of the report.

THE CASE STUDY APPROACH

As noted in the research approach section of this report, it is anticipated that the case studies will provide examples of best practice that other producers can leverage in showcasing their product, developing their own national and international uptake of product and establishing sustainable networks, partnerships and collaborations. "Narrative accounts can tell us why people value cultural experiences and what those experiences mean to them, rather than just measuring to what extent they were affected" (Carnwath & Brown 2014, p. 13).

Specifically for those organisations presenting the case study productions, it is hoped that the process of deconstructing the APAM experience will assist in a process of self-evaluation so that the successes and challenges for them as presenters of work at future APAMs can be effectively monitored.

The data represented in this section of the report is a sequence of six narratives developed from the interviews pre-APAM, six months post-APAM and for companies that presented at APAM 2014 ongoing tracking interviews conducted mid-2015 and in mid-2016. The twelve artists and companies will continue to be tracked in terms of the development and touring outcomes for the production until post-APAM 2018, where another six artists and companies will be added to make a total of eighteen case study artists and companies over the life of the delivery of APAM in Brisbane 2014 to 2018. Interviewees have been de-identified in accordance with research ethics. This is to allow each participant full disclosure in the expression of their views without any ramification for the individual making the comments.

Companies selected for detailed tracking in 2014 and 2016

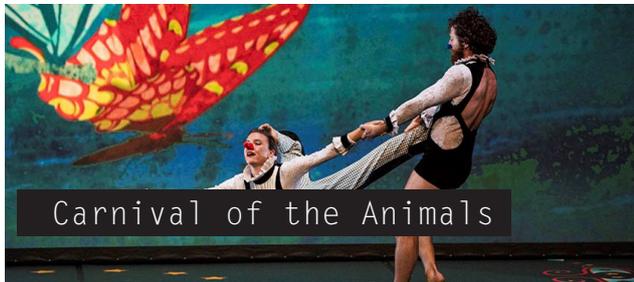
Presented at APAM 2016

Terrapin Puppet Theatre's presentation of You and Me and the Space Between (Theatre: Pitch)	On the island grew a girl. She found herself wondering sometimes, could there be another place, where the stars right above her could be seen from the left, but the ones to her right could be looked at straight up? Influenced by Kamishibai, an ancient form of Japanese paper theatre, <i>You and Me and the Space Between</i> sees an illustrator draw a story live as it is read to the audience, a musician plays a live composition. (APAM Program Guide 2016, p.134)	Pitch (all ages)	Premiered in 2016	Funded
Circa's presentation of Carnival of the Animals (Physical Theatre/circus/puppetry: Excerpt)	The Circa Carnival comes to town with whimsical tales of creatures from land and sea, who tumble, fly, leap and spin their way through the many wondrous worlds of the animal kingdom. A work of sophisticated and delightful family entertainment, this multimedia reimagining of <i>Carnival of the Animals</i> is at once both contemporary and old world. (APAM Program Guide 2016, p.65)	Excerpt (family)	Premiered in 2014	Funded
NORPA's presentation of Three Brothers (Theatre: Pitch)	Through the language of dance, song, storytelling and imagery, renowned Aboriginal theatre and dance practitioners have collaborated to develop a powerful new work. The poignancy of this story rests in the parallel of a fictional Aboriginal family to the ancestral "Three Brothers" creation story of the Bundjalung people. With resilience and humour <i>Three Brothers</i> explores the twists of these men's relationship to one another. (APAM Program Guide 2016, p.131)	Pitch (all ages)	In development*	Funded
Stephanie Lake Company's production of Double Bind (Dance: Full-length)	What if internal conflict was made external? Inspired in part by real-world experiments on personal conscience versus the tendency to just follow orders. <i>Double Bind</i> features original composition from internationally acclaimed audio-visual artist Robin Fox, while Stephanie Lake, one of Australia's most commanding choreographers, interrogates the perils of obedience with electricity, intricacy and grace. (APAM Program Guide 2016, p.75)	Full Length (12 years+)	Premiered in 2016	Independent
Nicola Gunn's production of Piece for Person and Ghetto Blaster (Theatre: Full-length) Also presented as part of World Theatre Festival 2016 at Brisbane Powerhouse	<i>Piece for Person and Ghetto Blaster</i> is the story of a man, a woman and a duck. It dissects the excruciating realms of human behaviour in an attempt to navigate the moral and ethical complexities of becoming a better person. Accompanying the text is a rhythmic electronic soundscape by composer Kelly Ryall and choreography by Jo Lloyd that shifts from the unnecessary and incongruous to the strangely affecting. (APAM Program Guide 2016, p.95)	Full length (15 years+)	Premiered in 2015	Independent
Back to Back Theatre's production of Lady Eats Apple (Theatre: Pitch)	Back to Back's new large-scale theatrical work examines the awesomeness of our existence and the simultaneous tragedy of our death. Staged in a large proscenium theatre, the audience sits on stage, facing the auditorium. A thin single cell inflatable surrounds, the audience and actors are repositioned in another world, rupturing expectation of the conventional theatre experience. <i>Lady Eats Apple</i> explores human nature and our search for immortality. (APAM Program Guide 2016, p.126)	Pitch (16 years+)	Premiering in 2016	Funded

*The passing of key creative collaborator David Page has necessitated that *Three Brothers* undergoes a new stage of development.

CASE STUDIES

Tracking the commercial outcomes from presenting companies and artists



Images (top left to bottom right) courtesy of: *You and Me and the Space Between*: Peter Matthew; *Carnival of the Animals*: Rob Maccoll; *Three Brothers*: Adam Taylor; *Double Blind*: Rob Maccoll; *Piece for Person and Ghetto Blaster*: Gregory Lorenzutti; *Lady Eats Apple*: Jeff Busby.

Case studies and market development outcomes

CASE STUDY	DETAILS	MARKET DEVELOPMENT OUTCOMES
<i>You and Me and the Space Between</i>	Terrapin Puppet Theatre Theatre Pitch	Confirmed presentation at Edinburgh Children's Festival, May 2017 Interest from Japanese presenter, probably for 2018 Interest from Canadian presenter Negotiating with domestic presenters
<i>Carnival of the Animals</i>	CIRCA Physical Theatre/Circus/ Puppetry Excerpt (Family)	US agent secured 4-week tour to Mexico Confirmed presentation in Korea, May 2017 Hoping for an AusAsia Connect program Queensland and National tour of a new work, <i>Landscape with Monsters</i> , 2017
<i>Three Brothers</i>	Northern Rivers Performing Arts (NORPA) Theatre Pitch	The passing of key creative collaborator David Page has necessitated that <i>Three Brothers</i> undergoes a new stage of development
<i>Double Blind Piece for Person and Ghetto Blaster</i>	Stephanie Lake Company Dance Full-Length Production	Securing of commission for new work in New Zealand Securing of commission for a separate new work nationally
<i>Piece for Person and Ghetto Blaster</i>	Nicola Gunn Theatre Full-length production	Presentation of work at PS122 New York, January 2017 (Relationship already developed, but consolidated at APAM) Six city European tour with Paris as central venue, 2017 (artist followed up APAM with market development trip to Europe) Tour to Santiago and possible other South American venues, 2017 (direct connection from APAM) Possible tour to Vancouver in 2018
<i>Lady Eats Apple</i>	Back to Back Theatre Theatre Pitch	Secured a further commissioning partner for the work Potential co-commissioning from Hamburg, Germany Expression of interest from Parc de la Villette Paris, France Expression of interest from Taipei Performing Arts Centre, China Interest and advocacy by US presenter, working to make connections with The Kennedy Centre, Washington DC, USA Discussions with presenters around future collaborations of commissioning of new works

Presented at APAM 2014 and still being tracked

Polyglot Theatre's presentation of Separation Street (Interdisciplinary/hybrid arts, theatre: Pitch)	<i>Separation Street</i> takes the audience on an adventure that starts with the division of ages – adults going in one direction and children in another. Each group undertakes a separate theatrical journey within the one performance, experiencing a provocative tale from completely different perspectives. (APAM Program Guide 2014, p.140)	Pitch (children's)	Premiered 2016	Funded
Contact Inc's The Walking Neighbourhood (Interdisciplinary, hybrid arts: Full-length production and Special Event)	Take a curated guide around your city with a child as your guide...the tour guides collaborate with professional artists in a series of workshops to present this intimate event, and then invite you to take a walk with people you do not know to a place you have never experienced this way. (APAM Program Guide 2014, p.113)	Full-length production and Special Event	Premiered 2012	Independent
Roslyn Oades' presentation of I'm Your Man (Theatre: Full-length production)	For 18 months theatre-maker Roslyn Oades and her trusty tape recorder followed a determined young boxer from Western Sydney through his preparation for a world-title fight. <i>I'm Your Man</i> is the story of who she met along the way: past legends, up-and-comers and failed contenders whose lives have been irreversibly changed by the fight game. Using an innovative headphone-verbatim technique, the actors are able to speak the words of real-life boxing legends, transporting you into the boxer's world of sweaty gyms and backstage dressing rooms. (APAM Program Guide 2014, p.79)	Full-length production	Premiered 2012	Independent
Shaun Parker and Company's Am I? (Dance: Full-length production)	Seven individuals seek to re-establish a new civilisation, observing the frailties and mishaps of those that have gone before them. Religion meets science in this new world order and society fluctuates between conflict and harmony. World music and cult-like singing collide to create a compelling and gut-wrenching soundscape. (APAM Program Guide 2014, p.51)	Full-length production	Premiered in 2014	Funded
The Black Arm Band Inc's presentation of dirtsong (Music, theatre: Full-length production)	Drawn wholly from Aboriginal Australia, <i>dirtsong</i> mixes traditional approaches and contemporary songs, existing repertoire and newly commissioned music to conjure a sense of 'country' as not only a geographical place, but as encounters, memories, obligations and nature. This is one unforgettable experience that inspires the heart. (APAM Program Guide 2014, p. 65)	Full-length production	Premiered in 2009	Indigenous Funded
Performance Space's presentation of Long Grass (Dance: Pitch)	The distinctive voice of Indigenous choreographer Vicki Van Hout probes life at the margins in this powerful new dance theatre work and finds warmth, humour and play in a situation so often seen as unremittingly bleak. <i>Long Grass</i> combines live weaving methods, shadow play, text, sparse video footage and idiosyncratic NT-style dance. As layers of cloth are woven, a story unfolds. (APAM Program Guide 2014, p.137)	Pitch	Premiered in 2014	Indigenous Independent

2014 case study companies presenting different work at APAM 2016

Roslyn Oades' presentation of <i>Hello, Goodbye & Happy Birthday</i> (Theatre: Excerpt)	<i>Hello, Goodbye & Happy Birthday</i> celebrates two very different perspectives on life – the clear-eyed lens of youth and the well-worn experience of age. Scripted from intimate real-life conversations with people aged 18–80+, this documentary performance is the creative culmination of a two-year research process by innovative headphone-verbatim theatre maker, Roslyn Oades. Playful and poignant, <i>Hello, Goodbye & Happy Birthday</i> celebrates life well-lived with extraordinarily immediate and vivid performances. (APAM Program Guide 2016, p.85)	Excerpt (14+ years)	Premiered in 2014	Independent
Shaun Parker and Company's <i>XY</i> (Dance: Pitch)	<i>XY</i> (working title) is Shaun Parker's new dance theatre work that investigates the XY chromosome of the human male. Parker utilises the extraordinary movement skills of nine male performers to investigate how the XY chromosome, from a chemical, biological, and psychological perspective, shapes the male brain on both a microscopic and macroscopic level. This latest work will take the genetic science of this chromosome and transform it through the theatrical canvas of the human male body on stage. (APAM Program Guide 2016, p.133)	Pitch (16 years+)	Scheduled to premiere in 2017	Funded
Polyglot Theatre's and Papermoon Puppet Theatre presentation of <i>Cerita Anak</i> (Theatre: Pitch)	The long-running creative collaboration between Australia's Polyglot and Indonesia's Papermoon Puppet Theatre is taken to a new level: climb aboard a boat and be rocked and rolled across the seas as you experience the story of a small Sri Lankan refugee boy who ends up in the Western suburbs of Melbourne. <i>Cerita Anak</i> takes the true story of a child adrift on the ocean and winds mythology and folk tale through it to make a drama on the high seas for very young audiences. (APAM Program Guide 2016, p.120)	Pitch (family)	Premiered in 2016	Funded
The Black Arm Band Inc's presentation of <i>Grungada</i> (Music: Pitch)	<i>Grungada</i> is Black Arm Band's new full-length theatrical work, currently under development. Meaning "an intimate invited conversation", <i>Grungada</i> is a narrative told through the songs, stories and visual art of Mark Atkins. Through music and art, <i>Grungada</i> celebrates the spaces between two worlds. (APAM Program Guide 2016, p.122)	Pitch (all ages)	Not yet scheduled	Indigenous Funded

Please note that for the 2014 case study artists and companies, only outcomes that are IN ADDITION to those noted in the *Evaluation of Australian Performing Arts Market 2014–2018 Inter-year Report* (2015) are noted.

CONTINUING CASE STUDIES



Separation Street



Am I? & XY



The Walking Neighbourhood



dirtsong



I'm Your Man



Long Grass

Images (top left to bottom right) courtesy of: *Separation Street* & *Cerita Anak* (2016): Marg Horwell; *The Walking Neighbourhood*: Melly Niotakis; *I'm Your Man*: Lucy Parakhina and Performance Space; *Am I?* and *XY*: Michele About; *dirtsong*: The Black Arm Band Inc.; *Long Grass*: Lucy Parakhina

CASE STUDY

DETAILS

MARKET DEVELOPMENT OUTCOMES

***Separation Street* (2014) & *Cerita Anak* (2016)**

Polyglot Theatre
Interdisciplinary/hybrid arts
Theatre
Pitch

Separation Street: Melbourne Fringe Festival, 2015
Cerita Anak: meetings arranged with potential presenters following APAM 2016

The Walking Neighbourhood

Contact Inc. (now Lenine Bourke as Independent Producer)
Interdisciplinary
Hybrid arts
Full-length production and Special Event

Season at Arts Centre, Melbourne, 2016
Seasons at Redfern and King's Cross, Sydney, as part of the Art and About Festival, 2014
Season at ANTI Festival, Finland, 2014

***I'm your Man* (2014) and *Hello, Goodbye & Happy Birthday* (2016)**

Roslyn Oades
Theatre
Full-length production

SBS bought adaptation rights to *I'm Your Man* (unsure if this is a direct outcome of APAM)
Possible Toronto and Vancouver tour of *Hello, Goodbye & Happy Birthday* in 2018
Possible re-mount of this work in New Zealand with local cast
Offers to commission new work both domestically and internationally

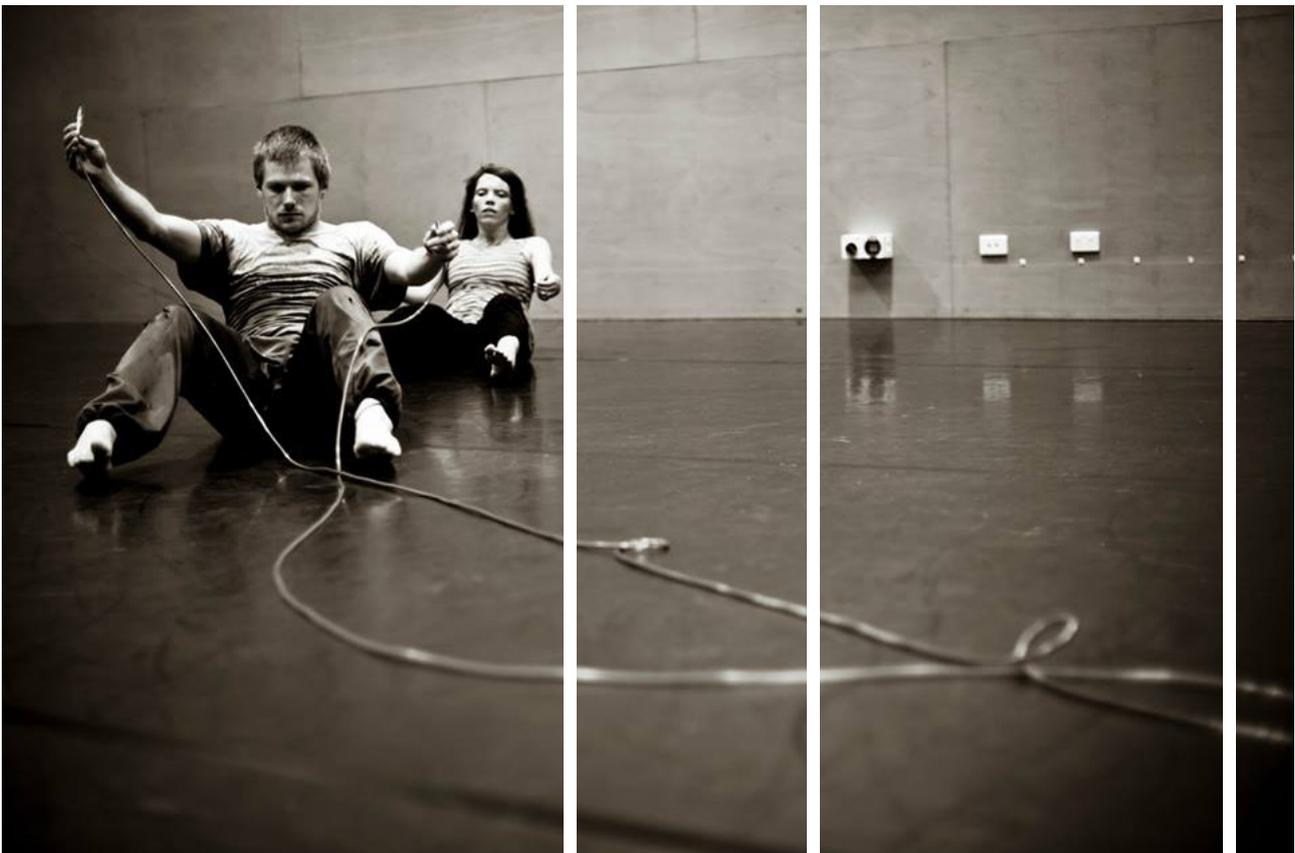
CASE STUDY	DETAILS	MARKET DEVELOPMENT OUTCOMES
<i>Am I? (2014) and XY (2016)</i>	<p>Shaun Parker and Company</p> <p>Dance</p> <p>Full-length production</p>	<p>Season at the Adelaide Festival, 2014</p> <p>Season at the Melbourne Festival 2014</p> <p>Season at Georgetown Festival, Penang, Malaysia, 2015 (director of Festival attended APAM 2014)</p> <p>Movimentos Festival, Wolfsburg, Germany (2015 – Company's German agent attended APAM 2014)</p> <p>Season in Ludwigshafen, Germany, 2015</p> <p>Season in Ludwigsberg, Germany, 2015</p> <p>Season in Stockholm, Sweden, 2015</p> <p>Season in Luxembourg, 2015</p> <p>Potential new work for Malaysia in next few years for Butterworth Fringe Festival</p> <p>Potential tour of XY for Switzerland and Germany, eight cities so far, 2018</p> <p>Potential tour of XY for Belgrade, 2018 (part of same tour as above)</p> <p>Potential tour of XY to Dansens Hus, Norway, 2018 (part of same tour as above)</p> <p>Potential season of XY Taiwan, year to be confirmed</p>
<i>dirtsong</i>	<p>The Black Arm Band Inc.</p> <p>Music</p> <p>Theatre</p> <p>Full-length production</p>	<p>Six-city tour of China, August, 2014</p> <p>Season at the Darebin Arts and Entertainment Centre, Victoria, 2015</p> <p>Season at Ten Days on the Island, Tasmania, 2015</p> <p>Season at the Singapore International Festival of Arts, 2015</p> <p>Season in Taipei, 2015</p> <p>Season at the Georgetown Festival, Malaysia, 2016 (concert version of dirtsong)</p> <p>Season at the New Zealand Festival, Wellington, 2016</p> <p>Season at the Barbican, London, 2016</p> <p>Possible season at the Sydney Recital Centre, 2016 (concert version of dirtsong)</p> <p>Five-week, 11-venue tour to the US and Canada (including a season at the PuSH Festival, Vancouver, which had been discussed in 2015)</p> <p>Possible tour to South America, 2017</p> <p>Possible return tour to the US, 2018</p>
<i>Long Grass</i>	<p>Performance Space</p> <p>Dance</p> <p>Pitch</p>	<p>Season at Sydney Festival, Sydney, 2015</p> <p>Season at Dance Massive, Victoria, 2015</p>

Consolidated reflections from the case study analysis

As stated in the introduction to this portion of the study, for the most part it's difficult to provide a clear correlation between presenting or pitching at APAM and a subsequent tour or other immediate outcome, even though there are a few cases of this, as articulated in the analysis above. What is overwhelmingly apparent is that APAM, when employed as part of a well-considered marketing development targeting strategy, is highly advantageous.

In more detail, from the case study analysis, a number of key trends are apparent which, when addressed, afford artists and companies presenting at APAM a highly advantageous environment in which to create leverage, not only for the particular work being presented, but for the profile and reputation of the artists and companies themselves:

- the right producer
- the right market
- the expense of touring Australian work
- developing new models
- leveraging new contacts from current ones
- quality and tour-ability of work
- profiling and positioning of artists and companies
- exposure to other artists and productions
- location.



Double Blind, Image courtesy of Pippa Samaya

SECTION THREE

Evaluation of the exchange ideas, dialogue, skill development, partnerships, collaborations and co-productions and networks with local and international peers

The data analyses shows the following trends related to this target reporting area:

1. Delegate identification and repeat attendance

While there was a significant level of negative commentary around event delivery demonstrated in the 2014 survey, 54.25% of respondents stated that they would return to the 2016 iteration. In asking a similar question to delegates in the 2016 survey 65% of delegates indicated that they would return in 2018.

In the 2016 survey delegates identified as being in the following categories:

- 28.63% identified as sellers of work
- 22.98% identified as buyers of work
- 26.21% were attending to network.

The reasons for attending APAM in 2016 are listed as follows: 10.75% were invited, 21.41% were there in a representation capacity, just over 2% were lobbyists, and over 50% were in attendance for networking.

2. Identification of the Market as a site for networking that leads to commercial outcomes, drawn from the interview data of APAM staff, Brisbane Powerhouse management, key stakeholders and delegates in the online survey

Data from the 2014 delegate survey indicate that the highest ranked reason for delegates (buyers, sellers and those that identify as other delegates) to attend APAM is for its networking opportunities.

Once again, in 2016, the delegate survey showed that networking remains the key reason for attending APAM for all delegates.

Combining data from both 2014 and 2016 demonstrates that there is a strong reciprocal relationship between the opportunities for networking at the Market, whether the company or artist is presenting their work in one particular year. The data demonstrates how APAM affords artists the opportunity to invest in ongoing relationships that allow the artist to develop a commercial and sustainable engagement for their product.

3. Attraction of the Market for national and international presenters, agents and producers to develop partnerships, collaborations and co-productions, drawn from the focus group of national and international buyers and APAM staff.

The buyers attending the Market indicated through the survey that in the majority of cases they came with a possible budget allocation to spend on purchasing touring product. By and large, the financial envelope dedicated to this activity was a negotiated arrangement between buyer and seller.

International buyers attending APAM noted the importance of face-to-face engagement with Australian artists and companies.

Recommendations

Indigenous and First Nations Peoples focus must remain central in the delivery of APAM 2018

Development of financial support for selected presenting companies and artists at APAM 2018

Recalibrating the value proposition of APAM to respond to stakeholder needs

Ongoing strategic targeting of Asian producers

Conclusion

It would appear that the key issues raised in 2014 have been addressed for the 2016 Market, although certain commentary from delegates did highlight that the multi-venue approach still poses challenges. Given the logistical difficulties this approach poses, as opposed to the one-venue approach proffered by the Adelaide Festival Centre, the previous venue for APAM for fourteen years, perhaps comparisons are no longer useful. It is interesting that there are still a number of comments in the delegate surveys (2014, 2015 and 2016) about the desire to move the Market back to Adelaide. Perhaps this is rooted in sentimentality from delegates who have been long-term APAM delegates. But as the data set does not provide for a “before Adelaide and after Adelaide approach” the report cannot make any strong statement around the continuance of the data appearing in the delegate survey responses.

It must be acknowledged that the 2016 event had a stronger sense of purpose and identity. One stakeholder believes that the event “maybe it can be a satellite for change” (APAM Stakeholder 3, 2014).

This comment was made in response to the foregrounding of First Nations that included not only Aboriginal and Torres Strait Islander peoples, but also First Nations groups from Canada and New Zealand. The other noticeable change was the deliberate move to see the Market only as a transactional event, that is: from one situated in the buying and selling of performing arts product, to becoming a Market that is more supportive for relational transactions and connections that may be more fruitful for Australia artists and companies in the development of long-term relationships and touring outcomes. This is a really salient point – it was as if a range of what had previously operated as competing interests in the operations, in particular for 2014 (i.e. disconnect between the aims of the Brisbane Powerhouse and the APAM team; Australia Council for the Arts; Tourism and Events Queensland), were ironed out so that 2016 felt like a far more seamless event. However, from the interviews undertaken with Brisbane Powerhouse, APAM staff and key stakeholders, the data reveals that the conversation has actually become more complex, so that

those competing interests are more multi-layered. These priorities include: positioning Brisbane as the new world city; prioritising of First Nations’ profiling; QPAC more to the fore; the possibility of opening up certain events for the general public; and the de-focussing of Brisbane Powerhouse as the “centre” of the Market.

Swirling in this milieu is the ongoing diminution of funding within the small to medium companies in the Australia arts sector that may result in additional implications around the ability of delegates, both buyers and sellers, to attend the Market in 2018.

Like the outcomes of research undertaken in 2014, once again the data set has revealed a high level of good faith for the future of APAM in Brisbane in 2018 and there is every reason to believe that APAM’s ongoing delivery at the Brisbane Powerhouse will be dynamic, inclusive and innovative.

APAM key research activities for 2017

As agreed in the contract (see variation dated 10 February 2015), most contract deliverables, in the form of written reports, are tied to incremental payments. This occurs on delivery of all reports, apart from interim and mid-year reports slated for 2016 and 2017.

DELIVERY DATE	ACTIVITY
February 2017	Contracting of SRA, RA (digital survey) and transcriber Re-engagement with APAM management, and key personnel at Brisbane Powerhouse to discuss 2017 and 2018 approach and data reporting needs
End-February–mid-March 2017	Creation of 10-page summary of 2016 report. APAM staff to identify pages for inclusion. Summary report delivered as PDF only Delivery of research summary slides for APAM Roadshow
Mid-March 2017	Delivery of 10-page summary report
March-April 2017	Commencement 12 month check-in interviews with presenter artist/company for developing case studies. Inclusion of short survey of touring outcomes and income generation for case study companies This includes transcription of interviews
May–June 2017	Data analysis – case studies Drafting of mid-way report – case studies update only Development of 2017 online delegate survey including feedback from APAM staff
End-July 2017 (Deliverable 7 as per contract)	Draft mid-way 2017 report delivered to BPH
August 2017	Development completed and dissemination of online survey to all delegates who attended APAM 2016
September 2017	Analysis of survey data Drafting of final 2017 evaluation report delivered
End-October 2017 (Deliverable 8 as per contract)	Final 2017 evaluation report delivered

