

INTERNATIONAL ARTS ACTIVITY – AUSTRALIAN ARTS SECTOR

SUMMARY REPORT
AUGUST 2015



COVER

Image: Gosia Wlodarczak, *Frost Drawing for the Moscow Manege* (2013) a 21-day drawing performance and installation on interior glass architecture of the Moscow Manege Exhibition Hall, the 5th Moscow Biennale of Contemporary Art: More Light, curated by Catherine de Zegher, Moscow. Pigment pen on glass, approximate overall size 230m².

Credit: Longin Sarnecki. Courtesy the artist and the Moscow Biennale of Contemporary Art Foundation.

This report is based on research by Jackie Bailey, Hung-Yen Yang, Sarah Penhall & Tarecq Shehadeh, BYP Group, <http://bypgroup.com>

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Australia Council for the Arts (2015), Sydney.

FOREWORD


For the last two decades, the Australia Council for the Arts has invested in international arts development through a range of grants, programs and strategic initiatives. In addition to support for regularly funded organisations this has included touring and presentation grants; presence at major trade fairs and biennales; incoming visitor programs that enable international influencers and presenters to see Australian work in situ with a view to international presentation while building networks with the Australia arts sector; international residencies that play a vital role in artistic development and enable international network development and benchmarking; building long term partnerships with key international networks and platforms, such as the respected IETM contemporary performing arts network in Europe and the Performing Arts Market in Seoul; international networking at key platforms; and many other bespoke activities targeted at supporting our artists in their international ambition and growing the profile of Australian arts overseas.

Initially adopting an export-driven approach, Council's international development program has significantly evolved over time to recognise the importance of a long-term engagement and to embrace the important principles of reciprocity and exchange. We now appreciate the paucity of a purely outbound approach and understand that funding international presentation is but one element of a connected and interdependent program of international development. Effective support operates on a continuum from development to presentation, an approach reflected in the Council's Strategic Plan. Work funded for touring/presentation is often also supported through strategic partnerships with presenting organisations or arts funding agencies; market development capacity building; the support for reciprocal partnerships developed over time; through facilitated platforms or showcasing opportunities; through expert advice including brokerage and market development capability; or a combination of some or all of these.

After decades of working in the international arts arena, we have seen that core activities go hand-in-hand to maximise international arts investment outcomes: the presentation of work internationally; the development of networks; long term collaborations and partnerships; and support for cultural learning and exchange.

Collaborations, partnerships and reciprocal programs will continue to be a high sector priority over the next five years. Australian artists and organisations are already planning wide-ranging activities including skills exchange, co-creation and community cultural development. Bespoke engagements, including multi-year collaborations and residencies that allow cross and intercultural artists to explore ideas and artistic practices, build relationships and allow outcomes to develop from process.

We are acutely aware of the important role the Australia Council plays in international arts development. The Council has been the leading public investor in Australian international arts activity, supporting artists and arts organisations to take up the creative, economic and cultural opportunities offered by international mobility. While funding remains an important element of support, equally important is Australia Council advice and introductions, made possible through our deep in-market intelligence and established networks,



We are committed to ensuring
the greatest outcomes
for public investment and
for the arts sector.

have been critical in enabling and fast-tracking the international aspirations of our artists. We look forward to further building on this work through our International Development Managers, a new initiative under the 2014-19 Strategic Plan.

We are particularly delighted that our work over the last few years supporting Indigenous artists and arts mediators to be prepared for and mentored in international markets has yielded outstanding results for this unique and important work.

We are proud that our progressive approach has firmly positioned the Australia Council as a leader on the international stage. Our international reputation is outstanding. Australia Council policies have been adopted internationally, to the extent of becoming a model for many councils and funding bodies.

This in turn has opened up a realm of possibilities for Australian artists, connecting key players and opening up funding schemes for cultural cooperation. The trust that has been developed with our numerous international partners has yielded enormous opportunities for Australian artists.

We are committed to ensuring the greatest outcomes for public investment and for the arts sector. For international arts investment to provide the greatest return, it must be grounded in deep knowledge of the arts sector's international activities, ambitions and support needs. The council also works closely with our DFAT colleagues to ensure broader benefits are leveraged for Australia's international profile. The following report is intended to share that insight and further realise our vision of a culturally ambitious nation.

Tony Grybowski
CEO, Australia Council for the Arts



Image: Expressions Dance Company, Natalie Weir's *4Seasons*, Singapore, 2013.
Credit: Nicoletten Studio

INTRODUCTION

International activity benefits artists through the development of artistic practice, financial sustainability and inspiration. More than one in three Australian artists engages in international work.¹ Public funding means more people internationally have the opportunity to engage with Australian arts, the profile of Australia and its artists is enhanced, and opportunities to leverage investment are increased. The broader effects cascade from the artists/creators to the wider arts sector and then on to the nation. At the centre are the direct outputs, such as international audiences or number of tours, and the critical impact on reputation and collaboration. In time these create artistic and cultural impacts for the Australian arts sector and its audiences, national economic impacts, and socio-political impacts.

The Australia Council for the Arts is the lead public investor in Australian international arts activity, supporting artists and arts organisations to seize the creative, economic and cultural opportunities offered by international mobility. From 2010–11 to 2013–14, the Australia Council invested more than \$44.4 million in grants for international activity, supporting 1,830 artists and organisations, and reaching 93 different countries. In addition, we provided annual core funding to 79 regularly funded organisations who engaged in international activities across 61 countries.

For it to be most effective, international arts investment must be grounded in knowledge of the arts sector's international activities, ambitions, and support needs. Over 2014 and early 2015, the Australia Council conducted a program of research and analysis to inform the Australian Government's future international arts investment. We began with analysis of the trends in the Council's own funding, and in-depth interviews with funding recipients.

We then broadened the lens, conducting a sector-wide survey to consult the industry about their current activity, as well as their motivations, needs and future priorities.

This paper shares our data and knowledge, to inform and enrich the development of Australian arts activity internationally. It also demonstrates the scale and nature of recent Australia Council funding and the activity it has supported. As the national advocate for the arts, we share this evidence base to build understanding of the ambitions of Australia's arts communities, the impacts of international activity, and sector support needs. We will use this evidence base to guide our future investment: to support artistic aspirations, facilitate exchange and growth, and enhance the international profile of excellent Australian art.



“From 2010–11 to 2013–14, the Australia Council has invested more than \$44.4 million in grants for international activity, supporting 1,830 artists and organisations and reaching 93 different countries.”

1. Throsby and Zednik, Do You Really Expect to Get Paid: An Economic Study of Professional Artists in Australia, 2010.

1. INVESTMENT PROFILE

The Australia Council invests in international activity to support artistic, market and audience development through grants, initiatives and programs (collectively referred to in this report as ‘funding’). We have invested an average of \$11.1 million per year on international activity since 2010–11. In an average year, we have funded about 670 applications, supporting activity across 45 different countries.

In addition, over 2010–2013 the Australia Council gave annual or multi-year core funding to 185 arts organisations, four in ten of which engaged in some international activity over the period. In an average year, 43 of these organisations held about 950 performances and 1,050 days of exhibitions, reaching an audience of about 4.5 million people across 44 countries.

In the four year period over 2010–11 to 2013–14, we were the largest Australian public funder of international arts activity. Our research has identified 26 Australian-based organisations and agencies that provide public funding for international arts activity. After the Australia Council, the largest government funders are the Department of Foreign Affairs and Trade (DFAT), and Austrade:

- DFAT spends about \$8.6 million per year on cultural and arts activities. This includes about \$3.2 million to Australian artists and arts organisations, \$2.0 million in Embassy budgets for arts and cultural activities, and the balance in targeted programs.
- Austrade invests about \$2.8 million per year on cultural and arts activities through its Export Market Development Grants.

The largest funder in the not-for-profit sector appears to be the Ian Potter Cultural Trust, and in the university sector, Asialink Arts.

Funding: who and where

From 2010–11 to 2013–14 the Australia Council funded 2,665 grant applications. These went to 1,830 artists and arts organisations, 20 percent of whom received more than one grant for international activity over the four years.

The median grant size was about \$9,000. More than half of all successful grants for international activity were for less than \$10,000 (61 percent). 25 percent of all successful grants were for \$5,000 or less. However, at the other end of the spectrum, 3 percent of grants were for over \$80,000. Survey research and sector feedback indicates that relatively small grants are often enough to enable market responsiveness internationally and leverage other investment. Small grants also enable important research and development work to prepare for market entry, including relationship building, which in turn leverages future investment in presentation.

The majority of grants went to independent groups and individuals. This segment has proven to be highly successful internationally and are often able to be more flexible and nimble. Individual artists made up more than half of the respondents to our sector-wide survey on international arts activities (further described in Section 3). Over the four-year period, individuals and groups represented 61 percent of total successful grants, and received 39 percent of international arts funding. While more of the funding overall went to organisations, where international activity is typically more expensive than it is for individuals, support for groups and individuals increased from 28 percent of funding in 2010–11 to 53 percent in 2013–14.

Looking at patterns by art form, around one third of the funding went to visual arts (31 percent), and a quarter to music (24 percent). Theatre accounted for 15 percent, cross-art form work for 13 percent, literature for 8 percent and dance for 5 percent. These patterns reflect a mixture of art form and international market interest, and engagement costs.

Over the four year period our grants supported activity in 93 different countries. Most international funding applications were for activities in the established markets of Western Europe and North America. At least third of funding distributed went to activities in these regions – 18 percent to Western Europe and 14 percent to North America.

Over the same period, the Council more than doubled our investment in Asia from 5 percent to 11 percent of funding. Rapid growth in our region and local investment by Asian nations in arts infrastructure have created new opportunities. The Australian arts sector is also increasingly turning towards our own region for artistic and cultural development (as identified in our sector-wide survey discussed further in Section 3).

Funded activities

Of our international arts funding 91 percent supported “outbound” activities, such as residencies, tours, exhibitions and market visits and other export-focused activities.

This reflects the Australia Council’s strong commitment to support the export of Australian arts. “Inbound” activities made up the remaining 9 percent and include bringing international

buyers, influencers and artists to Australia to build their knowledge of and networks with Australian artists and arts organisations.

The majority of funding (64 percent) went to support the distribution of Australian art internationally. This included funding for touring, exhibitions, and market development activities. Just under a quarter (23 percent) went to the production of new artistic work in international settings, including residencies and fellowships. The final 13 percent went to preparation, including skills development, and research and development for future creative projects.

Regularly funded organisations: who and where

The Australia Council administers multi-year funding for two groups of organisations. The first is the Major Performing Arts group, who are funded in partnership by the Commonwealth and State governments under the National Framework for Governments’ Support of the Major Performing Arts Sector. The second group is the Key Organisations, who receive multi-year funding from the Australia Council through a peer-assessed grants program and include small to medium size organisations across a range



Image: Sydney Children's Choir, London, 2013.
Credit: Lyn Williams

of areas of arts practice. These two sets of organisations are referred to collectively as 'regularly funded organisations'.

Among the regularly funded arts organisations, 43 percent had engaged in international activity over 2010–2013. This includes:

- 13 out of 28 Major Performing Arts organisations
- 66 out of 157 Key Organisations² – 40 performing arts organisations, and 26 visual arts and cross-artform arts organisations.

Most activity by the regularly funded organisations occurred in Western Europe (24 percent) or North Asia (26 percent).³ Other areas of high activity were North America (16 percent), South East Asia (15 percent) and New Zealand (14 percent).

Asian activity tended to be associated with festivals and special events, whilst a greater proportion of Western European activity was associated with tours.

Activities by regularly funded organisations

During 2010–2013, regularly funded organisations had presented 3,800 performances and 4,473 days of exhibitions across 61 countries. In total, these were seen by an estimated 17.9 million people.

Audience numbers vary by the type of event. Some events, such as World Expos and Biennales, have especially large audience numbers.⁴ The visual arts tended to achieve higher audience numbers (per exhibition day) than the performing arts (per performance). Within the performing arts sphere, public performances (which do not require tickets)

Table 1: Key data on international activities by regularly funded organisations, 2010–2013

	Major Performing Arts Organisations	Key Organisations	Total
Visual arts and cross-artform			
No. of organisations	–	24	24
Exhibition days	–	4,473	4,473
Audiences at exhibitions	–	15,728,226*	15,728,226
Performing arts			
No. of organisations	13	45	58
Performances	714	3,086	3,800
Ticketed	527	2,260	2,787
Public	187	826	1013
Audiences at performances	359,668	1,772,555	2,132,223
Ticketed	341,845	736,847	1,078,692
Public	17,823	1,035,708**	1,053,531

* 12.7 million from 2010 Shanghai World Expo

** 413,800 from 2010 Shanghai World Expo

2. Over 2010–2013 there have been 157 unique Key Organisations. In any one of these years there were between 140 and 149 Key Organisations.

3. Measured in terms of performances and exhibition days.

4. The single largest event over 2010 – 2013, in terms of audience numbers, was the 2010 Shanghai World Expo. This resulted in about 13.2 million people seeing the work of four regularly funded organisations. This estimate is based on visitors to the New South Wales and Australian Pavilions only; the Expo as a whole had over 73 million visitors.

tended to have higher audience numbers than ticketed performances.

A handful of companies are particularly active internationally, accounting for the majority of performances and audiences by regularly funded organisations:

- 66 percent of international audiences for performing arts are due to the activity of five organisations (four Key Organisations who comprise 62 percent of total audiences, and one MPA who comprises 4 percent)
- 51 percent of performances are due to the activity of five organisations (all Key Organisations)
- 62 percent of exhibition days are due to the activity of three organisations (all Key Organisations).

Overall, Key Organisations were more active internationally than the Major Performing Arts companies, as can be seen from the figures in Table 1.

Impact of our support

Our support made a range of international arts activity possible. Effective international support operates on a continuum from development to presentation: work funded for touring is often also supported in the concept stages, or through facilitated platforms or showcasing opportunities, or through expert advice, and sometimes a combination of these. The Australia Council has provided a range of mobility support including residencies, networking, market development, event travel for individuals and groups to participate in festivals, fairs, or showcase events; support for translations and coproduction, and international presentation. Many artists and organisations report that they would have been unable to undertake their activity without Australia Council support, and that they get their start in international engagement through our grants.

“The Australia Council’s investment in international funds as part of core funding has been essential to what we’ve been able to achieve. Absolutely, totally essential, would’ve been impossible without it. It’s allowed us to leverage other support from presenters.”



Artists and arts organisations believe that the best ways to help them engage in international arts activity are through a mix of funding, support for international collaborations and relationship development, and support for cultural learning and exchange. Independent artists want help to make international arts activity profitable and information about opportunities is critical. Organisations seek support for international influencers and buyers to come to Australia, and for capacity building.

For almost all of the artists and organisations interviewed, funding was the crucial element of Australia Council support. Even for very active organisations, Australia Council investment was still critical to their survival. At least half of the artists and organisations interviewed had benefited from the international visitor programs and called for more strategic investments like these. Many also said that Australia Council advice and introductions had been critical in getting them off the ground internationally. This was particularly the case for performing arts companies, which had benefited from the Australia Council’s expert staff networks and introductions. Interviewees also spoke very positively of the Australia Council’s recent support for Indigenous artists and arts mediators to be prepared and mentored in international markets.

“The travel grants are crucial to the research and development of these relationships. They don’t usually cost the Australia Council a lot in my perception, but develop big rewards in terms of the networks and opportunities that come out of them”

Direct outputs include:

- The number of international audience members who experience Australian work
- The number of, and income from, tours, exhibitions and Australia books/artworks which are sold internationally as a result of Australia Council funding
- The number of artistic collaborations.



Image: Terrapin Puppet Theatre, *Boats*, Asia, 2010 - 2014.
Credit: Peter Mathew

Artistic and cultural impacts include:

- Contribution to the artistic vibrancy of the Australian arts sector, society and culture
- Development of artistic practice
- Benchmarking and contextualisation of practice
- Critical review
- Ideas and inspiration for new work
- Richer artistic experiences for Australian audiences.

Financial impacts include:

- Future activity and new opportunities
- Larger audiences internationally (and sometimes in Australia)
- Greater profile internationally and consequently in Australia
- Income from artistic work
- More employment for Australian artists due to increased turnover.

Arts sector impacts include:

- Bringing new ideas back to Australia
- Raising the bar across the sector
- Retaining talent in Australia
- Promoting the Australian arts sector
- Peer-to-peer learning and mentoring.

In addition to the artistic and cultural impacts outlined, the Australia Council’s support and activities can create value for other policy areas, such as foreign affairs and trade.

Socio-political impacts are also evident, such as the contribution of international arts activity to cultural diplomacy. Profiling Australian arts and culture internationally can also have positive impacts on the Australian nation-state and identity. International representations of Australia which resonate with the diversity of the Australian population can build national identity, as well international recognition for being a pluralistic and tolerant society. At the global level, Australian arts contribute to conversations about transnational social and political issues, as well as enhancing our reputation for creativity and innovation.

2. INTERNATIONAL ARTS ACTIVITY SNAPSHOT

In early 2015 the Australia Council conducted an International Activity Survey, a sector-wide survey to consult on activities, motivations, needs and future priorities. It was an open online survey promoted widely across the national sector to enable input from more than just those we had supported in the past. The survey had an excellent response rate, and attracted a wide range of respondents: both government funded and not; those who had recently undertaken international activity and those who had not; individual artists, independent groups, and formal organisations.

Overall, the respondents are broadly representative of the Australian arts sector, both in terms of artist demographics and sector composition (see Appendix 2 for details). As we expected in a survey on this topic, run by a government agency, there is over-

representation of those who have recently completed international activity; and some over-representation of the government funded parts of the sector. The survey results provide good insight into the behaviours and opinions of those who do, or would like to do, international activity.

Table 2: International activity in last 2 years, International Arts Activity Survey 2015

Outbound Activity	All Respondents %
Travelled overseas to develop networks (including to meet agents and managers)	69
Tours, exhibitions, presentations or international publications	64
Undertaken collaborations, partnerships or reciprocal programs with international artists or arts organisations	59
Travelled overseas to see work	53
Travelled overseas for cultural learning or exchange	46
Created new work overseas	45
Travelled overseas to undertake professional development or training	42
International artist or arts worker residency/ies	38
Exhibited or presented at international art fairs or markets	31
Undertaken international market research	26
Sold work or rights while overseas	25
Inbound Activity	
Collaborations, partnerships or reciprocal programs with international artists or arts organisations	57
Brought artists or arts workers from overseas into Australia	43
Used connections to culturally diverse communities in Australia to inform or support your international activities	42
Showcased/presented at international showcase events held in Australia	34
Sold work or rights internationally	32
Participated in key visitor programs in Australia	27
Exhibited or presented at international art fairs or markets held in Australia	22

International arts activity takes time, money, and collaborative networks

The International Activity Survey found three key activities were interconnected and interdependent: presentation of work internationally, the development of networks, and collaborations and partnerships.

Respondents who had engaged in some international arts activity over the past two years tended to spend a month or more per year on it, including both preparing and undertaking the activity. The median number of performances per year was four, and the median number of exhibitions was one; but a small proportion of respondents had conducted much higher levels of activity.

Almost all recipients of funding report some degree of income and further work opportunities resulting from the Australia Council-supported activity. For most respondents, international arts activity did not have a 'direct' financial return on investment. International engagement is motivated by returns in artistic practice development, audience development, and market development; and the sector's drive to work internationally is demonstrated by their own investment in it.

“Touring is a zero-sum game. Don’t get me wrong, touring is incredibly useful and important, but you can’t expect touring itself to make you money. What touring does is build cultural capital – profile opportunities. It definitely builds turnover, which builds internal capacity, but it rarely produces real, significant profit.”

Most spent more money on international activity than they earned from it, and many relied heavily on their own investment as a funding source. Respondents reported that their own money comprised on average 43 percent of their total funding for international activity, followed by fees/sales (18 percent) and the Australia Council (11 percent). Almost all recipients interviewed believed that they would not have been able to engage in the relevant international activity without Australia Council support.

Table 3: Top three outcomes from international arts activity
(percentage of respondents who chose each outcome as one of their top three)

Outcomes	Independent Artists %	Organisations %	All Respondents %
Development of artistic practice	50	33	45
Future international projects	44	45	45
Being part of the global arts landscape	44	39	42
Knowledge and skills	34	23	29
Audience development	21	33	27
New collaborators	24	29	25
Building international partners, such as agents and managers	23	33	25
Market development	18	38	25
Arts-related income	18	14	18
Formal and informal critical review	15	5	12



Image: Visiting International Publishers Program, Adelaide, 2014.
Credit: Australia Council

The exception is those organisations who were earning more than \$50,000 per year from their international activities, who tended to make a positive return on investment.

Artistic engagement in a global arts conversation

“Artists need international experience – the rigour, exposure, collaboration, residencies, seeking work. It adds a huge dimension to your own practice.” – Interviewee

“Touring work internationally has provided us with not only new markets and national and international profile, but has provided us with artistic networks that are beginning to bear fruit with new artistic collaborations.”

– Survey respondent

“The impulse is not primarily to make money. It mostly came out of us wanting to be part of an artistic conversation, work with our peers and betters, to be part of the conversation.”

Artists and organisations believe that international arts activity is important for their reputation and artistic practice. Most respondents thought that international arts activity was only marginally important to financial viability. Rather, top outcomes from international arts activity were participation in the global arts landscape, artistic development, future international projects and market development.

Among the recipients of Australia Council funding who were interviewed, many noted that Australia’s domestic market can be too small to support their work. International activity, while not often generating a major financial return, does offer a source of income to support the viability of an artist’s career.

“International arts gives us the opportunity to discover a more diverse, broader and wider audience, a bigger arts community whereby an artist can thrive and develop, share and sound out ideas.” – Survey respondent

Ways of working: collaboration, partnerships and reciprocity

“For me collaboration internationally is the building block for development of opportunity”
– Survey respondent

“I think whatever initiatives are proposed need to be reciprocal, so that international audiences at both ends are being exposed to work from foreign artists” – Survey respondent

Collaboration and reciprocity were key features of international arts activity, both inside and outside Australia, as can be seen from Table 2. ‘Undertaking collaborations, partnerships or reciprocal programs with international artists and organisations,’ was one of the most common international arts activities domestically and internationally. Organisations also regularly brought artists or arts workers from overseas to Australia.

Australian artists and organisations were also tapping into the local diaspora communities and networks to inform their work. Using connections to culturally diverse communities in Australia to inform or support international activities was one of the most common international arts activities undertaken in Australia, by both artists and organisations.


Aboriginal and Torres Strait Islander arts

The sector noted that Indigenous arts achieve great artistic and cultural impacts for Australia internationally. This is because of its absolute uniqueness and widespread international interest. This high level of interest is also evidenced by Australia Council research which has found that Aboriginal and Torres Strait Islander artists have a proportionally greater presence at key international arts events than non-Indigenous Australian artists.

“Almost everything I’ve done internationally, where I’ve involved Indigenous artists has had the strongest impact.” – Interviewee

Indigenous artists, like most artists, benefit from international exposure. Indigenous interviewees spoke of the benefits of seeing their work in a global context.

“Understanding the context of your work globally is so important. Having a sense of what the response is when you take your work out of the place it’s been. How it can speak to different people on a cultural level. I find I’m reflecting more on what I do and why I do it, and being inspired by new things.” – Interviewee



“International arts gives us the opportunity to discover a more diverse, broader and wider audience, bigger arts community whereby an artist can thrive and develop, share and sound out ideas.”



Image: Marrugeku, *Gudirr Gudirr*, United Kingdom, 2013.
Credit: Rod Hartvigsen

3. SECTOR PRIORITIES AND UNMET NEEDS

Future priorities and plans

The key reason identified by artists and arts organisations for working internationally is for artistic development and engagement. This is driving artists to seek process-driven engagements, rather than just exports, and looking for collaborations and exchange. Artists and arts organisations bring back new inspirations to benefit Australian audiences and the broader arts sector. As is shown in Table 4, collaborations, partnerships and reciprocal programs will continue to be a high priority over the next five years. Australian artists and organisations are already planning wide-ranging activities including skills exchange, co-creation and community cultural development. Interviewed artists and organisations spoke of bespoke engagements, including multi-year collaborations and residencies, which allow cross-cultural artists to explore ideas, build relationships and allow outcomes to develop from process.

For many respondents, exhibiting, touring and presenting work in international contexts is also key to their future plans, with delivering work to international audiences an important goal for respondents. Artists and organisations also want to increase the financial sustainability and direct return on investment from international engagement. The goals of survey respondents for the next five years include developing sustainable touring models, driving sales, developing markets and building on the opportunities from previous international work.

Priority locations

Ambitions are focused on consolidating and developing in traditional markets, and testing rapidly growing markets. When analysed by country, the US, UK, France, Germany and Canada were the five most common locations of activity for the sector and their top priorities for the future.

Table 4: Highest scoring priorities for future international activity (inbound and outbound)

Future Priority Rating (0, not a priority to 5, top priority)	Independent Artists (mean score)	Organisations (mean score)	All Respondents (mean score)
International tours, exhibitions, presentations or publications	4.2	4.1	4.2
Undertaken collaborations, partnerships or reciprocal programs with international artists or arts organisations	3.9	4.2	4.0
Travel overseas to develop networks (including to meet agents and managers)	3.9	3.9	3.9
Travel overseas for cultural learning or exchange	3.8	3.3	3.7
International artist or arts worker residency/ies	3.7	3.3	3.6
Showcase/present at international showcase events held in Australia	3.6	3.6	3.6
Create new work overseas	3.8	2.8	3.5
Sell work or rights internationally	3.6	3.2	3.5
Travel overseas to undertake professional development or training	3.6	3.0	3.5

Table 5: Current locations and future planned activities

Location	2013-2014 Activity %	2015-2019 Planned Activity %	Trend % change
United States	45	53	+8
United Kingdom	39	46	+7
France	22	22	0
Germany	21	26	+5
Canada	17	14	-3
China	16	26	+10
New Zealand	13	15	+3
Indonesia	12	15	+3
Netherlands	12	10	-2
Singapore	11	12	+1
Italy	10	9	-1
Japan	10	21	+11
India	9	11	+2
South Korea	9	10	+1
Hong Kong	9	10	+1



Image: Slingsby Theatre Company, *The Tragical Life of Cheeseboy*, Dublin, 2014.
Credit: Slingsby Theatre Company

There is increased interest in accessing international opportunities to develop artistic practice in Asia, in particular China and Japan:

“It’s not a question of money, it’s a question of emphasis. The fact is, our future is in this part of the world.” – Interviewee

“It’s important to us culturally that we know more about those parts of the world.” – Interviewee

Support needs

When asked about the challenges of international arts activity almost half of respondents said they needed more support to develop relationships. Independent artists are also faced with limited knowledge of international market opportunities and the process of engaging internationally.

Organisations identified that support is there, but it could be more strategic, and that support to conduct on-the-ground market research is needed.

The sector identified some areas of investment that would enhance the international engagement of Aboriginal and Torres Strait

Islander arts. They referenced the need to build Indigenous arts mediators’ capacity in international development, and the opportunity for growing international market knowledge of Indigenous work in an artistic and cultural context, rather than an anthropological one.

Survey respondents were asked to select the top five initiatives that would best help them or their organisation to engage in international arts activity. The top five were:

- Funding (74 percent)
- Support for international collaborations (65 percent)
- Support for relationship development (52 percent)
- Support to make international arts activity more profitable (36 percent)
- Support for cultural learning and exchange (35 percent)

Organisations also sought support for artists to come to Australia, and for capacity-building.

Table 6: Challenges with international arts activity

Challenges	Independent artists %	Organisations %	All Respondents %
Lack of support to develop relationships	43	52	45
Limited knowledge of international market opportunities	31	25	45
Need for more strategic support	26	37	42
Support needed to conduct on-the-ground market research	24	32	29
Inadequate support for preparatory activities, such as a translation or a remount of your work	27	25	27
Limited knowledge of the process of engaging internationally	27	16	25
Non-competitive pricing of your work overseas	19	16	25
Visa constraints	18	10	25
Taxation issues	14	13	18
Limited knowledge of working in other cultures	10	11	12



Image: Back to Back Theatre, *Small Metal Objects*, Seoul, 2011.
Credit: Australia Council

The sector was keen for greater clarity from the Australian Government about its goals and strategies for international arts activity. They also called on the Australia Council to promote a more unified government strategy on arts and culture in the international space.

The sector emphasised the value of a diverse suite of funding opportunities to support artistic ambitions. This could include quick response grants, small grants, providing greater certainty of funding for internationally active organisations, and support for arts mediators including curators, producers, and technicians.

Interviews with the sector highlighted a critical role for the Australia Council in offering large-scale information, research and insights, and advocating across Government and with international governments. This advocacy work could include shifting international perceptions about the Australian market, investing in market testing and country specific market intelligence, developing bilateral and multilateral relationships, and advocating to other portfolios and levels of government. While the sector saw an important role for the Australia Council in spearheading engagement in new markets, they felt it critical to then own the new relationships directly with key international producers, presenters and other gatekeepers.

“Long term investment in strategies. Building international confidence takes time...”

– Survey respondent

“Touring work internationally has provided us with not only new markets and national and international profile, but has provided us with artistic networks that are beginning to bear fruit with new artistic collaborations.”

APPENDIX 1: METHODOLOGY

The research and analysis underpinning this paper had four components.

1. Analysis of Australia Council funding patterns

- Data coding and analysis of Australia Council application data, which includes all data related to grants, initiatives and programs. This covered the financial years 2010–11 to 2013–14.
- Analysis of annual reporting data submitted by the 28 Major Performing Arts organisations, over the calendar years 2010–2013.
- Analysis of annual reporting data submitted by the 157 Key Organisations, over the calendar years 2010–2013.
- Focus groups and interviews with Australia Council staff.

2. Analysis of non-Australia Council sources of funding

This involved desk research, and qualitative interviews with 24 international and domestic stakeholders (focusing on other funding bodies). This took place in October – November 2014.

3. Qualitative research with recipients of Australia Council funding for international activity

This involved 50 qualitative interviews and 9 focus groups with artists and arts organisations. This took place in October – November 2014.

4. Sector-wide consultation survey

The International Activity Survey was an open web-based consultation, conducted in January – February 2015. It was widely distributed both by the Council and partner organisations and agencies. Analysis shows the 439 respondents (both artists and arts organisations) are broadly representative of the Australian arts sector.

APPENDIX 2: SURVEY RESPONDENT PROFILE

We received 439 completed responses to the survey. More than half of all respondents were independent artists (61 percent) and just under a third represented arts organisations (31 percent). About a quarter of organisations were service or peak bodies (27 percent), 20 percent were galleries, and about one in ten were festivals (8 percent), publishers (8 percent) or venues (11 percent).

The survey is broadly representative of the general artist and arts organisation population.⁵ It is representative of artists who identify as coming from culturally and linguistically diverse backgrounds, artists with disability, and artists who identify as Aboriginal or Torres Strait Islander.

81 percent of respondents had undertaken international arts activity in the last two years. This is higher than in the general artist population, but not unexpected given the focus of the survey. As such, the survey results give good insight into the behaviours and opinions of those who do, or would like to do, some international activity.

60 percent of respondents had received government funding for their arts activity in the last two years (2013 and 2014). Government-funded artists and organisations are slightly over-represented amongst respondents. This is expected, however results in the full report have been broken down by government-funded to take this into account.

The majority of respondents were based in Victoria and NSW, broadly mirroring the distribution of artists across Australia. Also, like the general artist population, the majority of respondents were based in capital cities.

State and territory arts agencies were asked to distribute the survey through their networks to ensure a national reach.

More than a quarter of all respondents identified as visual arts and crafts practitioners (29 percent), followed by multi-art form (13 percent), literature (10 percent), contemporary music (9 percent), and theatre (9 percent). 'Classical music or opera' and 'physical theatre and circus' were equal at 2 percent.

5. Survey representativeness was tested by comparing results to the general profile of Australian artists, as found in Throsby and Zednik, Do You Really Expect To Get Paid: An Economic Study of Professional Artists in Australia, 2010.



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