Theatre Sector Snapshot | 2013

Introduction

This report provides an overview of the theatre sector in NSW. It outlines some of the key issues and trends impacting the sector and provides a summary of the structure and business models it operates within.

The report is based on consultation with key sector representatives.

It has been developed to provide Arts NSW Arts Funding Program (AFP) assessment panels with an up to date sector overview and insights as identified by sector representatives.

Arts NSW acknowledges the invaluable contribution of all involved in the preparation of this report.

Overview – Theatre Sector in NSW

NSW is home to a vibrant theatre sector and Sydney is recognised as the prime Australian theatre destination.

Figure 1. NSW Theatre Sector
NSW dominates national theatre attendances and revenues. In 2011 NSW theatre revenue (excluding musical theatre) reached over $35 million (53.4%) and 613,948 attendances (44.5%).

The NSW sector provides diverse opportunities to perform and experience theatre in all its forms, including several high profile and local festivals, major performing arts companies and venues, commercial musicals and touring works, a strong network of regional performing arts venues, well established small to medium (S2M) companies, many with their own resident venues, and a strong independent theatre sector.

There is a diversity of theatre being produced across all genres, from text-based work to contemporary performance, hybrid and physical theatre.

In addition to the production and performance of work, NSW theatre companies (and some performing arts venues) invest in the development of work and artists through commissions, residencies, mentorships, workshops and training, tour nationally and internationally and deliver education programs to schools and young audiences.

Arts NSW provides funding to the professional not-for-profit theatre sector, professional individuals and groups, councils and peaks and service organisations. Funding is provided on an annual, multi-year and project basis.

The State and local government is also involved in the sector’s infrastructure including performing arts and rehearsal venues and office accommodation.

The subsidised theatre sector earns income from performance fees, box office, corporate partnerships, philanthropy and other activities including workshops and training.

There is a significant independent theatre sector in Sydney. Independent theatre companies do not generally have a resident venue and if funded by government, it is usually on a project-by-project basis. Independent ‘companies’ may or may not be incorporated, and are often formed on a cooperative basis, with artists (actors, designers, directors etc), producers and production crew taking a share of box office income, rather than being paid a set wage by the company.

**Key issues and trends**

The following issues and trends were identified during discussions with key sector representatives:

**Touring**

It is widely acknowledged in the sector that touring theatre within Australia is a complicated process. Timelines are protracted due to the complex mechanisms through which tours are secured and differing state and federal funding processes. On average 1–2 year timeframes are experienced from initial season to tour delivery. A recent Australia Council investigation into touring, *The National Touring Framework*, has led to continuing national conversations on improving touring mechanisms.

**Collaboration**

There is a growing collaborative approach emerging across art forms. This is resulting in new cross-art form partnerships, productions and ways of working. There is also evidence of greater collaboration between different levels within the theatre sector, with partnerships across the independent, S2M and major companies increasing.

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1. Live Performance Australia: Ticket Attendance and Revenue Survey 2011. Note these figures exclude circus and physical theatre. Circus and physical theatre income in NSW was $17.3 million (31.1%) and attendances 194,490 (26.7%) in 2011.
**Producing and presenting**

There is a growing trend amongst presenting venues to invest in the production and presentation of their own work, in addition to the presentation of other companies’ work.

**Independent theatre**

Whilst independent theatre companies often receive in-kind venue, technical and front-of-house support for presenting work in independent seasons hosted by other organisations, in most cases they are provided with only minimal support towards their production costs (including rehearsal, sets, costume, venue rental and wages). In order to make the production viable, many independent theatre companies operate on a co-operative basis, sharing box office income and receiving minimal (below industry standard) remuneration for their work.

**Career pathways**

Sustainability within the sector continues to be an issue, with limited career pathways for mid-career artists to continue to engage in their practice.

**Education and training**

The roll out of the national curriculum will potentially offer NSW companies audience development opportunities and the opportunity to sell their education resources and productions inter-state. At present the conflicting curriculum and priorities across state borders make it difficult to consider engaging schools nationally.

**Digital technologies**

The expanding availability of digital platforms is creating the potential for greater access and engagement with work and new and innovative forms of theatrical expression.

**Regional**

Programs to encourage local creative development within local infrastructure (eg Local Stages) are integral to growing regional capacity and audiences in the regions.

**SWOT Analysis**

Strengths, weaknesses, opportunities and threats as identified by key sector representatives are as follows:

**Strengths**

- A vibrant theatre sector that greatly contributes to the state’s identity, with Sydney recognised as the prime Australian theatre destination.
- A good diversity in both the type of work produced and audiences for theatre.
- A growing demand for Australian stories, including culturally diverse work and Aboriginal work.
- Many opportunities exist for emerging theatre artists to develop their practice and create and perform their work.
- Sydney has an abundant independent theatre sector.
- Young audiences are able to engage with theatre through targeted education programs delivered by numerous organisations in the sector.
- Local government partnerships are supporting mid-sized venue growth within Sydney (e.g. The Eternity Playhouse, Bondi Pavilion Theatre).
Touring support is available at all levels and stages through well established tour facilitators like Arts on Tour.

Regional NSW has a viable network of regional venues to accommodate touring and locally created work.

The regional sector receives strong support from RADOs and can provide facilities, lower costs, partnership opportunities and less competition.

**Weaknesses**

- The Sydney market is very competitive and the costs of developing and producing work are high.
- Sustainability within the independent sector is difficult due to a lack of support mechanisms, including a lack of independent producers.
- There are many opportunities for under 30s and emerging artists, however career paths and sustainability for mid-career artists is an issue.
- Poor wage levels are experienced across the sector with wages often below the national average. This has led to high levels of staff churn and skills drain, particularly in the S2M sector.
- Regional areas experience artist drain with many artists desiring to move to major centres to develop their practice and create/expose their work.
- The creation of high quality new Australian work is hindered by short development timeframes due to cost pressures.
- There are a limited number of suitable and affordable rehearsal/development venues close to the Sydney CBD and limited residency opportunities.
- New multi-purpose venues being built regionally are not specifically adapted for contemporary theatre work and often lack small viable spaces for more intimate work and/or as a space for the development of work.
- NSW does not have its own touring forum which limits opportunities to showcase tour-able works and establish touring networks outside of national mechanisms.
- It is difficult to diversify income through sponsorship and philanthropy in the S2M and independent sectors given increasing competition in this area and the staffing resources required to establish and sustain these partnerships.
- The long-term engagement of CALD audiences is a growing challenge, particularly for main stage work.

**Opportunities**

- Increasing opportunities to engage with the education sector following the introduction of arts into the national curriculum.
- The increasing availability of digital platforms is creating new forms of theatrical expression and the potential for greater access to work through digital distribution (NBN) and engagement.
- Continuation of national conversations on an improved coordinated approach to performing arts touring following recommendations made within the Australia Council’s National Touring Framework.
- A growing interest in touring of Aboriginal work (e.g. Blak Lines national touring consortium).
- Establishment of the NSW Theatre Network to assist with communication and representation.
- Cross-art form collaborations and co-production opportunities providing increased audience exposure and cost sharing.
- The availability of performing arts infrastructure in regional NSW provides potential for partnerships and residencies in those communities.
- Investment by local governments in the arts sector provides opportunities to engage further with local government.
Threats

- The S2M sector is experiencing increased pressure to provide more support and more opportunities to artists and smaller organisations which is impacting on its sustainability.
- Venue affordability in Sydney places strain on the development and presentation of new work.
- A constant level of staff churn, particularly in the S2M sector, is resulting in brain/skills drain from the sector.
- The recruitment of skilled staff in regional areas is often difficult.
- The increasing costs of touring are impacting on tour viability.
- Global economic conditions have seen sponsorship income decline steadily across the sector at all levels.
- Whilst philanthropic support is increasing, competition for philanthropy is also increasing and potential for continued growth is not clear.
- The unknown impact of the recent amalgamation of Arts Support and ABaF into Creative Partnerships Australia.
- The unknown impact of the review of the Australia Council for the Arts.