



APAX

Australian Performing Arts Exchange

Serving the art and the audience



DARWIN
FESTIVAL



Garramilla Darwin
11-15 August

The sector is changing, costs to present and tour continue to rise, and the attention of our audiences is increasingly elsewhere.

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Is this still a conversation about relevance? A problem that only policy and funding can fix?

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The sector is changing, costs to present and tour continue to rise, and the attention of our audiences is increasingly elsewhere.

Is this still a conversation about relevance? A problem that only policy and funding can fix?

Or an opportunity for
some **creative** and **radical adaptation**?

APAX

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Garramilla Darwin
11-15 August

Hear from speakers with big ideas about what the future of performing arts presenting could look like – from organisations of the future, to audience development that requires a complete mindset shift.



**DARWIN
FESTIVAL**



APAX
Australian Performing Arts Exchange



PAC
Productions

APAX

Australian Performing Arts Exchange

Serving the art and the audience

www.apax.org.au



**DARWIN
FESTIVAL**



Principal Partner



IMPACT Awards Supporter



VIVATICKET

Design Partner

**Hours
After**

Tour Producer
Training
Support



Presenter Training
Program Support



Delegate Travel Bursaries



ADAPTIVE FUTURES

Online training for performing arts centres and cultural organisations ready to lead on climate solutions.



- Managing climate risks in your core business
- Achievable ways to decarbonise venues
- Moving beyond carbon neutrality and into regenerative practice
- How a sustainability narrative creates a deeper dialogue with your audiences and young people



ADAPTIVE FUTURES

Online training for performing arts centres and cultural organisations ready to lead on climate solutions.



FREE.

REGISTRATIONS ARE NOW OPEN.

SESSIONS COMMENCE IN OCTOBER.

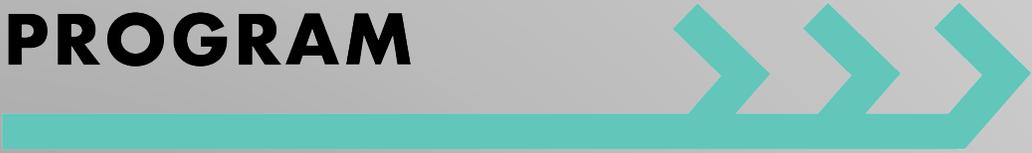
WWW.PACA.ORG.AU



PRESENTER TRAINING PROGRAM



PRESENTER DEVELOPMENT PROGRAM



TOUR PRODUCER TRAINING



Creating the conditions for presenters, artists, and audiences to thrive.

Our training programs aim to build capacity, share knowledge, and support staff retention and succession planning within the PAC Australia membership, and the broader performing arts sector.

Tour Producer
Training
Support

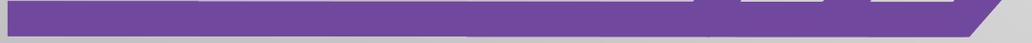


Presenter Training
Program Support



CIRCUITWEST

PRESENTER TRAINING PROGRAM



PRESENTER DEVELOPMENT PROGRAM



TOUR PRODUCER TRAINING



Creating the conditions for presenters, artists, and audiences to thrive.

These training programs support a peer learning experience, providing presenters and producers with opportunities to learn from existing organisations within the performing arts ecology and build an ongoing network to draw upon.

Tour Producer
Training
Support



Presenter Training
Program Support



PRESENTER TRAINING PROGRAM



PRESENTER DEVELOPMENT PROGRAM



TOUR PRODUCER TRAINING



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Tour Producer
Training
Support



Presenter Training
Program Support





AUSTRALIAN NATIONAL TOURING CHARTER





AUSTRALIAN NATIONAL TOURING CHARTER



Industry-led and principles-driven framework that supports an efficient, meaningful, respectful, and thriving performing arts touring sector in Australia.



AUSTRALIAN NATIONAL TOURING CHARTER



WHO IS THE TOURING CHARTER FOR?

- Presenters
- Producers
- Artists
- Tour Coordinators
- Funding Bodies

To align on...

1. General Responsibilities
2. First Nations Cultural Safety and Protocols
3. Marketing
4. Ticketing
5. Technical and Production
6. Negotiating and contracts
7. Cancellation
8. Funding
9. Receiving and presenting the Tour
10. Post-Tour



**AUSTRALIAN NATIONAL
TOURING CHARTER**



www.paca.org.au

PRESENTER CLASSIFICATION PROJECT



PRESENTER

CLASSIFICATION

PROJECT

How do presenters operate?



PRESENTER

CLASSIFICATION

PROJECT

How do presenters operate?

What do they program?



PRESENTER

CLASSIFICATION

PROJECT

How do presenters operate?

What do they program?

Who are their audiences?



PRESENTER

CLASSIFICATION

PROJECT



How do presenters operate?

What do they program?

Who are their audiences?

What are their resources to do all this?

PRESENTER CLASSIFICATION PROJECT

Coming 2026.





ADVISORY
BOARD
for the ARTS



What compels staff to work for your organisation?



**THE COMPELLING
EMPLOYMENT OFFER**



ADVISORY
BOARD
for the ARTS



THE COMPELLING EMPLOYMENT OFFER

What compels staff to work for your organisation?

And what compels them to stay?

Almost 500 respondents from 64 organisations



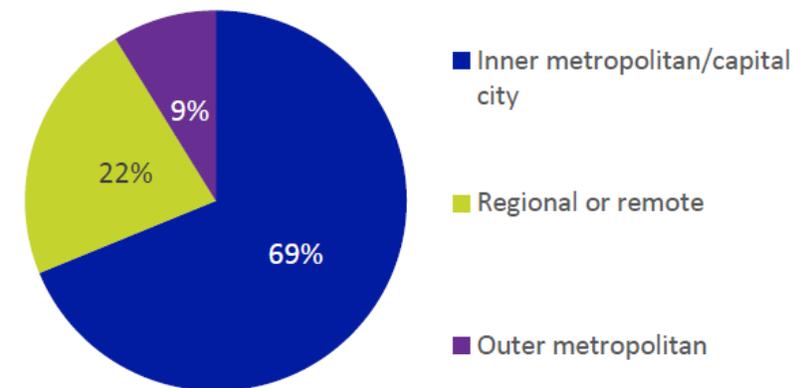
N=472 staff

Adelaide Festival Centre
 Albury Entertainment Centre
 ARTRAGE
 Arts & Culture Trust
 Arts Margaret River
 Auspicious Arts Projects
 Australian Chamber Orchestra
 Australian Dance Theatre
 Bangarra Dance Theatre
 Barking Gecko Theatre
 Belco Arts
 Belvoir Street Theatre
 Black Swan State Theatre Company
 Branch Nebula
 Brisbane Festival
 Bunbury Regional Entertainment Centre
 Canberra Symphony Orchestra
 Canberra Theatre Centre
 CircuitWest
 Co3 Contemporary Dance
 Darwin Entertainment Centre
 Dubbo Regional Theatre and Convention Centre

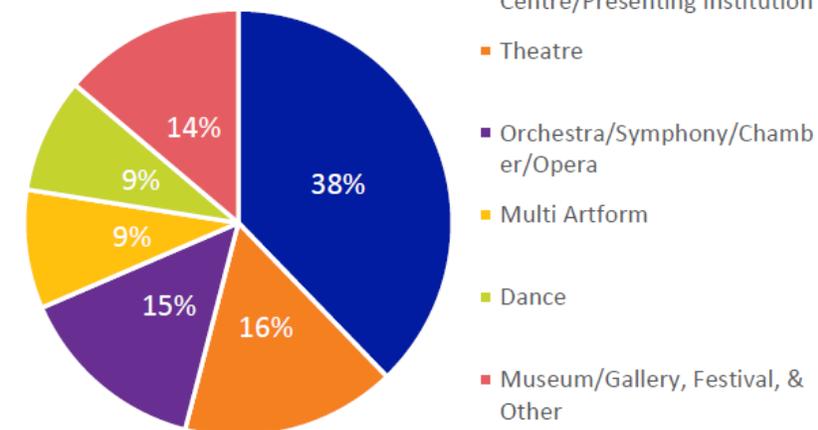
Empire Theatre
 Ensemble Theatre
 Entertainment Venues Tamworth
 Gladstone Entertainment & Convention Centre
 Glasshouse Port Macquarie
 Glen Street Theatre
 Griffith Regional Theatre
 HOTA - Home of the Arts
 Ipswich Civic Centre
 Kalamunda Performing Arts Centre and Gallery
 Melbourne Fringe
 Melbourne Recital Centre
 Merrigong Theatre Company
 Metro Arts
 Millmaine
 Moora Performing Arts Centre
 Musica Viva Australia
 Penrith Performing & Visual Arts
 Performing Lines
 Perth Institute of Contemporary Arts
 Pinchgut Opera
 Queens Park Theatre

Queensland Symphony Orchestra
 Queensland Theatre
 Riverside Theatres Parramatta
 Seymour Centre
 Spare Parts Puppet Theatre
 Sydney Dance Company
 Sydney Fringe
 Sydney Opera House
 The Cube Wodonga
 The Events Centre Caloundra
 The Pavilion Performing Arts Centre Sutherland
 Theatre Royal Sydney
 Tuggeranong Arts Centre
 Vitalstatistix
 Wagga Wagga Civic Theatre
 West Australian Opera

By location



By genre





ADVISORY
BOARD
for the ARTS



THE COMPELLING EMPLOYMENT OFFER

**“The ‘The show
must go on’
mentality is dead.**

Our budgets in the arts are predicated on people willing to throw themselves into this work and don’t mind being underpaid, and that’s not working anymore.”



ADVISORY
BOARD
for the ARTS



THE COMPELLING EMPLOYMENT OFFER

“There’s a real sense, that in some cases, [arts organisations] have **‘weaponized the mission’** to keep us working at full tilt. “You can’t work tonight? What *about* the children?”

“**Staff are starting to draw lines** about what they’re willing to do in a way that’s much more protective of their lives outside of work.”

We Examined the Data Through Eight Lenses



Generation



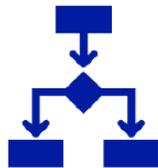
Role



Identity



Genre



Ownership Structure



Funding Model



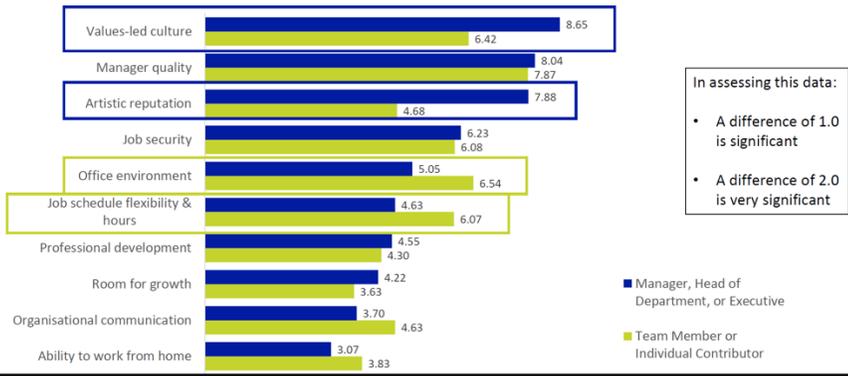
Turnover



Region

What managers think is important is not necessarily what their team members think is important

Role



In assessing this data:

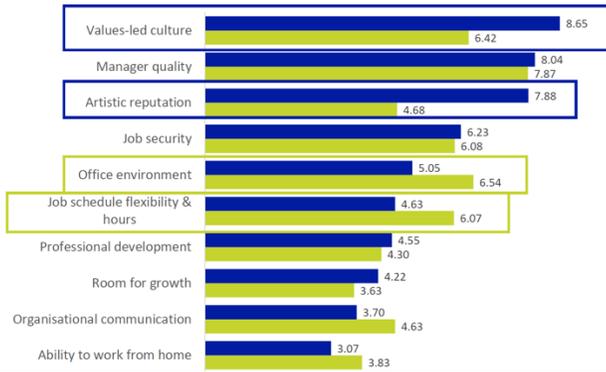
- A difference of 1.0 is significant
- A difference of 2.0 is very significant

■ Manager, Head of Department, or Executive
■ Team Member or Individual Contributor



What managers think is important is not necessarily what their team members think is important

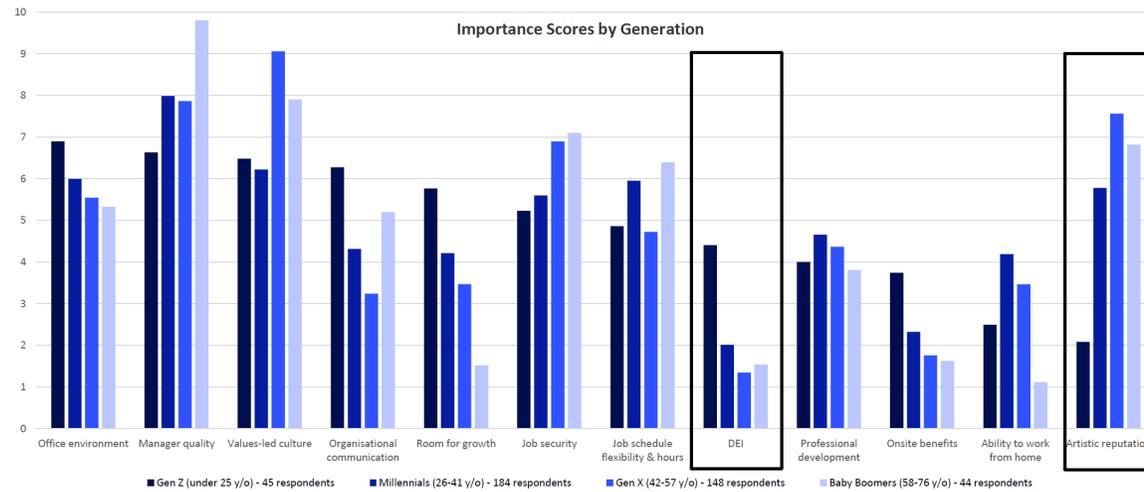
Role



In assessing this data:

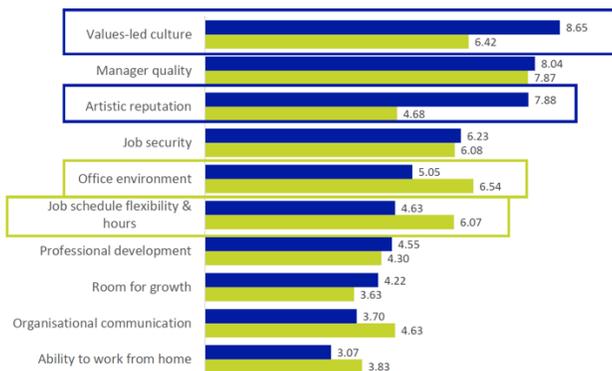
However, there are significant differences in what is important to Gen Z

Generation



What managers think is important is not necessarily what their team members think is important

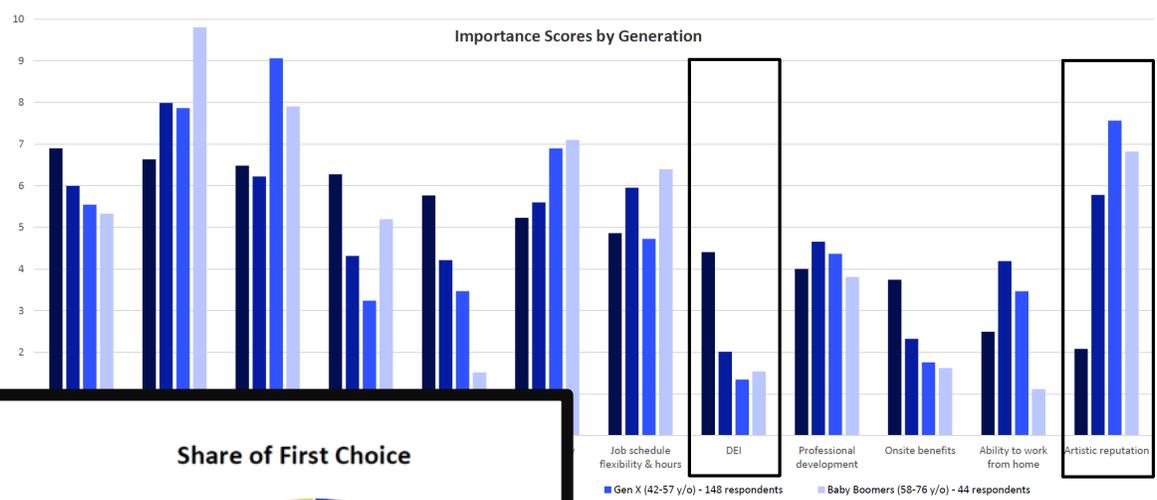
Role



In assessing this data:

However, there are significant differences in what is important to Gen Z

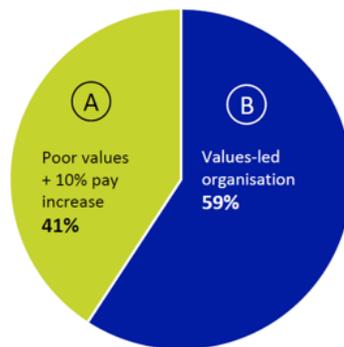
Generation



Simulation: Sacrificing Values-Led Culture for Pay



Share of First Choice

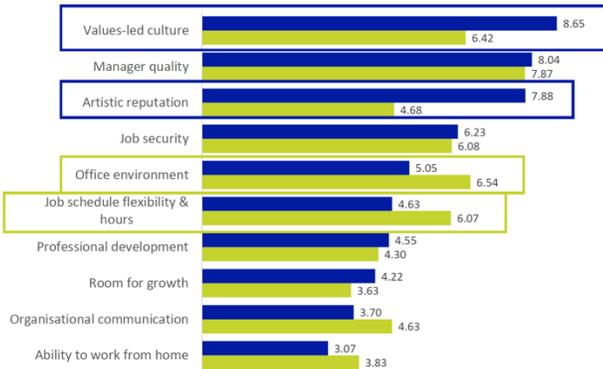


59% of staff will stay for the great values over a 10% salary increase elsewhere with poor values



What managers think is important is not necessarily what their team members think is important

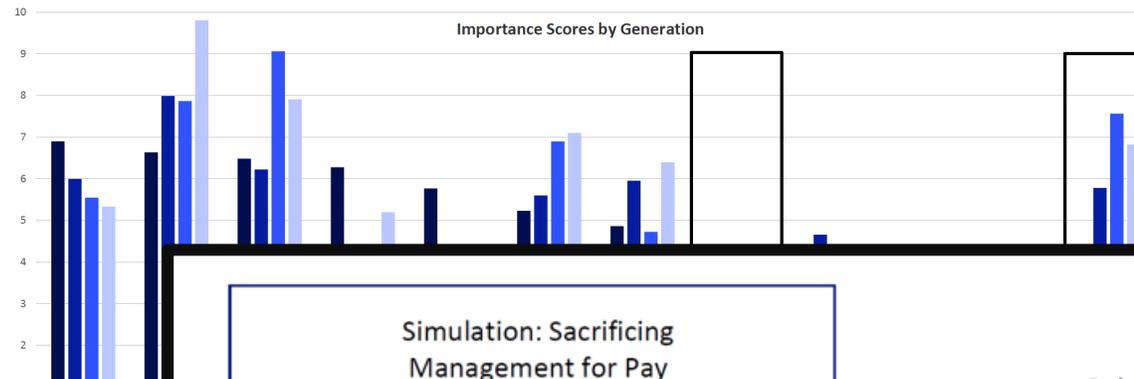
Role



In assessing this data:

However, there are significant differences in what is important to Gen Z

Generation



Simulation: Sacrificing Values-Led Culture for Pay



organisation with poor values but 10% more pay

organisation with great values



59% of 10% sal

Simulation: Sacrificing Management for Pay



organisation with bad manager quality, no professional development, poor job clarity and bad communications, but 10% more pay

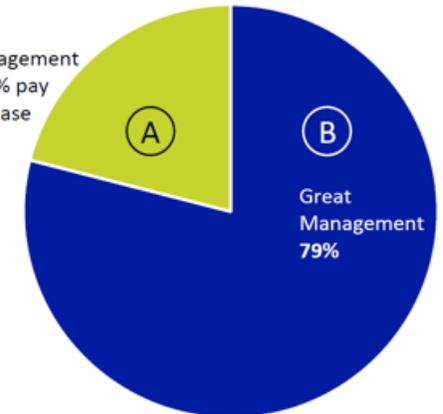


organisation with "great" on all of these



Share of First Choice

Bad Management + 10% pay increase 21%



79% of staff will stay for the great management over a 10% salary increase elsewhere with bad management



ADVISORY
BOARD
for the ARTS



THE COMPELLING EMPLOYMENT OFFER

FULL REPORT.

WEBINARS.

INTERVIEWS.

WWW.PACA.ORG.AU

NATIONAL PRESENTER OUTLOOK

Presenter outlook

Audiences.

Compared to pre-COVID levels:

	2022	2023	2024	2025
Less than pre-COVID	66%	41%	42%	18%
About when	22%	22%	22%	22%
Better than				

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

- Only 17% of presenter respondents plan to offer a subscription season in 2026. (71% responded as "Other" or "Membership programs")
- 57% of presenters are investing more in the audiences experience of attending shows (e.g. engagement, pre/post show activities).
- 27% of presenters are buying fewer, or less expensive shows to fund the above.

Whats going to h

Compared to recent year

(what presenters will spend in 2026, compar

PROGRAMMING	2023 response	2024 response	2025 response
Spending more	20%	28%	20%
Spending about the same	58%	32%	58%
Spending less	22%	40%	15%

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.



APAM

Australian Performing Arts Market



Australian Government



GOVERNMENT OF
WESTERN AUSTRALIA

Department of
Local Government, Sport
and Cultural Industries

WESTERN
AUSTRALIA

BUSINESS
EVENTS
PERTH



ASEAN-Australia
Centre



AUSTRALIA



Australian Government

Australian Trade and Investment Commission



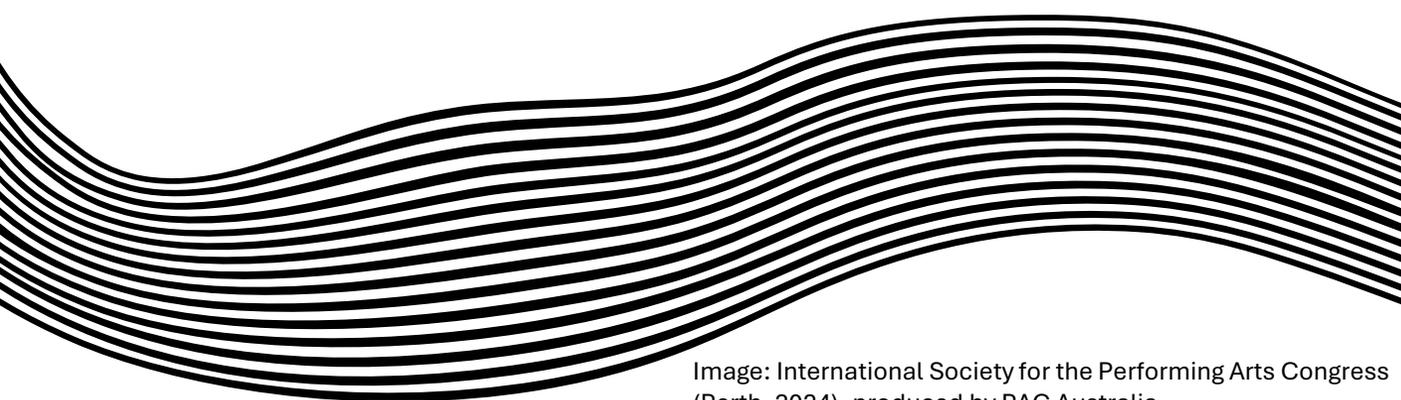
The Australian Performing Arts Market is a biennial market development gathering where Australian producers and presenters meet with national and international programmers.



APAM

Australian Performing Arts Market

Image: International Society for the Performing Arts Congress (Perth, 2024), produced by PAC Australia



An initiative of the Australian government through Creative Australia and funded by Creative Industries, Tourism and Sports WA, APAM will be managed by the Perth-based, national organisation [PAC Australia](#) with the next three market events to be hosted in Perth in 2026, 2028 and 2030.



Australian Performing Arts Market

Image: International Society for the Performing Arts Congress (Perth, 2024), produced by PAC Australia

This is the first time in its 30-year history that APAM will be hosted in Western Australia.



APAM

Australian Performing Arts Market

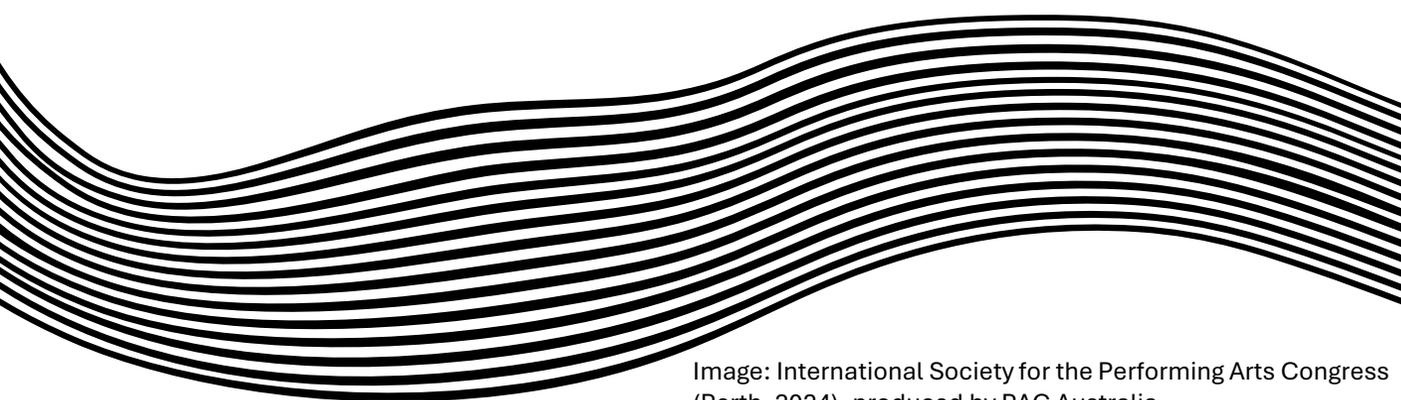


Image: International Society for the Performing Arts Congress (Perth, 2024), produced by PAC Australia

A truly international marketplace, the three upcoming major gatherings position Perth as the new international gateway to the Australian market.



APAM

Australian Performing Arts Market

Image: International Society for the Performing Arts Congress (Perth, 2024), produced by PAC Australia

In 2026, APAM will align with the final week of Perth Festival (23 – 27 February)

PERTH FESTIVAL



Image: Spare Parts Puppet Theatre pitching at ISPA Perth, 2024

APAM

Australian Performing Arts Market



APAM Perth will build on the immense legacy and momentum of the previous APAM First Nations Advisory Group, including:



Image: Global First Nations & Indigenous Delegates Gathering, ISPA Perth 2024

APAM

Australian Performing Arts Market



Formation of a new FNAG whose leadership will inform First Nations recognition and participation in the APAM program.

Barry Maguire

Lynette Narkle

Sinsa Mansell (Chair)

Ping Flynn

Maitland Schnaars

Janine Oxenham

Chloe Ogilvie

Thomas ES Kelly

Dalisa Pigram

Joshua Pether



Image: Global First Nations & Indigenous Delegates Gathering, ISPA Perth 2024

APAM

Australian Performing Arts Market



Support global connection, collaboration and exchange for Australia's First Nations artists and producers, with other First Nations and Indigenous peoples.

+

Deliver a gathering of Global First Nations and Indigenous performing arts workers also attending APAM.



Image: Global First Nations & Indigenous Delegates Gathering, ISPA Perth 2024

APAM

Australian Performing Arts Market



**1. First Nations and Indigenous
Delegate Gathering, from
Sunday 22 February**



APAM

Australian Performing Arts Market



Image: You Beauty, Chunky Move Dance Co

1. First Nations and Indigenous Delegate Gathering, from Sunday 22 February
2. **Welcome to Country and Opening on the evening of Monday 23 February**



APAM

Australian Performing Arts Market



Image: You Beauty, Chunky Move Dance Co

1. First Nations and Indigenous Delegate Gathering, from Sunday 22 February
2. Welcome to Country and Opening on the evening of Monday 23 February
3. **Showcases, pitching sessions, brokered 1:1 meetings, presenter introductions, networking, keynotes and professional development, artist profiles.**



APAM

Australian Performing Arts Market



Image: You Beauty, Chunky Move Dance Co

GROUNDWORK

Groundwork is a professional development and capacity building initiative, supporting the performing arts sector to build and maintain their skills in international touring and exchange.



Image: East Perth Power Station (Perth Festival, 2025) Credit: Jessica Wyld

APAM

Australian Performing Arts Market



GROUNDWORK

FREE.

REGISTRATIONS ARE NOW OPEN.

SESSIONS COMMENCE THIS WEEK.

WWW.APAM.ORG.AU



Image: East Perth Power Station (Perth Festival, 2025) Credit: Jessica Wyld

APAM

Australian Performing Arts Market



For Western Australia.

Image: State Theatre Centre of WA entry. (Tourism WA)

APAM

Australian Performing Arts Market



For Western Australia.

(And the rest of Australia.)

Image: State Theatre Centre of WA entry. (Tourism WA)

APAM

Australian Performing Arts Market





Executive Director
Katherine Connor
(She/Her)



Executive Producer
Virginia Hyam
(She/Her)



General Manager
Lynda de Koning
(She/Her)



Manager, Industry Development and
Training
Rosie Dwyer
(She/Her)



First Nations Producer
Eva Mullaley
(She/Her)



Operations Manager
Nate Newell
(He/Him)



International Engagement
Louise Coles
(She/Her)



National Stakeholder Engagement
(Contract)
Sophia Hall
(She/Her)



Programming Producer
Cecile Lucas
(She/Her)



Events Producer
Edwina Guinness
(She/Her)



Marketing and Communications Lead
Claire Holland
(She/Her)



Administration Coordinator
Samantha Hortin
(She/Her)



More information or join PAC Australia:

www.paca.org.au